VIRTUALCABINET

User Guide

Version 5.4

Contents

1 Introduction

Virtual Cabinet is a complete 'Document Management System' that enables you to store documents easily and retrieve them quickly. Everyone's client communications and e-mails are filed into the system, while letters and other post can be scanned straight in. These documents are 'indexed' with relevant information so that you can find them by searching for key words or dates. Virtual Cabinet also keeps track of past versions of documents and will prevent people from editing the same file at the same time.

Each Virtual Cabinet user has a username and password that is used to log into the system. All the functionality is immediately accessible in the Virtual Cabinet window and documents can be added into the system through the addins for Microsoft Office. Functionality may also be available through integrations with various other programs that you regularly use.

The Virtual Cabinet window has an Office-style 'ribbon' with tabs that allow you to access all the features of the system:

The **Home** tab shows your most recently visited documents and most commonly used searches.

The **Scan** tab enables you to scan post and printed documents directly into the system.

The **Intray** is where new documents stay until you have 'indexed' them with the information that will make them findable. You will also find any tasks that have been assigned to you in the Intray

The **Search** tab provides a way to quickly look through all documents you have access to.

The **Work In Progress** tab holds the documents that you are editing.

The **Reports** tab can search the audit history and show you how busy people's Intrays are.

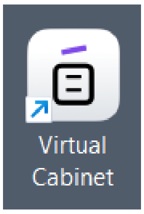
The **Admin** tab contains the setup and administration options. Admin functionality is described in the separate Administration Guide.

Virtual Cabinet also includes a Document Viewer that can be used to quickly preview multiple documents in a single window.

This guide describes the Virtual Cabinet window, the Microsoft Office Addins and the Document Viewer in detail.

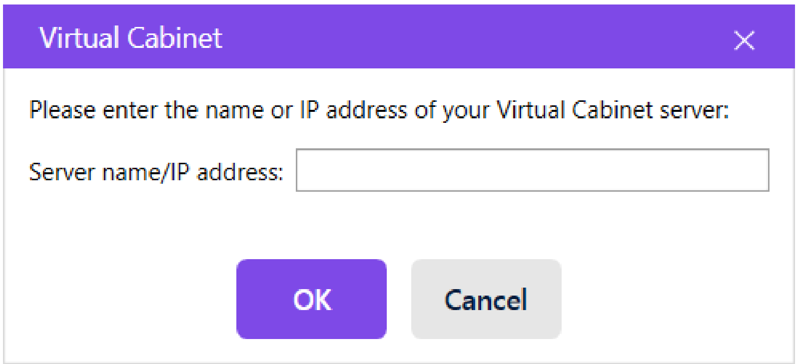
2 Starting Virtual Cabinet

You can launch the Virtual Cabinet window by double-clicking your mouse on the 'Virtual Cabinet' Desktop Shortcut or by navigating to the Virtual Cabinet folder in the Windows Programs Menu and clicking on the Virtual Cabinet menu item.



2.1 First-time Setup

The first time you launch Virtual Cabinet it will ask for a few details to help it find the rest of the system. Your administrator will be able to tell you what to type when Virtual Cabinet asks for a 'server name/IP address'.



Once you have entered the address, click the OK button to continue. Virtual Cabinet will take a few seconds to locate the server.

If the server can't be found (perhaps due to a typing mistake in the address or a disconnected network cable) you will be given another opportunity to type the address.

After Virtual Cabinet has found the server it will show a login window.

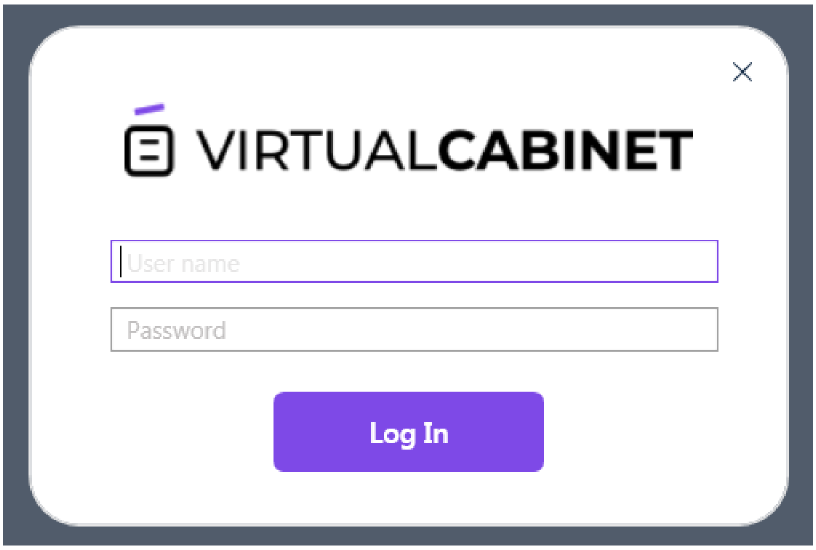
2.2 Logging into Virtual Cabinet

Each person needs a username and password to log into Virtual Cabinet. You will be notified of your username and password by your administrator.

When the login window appears, enter your username and password.

Your username is unique to you and may consist of an arrangement of letters and initials from your name, depending on the naming policy at your organisation.

Your password will be hidden from view as you type it. This helps to keep your login secure. Your password can include letters, numbers, spaces and symbols.

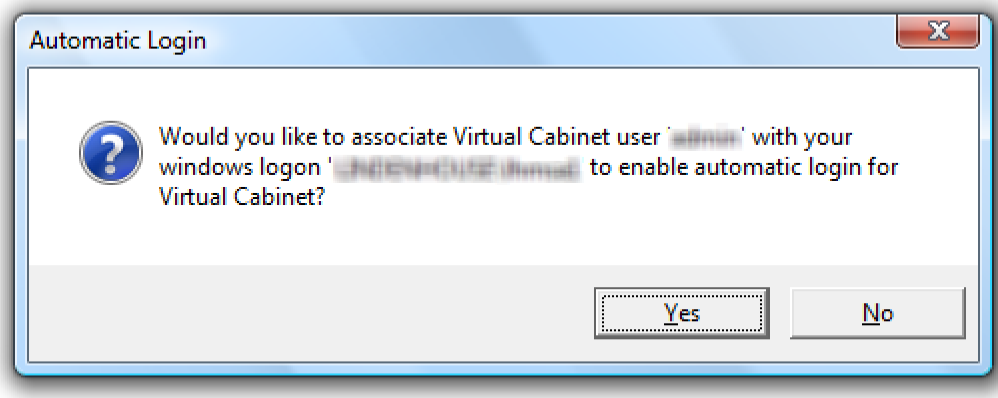


Once you have entered your username and password, you can click the 'Log In' button to log into Virtual Cabinet.

The first time you log in, Virtual Cabinet may present you with the option to 'associate your Virtual Cabinet user with your Windows logon'.

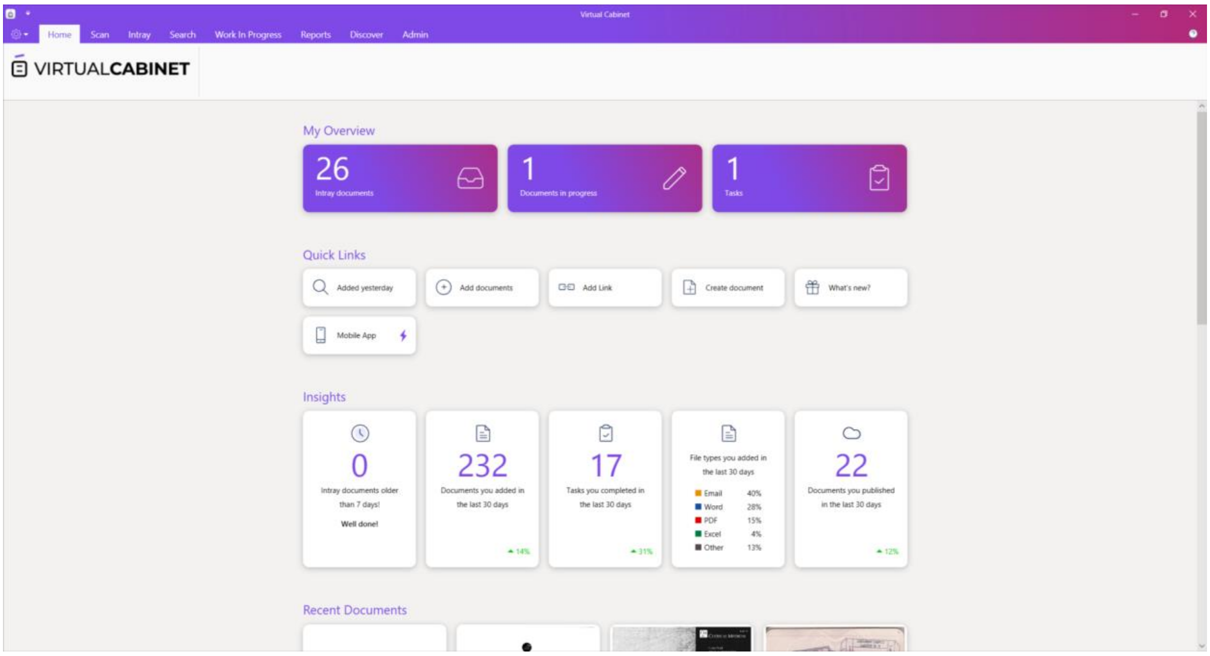
If you click the 'Yes' button then Virtual Cabinet will automatically enter your username and password for you from now on.

If you click 'No', you will be asked for your Virtual Cabinet username and password every time you want to log in.



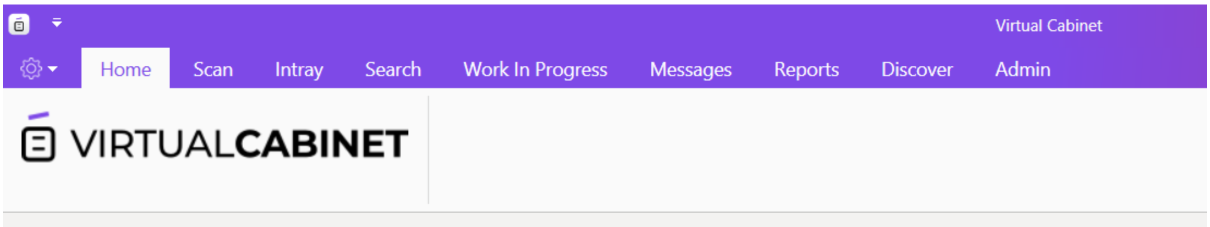
3 The Virtual Cabinet Window

When you log in, the main Virtual Cabinet window will open.



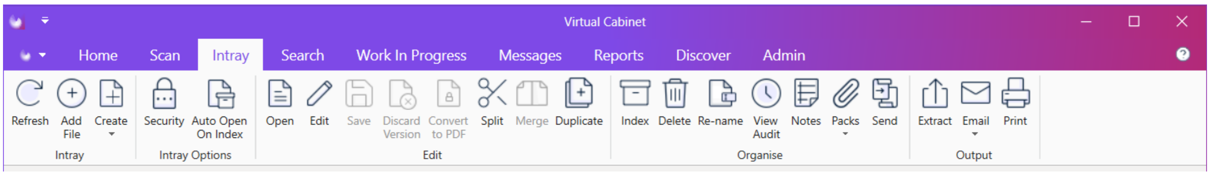
3.1 The Ribbon

The 'Ribbon' spans across the top of the window.



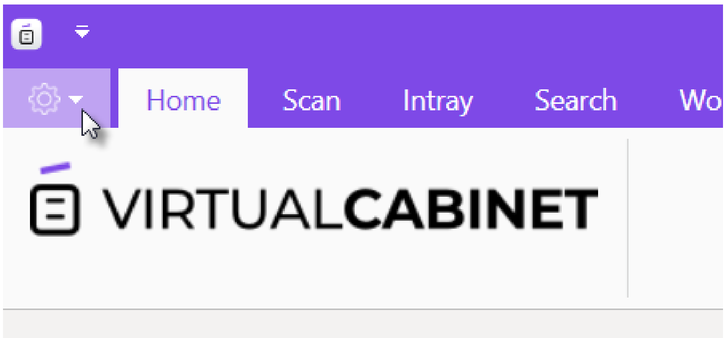
The Ribbon is divided into separate tabs. Each tab relates to a different task or action that you can perform in Virtual Cabinet. The current Ribbon tab is highlighted in a lighter colour than the others. You can change to other Ribbon tabs by clicking on them with the mouse.

When you choose a different tab, the selection of buttons on the Ribbon will change. The buttons will offer a set of actions related to the tab that you clicked on. Each Ribbon tab is described in a different section of this guide.

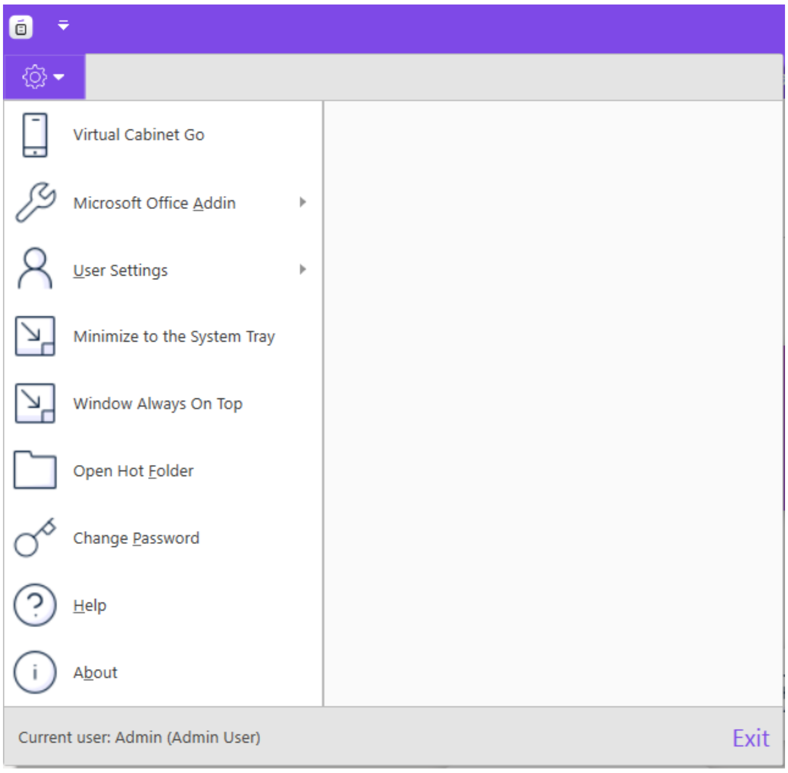


3.2 Settings

The Virtual Cabinet Settings button is available in the top-left corner of the window. It provides access to system settings and version information.



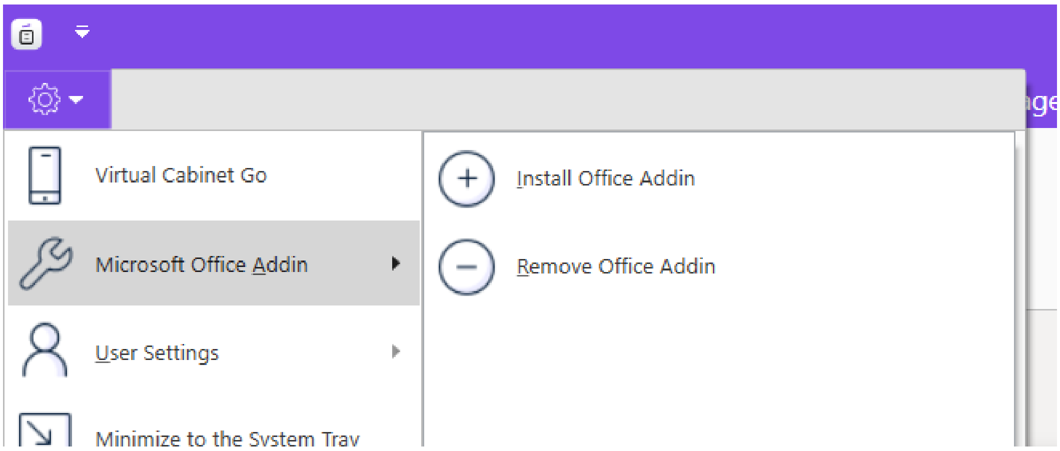
Clicking the Settings cog will display the Settings Menu.



3.2.1 Microsoft Office Addin

Virtual Cabinet has an Addin that integrates into Microsoft Office. This enables you to access some of the features of Virtual Cabinet without leaving the Office window.

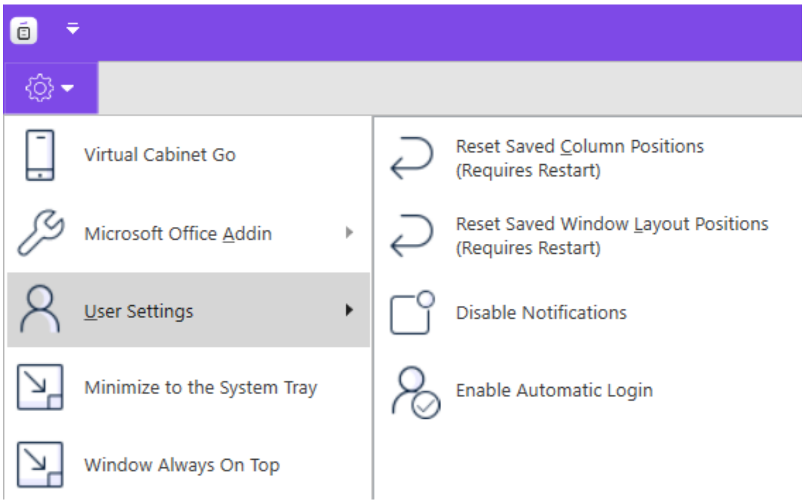
The Microsoft Office Addin can be installed by clicking on the 'Install Office Addin' option, and can be uninstalled by clicking on the 'Remove Office Addin' option.



Please see the Microsoft Office Addin section of this guide for more details about the installation process and features of the Office Addin.

3.2.2 User Settings

The User Settings menu presents options that let you reset come aspects of the Virtual Cabinet window.

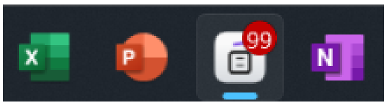


'Reset Saved Column Positions' will reset the ordering of columns in the search results window. This will clear any custom column orders and use the defaults instead. You may have to close and re-open Virtual Cabinet for the columns to reset.

'Reset Saved Window Layout Positions' will restore the default positions of all the small docked windows within the main window. This option can be used to recover windows that may have become lost or hidden. You may have to close and re-open Virtual Cabinet for the windows to reset.

'Enable Notifications' may be available, depending on how your administrator has set up your system. If this option is available and turned on, you will see a small pop-up window appear in the corner of your computer screen each time somebody else adds a document to your Intray.

You will also see a red circle with a number in it over the Virtual Cabinet icon on your task bar. This identifies the number of unread documents and Tasks currently assigned to you.



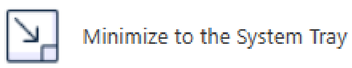
If Popup Notifications are turned on, the option will say **'Disable Popup Notifications'**. You can click this option to turn the notifications off.

‘Enable Automatic Login’ will associate your Virtual Cabinet username and password with your Windows login. If Automatic login is enabled, Virtual Cabinet will automatically enter your username and password and you won’t see a login window each time.

If Automatic Login is enabled, the option will say **‘Disable Automatic Login’**. You can click this option to turn Automatic Login off. If Automatic Login is turned off, you will have to enter your Virtual Cabinet username and password each time you want to log in.

3.2.3 Minimize to the System Tray

The ‘Minimize to System Tray’ option hides the Virtual Cabinet window and puts a small Virtual Cabinet icon into the System Tray (usually at the bottom-right corner of your computer screen, near the clock). You can click the small icon to bring the Virtual Cabinet window back.



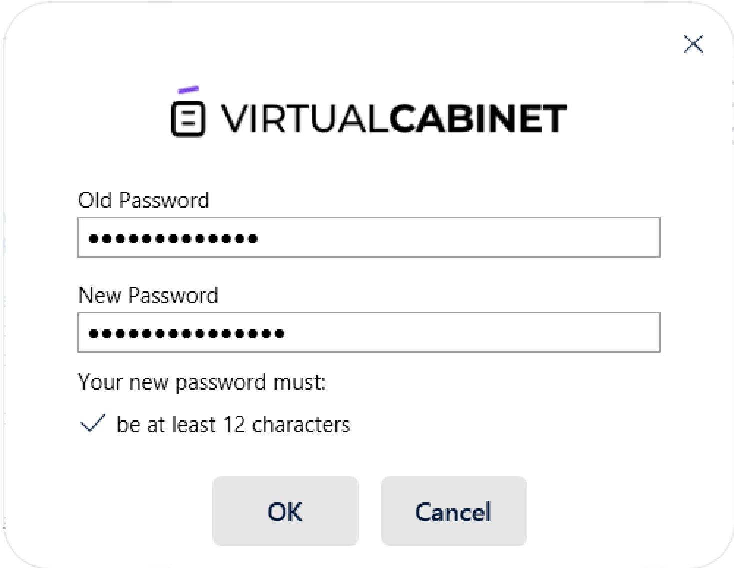
3.2.4 Window Always On Top

Clicking the ‘Window Always On Top’ option will cause the Virtual Cabinet window to sit on top of every other window on your computer screen.

3.2.5 Change Password

The 'Change Password' option will open a new window. You will be asked for your current password and the new password that you want to change to. To ensure high security standards the new password must be at least 12 characters, but doesn't need to contain special characters.

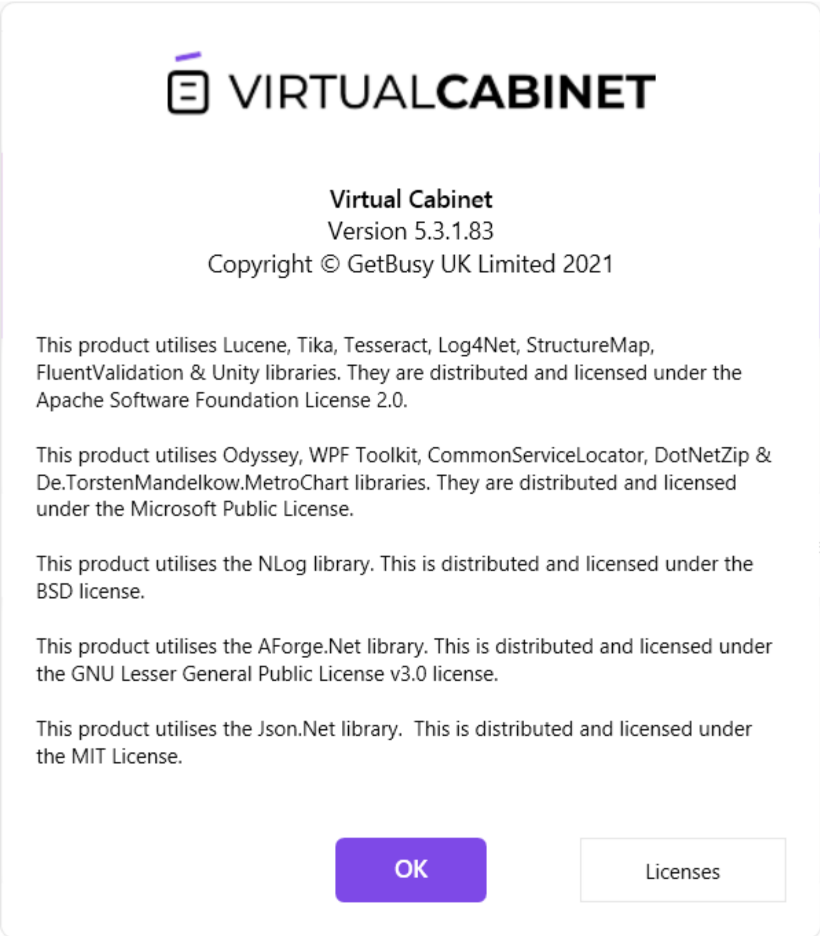
Click 'OK' to change your password to the new password you supplied, or click 'Cancel' to close the window without changing your password.



3.2.6 About

The ‘About’ box will open a new window that displays the version information for the currently installed version of Virtual Cabinet.

You can close the window by clicking ‘Ok’.



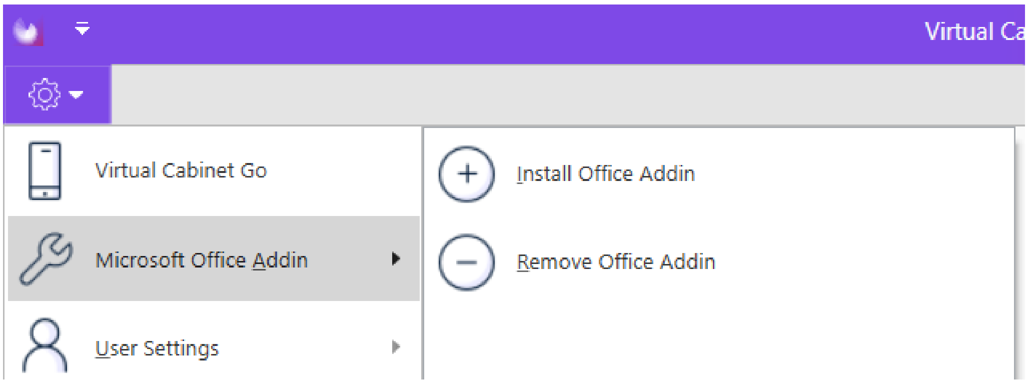
4 The Microsoft Office Addin

The Microsoft Office Addin allows you to access some of the features of Virtual Cabinet from within your Office applications. You can search for and open documents from Virtual Cabinet for editing, create documents from a template, send documents to a Virtual Cabinet intray or filing cabinet and insert links to documents within Virtual Cabinet.

Please use this section in conjunction with the **Virtual Cabinet Email Capture Guide**, which contains additional information in relation to the Microsoft Outlook Office Addin.

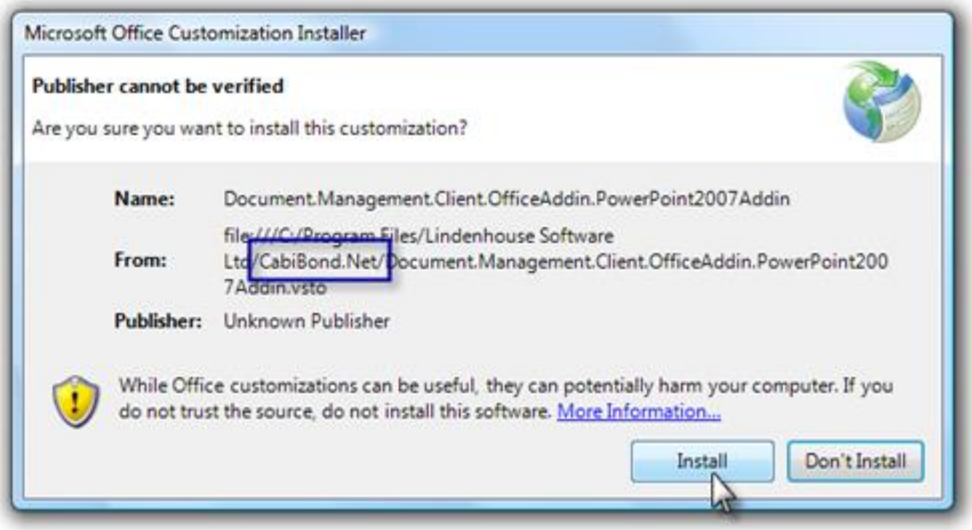
4.1 Installing the Microsoft Office Addin

The Microsoft Office Addin can be installed at any time from within the Virtual Cabinet client application. To install the Office Addin, click the Orb button in the top-left of the window and choose the 'Install Office Addin' option from the 'Microsoft Office Addin' menu.



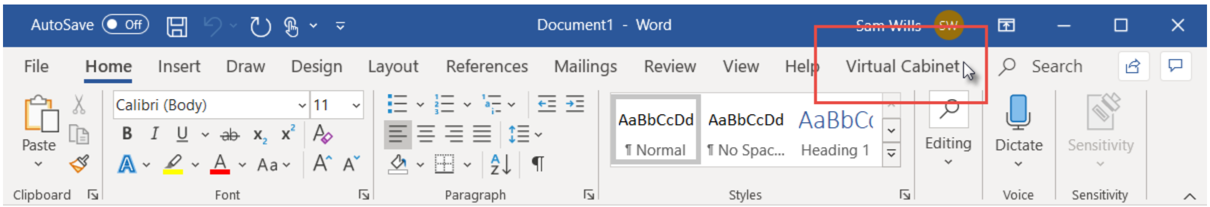
The next time you open a Microsoft Office application, you will be prompted to complete the installation. There is a separate Addin for each Office application.

You should check that the Addin originates from CabiBond.Net (as shown below) and then click the 'Install' button.

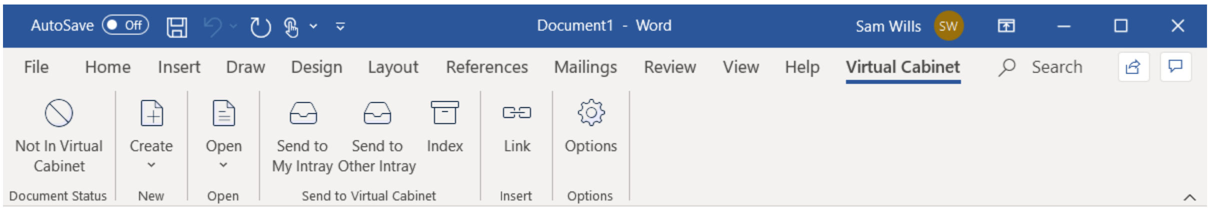


Once installed, the Microsoft Office Addin will display a new tab in the Office applications.

The 'Virtual Cabinet' tab will appear to the right-hand side of the other tabs in your Office application.



Click the Virtual Cabinet tab to see the available options.



4.1.1 Virtual Cabinet Connection

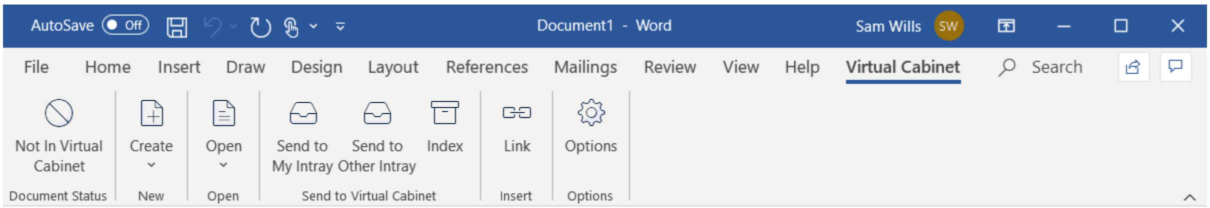
When Microsoft Office first opens the connection to Virtual Cabinet is checked. You may briefly see the 'Connecting' status and, in the unlikely event there is a issue, a failure message and connect button that will allow you to connect once the problem has been resolved.

4.2 Using the Microsoft Office Addin

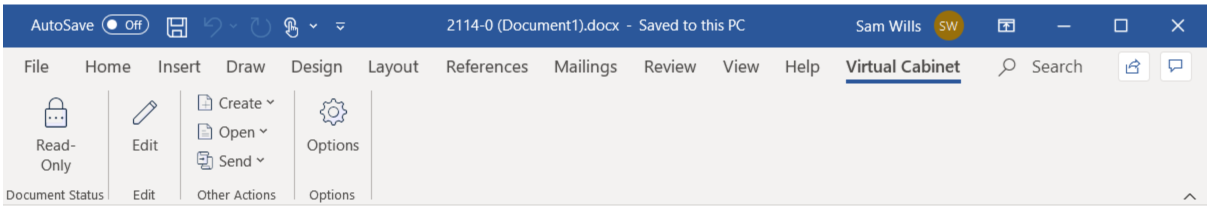
This guide uses screenshots taken from Word, but note that the Office Addin is also available in PowerPoint and Excel.

The Microsoft Office Addin has a differing set of options available depending upon the status of your document. As shown below your document can be: Not in Virtual Cabinet; Read-Only or Editable.

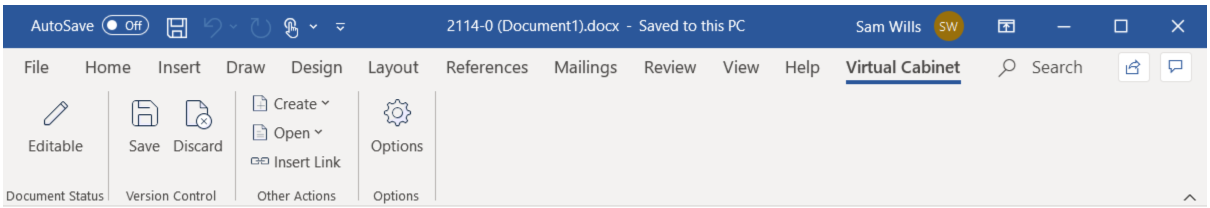
Not in Virtual Cabinet



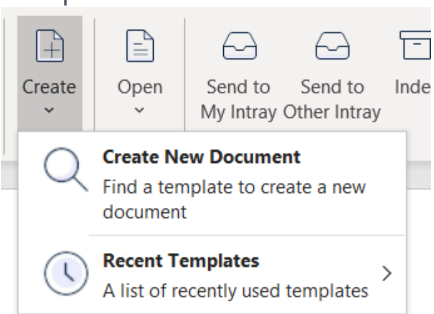
Read-Only

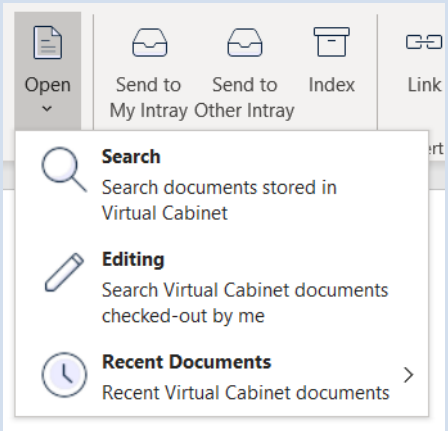


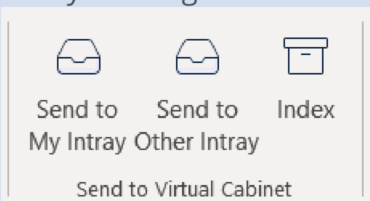
Editable



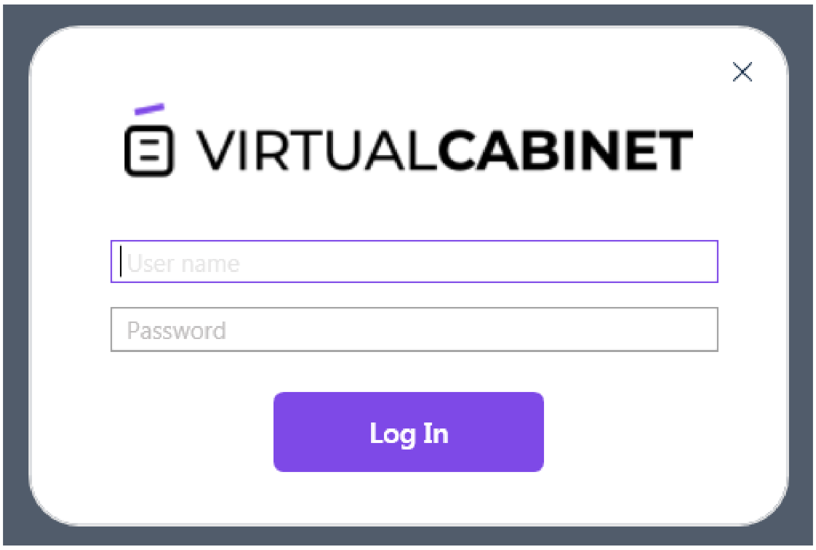
The Addin ribbon buttons function and visibility are described below.

<table>
<tr><th>Button</th><th>Description</th><th>Visible</th></tr>
<tr><td>Document Status</td><td>Displays the status of your document:
Not in Virtual Cabinet
Read-Only
Editable</td><td>Always</td></tr>
<tr><td>Create</td><td>Create a new document using a document template stored in Virtual Cabinet. Either search your Virtual Cabinet templates or select a Recent Template.


See Document Creation for more information.</td><td>Always</td></tr>
<tr><td>Open</td><td>Open a document stored in Virtual Cabinet. Either search all documents, documents checked-out for editing, or select from a list of recent documents.

</td><td>Always</td></tr>
<tr><td>Options</td><td>Options to set the default behaviours of the Addin…<table><tr><td>Option</td><td>Description</td></tr><tr><td>General</td><td>Toggle the Classic Office Addin mode on/off</td></tr></table></td><td>Always</td></tr>
</table>

	Document Links Microsoft Office Trust status of the document links. See Add Link	
	Open/Edit Choose when to open a document in Edit mode	
	Recent Documents Select the number of recent documents to display	
Send	Send the current document to a Virtual Cabinet Intray or Filing Cabinet 	Not in Virtual Cabinet; Read-Only
Link	Search Virtual Cabinet for a document and insert a link. See Add Link	Not in Virtual Cabinet; Editable
Edit	Changes the status of the document from Read-Only to Editable. The document is checked out from Virtual Cabinet for Editing.	Read-Only
Save	Saves the new version of the document back into Virtual Cabinet.	Editable
Discard	Discard the current version of the document and close the Microsoft Office window.	Editable

The first time you send a document, you may be asked to provide your Virtual Cabinet username and password. Enter your details and click the Login button.



4.2.1 Send to My Intray

The **'Send to My Intray'** button will send the document directly to your Virtual Cabinet Intray. For more information about the Virtual Cabinet Intray, please see the Intray Tab section of this guide.

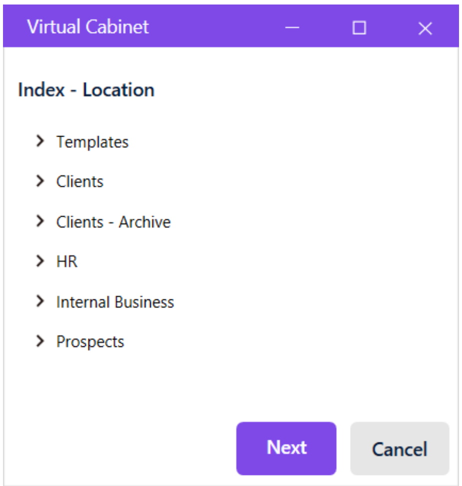
4.2.2 Send to Other Intray

The **'Send to Other Intray'** option opens a window so you can select the Intray that you want to send the document to, as well as an optional Shortcut to one or more users. This window is dealt with in more detail in the Shortcuts and Sending Documents section.

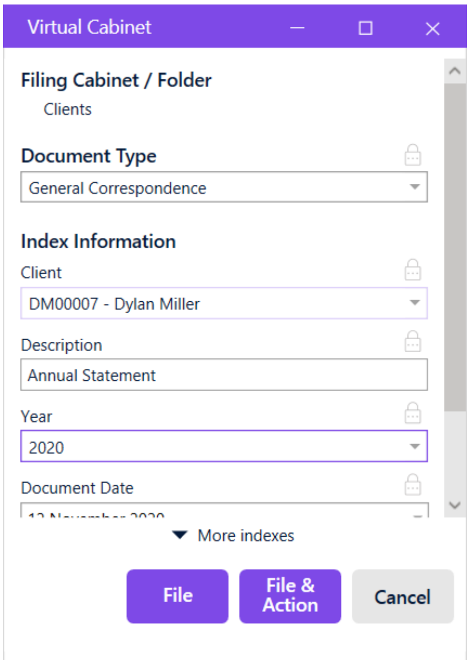
4.2.3 Index

The **'Index'** button lets you file your document straight into Virtual Cabinet. 'Indexing' is the process of adding extra information to a document so that it's easy to find amongst all the other documents in the system. To learn more about indexing, please see the Index Tab section of this guide.

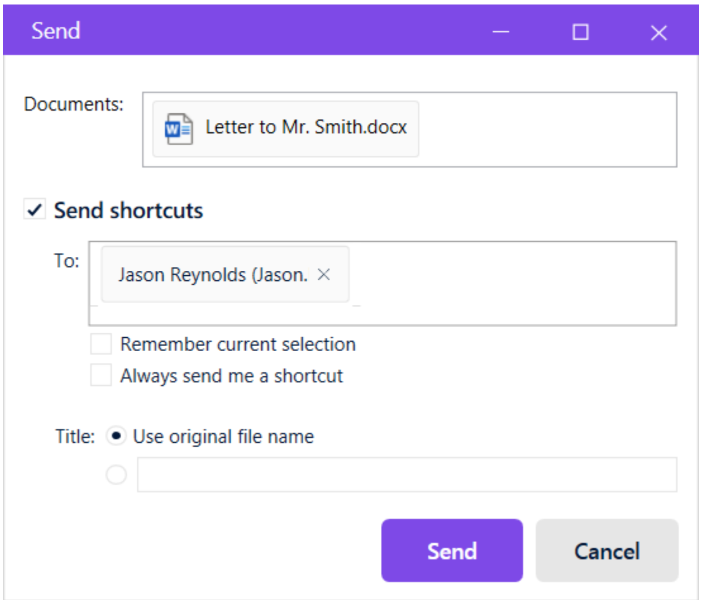
Clicking the 'Index' button will open a window so you can choose where to store the document. Once you have selected a location, click 'Next' to proceed.



To index the document, first select the correct type of document from the drop-down list and then complete the empty boxes. When ready, click the ‘File Document’ button to send the file to Virtual Cabinet, or ‘File and Shortcut’ to send the file to Virtual Cabinet and send a shortcut of that document to user. Alternatively, you can click ‘Cancel’ to return to your document without indexing it.



File and Shortcut will pop up a separate box to enable you to send a shortcut of the document that you just indexed to one or more users, including yourself, with an optional document title. Shortcuts are explained with in more detail in a later section.

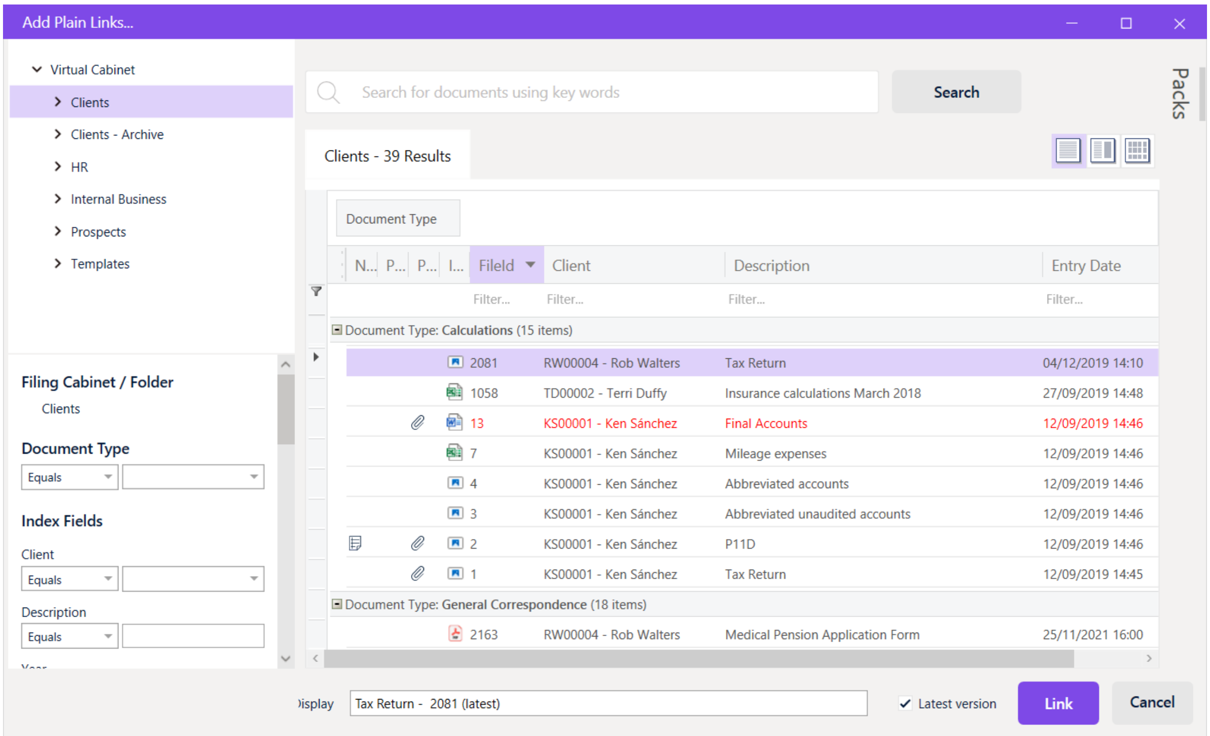


4.2.4 Add Link

The Add Link functionality, available in Word, Excel and Outlook, enables you to search for a document in Virtual Cabinet and then insert a hyperlink to that document in to the document you have open. The hyperlink will appear as text in the current document that when clicked will open up the corresponding document from Virtual Cabinet. The document you are adding the link to does not need to be in Virtual Cabinet for the link to function.

The linked document is not extracted in any way and remains within Virtual Cabinet. Virtual Cabinet security on that document remains, so that if another Virtual Cabinet user were to try to open the document through the link without the correct Virtual Cabinet security the document will not open. Audit history for the linked document is also maintained.

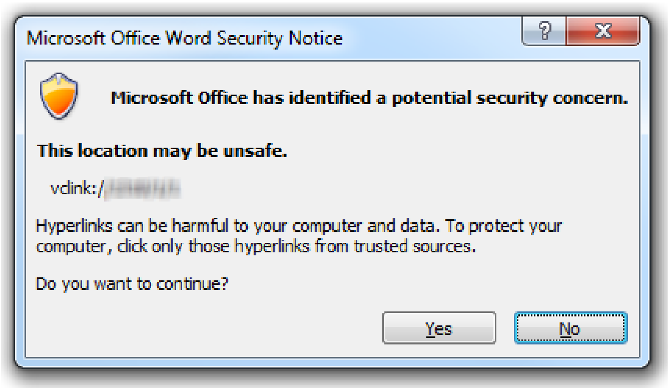
The window below will appear once you have selected Add Link in order for you to search for the selected document in Virtual Cabinet. Searching for a document is identical to searching within the search tab of Virtual Cabinet, discussed elsewhere.



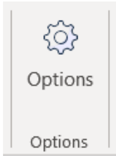
Once you have found the document you want to link to, select that row in the search results and click Link, or Attach for Outlook, in the bottom right to attach that document. For Outlook, multiple documents can be selected in the search results and inserted as links in an email message in a single action.

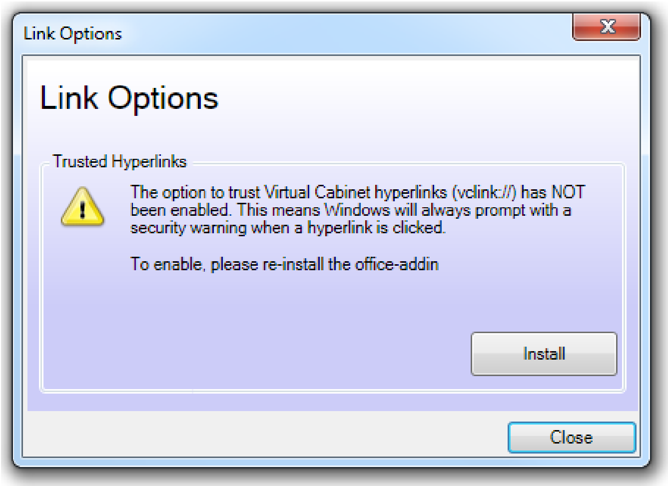
- **Text To Display** – This is the text of the hyperlink that will be displayed in your document.
- **Latest Version** – If ticked the hyperlink will launch the latest version of the selected document. If not ticked it will launch the version you have selected in the search results. Note that for Intray documents you will only be able to select the latest version of the document.

If you ever see the message below, this means that Virtual Cabinet hyperlinks are not trusted by Microsoft Office.



In order to resolve this go in to the Options button in the Virtual Cabinet tab of Microsoft Office, and click Install.





4.3 Microsoft Outlook Addin

Microsoft Outlook includes a number of extra Addin features that Word, Excel and PowerPoint do not.

Please use this section in conjunction with the **Virtual Cabinet Email Capture Guide**, which contains additional information in relation to the Microsoft Outlook Office Addin.

4.3.1 Email Indexing Pane

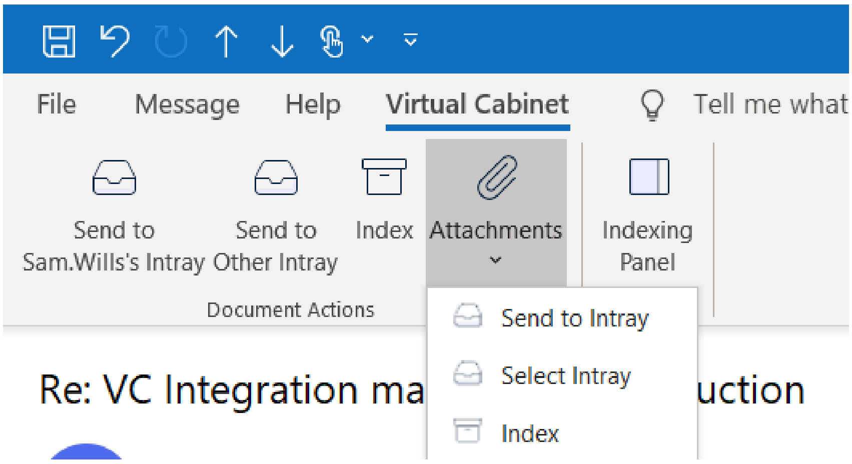
Please see the **Virtual Cabinet Email Capture Guide** for further information on this feature.

The email indexing pane can be enabled via General Outlook Addin Options. This setting embeds the Virtual Cabinet Indexing Screen in every Outlook email, making it much easier to file emails to Virtual Cabinet.

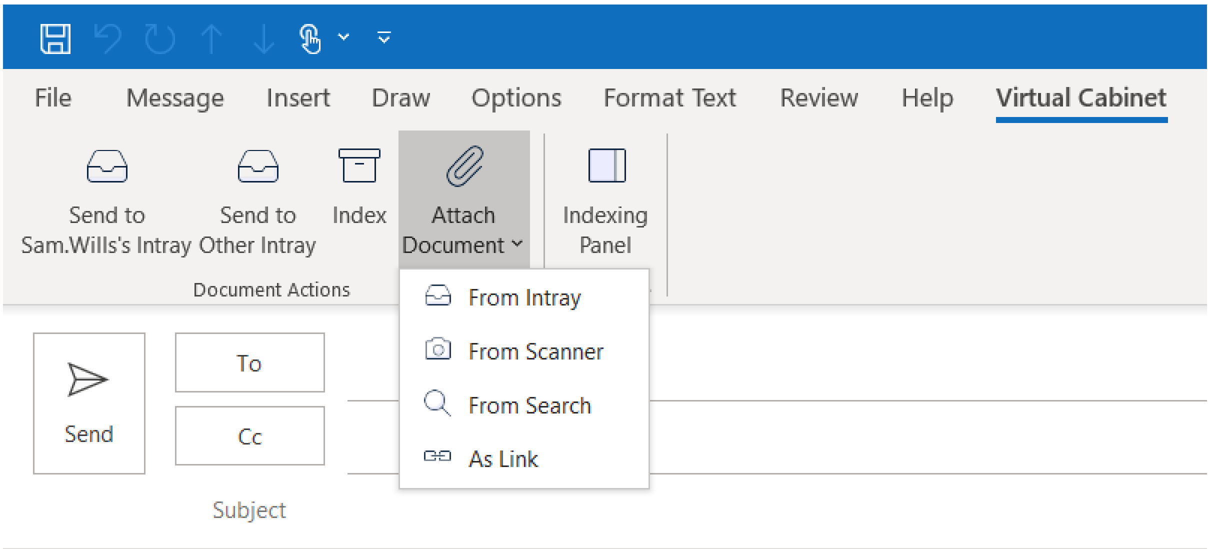
We recommend using the Email Indexing Pane in conjunction with Email Indexing Defaults and Conversation Rules.

4.3.2 Email Attachment Features

When opening an email that has an attachment you have the option to Send the attachment(s) to your Intray, to another Intray, or Index the document straight into Virtual Cabinet. Please note that any email filed into Virtual Cabinet with an attachment will keep the attachment; you do not always need to file them away separately.



When writing an email you have the option to attach a document stored in Virtual Cabinet, or scan in a new document and attach it to that email.



Option	Description
From Intray	Opens up a window containing all the documents in your Intray, select a document and click on the Select button to attach it.
From Scanner	Opens up the Virtual Cabinet scanner window to scan a file and attach it to the email directly.
From Search	Opens up a search window for you to find a document and attach a copy to the email.
As Link	Opens up a search window for you to find a document and attach an internal hyperlink to that document.

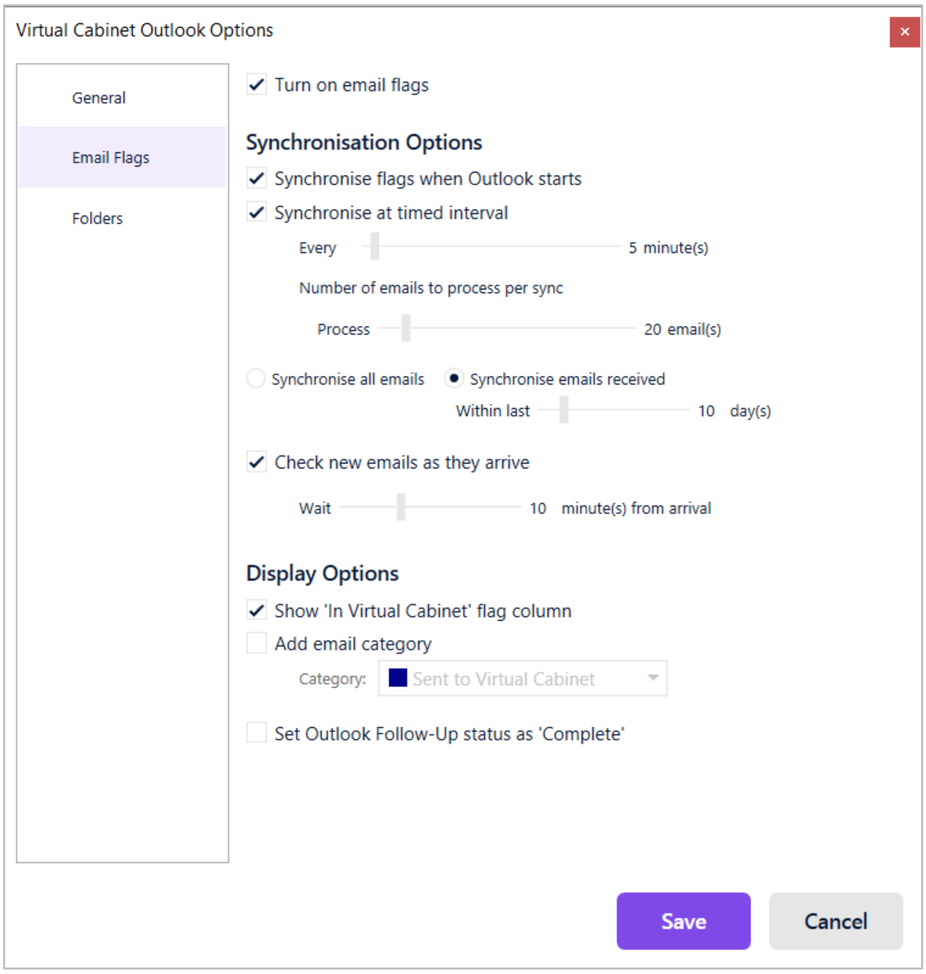
4.3.3 Flagging Emails in Outlook

Emails in Outlook can be flagged/categorised depending on whether they are stored in Virtual Cabinet or not. This functionality is available with Outlook 2007 and onwards.

Emails are flagged under these scenarios:

1. The email is sent to an Intray through our Office Addin by you or someone else in the office.
2. The email is filed away through our Office Addin by you or someone else in the office.
3. The email is filed away by our automatic email capture software, CcMail.

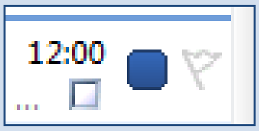
Email flagging can be configured using the Options button on the Outlook Toolbar.

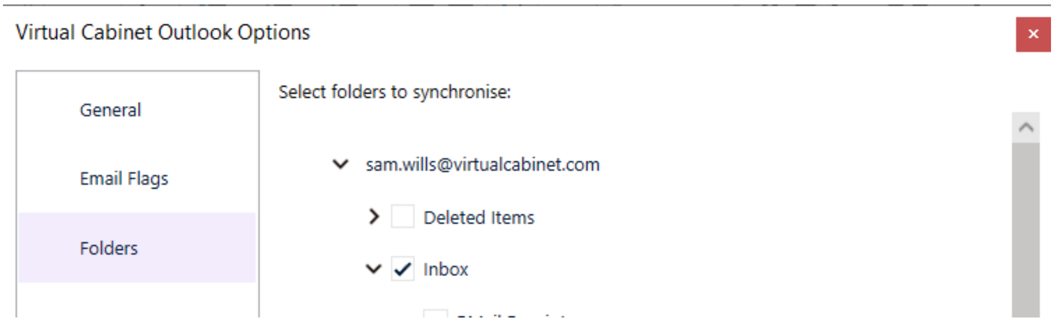


Synchronisation = Updates an email's Virtual Cabinet flag to reflect whether the email has been filed away into Virtual Cabinet by another means (e.g. CcMail), or whether the email has been removed from Virtual Cabinet and should therefore be no longer flagged.

Note: Changes to the default configuration options may impact system performance.

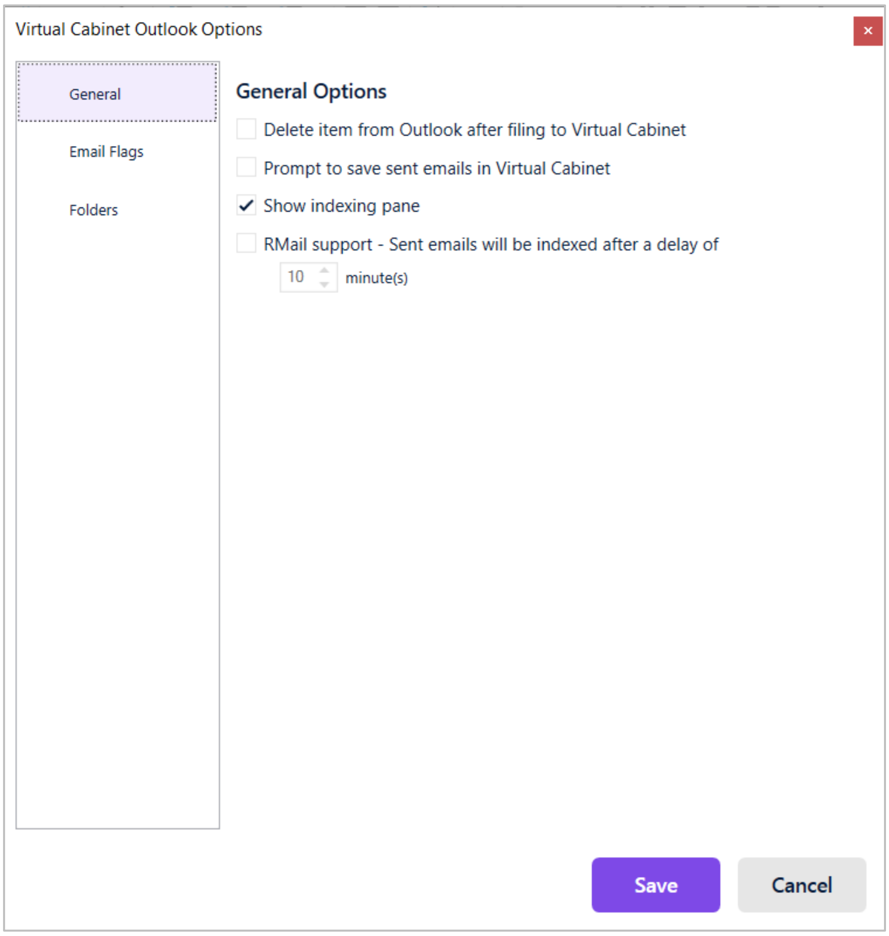
Option	Description
Turn on email flags	
Synchronise flags when Outlook starts	Synchronisation of flag status between Outlook and Virtual Cabinet will start as soon as Outlook starts, otherwise it will start after the specified timed interval (below).
Synchronise at timed interval	How often the system synchronises the status of emails with Virtual Cabinet.

	Increased frequency uses more system resources which may impact performance.
Number of emails to process per sync	The number of emails the system synchronises every timed interval. Increased number of emails uses more system resources which may impact performance.
Synchronise all emails	Synchronise all emails within the specified folders. The more emails there are to process, the longer the flagging will take and the more resources that will be used, which may impact performance.
Synchronise emails received	Synchronise only emails received within the date range specified in the slider below.
Check new emails as they arrive	Synchronise emails received automatically after the time interval specified in the slider below. There is little point in checking a new email immediately – no one will have had time to file it in Virtual Cabinet.
Show 'In Virtual Cabinet' flag column	Once selected each email synchronised with Virtual Cabinet (specified above) will have a tick box shown next to the email. Ticked means the email is stored in Virtual Cabinet, un-ticked means it is not. 
Add email category	Once selected each email synchronised and stored within Virtual Cabinet will be linked to an Outlook Category called 'In Virtual Cabinet', or an Outlook category of your choosing. 
Set Outlook Follow-Up status as 'Complete'	Once selected each email synchronised and stored within Virtual Cabinet will have its Outlook reminder status set to complete. 



Within the Folders section you can specify which Outlook mailboxes and associated folders you would like to synchronise.

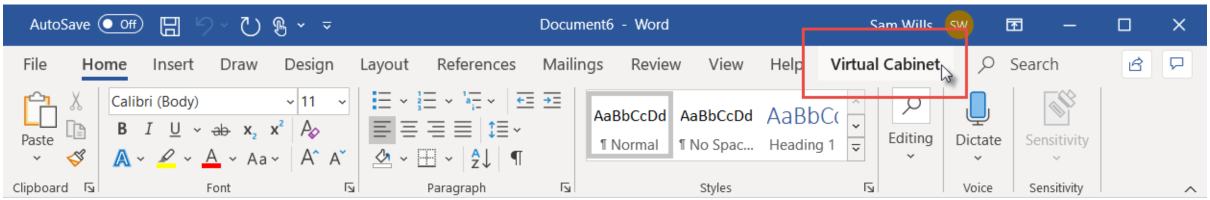
4.3.4 General Outlook Addin Options



Option	Description
Delete item from Outlook after filing to Virtual Cabinet	After an email has been sent to Virtual Cabinet through the Office Addin it will be deleted from Outlook.
Prompt to save sent emails in Virtual Cabinet	When you send an email a prompt will appear asking if you would like to file this document in to Virtual Cabinet. If you select Yes it will open up the standard Indexing window. If you have the following option enabled, 'Show indexing pane' you will be prompted to provide index information for the email when you Send it.
Show Indexing pane	Displays the Virtual Cabinet Indexing control in an open email, allowing you to utilise Indexing Defaults. Indexing Defaults make it faster and easier to index emails. See the Virtual Cabinet Admin Guide for further information on configuring Indexing Defaults. Please see the Virtual Cabinet **Email Capture Guide** for further information.

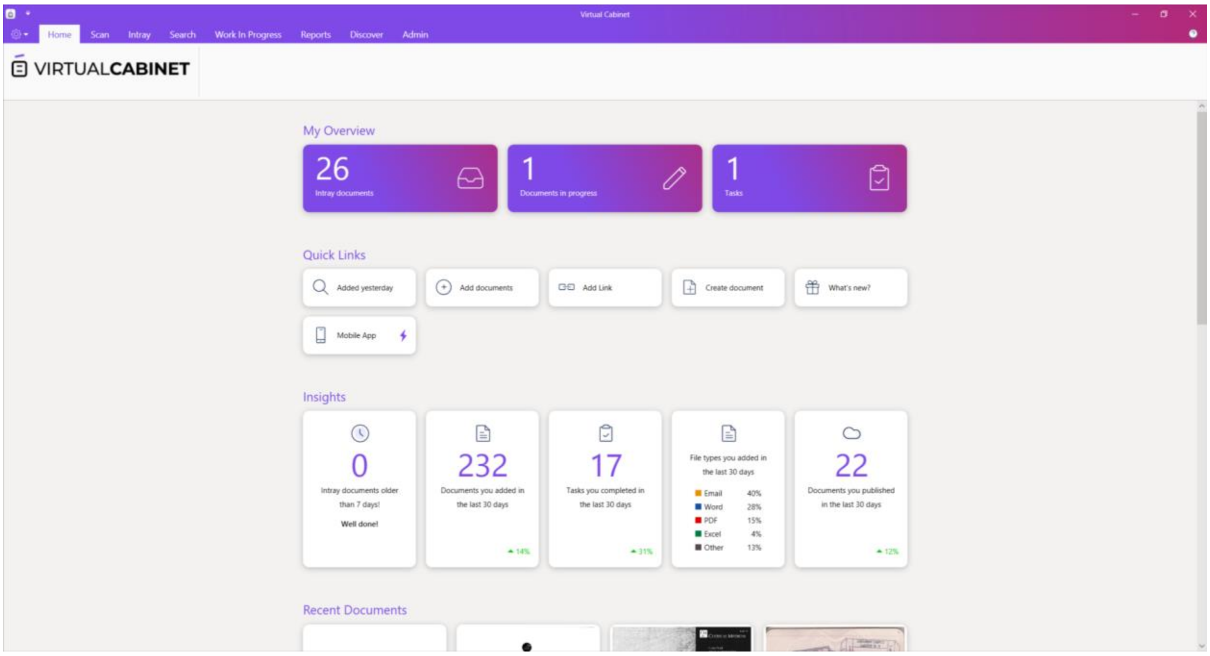
4.4 Addin Tabs in Different Microsoft Office Applications

In Microsoft Word, Excel and PowerPoint, the options will be available in a Ribbon tab to the right-hand side of the other application tabs.



5 The Home Tab

Virtual Cabinet initially displays the Home tab. The Home tab provides quick and easy access to Common Tasks, Recent Documents, your Saved Searches, and the latest product news and support.



5.1 My Overview

My Overview show you what you're working on right now and need to action. Click on any of these tiles to drill down into that area and begin working in Virtual Cabinet. For example, click on Tasks to see what outstanding tasks are assigned to you.

5.2 Quick Links

These quick links provide a great way to quickly access key functionality in Virtual Cabinet. For example, create a new document from one of your company's templates.

5.2.1 Mobile app

Virtual Cabinet Go is our mobile app designed to complement your Virtual Cabinet system when you're out of the office. Available on iOS, Android, and Windows.

If you are licensed for Virtual Cabinet Go you will have an option on the Home ribbon. You will need to use this the first time you set up your app so that it can connect to your Virtual Cabinet system.

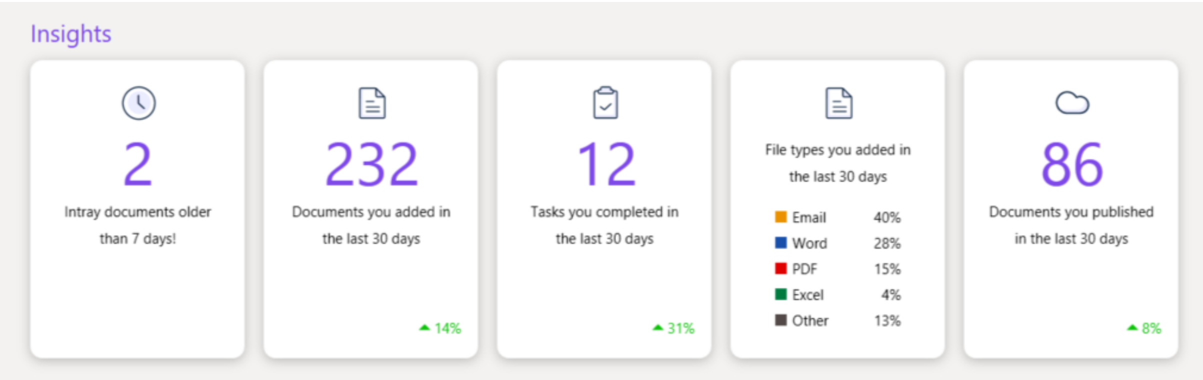
5.2.2 Upgrade available

A tile will appear in the Quick Links section if there is a new version of Virtual Cabinet available. Only administrators will see this link. Please contact your Virtual Cabinet support team to arrange an update and click on the Upgrade Available tile to see more information about the new version.

We recommend upgrading regularly to get the latest new feature, fixes, and security improvements.

5.3 Insights

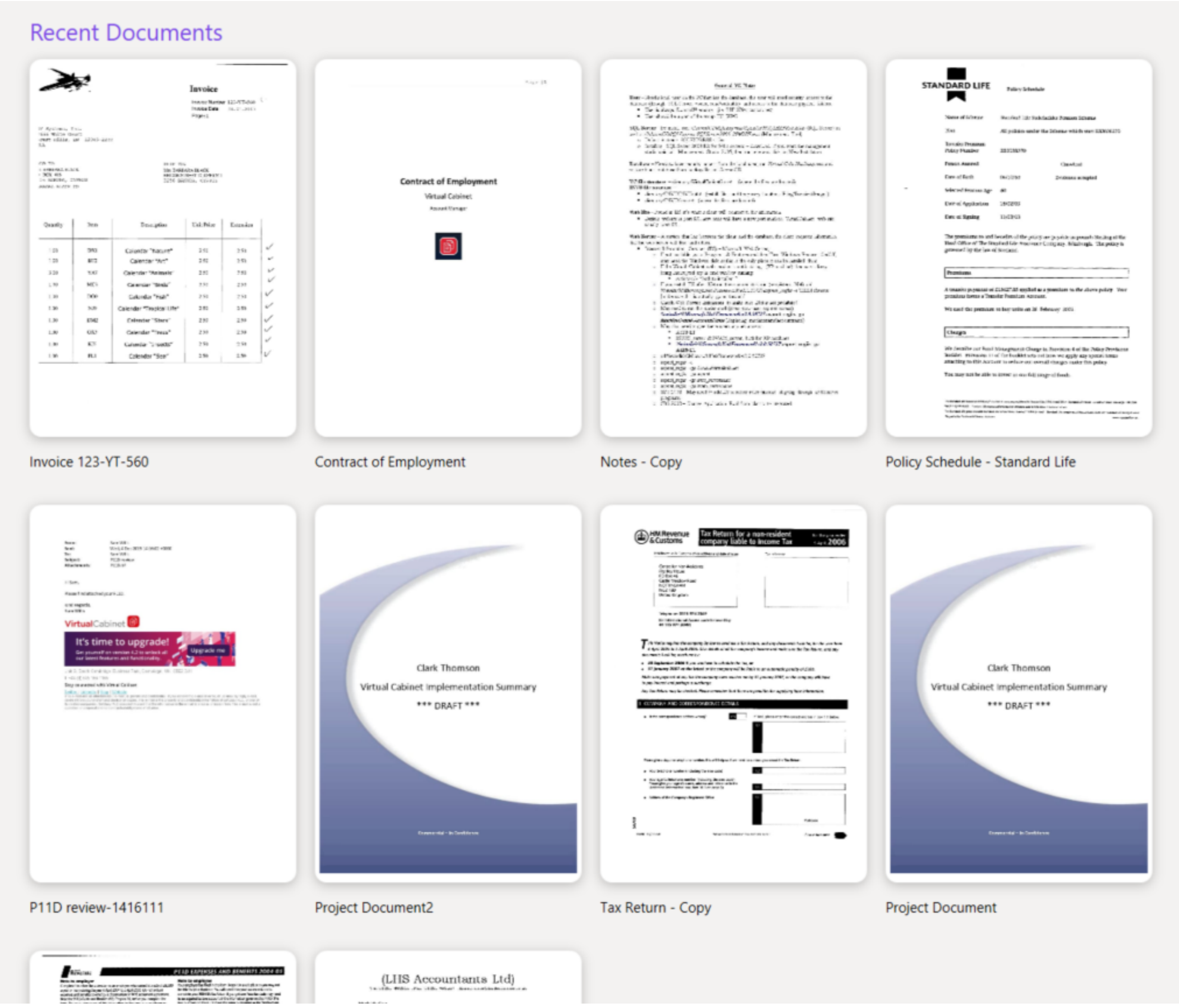
Get insights in to the way you're working with Virtual Cabinet and how much you're getting from the system.



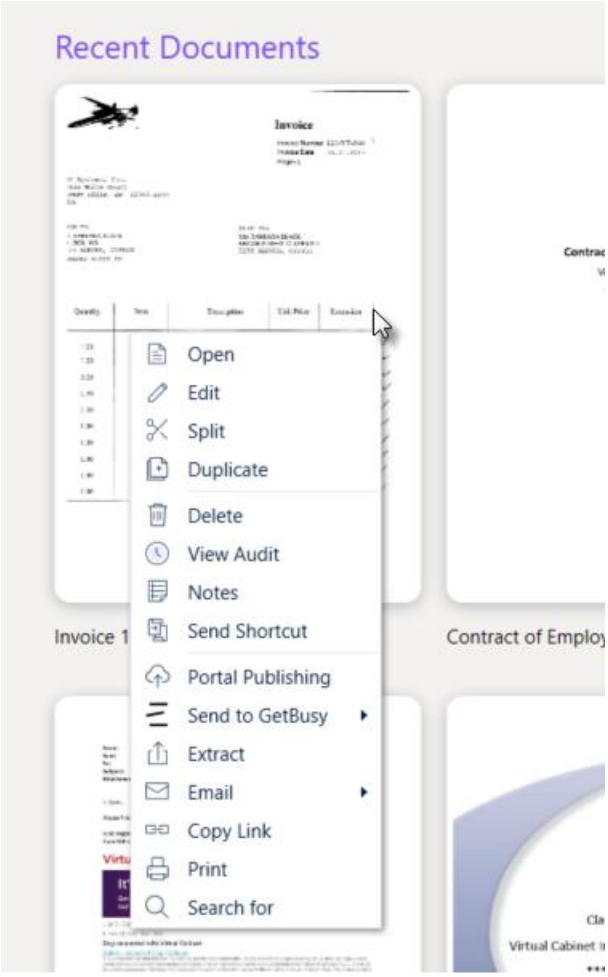
- Old intray documents - keep on top of your Intray by filing new documents so that your colleagues can get access to this information.
- Documents you added - see how many documents you've added to the system recently.
- Tasks completed - see how many tasks you've completed recently.
- File types - see what kind of files you've been adding to Virtual Cabinet.
- Document published - see how many documents you've been sending out to clients.

5.4 Recent Documents

The Recent Documents panel displays small thumbnail images of the documents you have opened last. Click on one to open it up again.



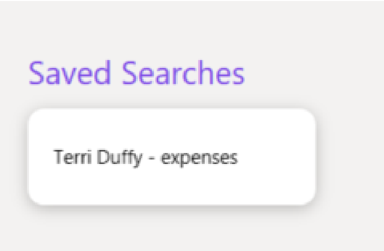
You can right-click the mouse to access a context menu, allowing you to perform various document actions depending on the state / location of the document and your security settings.


Recent Documents
Invoice
Open
Edit
Split
Duplicate
Delete
View Audit
Notes
Send Shortcut
Portal Publishing
Send to GetBusy
Extract
Email
Copy Link
Print
Search for
Invoice 1
Contract of Employ

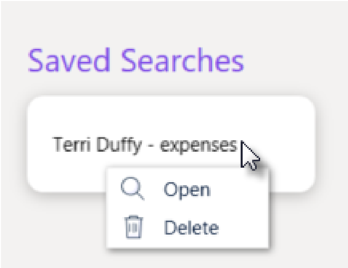
5.5 Saved Searches

Virtual Cabinet provides extensive functionality to enable you to search for documents. Frequently used search terms can be saved for quick access, and can be accessed from the Search tab and from the Home tab.

Saved searches are private for each user. You can only see your own Saved Searches.



A Saved Search can be deleted by first selecting it, right-clicking the mouse and selecting 'Delete'.



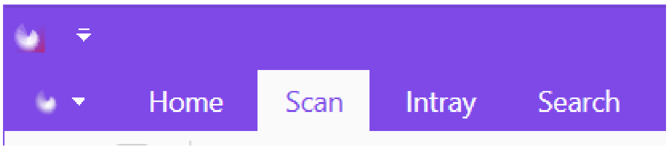
See the Search section of this guide for additional information on how to create Saved Searches.

6 Scanning

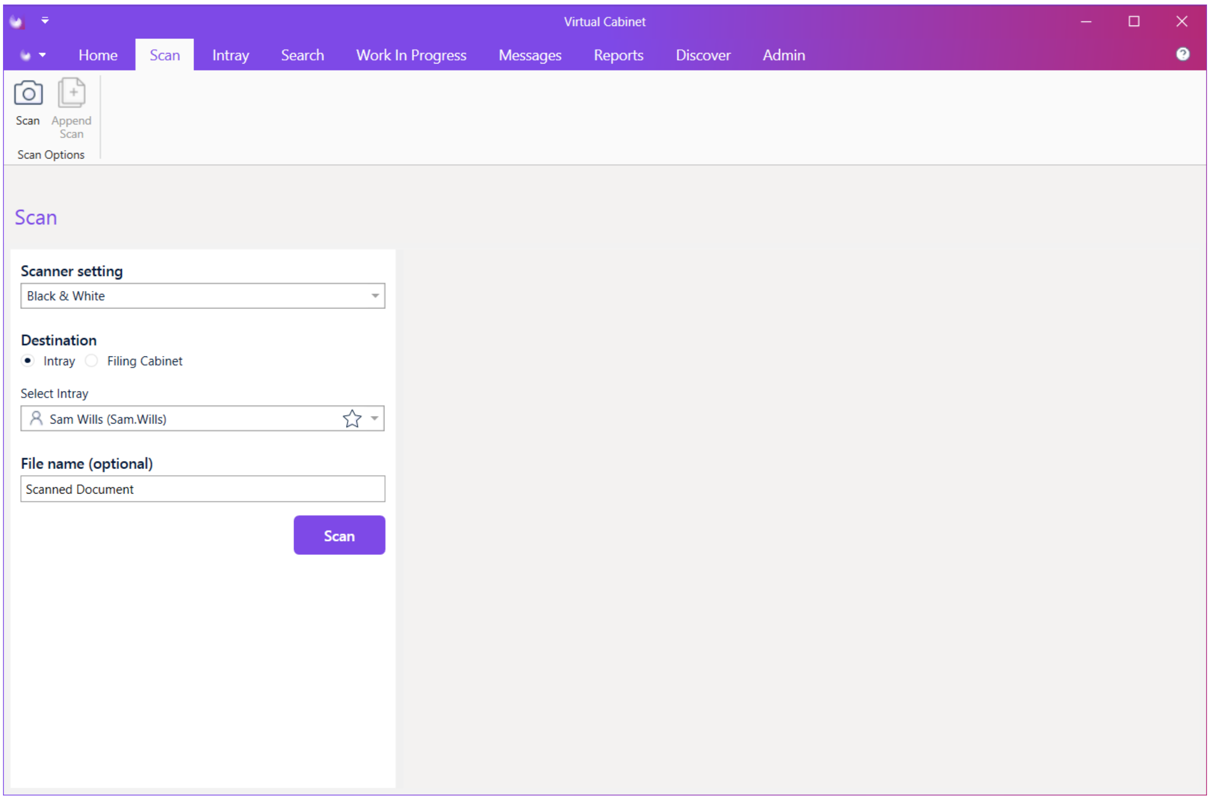
Paper documents can be scanned directly into Virtual Cabinet. You can quickly scan a document, name it and send it straight to an Intray.

6.1 The Scan Tab

The Scan tab can be reached by clicking on 'Scan' in the Ribbon near the top of the window. Alternatively, you can reach the Scan tab by clicking the 'Scan' button on the Ribbon on the Home tab.



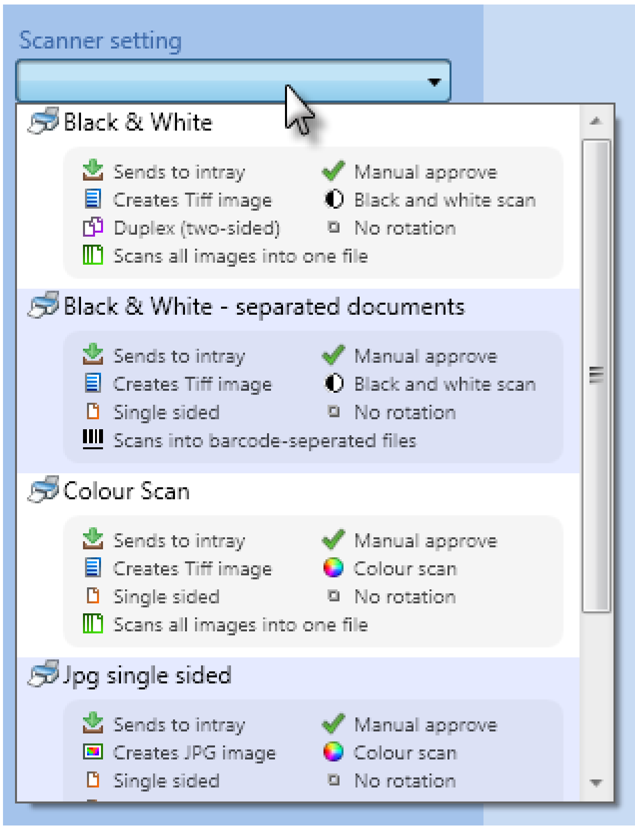
The Scan tab allows you to choose a 'Scan Setting', scan the document, name the file and choose the destination, either selecting an intray or scanning to a filing cabinet.



6.1.1 Scan Settings

The Scan Setting instructs the scanner about how to scan the pages of your document. You can choose a Scan Setting from the drop-down box. Each choice lists some settings to make it easier to identify the correct Scan Setting.

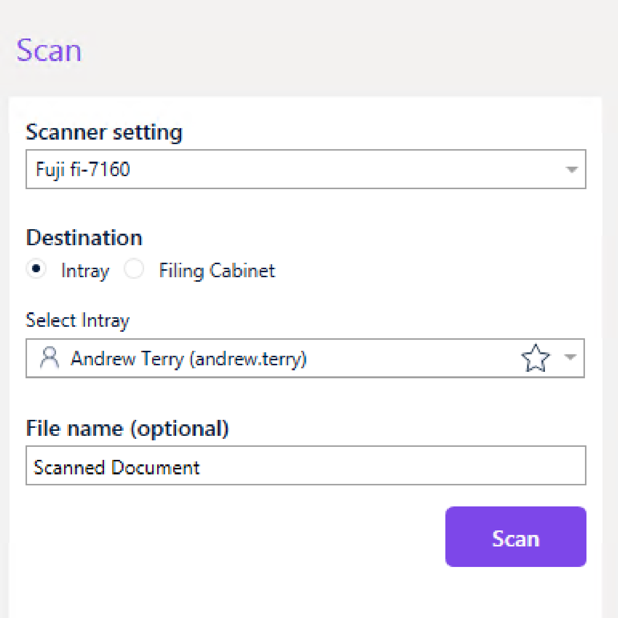
If your administrator has only added one Scan Setting, it will be selected by default. Otherwise, no Scan Setting will initially be selected.



Setting	Options	Description
Intray/ File	Sends to intray	Will send the resulting scanned image to the selected Intray in the Target Intray drop-down box.
	Saves to file	Will save the resulting image file into a folder that has already been specified by your administrator.
Manual /Automatic	Manual approve	Will display buttons that enable you to approve the scan or reject it so you can re-scan it.
	Automatic save/send	Will immediately save or send the scanned image without giving you the option to discard.
File type	Creates Tiff image	Saves the scanned image as a Tiff image.
	Creates PDF file	Saves the scanned image as a PDF document.
	Creates JPG image	Saves each page as a JPG image.
Black and White / Greyscale / Colour	Black and white scan	Instructs the scanner to scan in black and white.
	Greyscale can	Scans in shades of grey.
	Colour scan	Scans in colour.
Single sided / Double sided	Single sided	Will only scan one side of the paper.
	Duplex (two-sided)	Scans both sides of the paper.
Rotation	No rotation	Will not rotate the pages automatically.
	90 ' rotation	Shows the amount of rotation that will be applied to the pages automatically.
Document splitting	Scans all images into one file	All pages will be scanned into one file.
	Scans one-sided pages into separate files	Each page will be scanned into a separate one-page file.
	Scans each sheet of paper into a separate file	Each two-sided sheet of paper will be scanned into a new file.
	Scans into barcode-seperated files	Scans pages into one file until the scanner sees a 'Document Separator Sheet', then starts scanning into the next file.

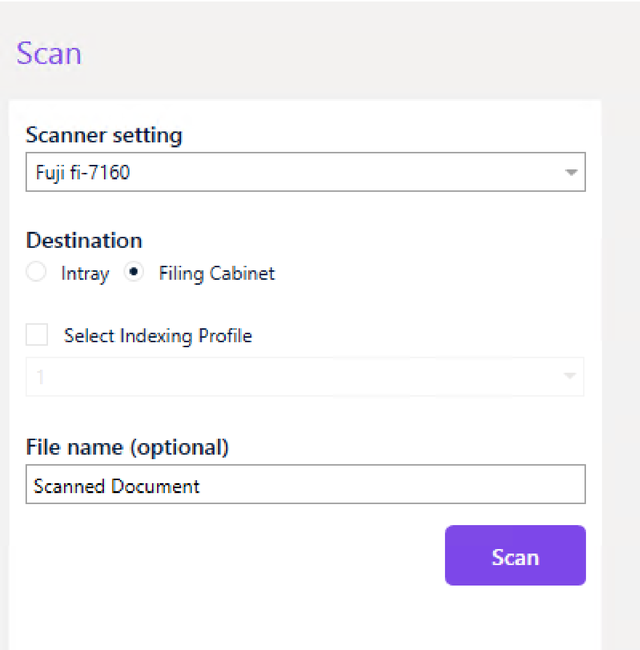
6.1.2 Destination Intray

The 'Intray' option lets you select the Intray that the scanned image will be sent to. This option will be disabled if the current Scan Setting has 'Saves to file' set. You can also choose an Intray by selecting one from the dropdown menu.



6.1.3 Destination Filing Cabinet

The 'Filing Cabinet' option lets you scan and then immediately complete indexing information from within the same scan window.



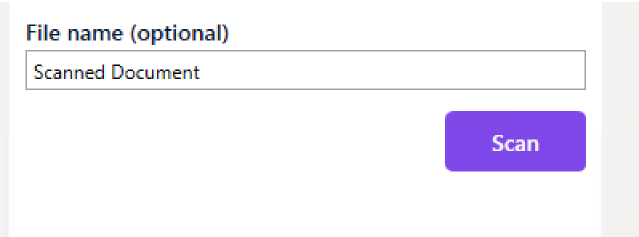
After pressing the scan button you can you move through the steps of indexing the document in a filing cabinet (not shown).

6.1.4 Select Indexing profile

If setup by your admin you can select an indexing profile to quickly file the scanned documents with a pre-selected set of indexing information. You can check the indexing information by clicking on the selection.

6.1.5 File Name

The optional File Name box enables you to type a name for the scanned image. Most letters are allowed, but some special characters cannot be used in filenames. These characters will trigger a small pop-up as a reminder.



6.1.6 The Scan Button

Before scanning, you should check the following:

The scanner is plugged in and turned on.

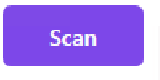
The pages of the document are loaded in the scanner, ready to be scanned.

The correct Scan Setting is selected.

The correct Target Intray is selected, if appropriate.

The file has a file name, if required.

When you are ready to scan, click the 'Scan' button.



6.2 Appending to Scans

If the selected Scan Setting specifies 'Manual Approval', you will be given the option of appending pages to a scan before you approve it.

You can append pages by clicking the 'Append' button that appears next to the now-disabled Scan button.

Appending is similar to the initial Scan. The differences are as follows:

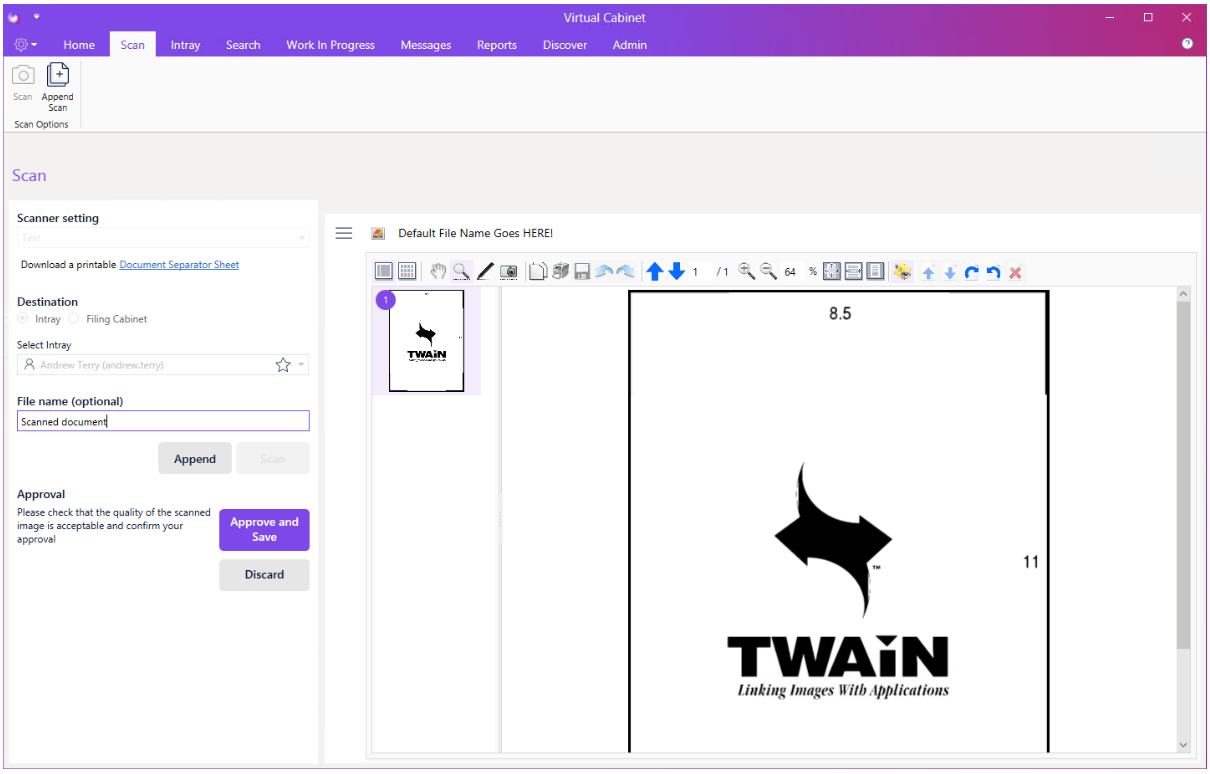
When Appending, you cannot change the Scan Setting – it has to be the same as the Scan Setting that was used for the initial Scan.

Appended pages will be added to the end of the initial Scan.

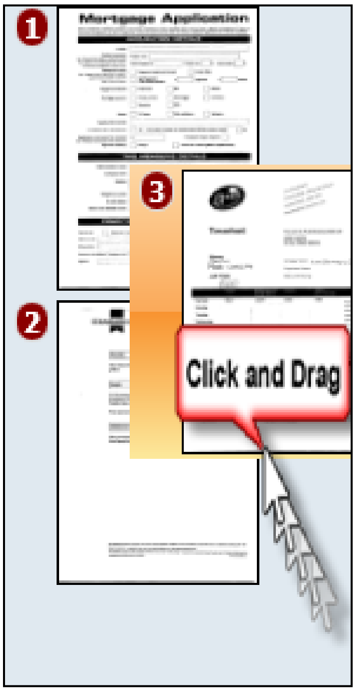
You are free to perform any number of Appends onto the end of the initial Scan.

6.3 Editing the Scanned Image in the Preview

The scanned image will appear in the preview panel on the right-hand side.

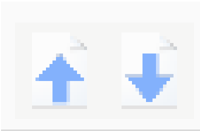


6.3.1 Re-ordering pages



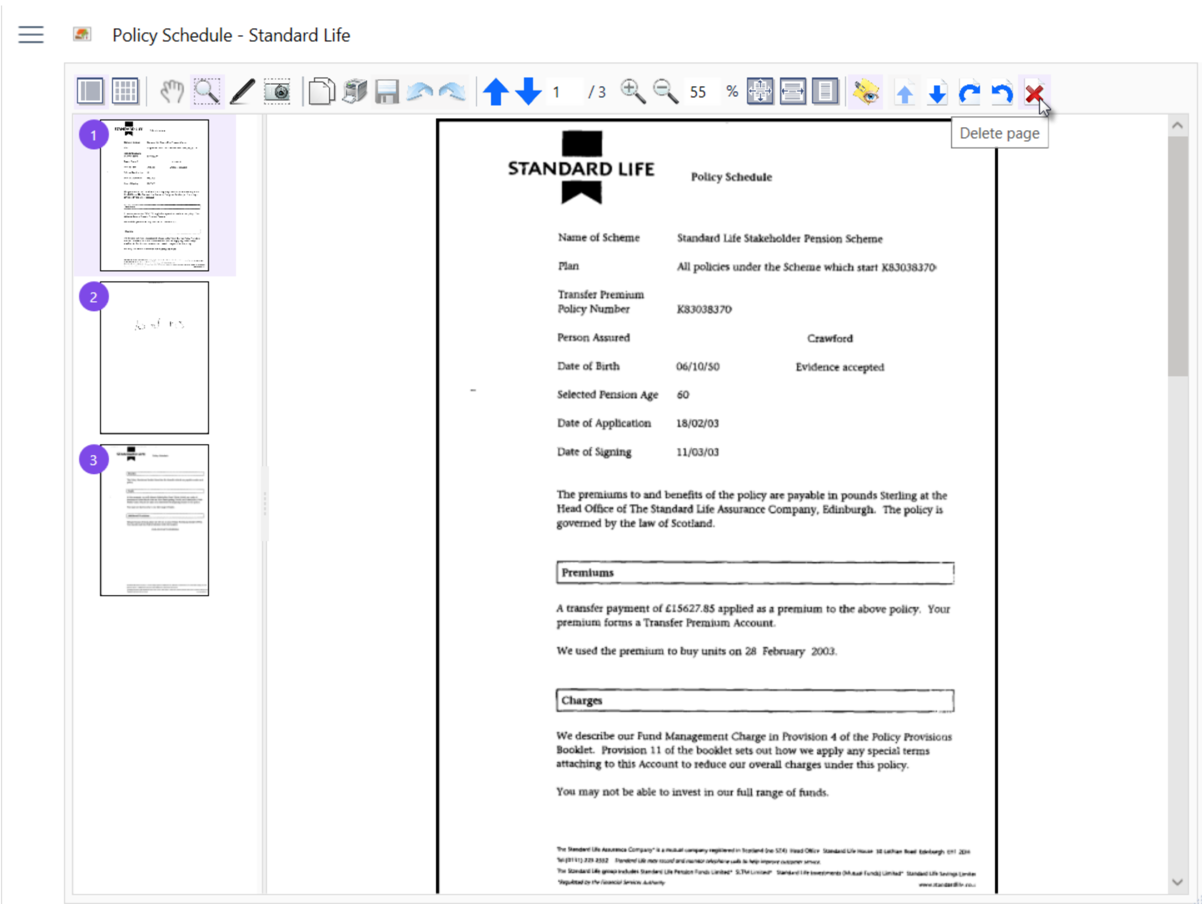
You can re-order pages on the preview by using the mouse to drag them up or down in the thumbnail view of the document viewer.

Similarly, you can use the Move Pages Up and Down arrows in the Viewer toolbar to change page ordering.



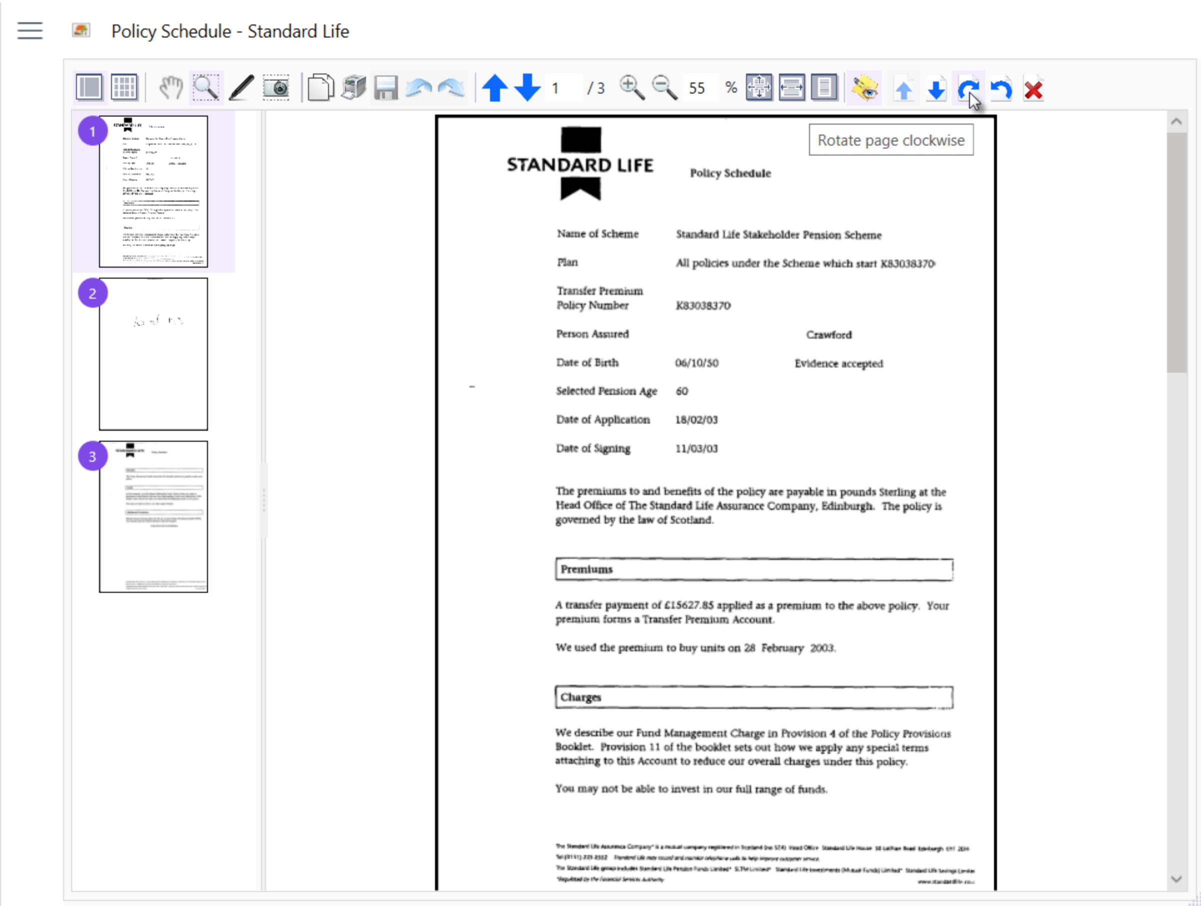
6.3.2 Deleting pages

Unnecessary pages can be deleted from the preview. To delete a page, select it and click the ‘Delete Page’ button on the preview toolbar.



6.3.3 Rotating pages

You can also rotate pages in the preview. To rotate a page, select it and click either 'Rotate clockwise' or 'Rotate anti-clockwise'.

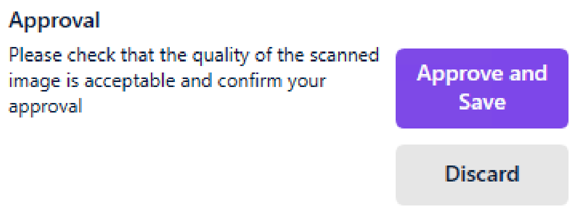


6.4 Approving the Scanned Image

If the selected Scan Setting specifies ‘Manual Approval’, you will be prompted to ‘Approve’ or ‘Discard’ the scanned image before finishing.

If you have checked the scan, you can confirm that the scanned image is of sufficient quality by clicking ‘Approve and Send’. (The button will display ‘Approve and Save’ if the Scan Setting specifies that it will save to a file instead of sending to an Intray.)

Clicking ‘Discard’ will reject the current scanned image, allowing you to re-scan the pages.

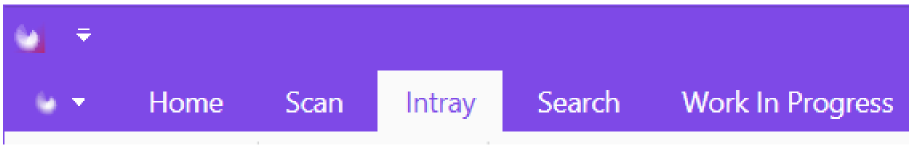


7 Intrays

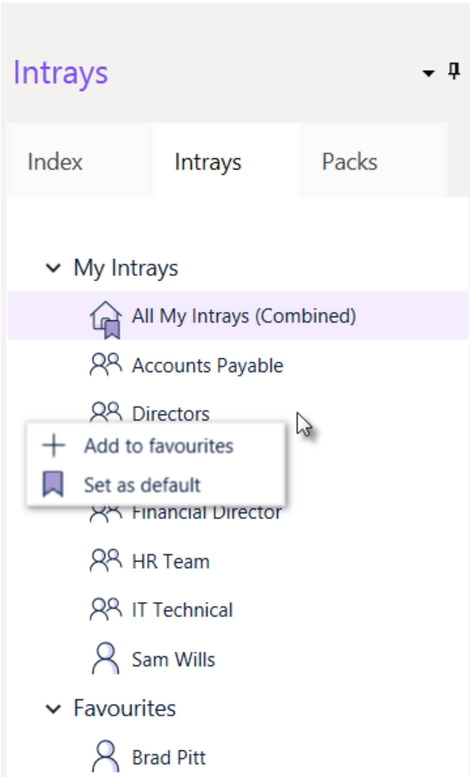
Every Virtual Cabinet user has an Intray. An Intray is a staging area for documents that are in the system but have not yet been filed for retrieval by other users. Any Virtual Cabinet user can put documents into your Intray but only you can see those documents. (People with special privileges, such as your Administrator, may also be able to access your Intray.) You can then either file the documents or move them to the Intray of another Virtual Cabinet user.

7.1 The Intray Tab

The Intray tab can be reached by clicking on the 'Intray' in the Ribbon near the top of the window. Alternatively, you can click the 'Intray' button on the Ribbon on the Home tab.



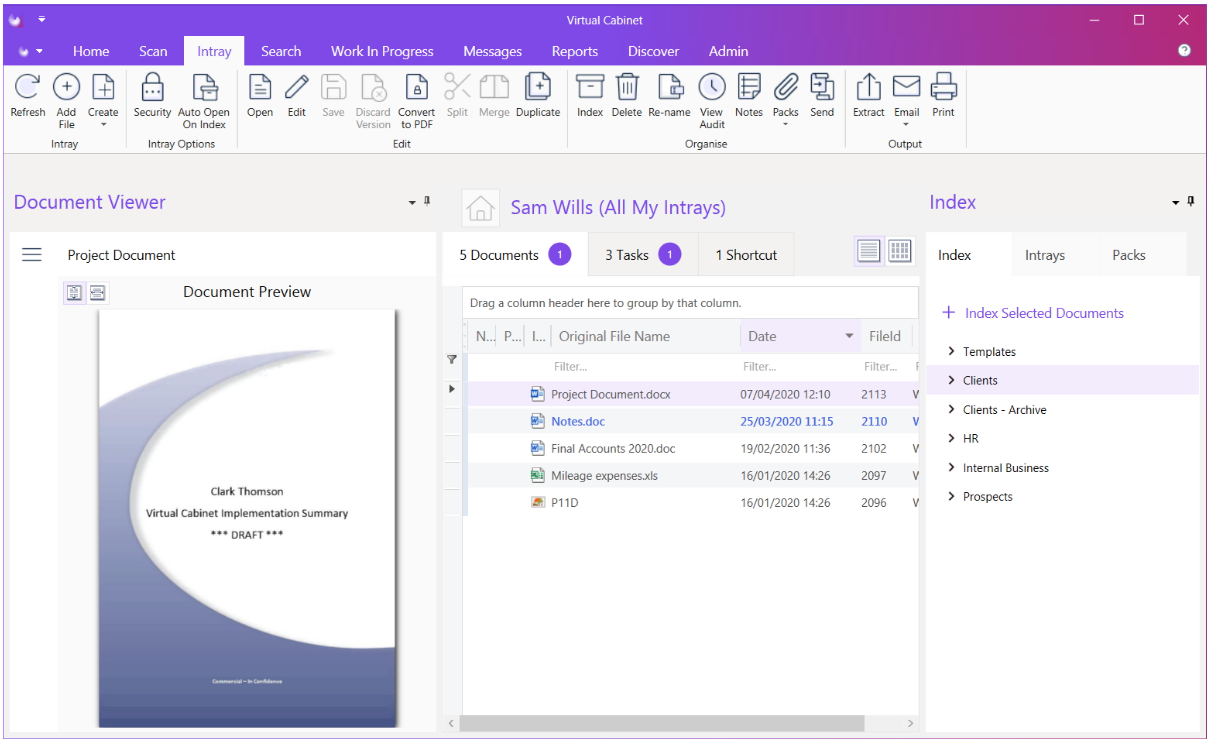
By default the home Intray shows a combined view of your own personal Intray and any groups of which you are a member. You can set another Intray as your default by right clicking and choosing 'set as default'.



The Intray has 4 main panels:

1. **Intray Documents and Tasks Lists** – shows the documents and tasks in your Intray.
2. **Document Viewer** – used for quickly previewing documents.
3. **Index panel** – enables you to file documents into the system.
4. **Intrays panel** – lists everyone's Intray so you can easily transfer documents.

The Intray also has a selection of Ribbon buttons along the top to the window.

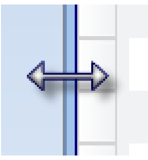


7.2 Re-arranging the Intray Panels

You can re-arrange the Intray panels to suit your preferences. Panels can be resized, hidden, and can also ‘float’ as separate windows.

7.2.1 Resize a panel

Panels can be resized so they appear larger or smaller within the Virtual Cabinet window. To resize a panel, move the mouse over the edge of a panel so that the pointer becomes a double-headed arrow. Drag the edge of the panel to resize it.



7.2.2 Auto-hide a panel

You can configure any of the Intray panels, except the Intray Document List, to ‘auto-hide’ themselves. This setting will hide the panel and show a tab at the edge of the window. The panel can be shown by moving the mouse over the tab.

Panels can be auto-hidden by turning auto-hide on or off using the Pin button. Alternatively, you can click on the panel title bar menu and select the Auto-Hide option.

When hidden, a panel can be expanded by moving your mouse over the corresponding tab.

In Auto-Hide mode, panels will remain expanded while they have focus. If you click outside the panel then the panel will hide again.

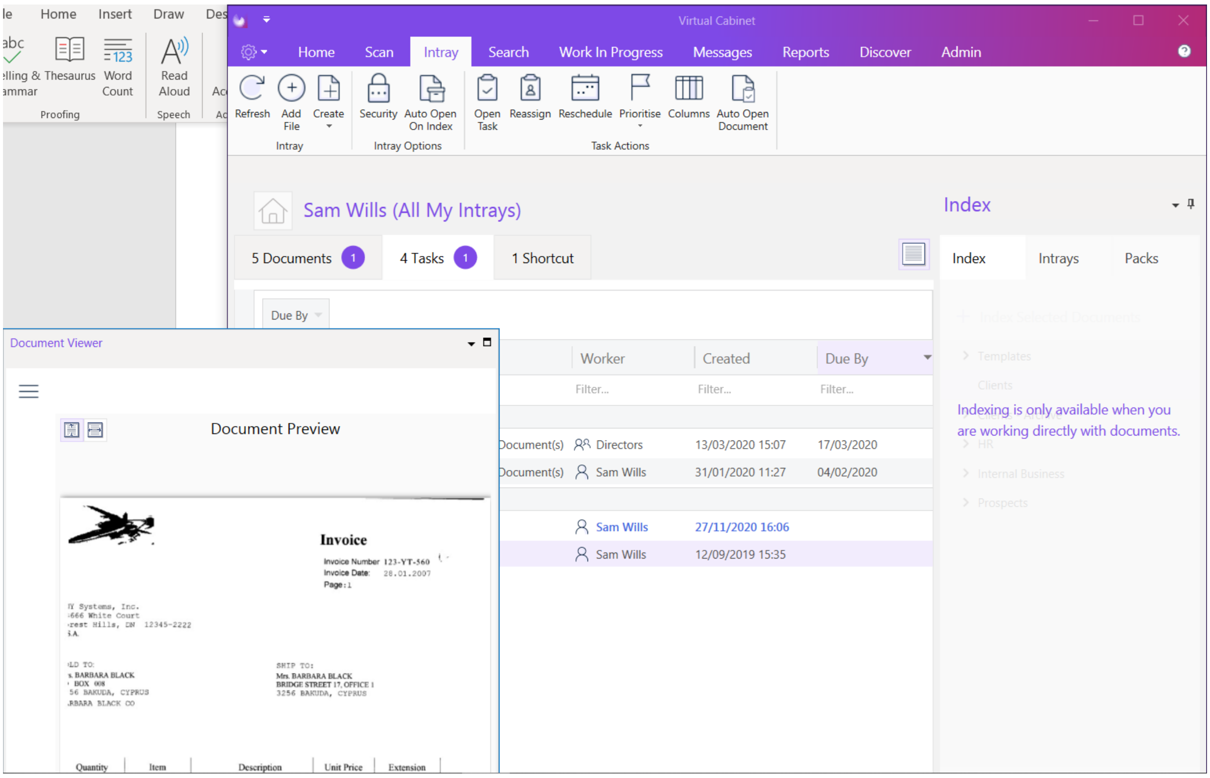
7.2.3 Float a panel

You can ‘float’ (detach) any of the Intray panels, except the Intray Document List, from the Virtual Cabinet window. A floating panel acts like a separate window until you choose to ‘dock’ it.

This allows you to position the panels wherever you like on your screen. It is particularly useful when using more than one monitor, allowing you to have the Document Viewer panel on a second or third monitor.

To float a panel, use your mouse to either double-click or drag the panel title bar. The panel also has a ‘Float’ option that can be accessed by clicking on the panel menu .

The Document Viewer, Intrays and Index panels can all float.



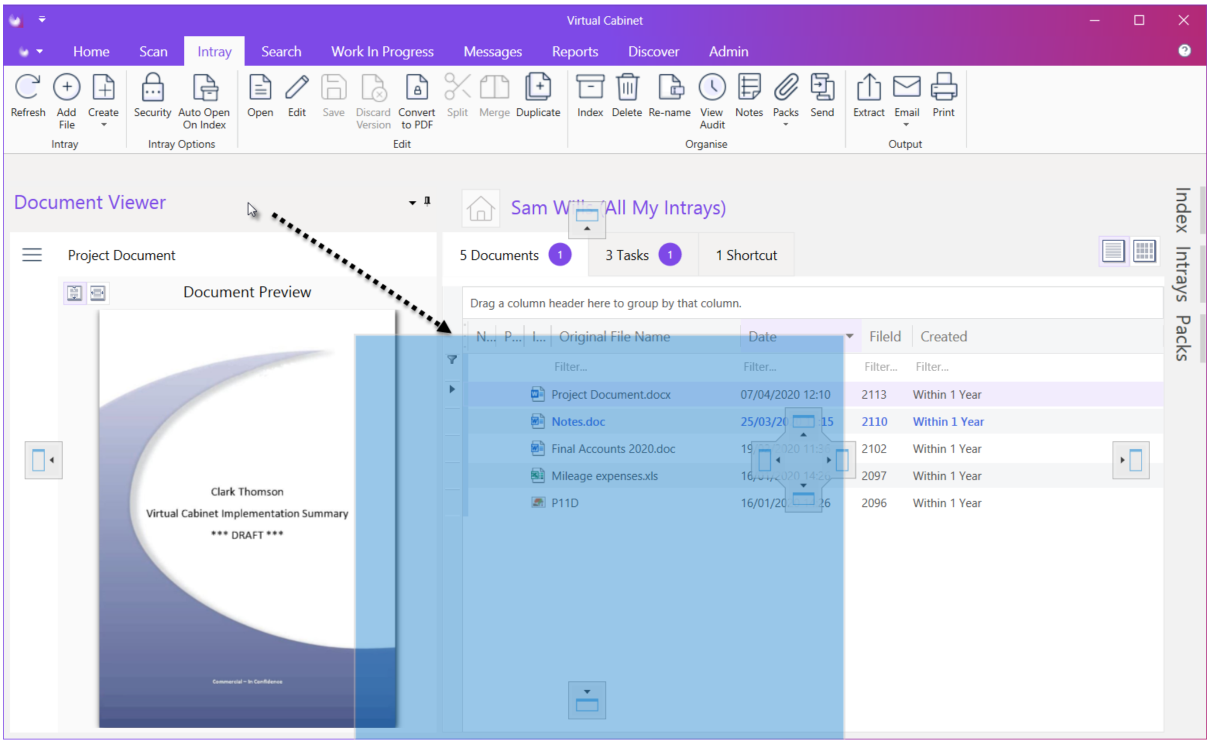
When the panels are in Float mode, they can be resized in the same way as other windows. You can resize the window by clicking the Maximise and Restore buttons or by dragging the edge of the window.

7.2.4 Dock a panel

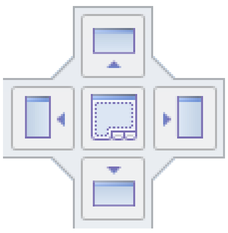
You can 'dock' (attach) any of the Intray panels, except the Intray Document List, on to any of the four edges of the Virtual Cabinet window.

If a panel is floating, you can dock it by double-clicking the mouse on the title bar of the panel or by selecting 'Dock' from the panel menu ▾. Alternatively, you can drag the title bar of a floating panel on to a 'docking position'.

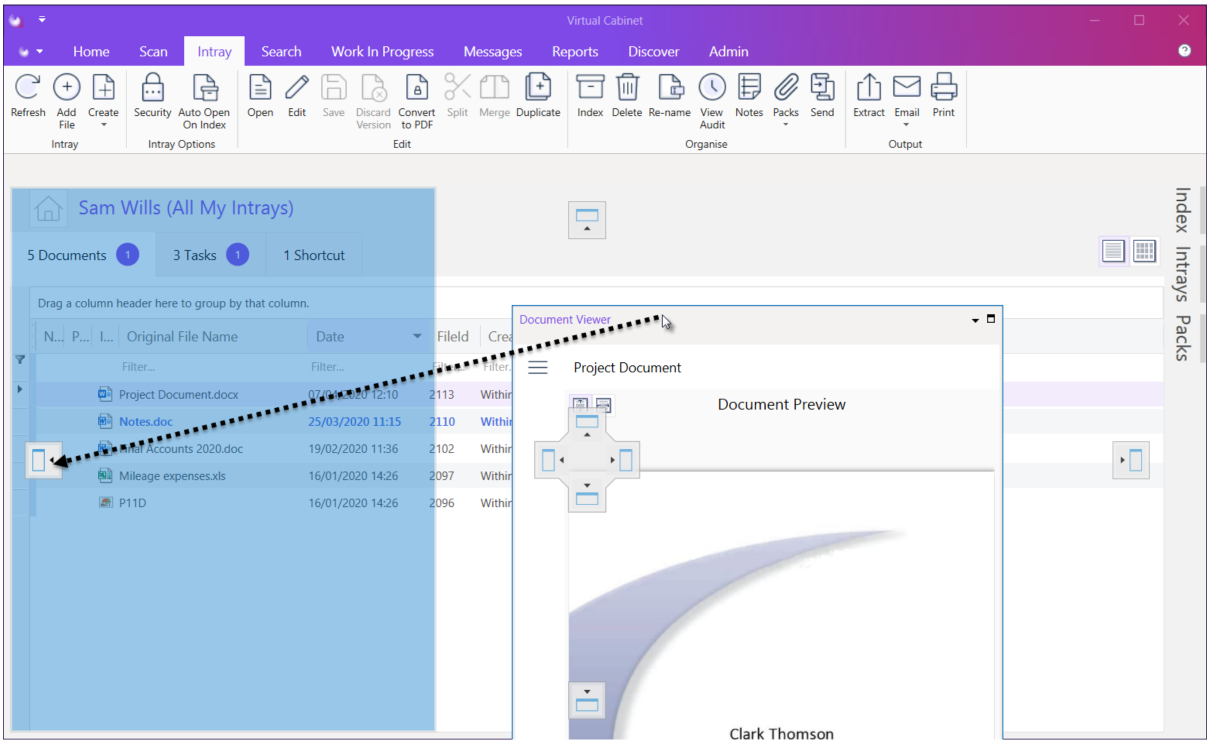
When you drag a panel, a 'docking position' will appear at each edge of the window. Dragging a panel to any of these positions will dock the panel along the length of that side of the window.



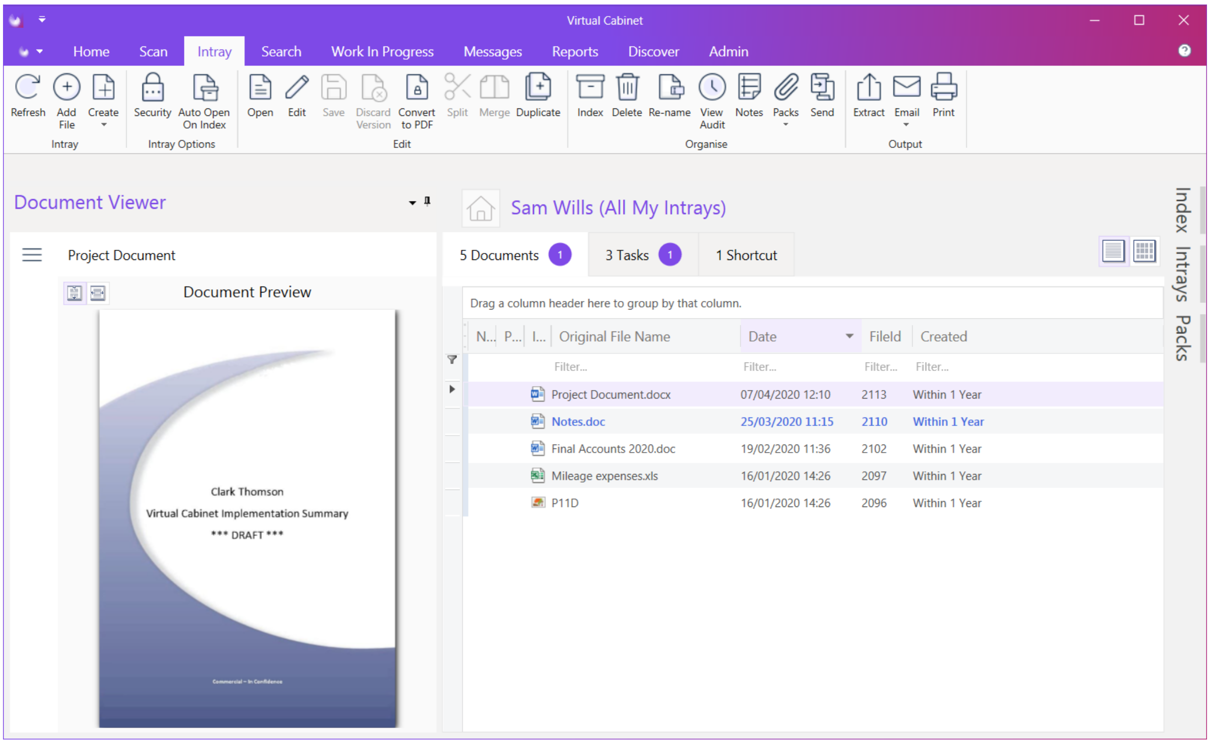
More docking positions will appear if you drag a panel over another docked panel. These allow you to dock your panel in relation to the panel you are over.



To dock the selected panel in one of the available locations, drag the panel over the docking position. A blue rectangle shows you where the window will dock if you release the mouse.

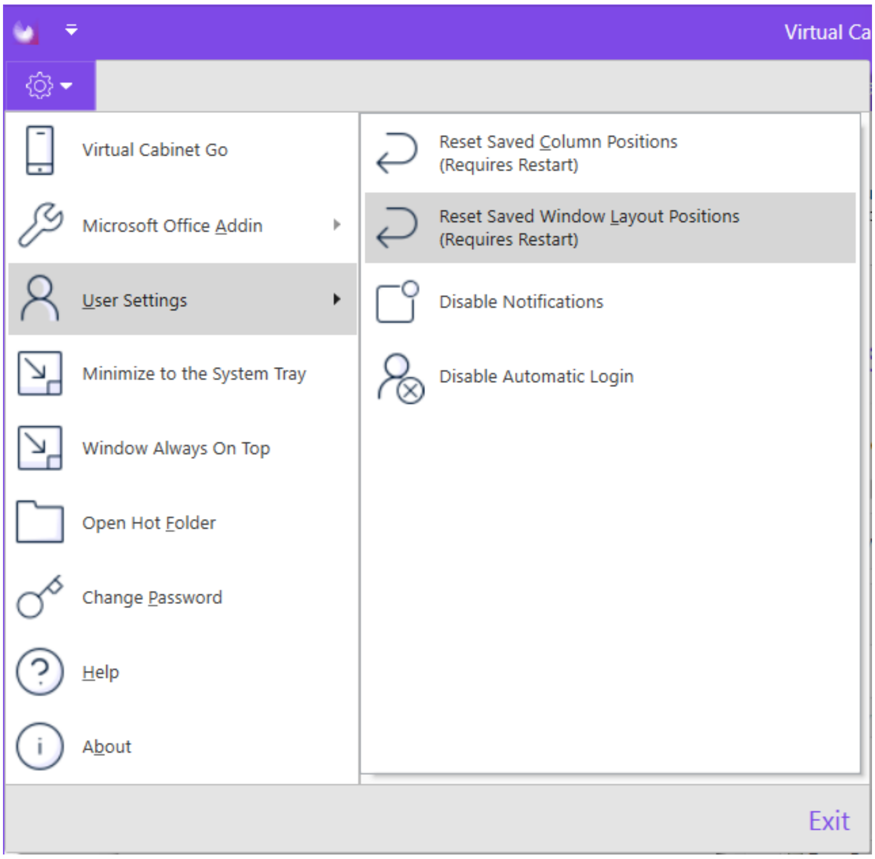


Release the mouse to put the panel in the new location.


Virtual Cabinet
Home Scan Intray Search Work In Progress Messages Reports Discover Admin
Refresh Add File Create Security Auto Open On Index Open Edit Save Discard Version Convert to PDF Split Merge Duplicate Index Delete Re-name View Audit Notes Packs Send Extract Email Print
Intray Intray Options Edit Organise Output
Document Viewer
Sam Wills (All My Intrays)
Project Document
Document Preview
Clark Thomson
Virtual Cabinet Implementation Summary
*** DRAFT ***
5 Documents 1
3 Tasks 1
1 Shortcut
Drag a column header here to group by that column.
N... P... I... Original File Name Date Fileld Created
Project Document.docx 07/04/2020 12:10 2113 Within 1 Year
Notes.doc 25/03/2020 11:15 2110 Within 1 Year
Final Accounts 2020.doc 19/02/2020 11:36 2102 Within 1 Year
Mileage expenses.xls 16/01/2020 14:26 2097 Within 1 Year
P11D 16/01/2020 14:26 2096 Within 1 Year
Index Intrays Packs

7.2.5 Resetting the panel layout

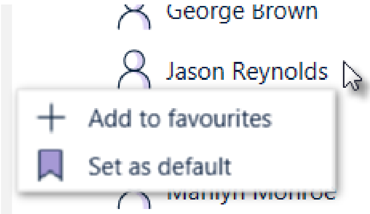
If you want to restore the default arrangement of all the windows and panels, you can click on the Orb in the top-left corner of the Virtual Cabinet window, and then choose the 'Reset Saved Window Layout Positions' option from the 'User Settings' menu.



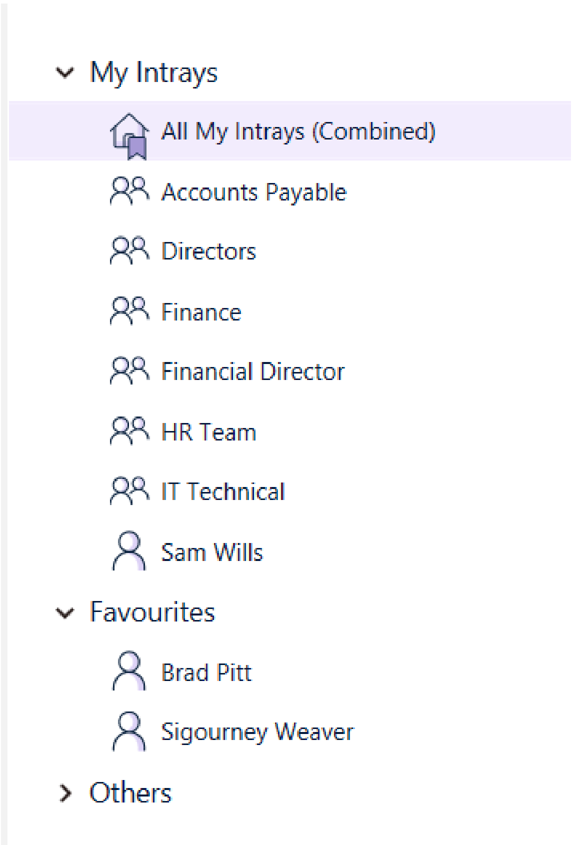
'Reset Saved Window Layout Positions' will restore the default positions of all the small docked windows within the main window. This option can be used to recover windows that may have become lost or hidden. You may have to close and re-open Virtual Cabinet for the windows to reset.

7.3 Intray Favourites

You can mark an Intray as a favourite by clicking on the star next to a user's name in the Send window or by right clicking on an Intray in the Intray panel and selecting "Add to favourites".

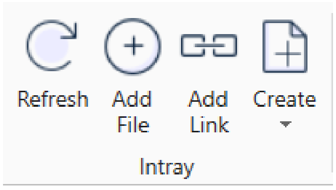


Favourite Intrays will appear in the Favourites group of the Intray panel, and will appear with a star next to their name in the Send window.

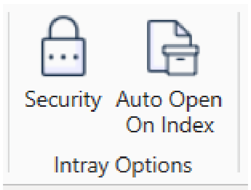


7.4 Ribbon Buttons

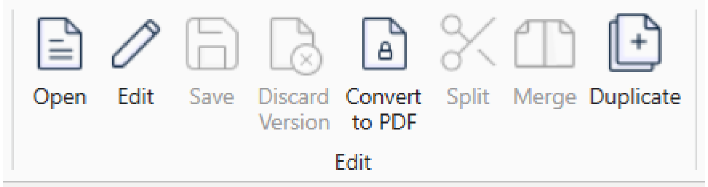
The Ribbon presents a selection of buttons that can be used to perform document-related actions.



Button	Description
Refresh	Refreshes the list of documents in your Intray.
Add File	Opens a new window to enable you to locate a file to add into your Intray.
Add Link	Opens a new window to add a document link to your Intray. A document link is a document in VC that behaves the same as other documents, but is actually a link to content stored outside of VC, e.g. a SharePoint file, a website, a folder path on the network.
Create	Create a new document based on a Document Creation template. See a list of recently used templates, or search for any template

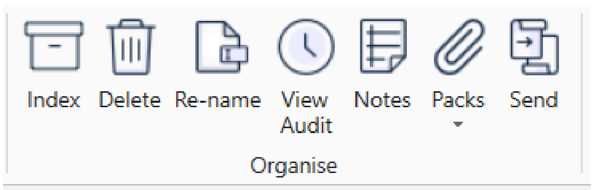


Button	Description
Security	See Section 7.4
Auto Open On Index	Click to enable 'Auto Open On Index' (the button will become highlighted). Clicking again will turn function off. When enabled, the Document Viewer panel will automatically show a preview of a document when you begin the indexing process.



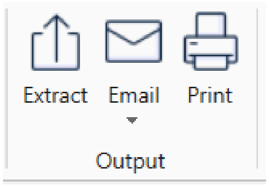
(These options are also available on the Right-Click menu)

Button	Description
Open	Opens the selected document for viewing in a new window. The document will either open in the Virtual Cabinet Document Viewer or the program associated with the type of document you are opening.
Edit	Opens the document for editing in a new window. The document will open in the program associated with that type of document.
Save	Will be available if the selected document is currently being edited. Saves the new version of the document back into Virtual Cabinet.
Discard Version	Will be available if the selected document is currently being edited. Discards the new version of the document and allows other Users to start editing this document.
Convert to PDF	Convert the selected document to a PDF. Creates a new PDF document and leaves the original Word document.
Split	Opens a seperate window allowing you to split individual TIF or PDF images (exclusively) at a particular page, or into a seperate document for every page. Newly created documents will be sent to your Intray.
Merge	Opens a seperate windows allowing you to merge multiple TIF or PDF images (exclusively). Newly created documents will be sent to your Intray.
Duplicate	Makes an identical copy of the selected documents and adds them to your Intray.



Button	Description
Index	Starts indexing the selected documents. For information about indexing, see the 'Indexing' section of this guide.
Delete	Opens a popup window that asks you to confirm that you want to delete the selected document. If you delete a document then you will be unable to find it or open it again.

Re-name	Opens a popup window that lets you change the Original File Name of the selected document.
View Audit	Opens the View Audit window, showing the history of the selected document.
Notes	Opens a window that displays any notes attached to the selected document. The window provides the option to add, edit or delete notes.
Packs	Allows you to create a new pack for the selected documents. Packs allow you to group related documents together.
Send	Send documents to another user’s Intray, and/or create a shortcut for the document.



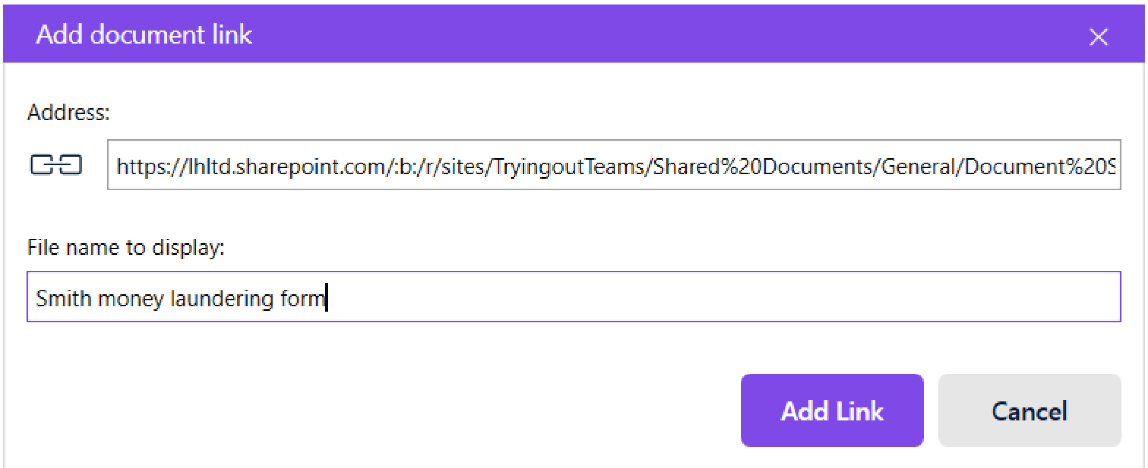
Button	**Description**
Extract	Opens a window, allowing you to download a copy of the selected document to your computer.
Email	• EMail - Opens a blank new e-mail with an attached copy of the selected document. • Email as PDF - Converts the selected documents to PDF files, opens a blank new e-mail and attaches the PDFs. • Email as Link – Attach selected documents to a blank email as an internal hyperlink.
Print	Prints the selected document.

7.5 Document Link

You can add a document link from your Intray using the Add Link button in the top ribbon.

You will need to supply two things:

- **Address** - copy and paste the website address, or path to the document/folder on your network drive.
    - Tip: On a SharePoint document use the "Copy Link" option and paste that into a document link.
- **A friendly name**

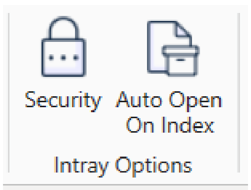


Double click on the document link in your Intray to open that address outside of VC.

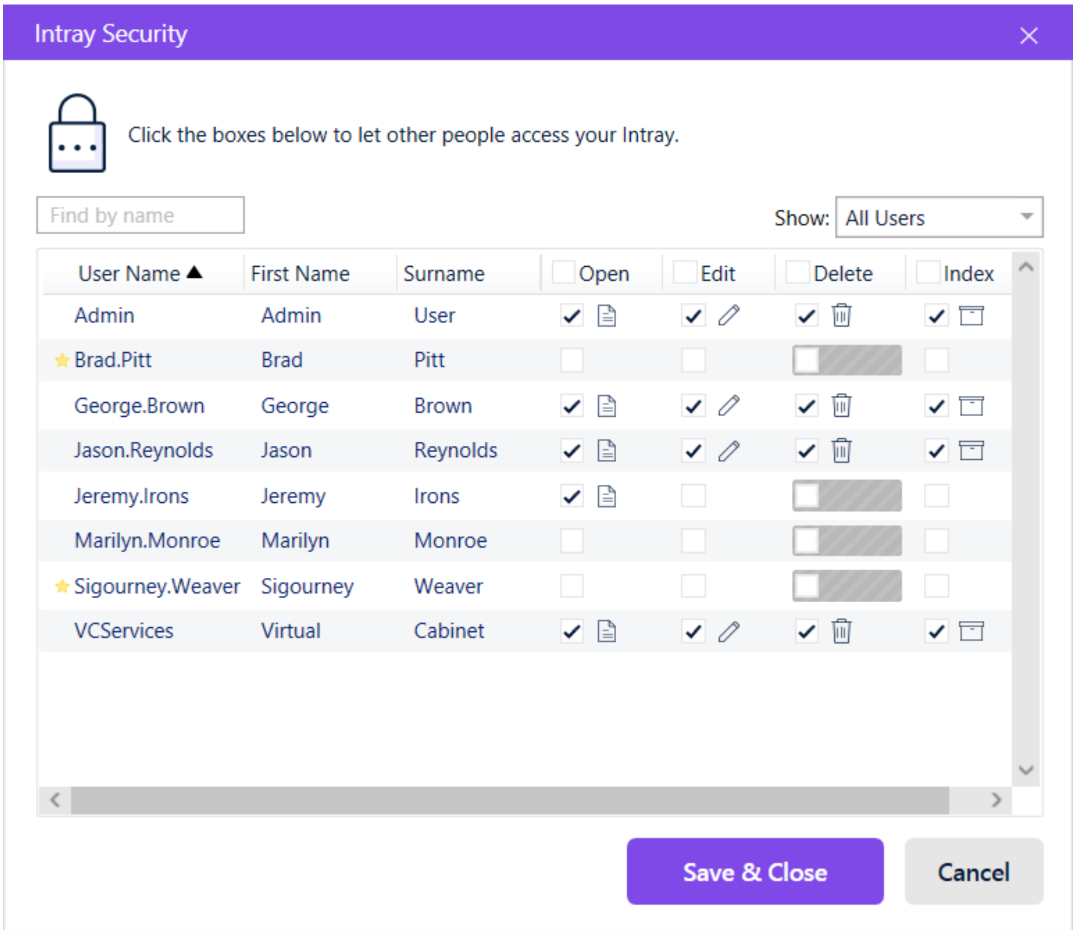
You can now index that document into a Filing Cabinet, or do almost anything else you would do with a normal document in VC.

You can edit a document link and change the address later. This will be captured by our audit and versioning systems in VC.

7.6 Intray Security



The security button on the Ribbon of the Intray enables you to specify which users have access to your Intray.



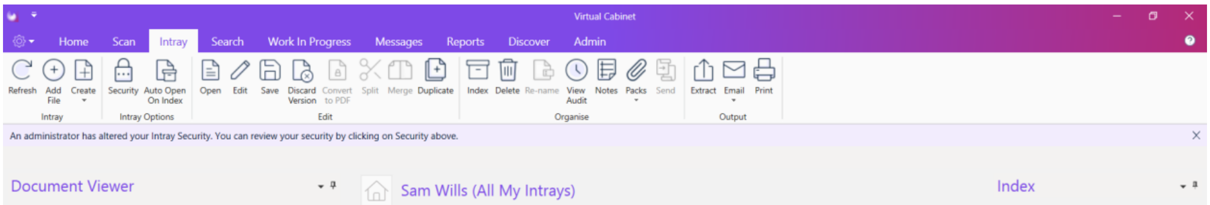
After clicking on Security you will see a list of all users from your Virtual Cabinet system. You can search for a particular user using the “Find by name” field, or you can see specific groups of users using the “Show:” drop down list.

For each user you can specify whether they have Open, Edit, Delete or Index rights over documents in your 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.

A star next to a user’s name designates they are a Favourite user.

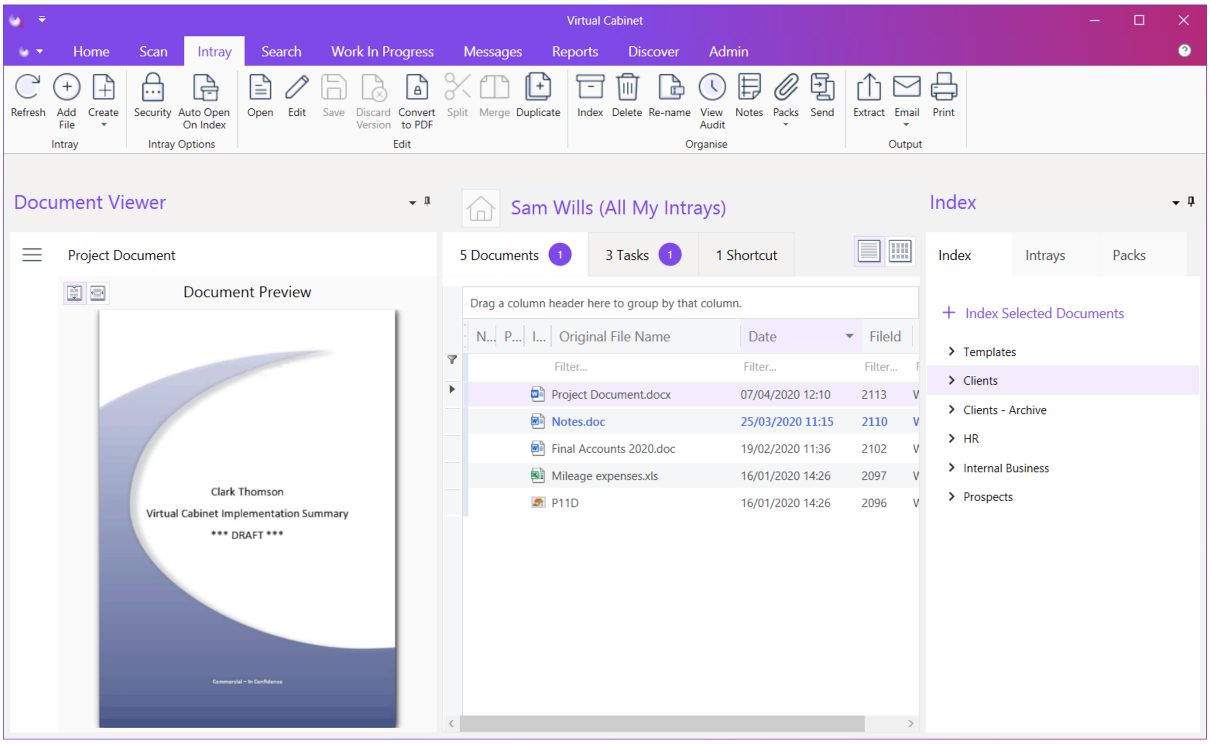
If a user has a tick box that is greyed out then your administrator has prevented that user from accessing that feature in their own Intray, and so will not be able to do that action in your Intray even if the box is ticked.

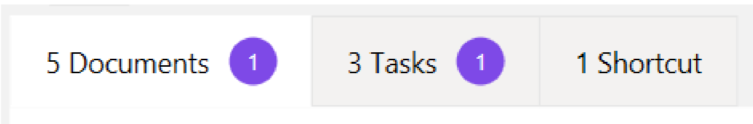
If you ever see the message below in your Intray then an administrator has changed which users have access to your Intray. You can review your security, including the changes that have been made, at any time through the Security button on the Ribbon of the Intray.



7.7 Intray Documents List

The Intray Documents List shows the documents that are currently in your Intray. Each of these documents should either be filed into the system (see the Indexing section) or moved to another person's Intray.



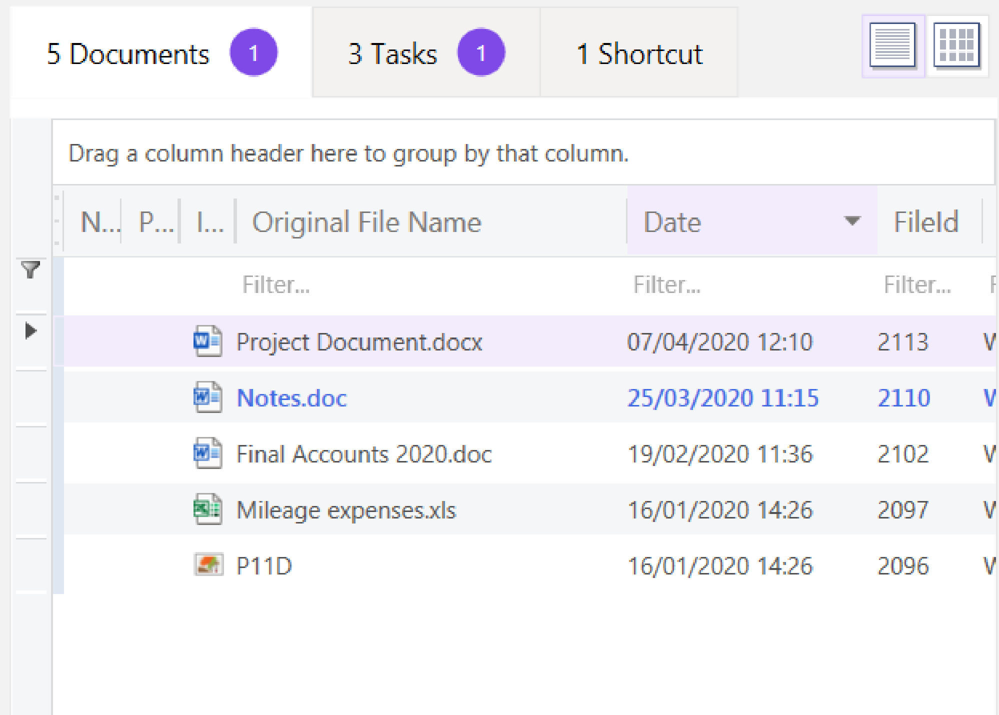


Each document is presented as a row in the table.

You can re-order the documents in the list by clicking on the column headers. Clicking on a column header will sort by that column. Clicking again will reverse the order of the sort.

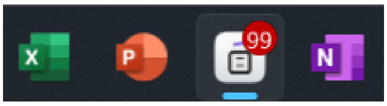
7.7.1 Unread Intray documents

Documents that have just been added to your Intray will appear as Unread until you either Open, Edit, or Index them. You can distinguish Unread documents by the bold and blue text the row will have, this will indicate whether you have read that document.



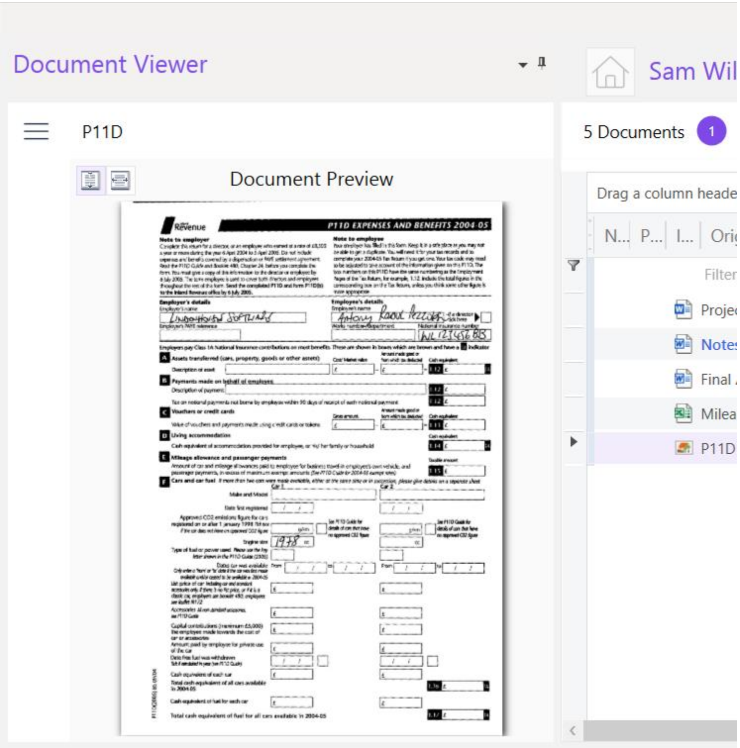
When viewing Group Intrays or other users Intrays you will see whether you have read each document. The unread status does not relate to whether other users have read that document.

If you have notifications enabled (check this by clicking on the Orb and then User Settings) then you will see a number in a red circle on the Virtual Cabinet Task Bar icon. This indicates the number of unread documents and Tasks currently assigned to you.



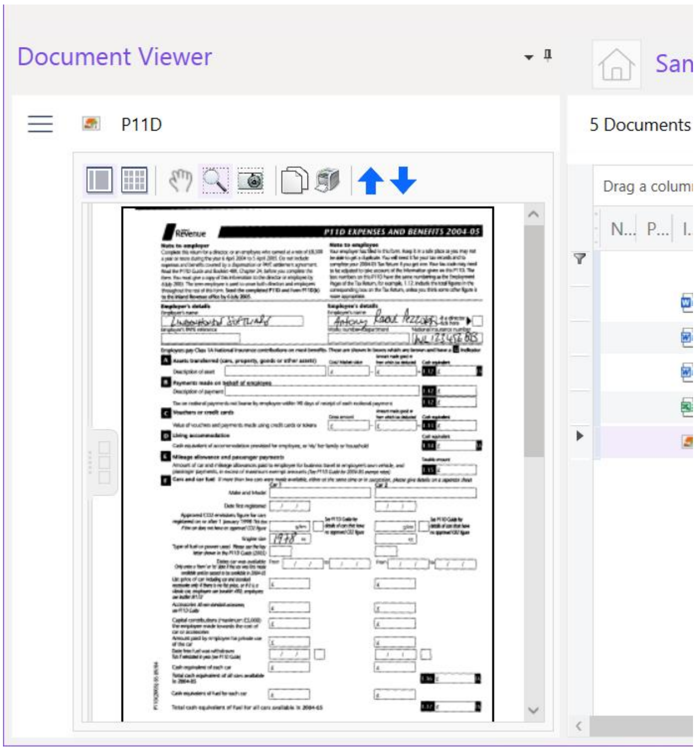
7.7.2 Preview a document

Select a document in the list and a preview of the first page of that document will appear in the Document Viewer. Click on the preview or double click on the row in the document list to open up the full document.



7.7.3 Open a document

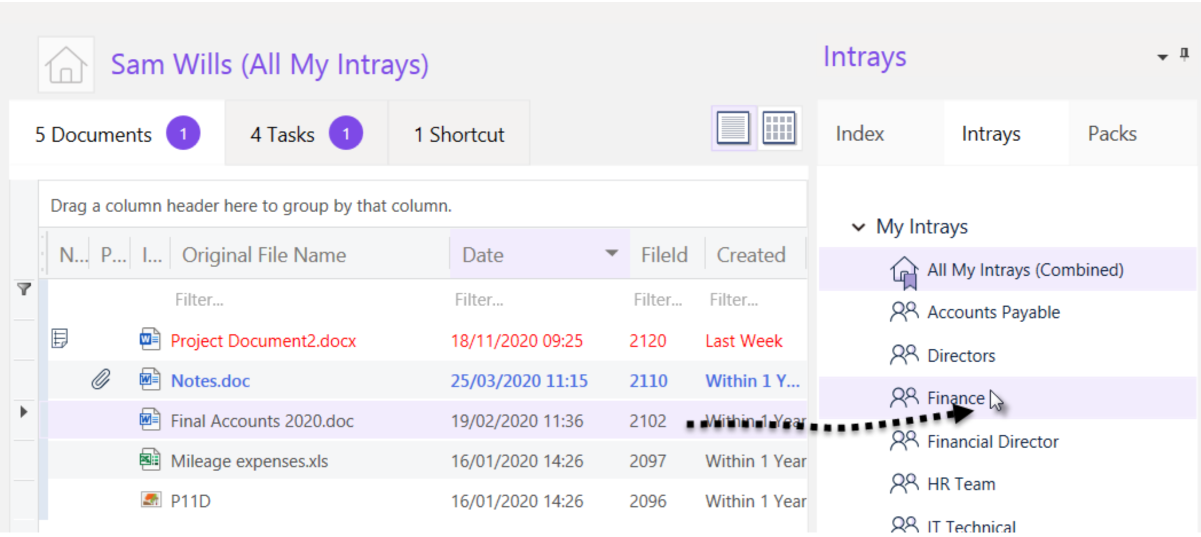
Double-click the mouse on a document to open it in the Document Viewer panel.



7.7.4 Move a document to another Intray

To move a document to another person's Intray:

Either find their Intray in the Intrays list and use the mouse to drag the document onto their Intray. The document will then disappear from your Intray.

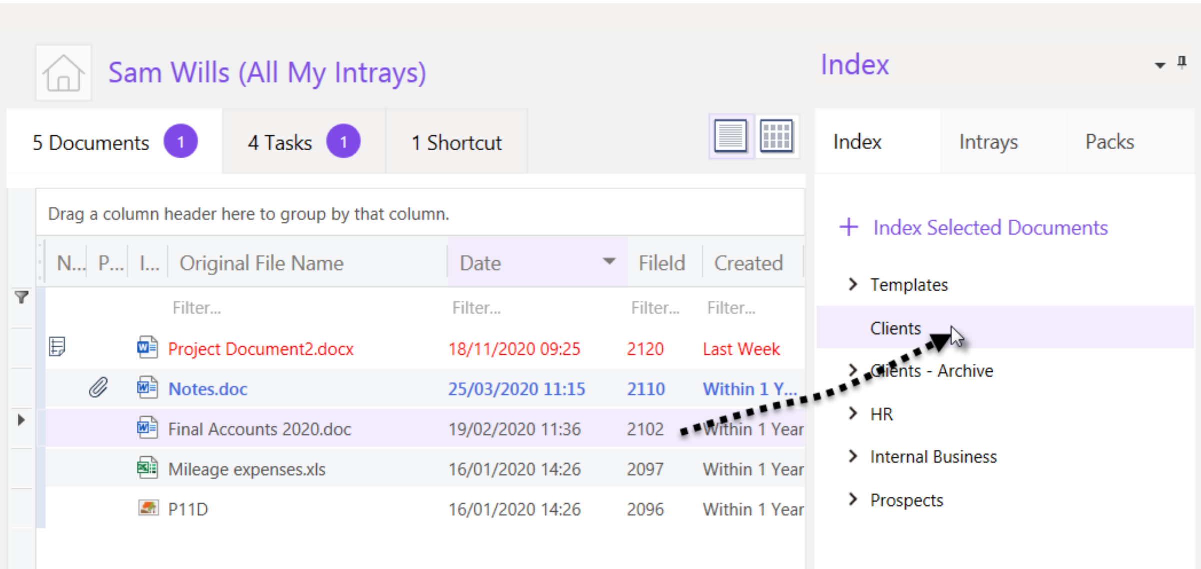


Or select the document(s) you wish to move and click the **Send** button.

See the Shortcuts and Sending Documents area below for more details.

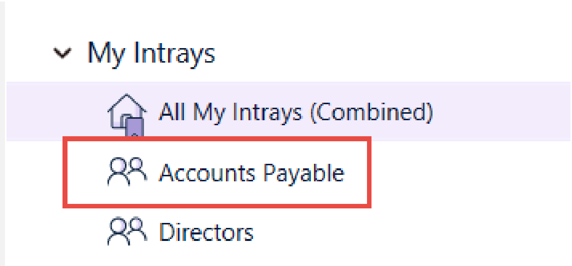
7.7.5 Begin indexing a document

To begin indexing a document, use the mouse to drag the document onto a folder or cabinet. For full information about indexing documents, please refer to the Indexing section.



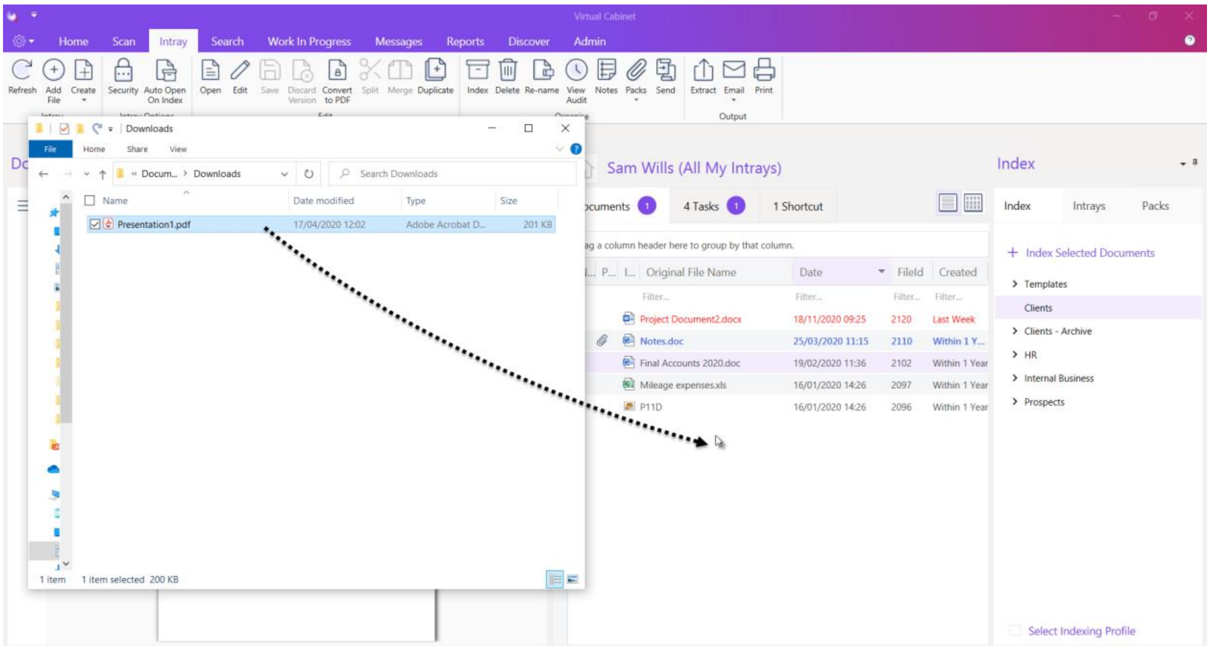
7.7.6 Group Intrays

Virtual Cabinet users can belong to groups. If your administrator has associated you with any Groups then you may be able to access various 'Group Intrays'. You can find Group Intrays under your group of Intrays at the top of the Intrays panel. If you have access to a Group Intray then you can freely move and index the documents.



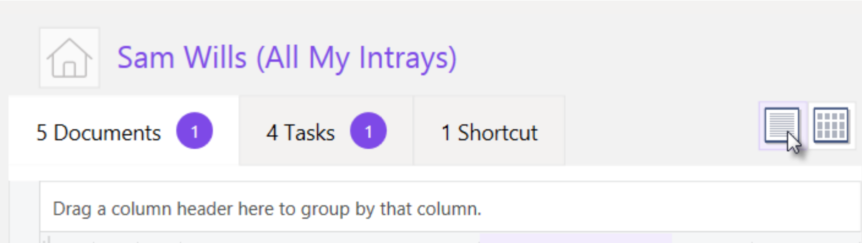
7.7.7 Adding documents directly to your Intray

You can add documents directly into your Intray from a folder or your Windows desktop. To add a document to your Intray, find it and drag the icon onto the Intray Documents List.

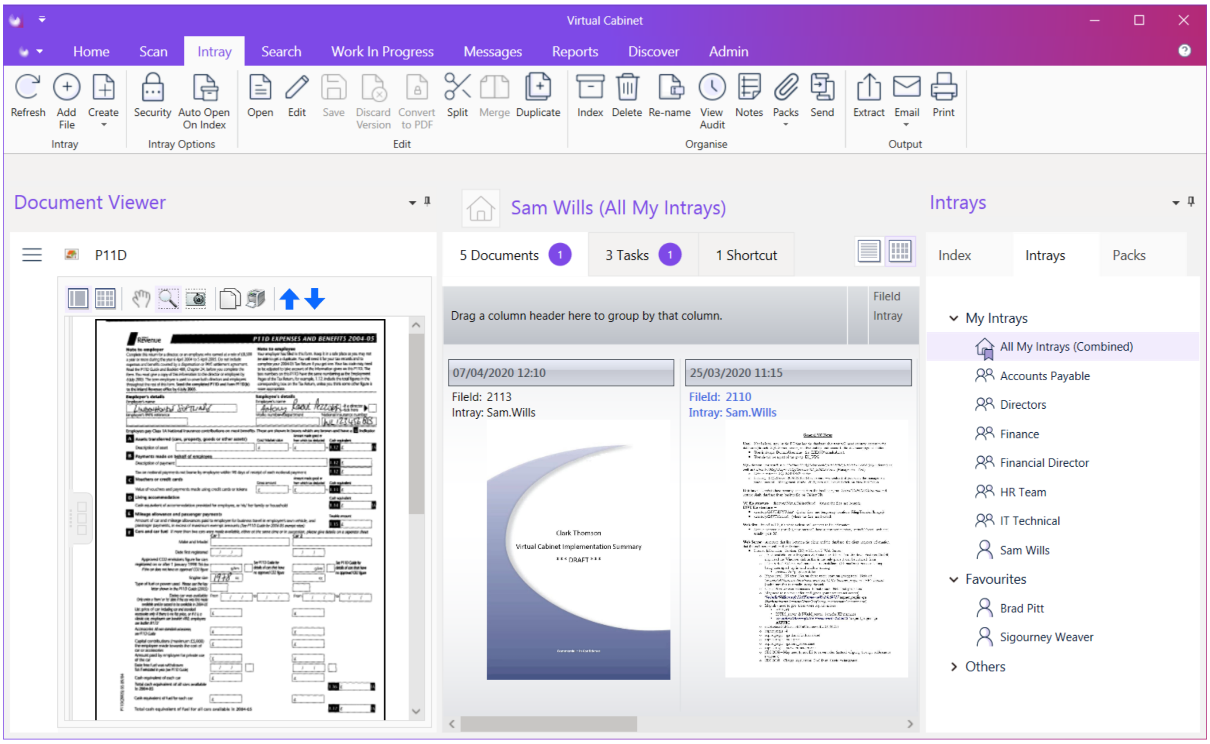


7.7.8 Displaying thumbnail images of documents in the Intray

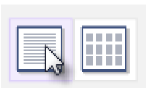
To view the Intray Documents List as a collection of thumbnail previews, click the Thumbnail view button in the top right corner of the list of documents.



The Intray will now show your documents as a collection of small thumbnail previews.

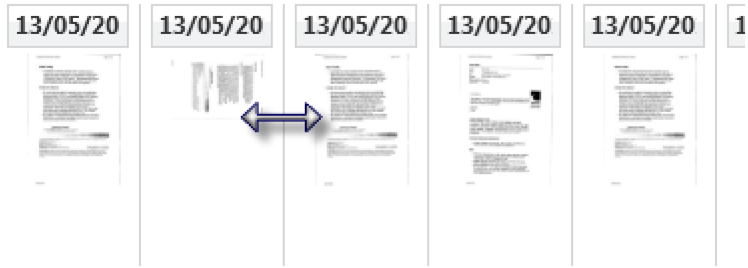


You can change the view back to a list by clicking on the List view button next to the Thumbnail button in the top right corner of the list of documents.

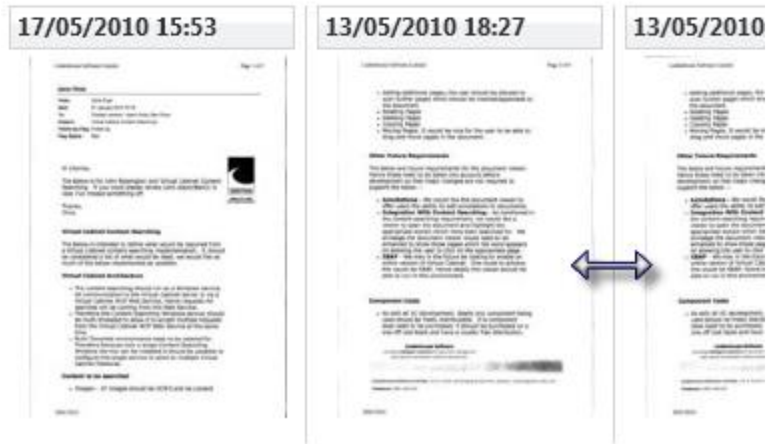


The thumbnails can be re-sized by using the mouse to press on a divider line between two thumbnails and dragging left or right.

Dragging to the left will make the thumbnails smaller, fitting more on-screen.

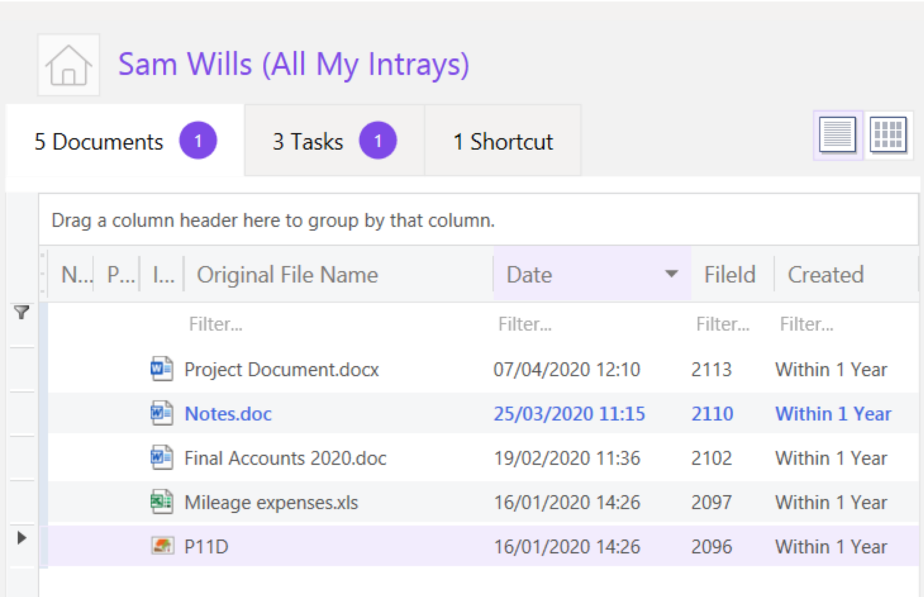


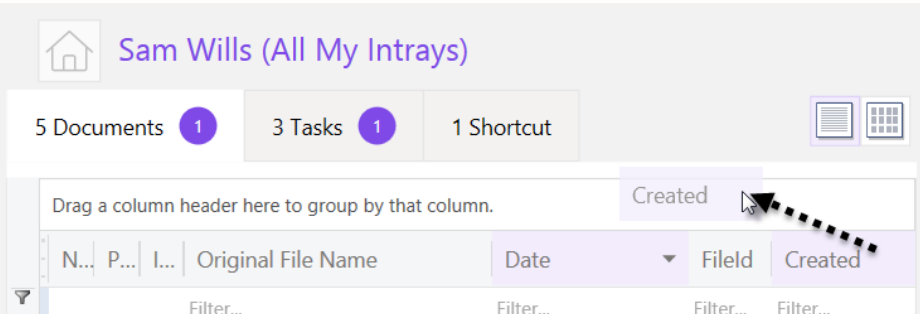
Dragging to the right will make the thumbnails larger, showing more detailed images.

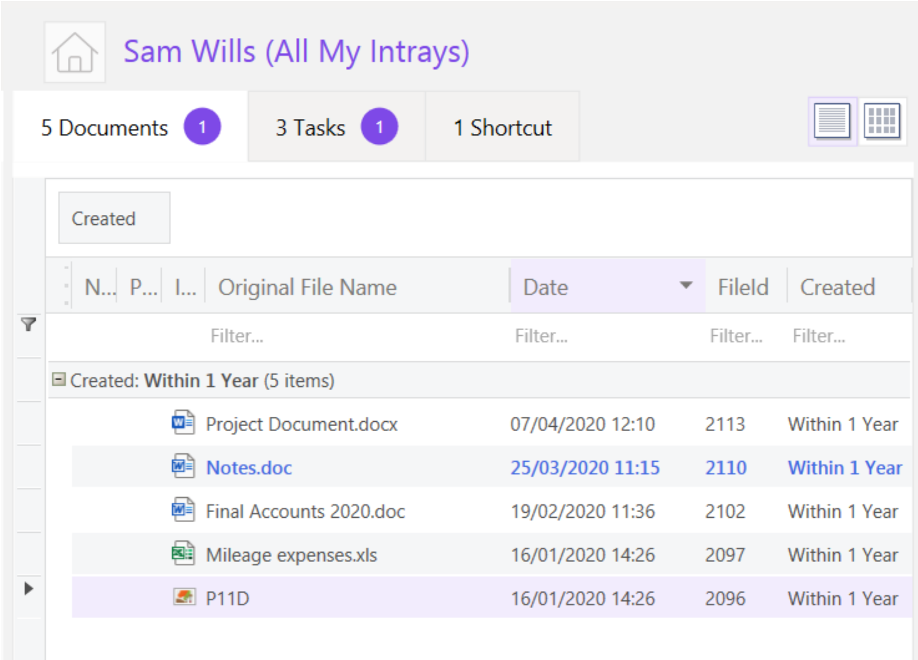


7.7.9 Organising documents in the Intray

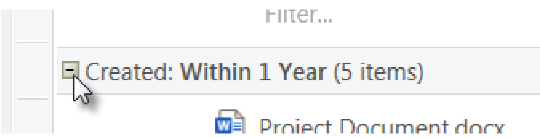
You can group the documents in your Intray by using the mouse to drag a column header into the space at the top of the list, labelled “Drag a column header here to group by that
column”.



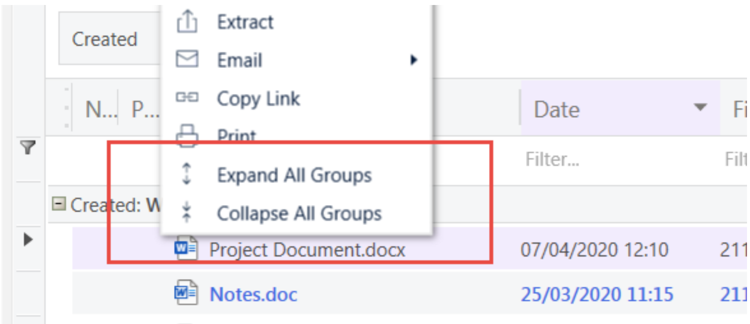




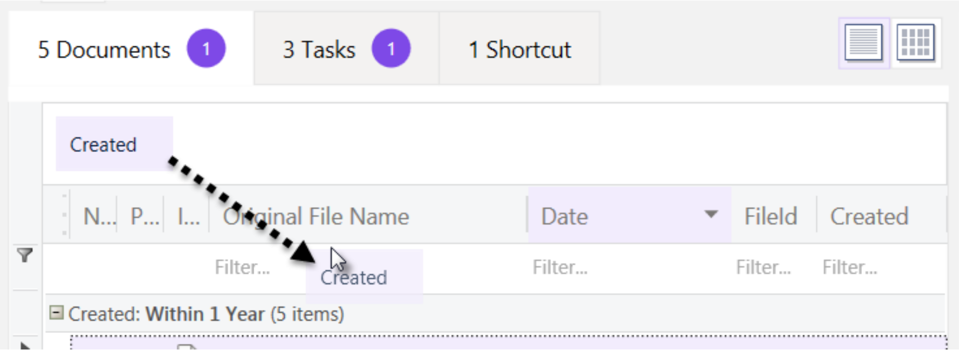
When the list is showing groups, each group can be 'expanded' (shown) or 'collapsed' (hidden) by clicking on the little plus/minus symbol next to the group heading.



To quickly expand or collapse all the groups, use your mouse to right-click on the list. This opens a menu which includes the options to 'Expand All Groups' or 'Collapse All Groups'.

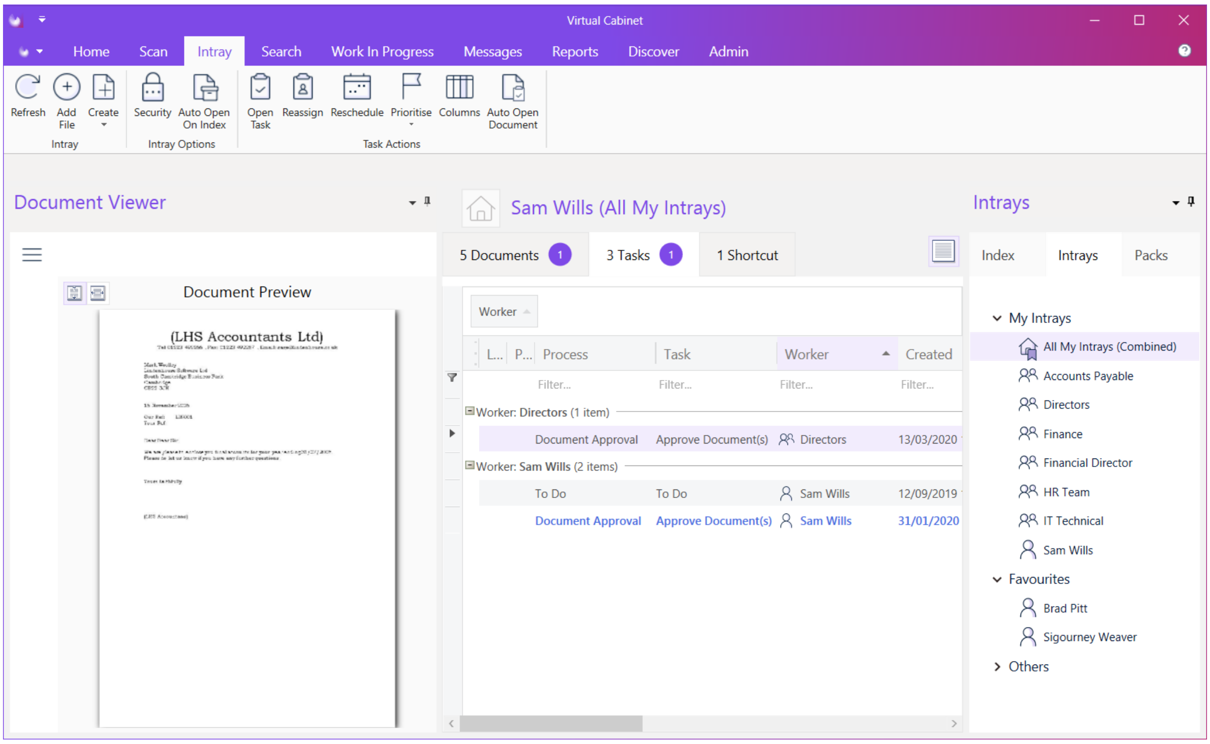


To remove the groupings and show the ordinary list again, drag the label back out of the area at the top of the list.



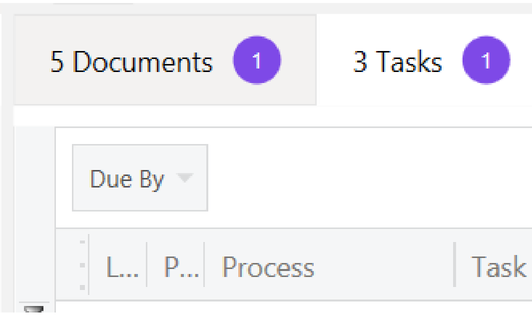
7.8 Intray Tasks List

The Intray Tasks List shows the tasks that are currently in your Intray. Unopened tasks are indicated in bold and by a red badge on the tasks tab. Tasks can be opened by double clicking on the row.



You can re-order the tasks in the list by clicking on the column headers. Clicking on a column header will sort by that column. Clicking again will reverse the order of the sort.

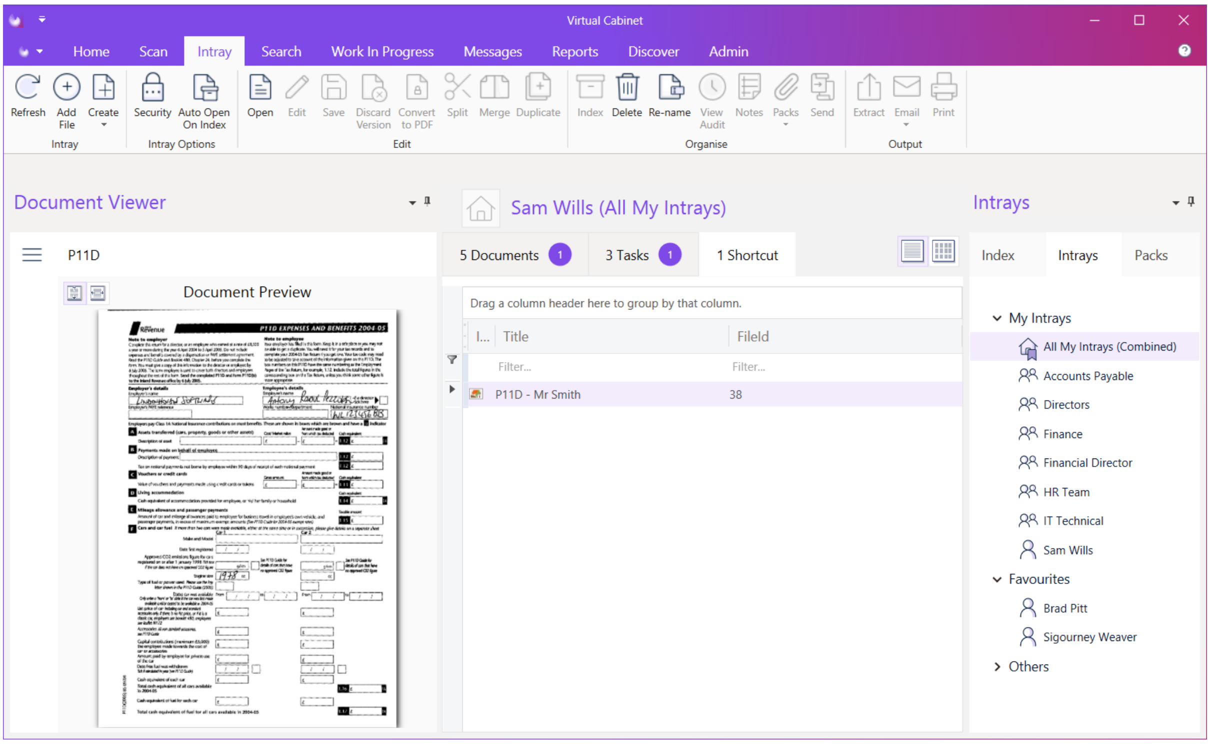
By default the tasks in the list are grouped by their due by date.



For more detailed information about tasks see the Processes and Tasks section of this user guide.

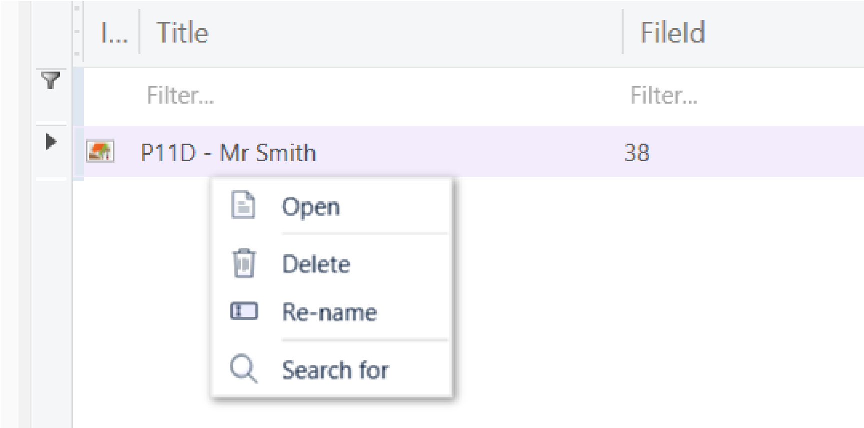
8 Shortcuts & Sending Documents

Shortcuts are links to documents that are in people's Intrays or filed away, and are a great way of keeping track of documents wherever they go. Shortcuts are accessed through the Shortcuts tab in your Intray.



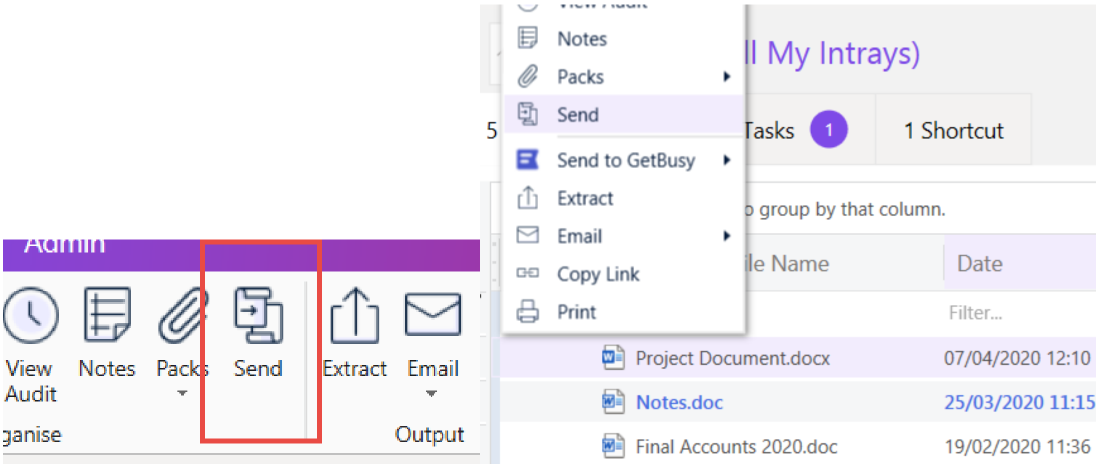
There are four actions associated with Shortcuts (N.B. none of these options affect the document the shortcut is linked to):

Option	Description
Open	Opens the document that the shortcut is associated with. Can also be accessed by double clicking on the shortcut row.
Re-name	Re-names the shortcut
Delete	Delete the shortcut
Search for	Opens the Search Tab and performs a search for the target document to provide access to other Document Actions



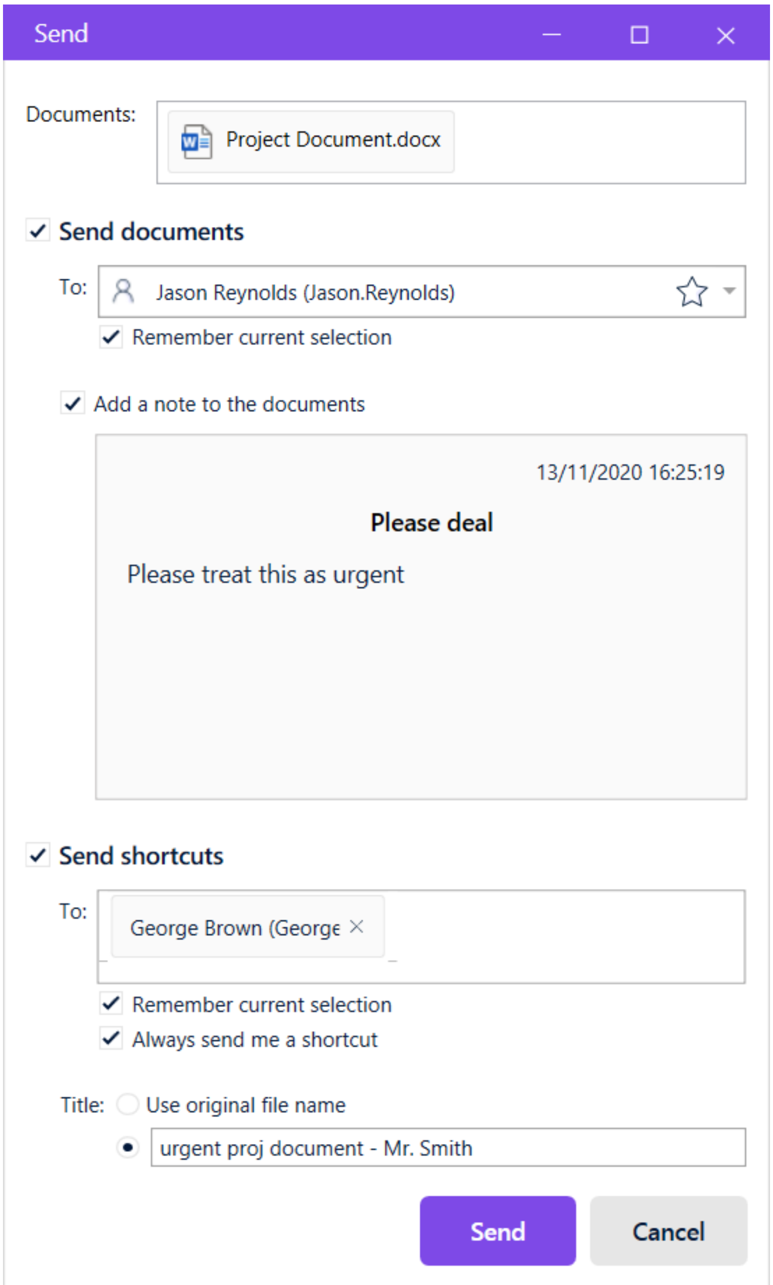
8.1 Sending documents & shortcuts in the Intray

Within the Intray there are a number of ways of sending a shortcut to a user's Intray.



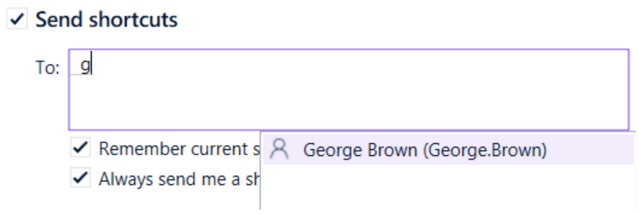
The first way is to select a document in your Intray from the Document list, and then either click on Send in the Ribbon, or right click on the document and click Send. You may select multiple documents to Send by holding down the Ctrl or Shift buttons on your keyboard whilst selecting the documents.

As discussed earlier on in this Guide you may also drag documents from the document list onto the User's Intray in the Intray window to bring up the Send window, pre-populated with that user's name.



Select the user you wish to send the document to in the To: field under Send documents and add a note to the document underneath if you wish. If you wish for your user selection to be remembered for the next document you send to an Intray then tick the box labelled 'Remember current selection'.

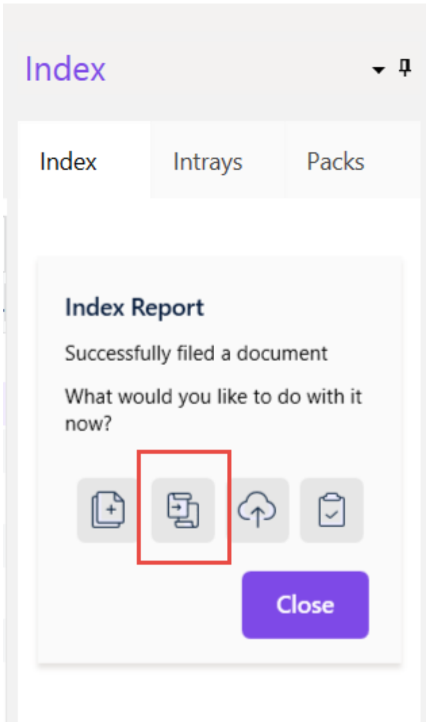
To send a shortcut select Send shortcuts, then start to type in the user's name that you wish to send the shortcut to, a drop down box will appear with a list of all users that match what you type, select one of these. You may add any number of users.



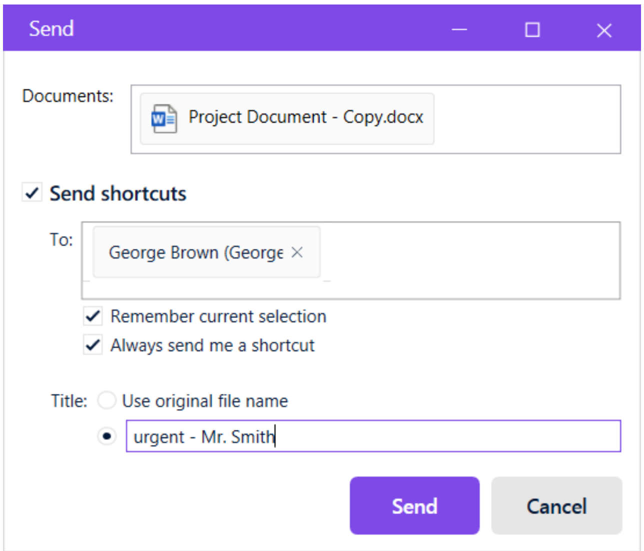
If 'Always send me a shortcut' is ticked then a shortcut will be sent to your Intray. The title of the Shortcut will either be the title of the Word/Excel document, the Subject of your Outlook email, or a custom title using the Title field at the bottom of the window.

8.2 Sending shortcuts when Indexing

Whilst filing away a document from the Intray you may also send a shortcut of that document by using the 'File & Action' button. You will then be presented with additional options, one of which is to Send the document via a shortcut.

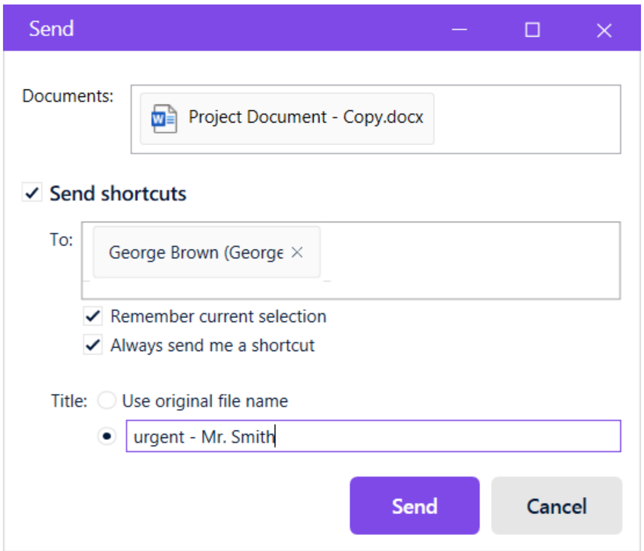


File and Shortcut will pop up a separate box to enable you to send a shortcut of the document that you just indexed to one or more users, including yourself, with an optional name.

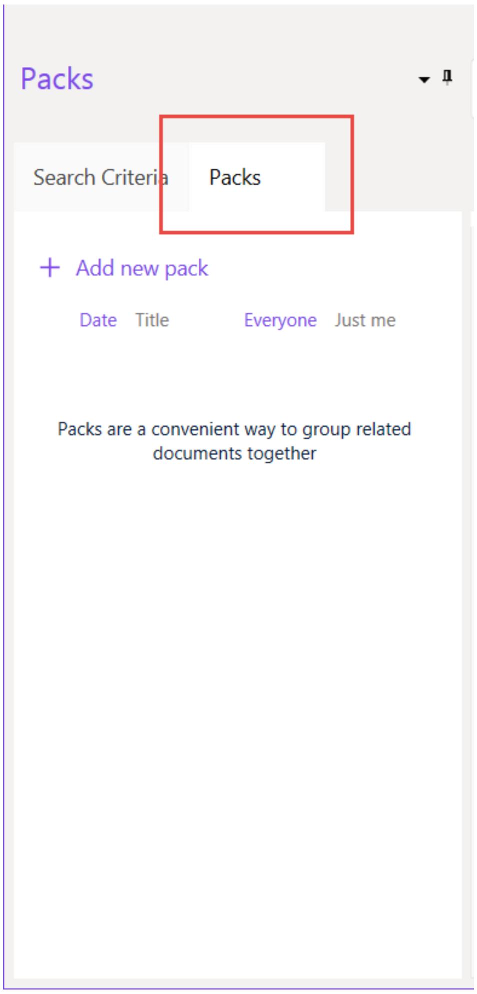


8.3 Sending shortcuts when searching

In the Search tab you may select one or more documents and send a shortcut for each document selected to one or more user's Intrays. The Send window is identical to the Send window that appears when Indexing and sending a Shortcut and enables you to remember the user selection for next time, and to give the Shortcut an alternative name. The default name of the shortcut is the Original File Name of the document it refers to.


Send
Documents:
Project Document - Copy.docx
Send shortcuts
To:
George Brown (George
Remember current selection
Always send me a shortcut
Title:
Use original file name
urgent - Mr. Smith
Send
Cancel

9 Document Packs



Packs are a convenient way of grouping related documents together. Packs can contain documents from Intrays or Filing Cabinets, and can be managed from the Intray or Search tabs. A document will stay in that pack if it is moved or reindexed. One document can be in any number of different Packs.

To create a new pack or view the packs associated to the documents you are viewing you need to go in to the Packs panel.

9.1 Create a New Pack

There are a number of different ways you can create a new pack:

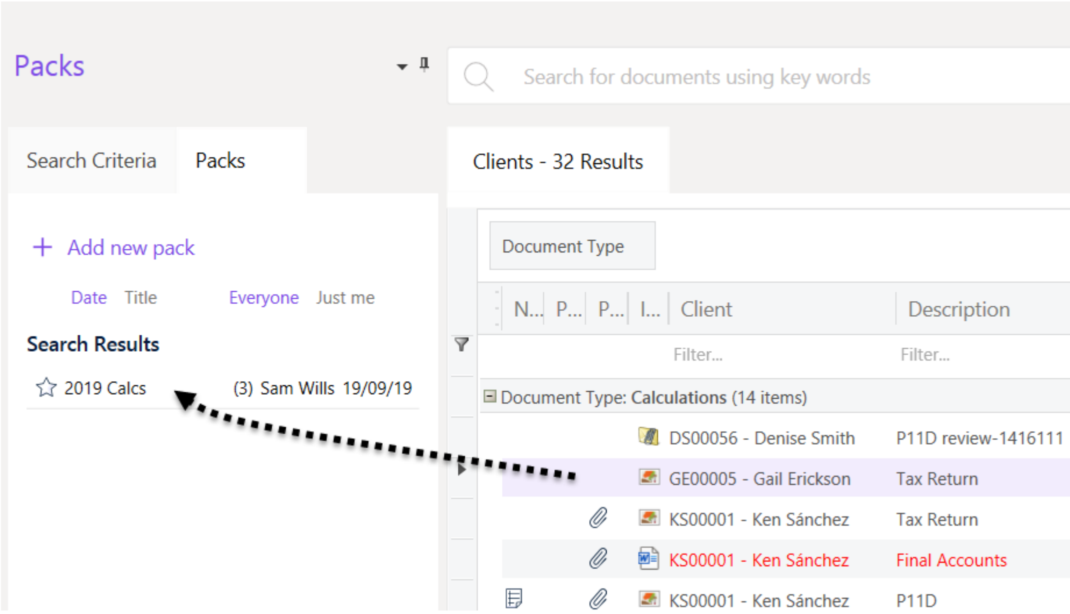
1. Click the "+ Add New Pack" button in the Pack panel. This will create an empty pack and ask you to give it a mandatory title. If you do not add any documents to this pack before you do another search the pack will disappear.

2. Right click on a document(s) and select Packs -> New Pack. This will create a new pack in the Packs panel with the selected document(s) attached, it will now ask you to give it a mandatory title.

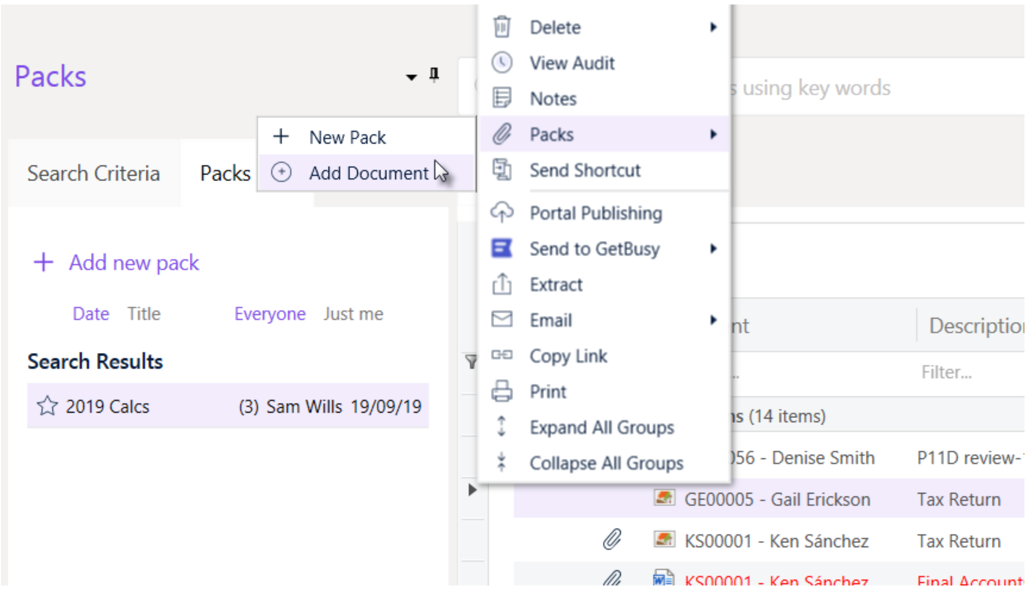
9.2 Add Documents to a Pack

To add new documents to a pack you can use any of these options:

1. Left click on a document and drag and drop it on to the Pack you want to put it in.



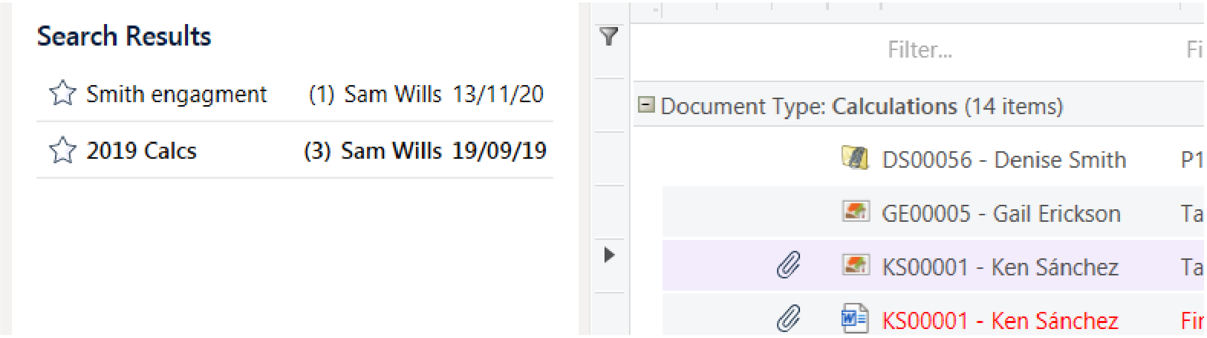
2. Make sure the Pack and documents are selected, then right click on the selected document and go to Packs -> Add Document. You can also right click on the Pack and use “Add selected documents”.



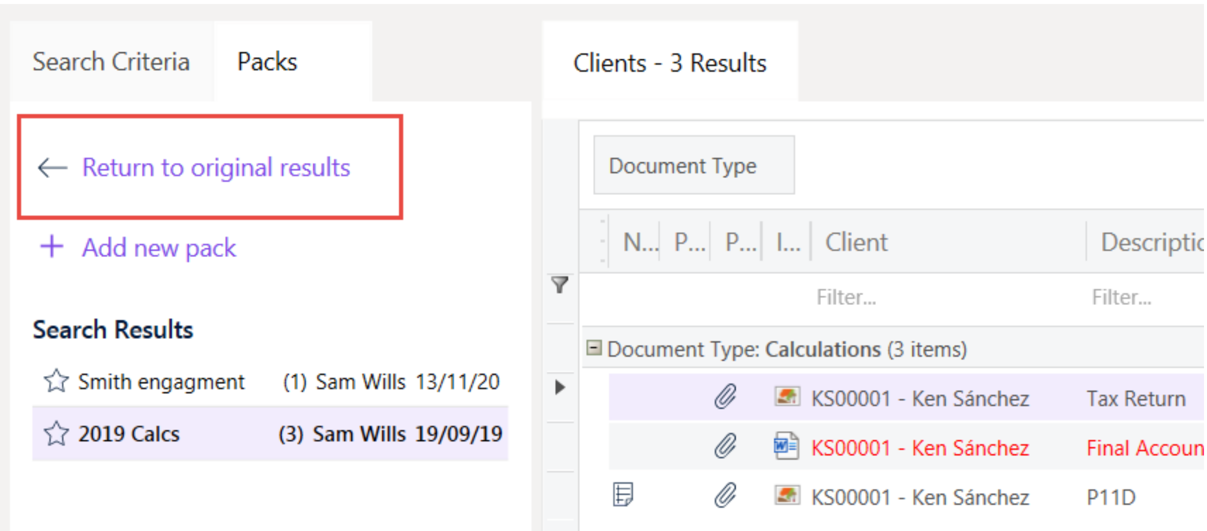
9.3 Opening a Pack

The list of Packs in the Packs panel always corresponds to the list of documents you are viewing. Each pack has at least one document from your list of documents. If you select a document (or documents) you can see which Packs that document is in because the names of those packs will be in bold.

You can also see which documents are in a pack by the paperclip icon in the document list.



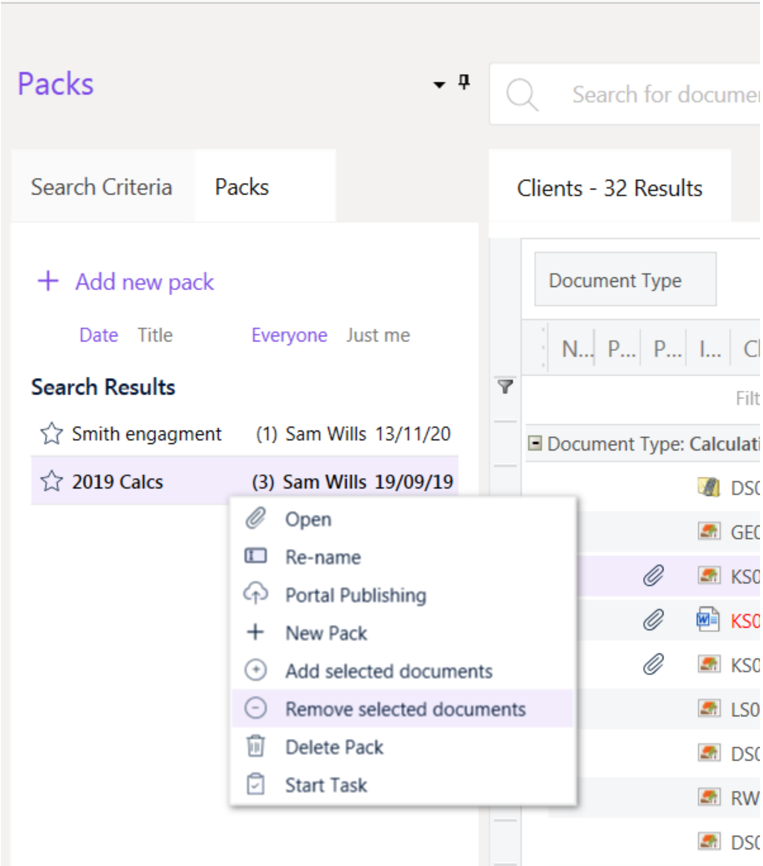
To open up a pack and see the documents inside double click on the Pack in the Packs panel.



You will see all the documents from that Pack in the document list. In order to return to your original search results click "Return to original results" at the top of the Packs panel, or click Refresh Search in the Ribbon.

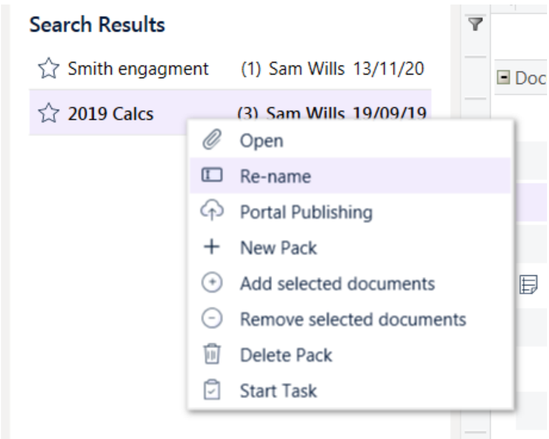
9.4 Remove Documents from a Pack

In order to remove documents from a pack, select the documents from the document list, select the Pack from the Pack panel, then right click on the document or pack and select "Remove selected documents".



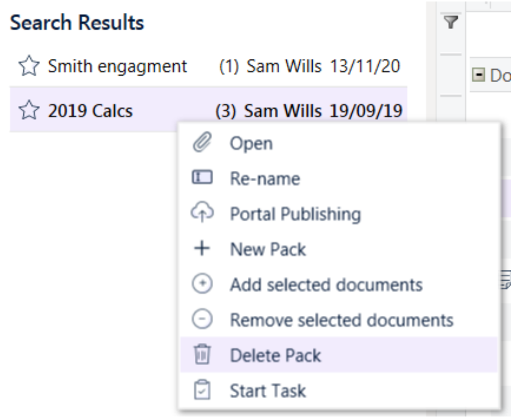
9.5 Other Pack Options

9.5.1 Rename a Pack



Right click on a Pack in the Packs panel and you will have the option to rename that Pack. This will not affect the documents that are in that pack.

9.5.2 Delete a Pack



To delete a Pack right click on the Pack and select "Delete Pack". This will not delete the documents inside the pack.

A Pack will also be automatically deleted if you remove all documents from that Pack; there is no use in having an empty Pack.

9.5.3 Publishing and Retracting Packs

When you publish multiple documents together to the Portal, a pack is automatically created and marked as published using the published icon. Published packs cannot be edited or deleted.

You can publish or retract a pack by right clicking on the Pack and selecting **Portal Publishing**.

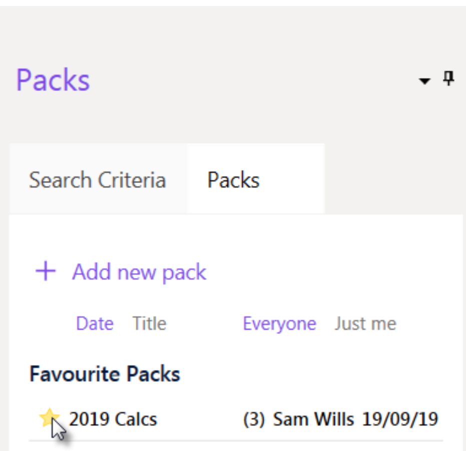
Further information about using the Portal Publishing window can be found in sections Publish Documents to the Portal and Retract Documents from the Portal.

9.5.4 Start a Task with a Pack

You can start a task by right clicking on the Pack and selecting "Start Task".

Further information about Tasks can be found in the Processes and Tasks section

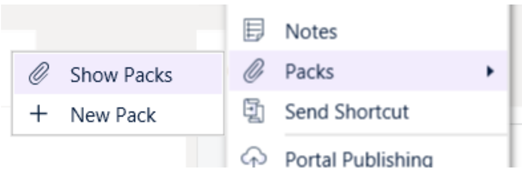
9.5.5 Favourite Packs



You can group Packs into a list of favourites. These favourite Packs will appear at the top of the Packs panel and will appear no matter what documents you have in your document list, or what search you for.

In order to make a pack a favourite click on the star to the left of the pack name.

9.5.6 Show Packs



You can filter the list of Packs in the Packs panel to show only the Packs relating to a document.

Right click on a document that is in one or more Pack and go to Packs -> Show Packs.

10 Indexing

Virtual Cabinet enables you to store documents and find them quickly when needed. Documents are easier to find if they have been filed alongside relevant 'index' information. You can then search for a particular keyword or date in order to find the correct document.

'Indexing' is the process of adding a document into the system while tagging it with extra information such as a client's name or a description.

Your administrator will configure a custom Indexing Structure to suit your organisation. This structure defines the types of information you can associate with a document. The Indexing Structure will be different for each department and may vary depending on the type of document you choose to index. For example, the Indexing Structure for the Human Resources department will be different to the Indexing Structure for Finance.

Indexing is a two-step process:

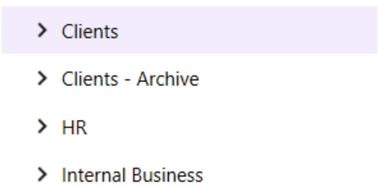
1. Choose a location for your document (a Cabinet or Folder)
2. Complete the index fields (if prompted to do so)

10.1 Choosing a Location

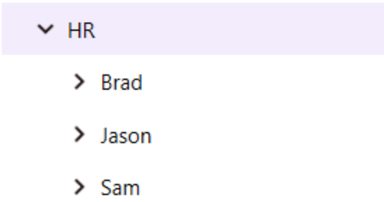
The first stage of the document indexing process involves choosing where to file the document.

The top level of a Filing Structure is made up of Filing Cabinets. All the documents in Virtual Cabinet are stored in either a Cabinet or a folder within a Cabinet. You may have access to any number of Cabinets – there is usually one Cabinet per department or business area.

Available Cabinets will be listed on the Index panel of the Intray.



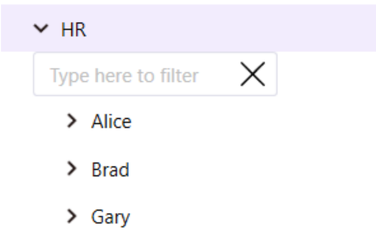
You can see the folders inside a Cabinet to by clicking on the expander next to it or by double-clicking on the Cabinet itself.



There are three ways to select an indexing location for a document you wish to index:

1. Use the mouse to drag the document onto a blue Cabinet or a yellow sub-folder (See 'Dragging a document onto a location' below)
2. Select a document, click to select a blue Cabinet or a yellow sub-folder, and then click the 'Index Selected Documents' button at the bottom of the Index panel. (See 'Matching a document with a location' below)
3. Select a document, click to select a blue Cabinet or a yellow sub-folder, and then click the 'Index Document' button on the toolbar at the top of the window.

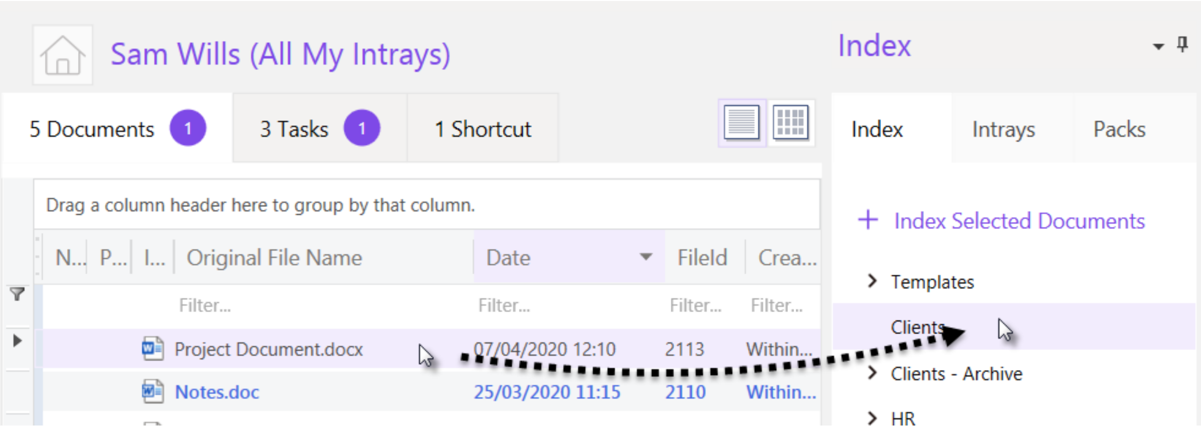
If there are a lot of folders, Virtual Cabinet may show a 'Filter Box' instead of listing them all. To find the folder you want, click on the Filter Box and type the name of the folder you are looking for. The filter will automatically show the folders that match what you type. To clear the filter, click on the cross.



10.1.1 Dragging a document onto a location

You can select a location by dragging the document.

Select the document you wish to Index, then click and drag the document towards the Index panel. Drop the document in the required location by letting go of the left mouse button.



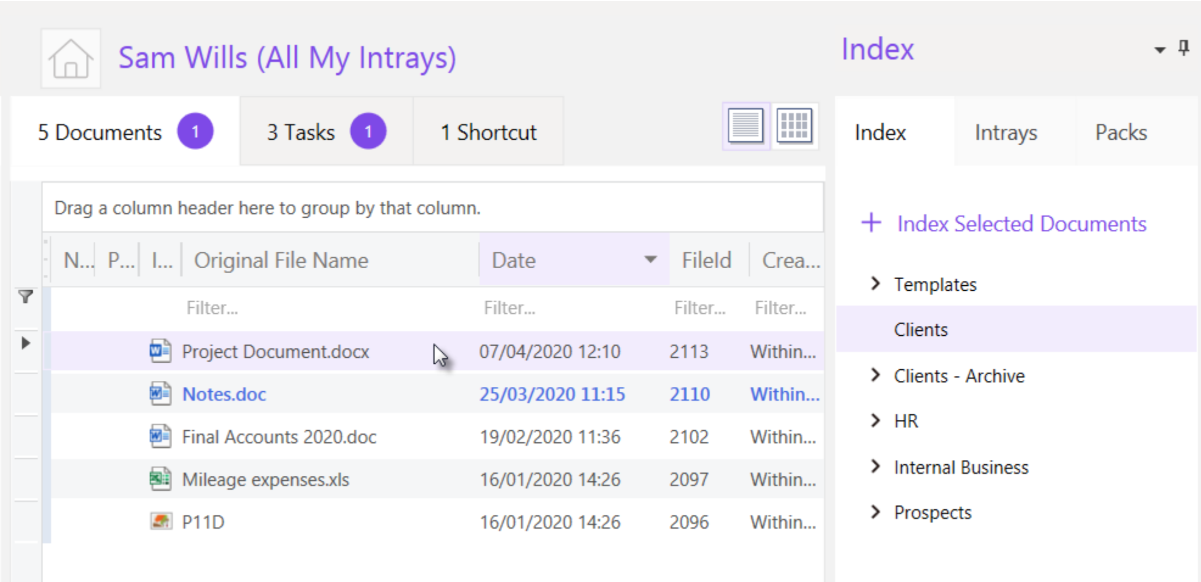
Hovering the mouse momentarily over a Cabinet will expand the structure to display any sub-folders.

If the Index panel is in Auto-Hide mode, hovering over the Index tab momentarily will display the Index Panel.

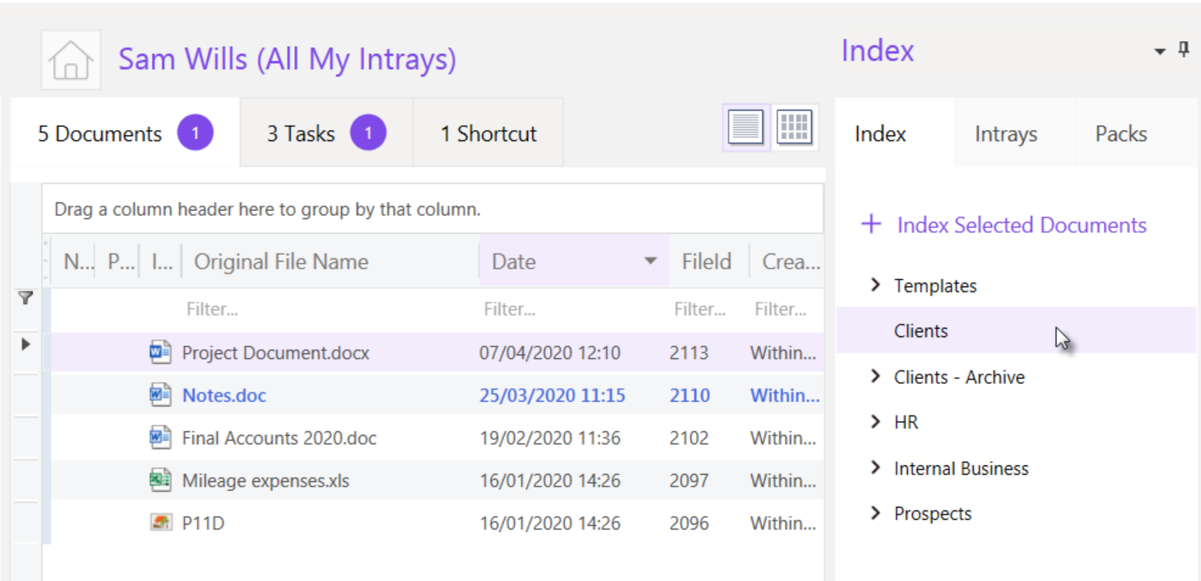
10.1.2 Matching a document with a location

Another method of selecting a location is to select the document and location, then click 'Index Selected Documents'.

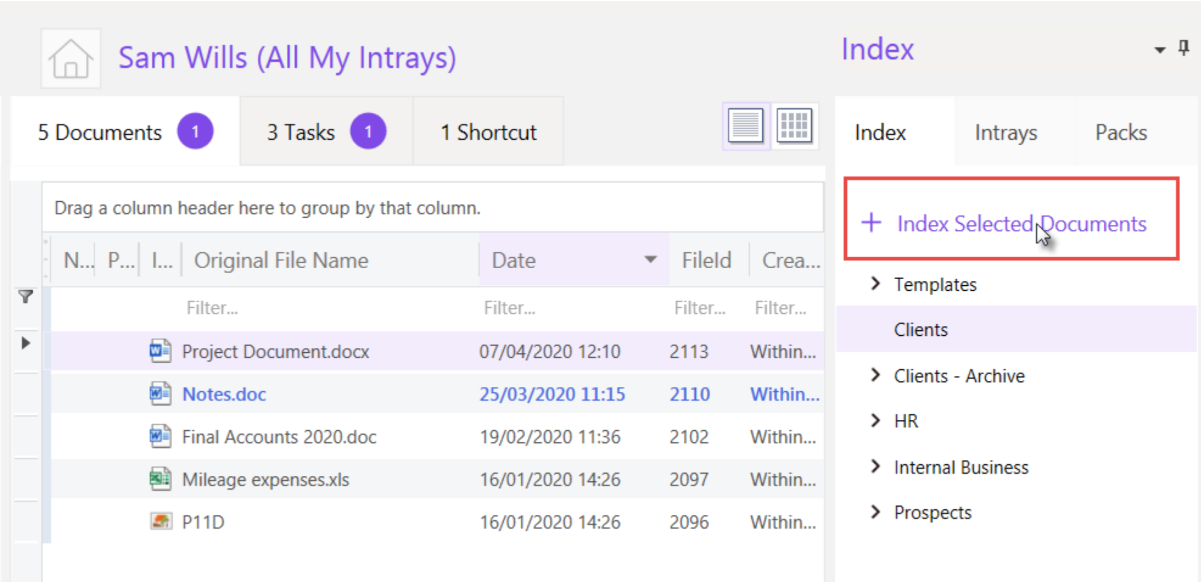
Select the document you wish to Index.



Select the Cabinet or Folder you wish to Index the document into using the mouse.



Finally, click the ‘Index Selected Documents’ button to begin indexing.

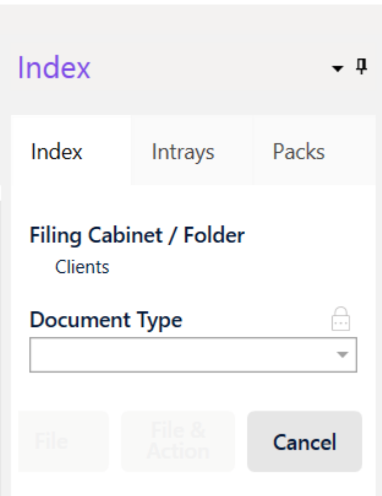


10.2 Completing Index Fields

Depending on the Indexing Structure, you may be prompted to complete additional Index fields.

If there are no additional Index fields to complete then the document will simply disappear from the list from which you indexed it.

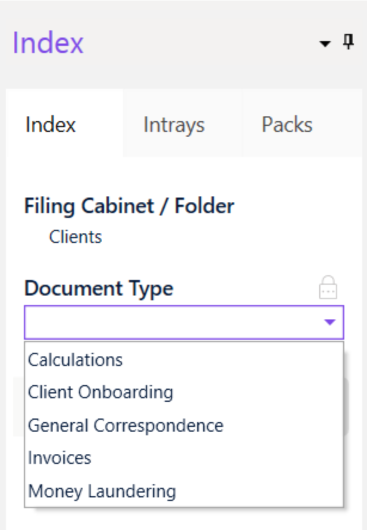
If there are additional index fields to complete, you will see a window with blank indexes for you to complete:



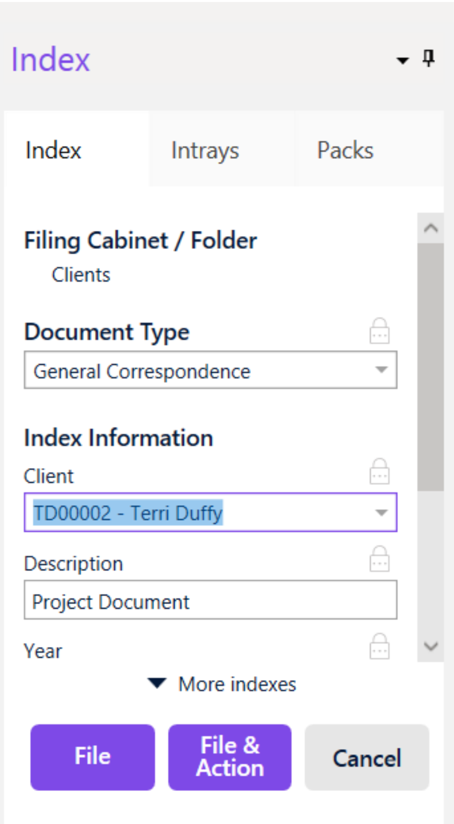
The ‘Filing Cabinet/Folder’ section of the Index panel confirms the Indexing location you have selected. If you wish to change the location, you can click the ‘Cancel’ button to return to the Cabinet list.

You should then complete the indexes from top to bottom.

The very first field in the list requires you to select a value from the list. Once selected, you may be shown additional index fields.

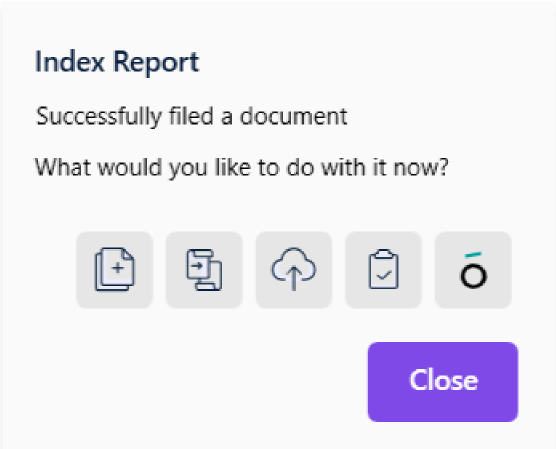


Any fields with red borders are mandatory and must be completed.



Once all index fields are completed as required, you can click the ‘File’ button to file the document. The ‘Cancel’ button will take you back to the Intray without filing the document.

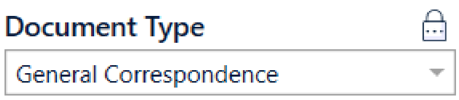
You will note that there is also an option to ‘File & Action’ the document. File & Action indexes the document and then presents additional options for the filed document depending on your access rights.



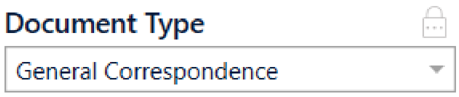
- File Again - Index another copy of this document against new indexing criteria.
- Send - Send a shortcut to yourself, or another user.
- Portal Publishing - Publish this document to the Portal.
- Start Task - Start a Task for the indexed document from a list.
- Send to Workiro - Send a copy of this document to Workiro to share with people, or to get electronically signed.

10.2.1 Locking index fields

Index fields can be ‘locked’ so that they remember their value the next time you index a document. This saves you from having to enter the same data repeatedly. You can lock an index field by clicking your mouse on the little padlock at the right-hand end of the index field. A closed padlock indicates that the field is now locked.

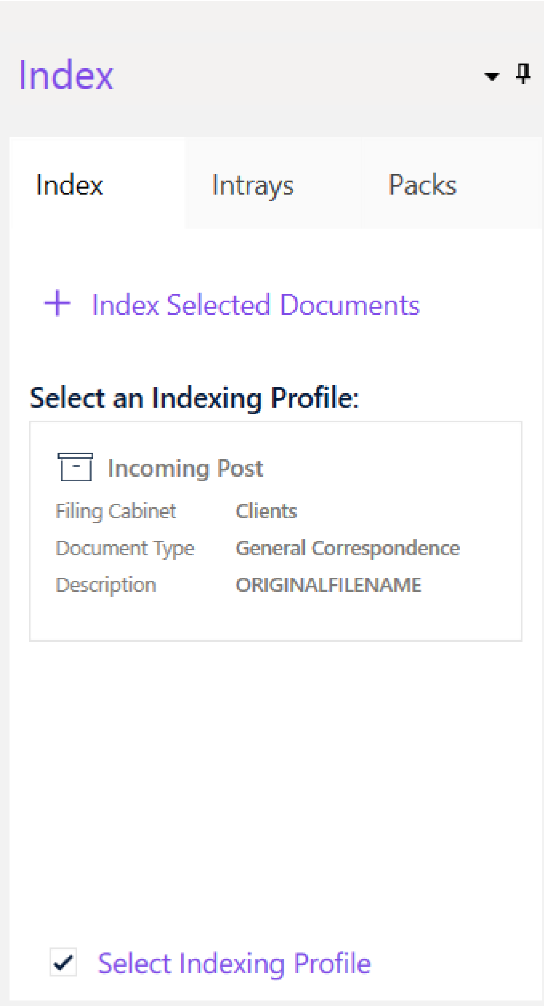


To unlock the field, click again on the little padlock. The open padlock indicates that the field is unlocked.



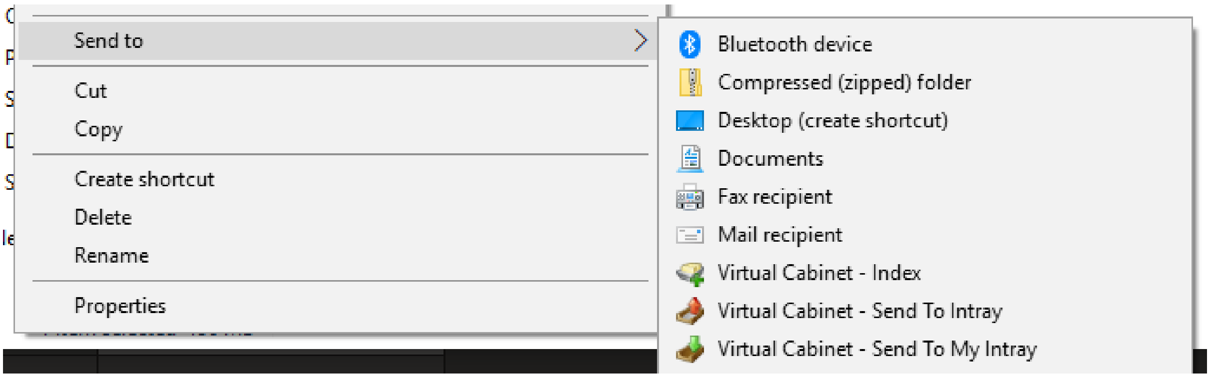
10.3 Indexing Profiles

If enabled by your administrator you may see the option to select an indexing profile. Indexing profiles provide a way to quickly index a document with predefined information. With document(s) highlighted in your Intray, check the box to select an indexing profile. Double click the indexing profile to begin indexing.

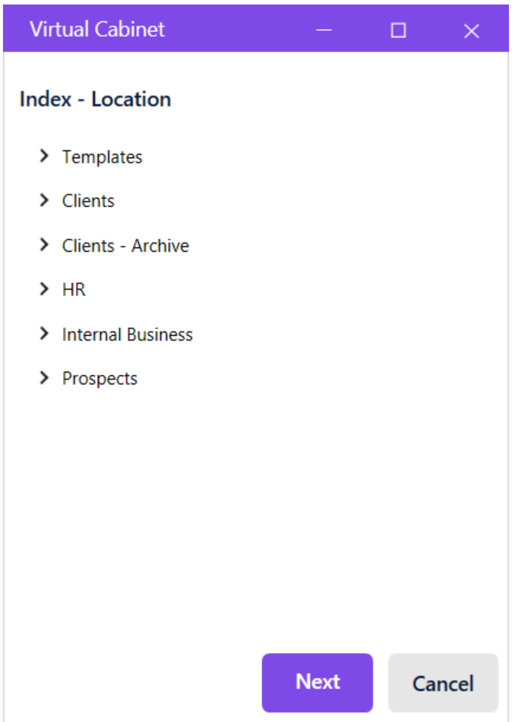


10.4 Indexing documents from Windows

There is an alternative way to index documents located outside of the Virtual Cabinet Intray in Windows, for example on your desktop. First find the document you want to Index through Windows Explorer (N.B. if the document is on your desktop you do not need to do this), right click on the document, go to Send To, and click on Index to Virtual Cabinet.



This will then bring up the screen allowing you to choose the filing area you want to put the document in and to fill in the index information about that document.



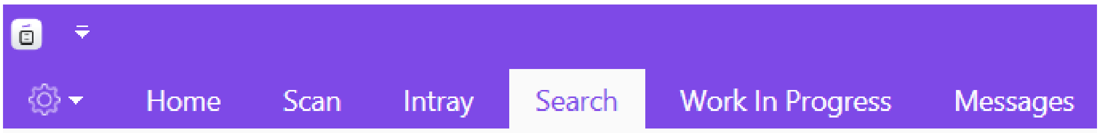
There is also the option to send the document to your Intray or somebody else's Intray within the same area under Right Click, Virtual Cabinet.

11 Searching

Virtual Cabinet provides extensive functionality to enable you to search for documents in the system. You can perform general searches or focus your searches using the advanced capabilities. The documents that match your search will be listed either as rows in a results table or as clickable preview images.

11.1 The Search Tab

The Search tab can be reached by clicking 'Search' on the Ribbon near the top of the window. Alternatively, you can click the 'Search' button on the Ribbon while on the Home tab.



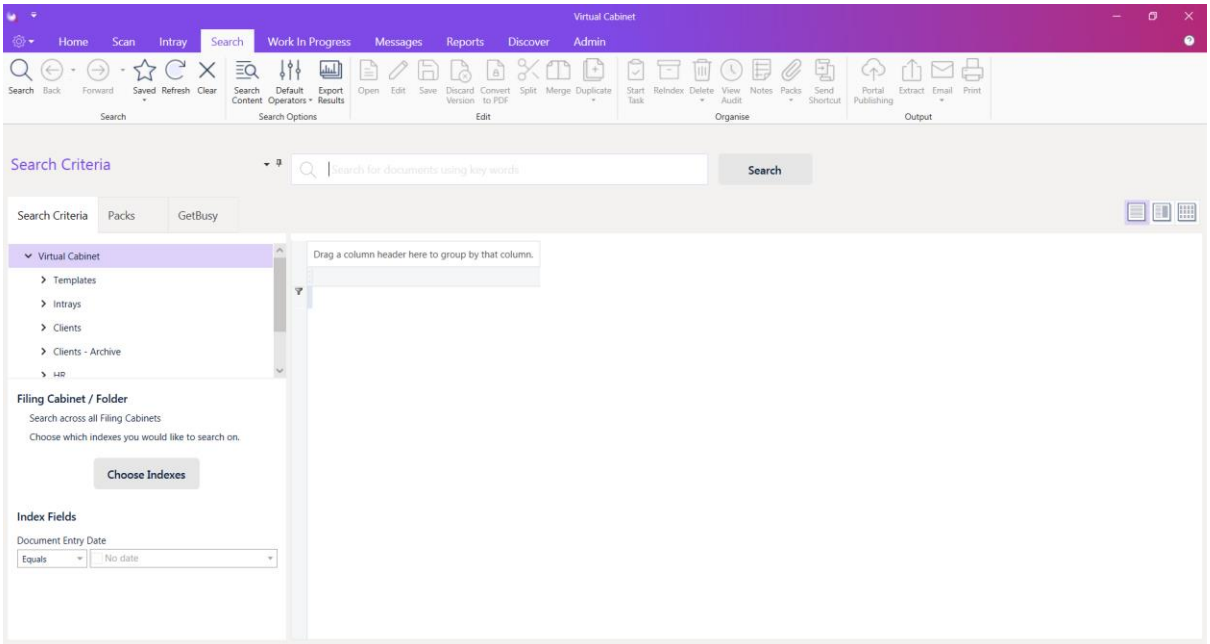
The Search tab has several elements:

A ‘keyword search’ box used for entering search criteria.

A panel for displaying search result documents.

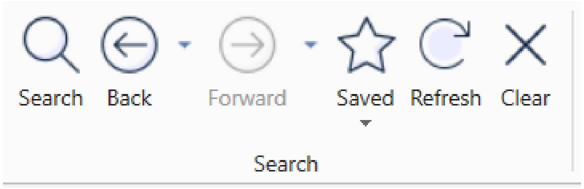
A selection of buttons on the ‘ribbon’ toolbar along the top of the window.

A panel that lists the cabinets and folders you can search in, and the indexes you can search on for your chosen folder.

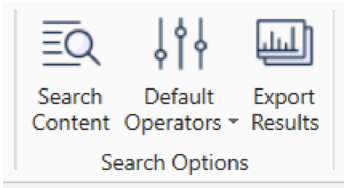


11.2 Ribbon Buttons

The Ribbon presents a selection of search-related actions that can be performed.

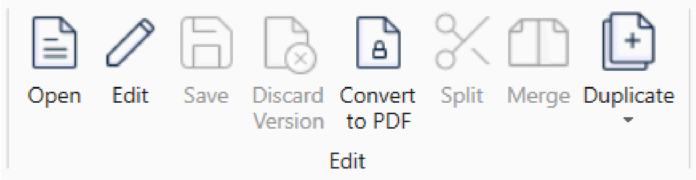


Button	Description
Search	Performs a search using the current search criteria.
Back	Go back one search.
Forward	Go forwards one search.
Saved	Save the current search for easy access to your common searches. Get a list of previously saved searches that you can execute again. Delete those searches using the red cross to the right of each saved search.
Refresh	Performs a search based on the last used search criteria.
Clear	Clears all the search criteria.



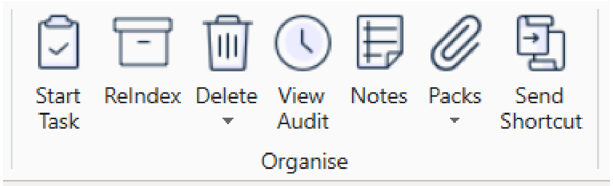
Button	Description
Search Content	One click turns Search Content on (it will become highlighted), and a second click turns it off again. When searching with Search Content turned on, the search which is performed searches the words in the content of the document (rather than the index/metadata the document has been filed with).
Default Operators	Opens a drop-down menu, letting you change the defaults for searching across the document indexes. For example, selecting a 'Text' default of 'Starts with' (and then refreshing) will set the text index drop-down boxes to default to 'Starts with'
Export Results	Opens a new 'Save File' window, enabling you to save the current search results as a .csv ('comma separated values') file that can be opened in Excel.

The Ribbon also includes a set of buttons that perform actions on a selected document. All of these buttons are also available by right clicking on a document in the list.

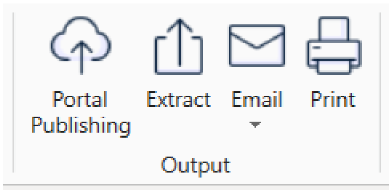


(These options are also available through the document Rick-Click menu)

Button	Description
Open	Opens the selected document for viewing in a new window. The document will either open in the Virtual Cabinet Document Viewer or the program associated with the type of document you are opening.
Edit	Opens the document for editing in a new window. The document will open in the program associated with that type of document.
Save	Will be available if the selected document is currently being edited by you. Saves the new version of the document back into Virtual Cabinet.
Discard Version	Will be available if the selected document is currently being edited by you. Discards the new version of the document with any changes you have made.
Convert to PDF	Convert the selected document to a PDF. Creates a new version of the existing document as a PDF. E.g. version 1 is a .docx and version 2 is a .pdf.
Split	Opens a seperate window allowing you to split individual TIF or PDF images (exclusively) at a particular page, or into a seperate document for every page. Newly created documents will be sent to your Intray.
Merge	Opens a seperate windows allowing you to merge multiple TIF or PDF images (exclusively). Created documents will be sent to your Intray.
Duplicate	• Copy to Intray - Creates a copy of the selected document version and adds it to your Intray. • File Again - Opens a new window, allowing you to index a copy of this document with new indexing criteria.



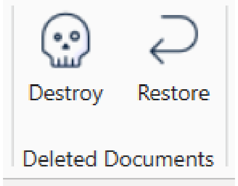
Button	Description
Start Task	Opens an embedded window allowing you to start a task that includes the selected document(s)
ReIndex	Opens a new window, allowing you to re-index the selected document.
Delete	Opens a popup window that asks you to confirm that you want to delete the selected document. If you delete a document then you will be unable to find it or open it again.
View Audit	Opens the View Audit window, showing the history of the selected document, including previous versions.
Version History	Available on the right click menu of a document. Shows information about all the previous versions of the document, including status, modfiied by, modified date, and comments made when saving the new version. Can also **Revert** to a previous version, or **destroy** previous versions.
Notes	Opens a window that displays any notes attached to the selected document. The window provides the option to add, edit or delete notes.
Packs	Manage the Packs that the document is in, and create new Packs. Packs are used to group related documents together.
Send Shortcut	Send a shortcut of this document to yourself, or another user.



Button	Description
Portal Publishing	The Portal Publishing button will only be available if your administrator has enabled them. Please see the section on Portal Publishing for more detail.
Extract	Opens a window, allowing you to download a copy of the selected documents to your computer.
Email	• EMail - Opens a blank new e-mail with an attached copy of the selected document.

	• Email as PDF - Converts the selected documents to PDF files, opens a blank new e-mail and attaches the PDFs. Email as Link – Attach selected documents to a blank email as an internal hyperlink.
Print	Prints the selected document.

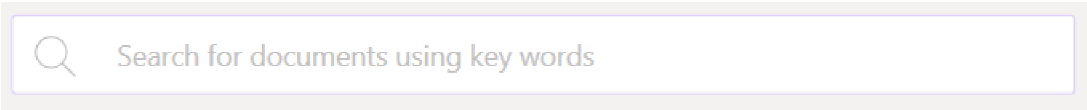
If your administrator has enabled permission you may be able to search for deleted documents. In this case you will have the ability to further act on those documents by permenantly destroying them, or restoring them from the deleted state.



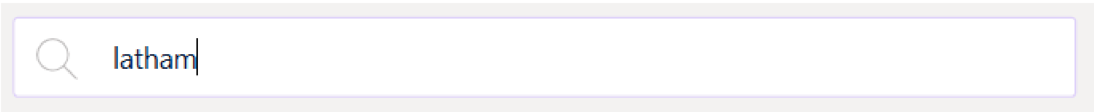
Button	Description
Destroy	Permanently destroy a document that has been deleted.
Restore	Restore a document that has been deleted.

11.3 The Keyword Search Box

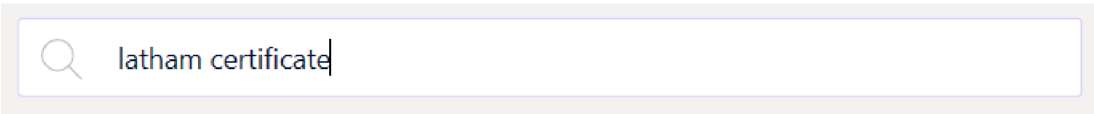
You can search by entering a search term into the central 'keyword search' box and clicking the 'Search' button.



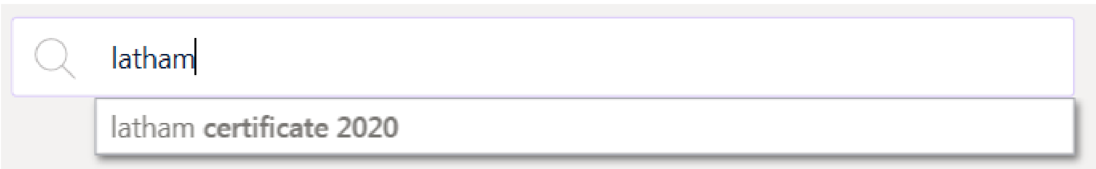
The search box will search through all the indexes on the documents and any matching documents will be shown in the Search results panel.



You can enter more than one search term into the search box. The search results will only contain documents that match all of the search terms.



If you've performed a similar search recently you will get suggestions based on what you're typing in. Choose one of these suggestions to save you time or continue typing something different for a new search.

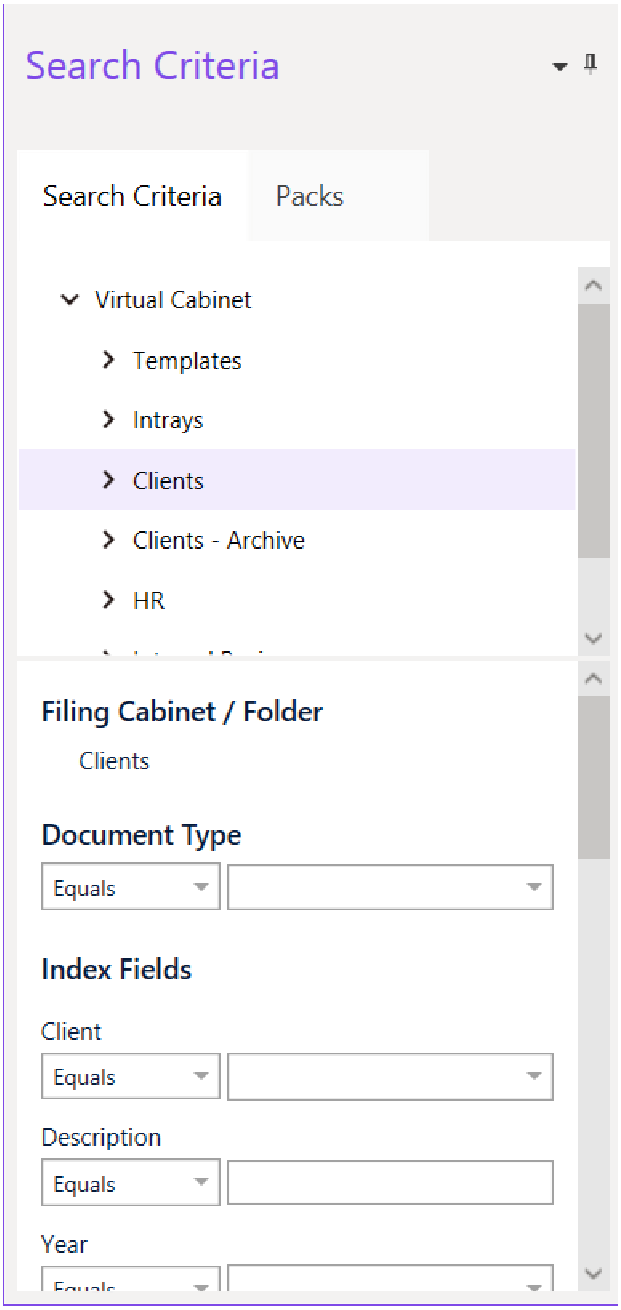


11.4 Search Criteria

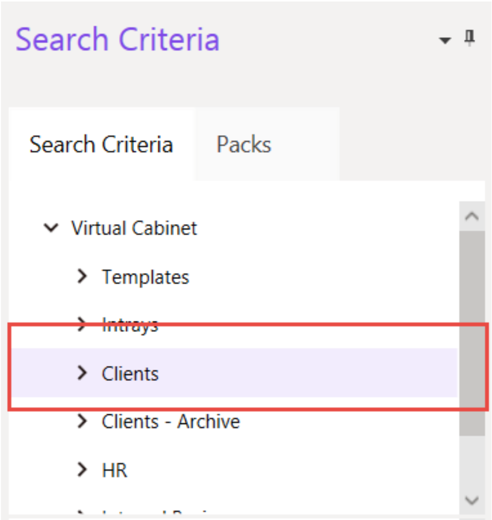
Further searching functionality is available through the 'Search Criteria' panel.

The upper half of the Search Criteria panel shows all the Cabinets and Folders you have access to. This lets you select the Cabinet or Folder you want to search in.

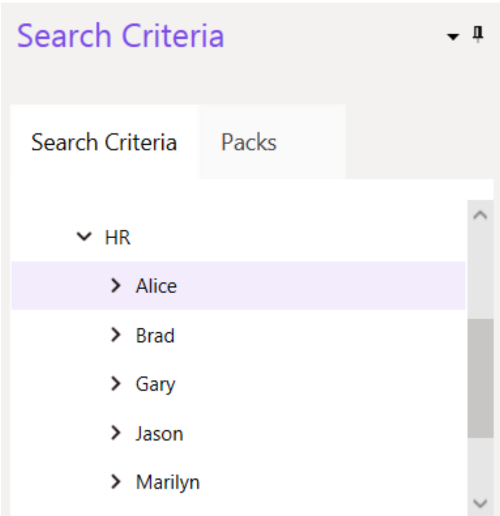
The lower half of the panel automatically shows the Indexes for the selected Cabinet or Folder. These indexes can be used to help target your searches.



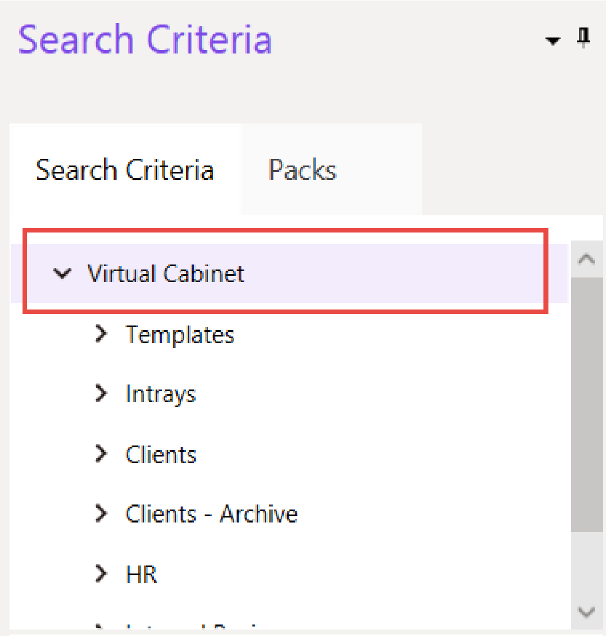
To search through all the documents in a Cabinet, select the Cabinet.



To focus the search on a set of documents inside a Cabinet, use the little arrows to 'expand' the Cabinet. You can then see any Folders inside the Cabinet. Select a folder to search in just that Folder.

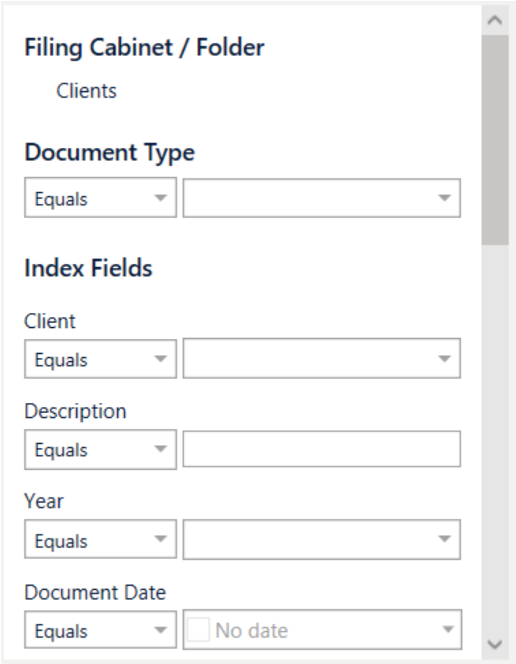


To search through the entire system and all the documents in all the Cabinets, select 'Virtual Cabinet' at the top of the list.

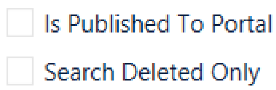


With a Cabinet or Folder selected, the appropriate indexes will appear in the lower half of the panel. These can be used to search through a specific index.

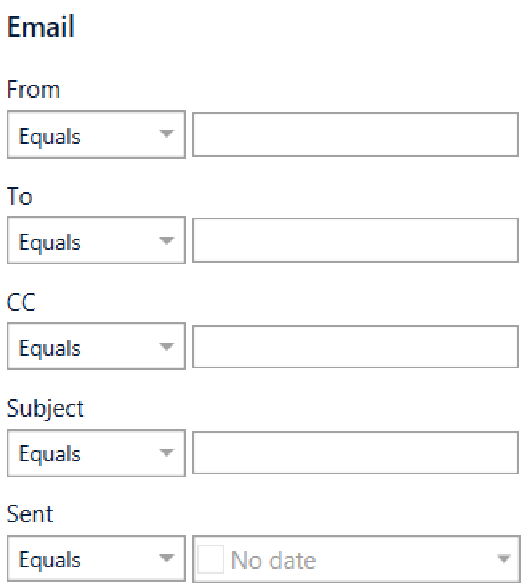
This area is split into multiple parts for different types of indexes. The top 'Filing Cabinet / Folder' area shows which Cabinet or Folder you're about to search in. The 'Document Type' is a drop-down list of the types of documents in the chosen Cabinet or Folder. Below that, you will see an 'Index Fields' list of indexes that apply to the type of document you're looking for. Then it is a list of System indexes that are automatically created for the document, such as when the document was last modified. At the end you have Email specific indexes, such as the subject of an email.



If enabled by your administrator you may also have the options to restrict your search to deleted files or files published to the portal

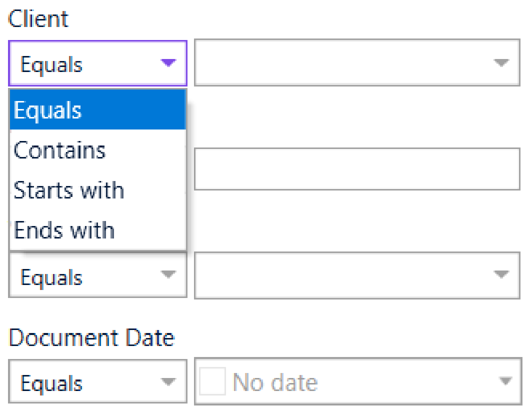


Below 'System' you will find 'Email Fields'



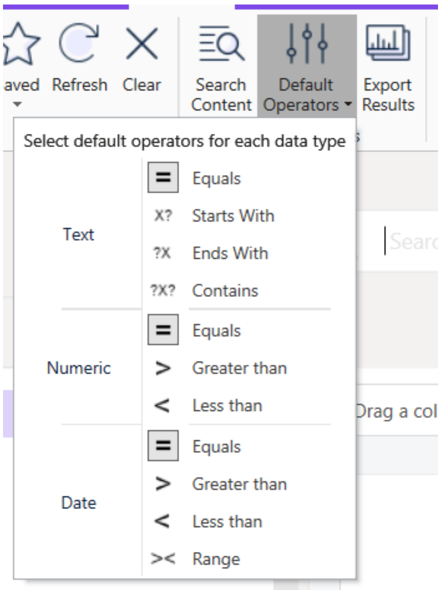
Each index has a small drop-down selector on the left and an empty box to type in on the right.

The selector lets you choose how you're going to search. The choices will be different depending on whether the index contains text, a number or a date.

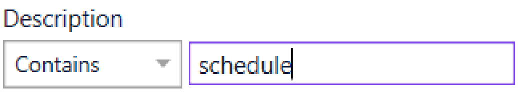


Type of Index	Option	Description
Text	Equals	Search for an exact match between what you type and the whole content of the index.
	Starts With	Search for indexes that begin with what you type.
	Ends With	Search for indexes that end with what you type.
	Contains	Search for indexes that contain the text you type.
Numeric	Equals	Search for indexes with exactly the number you type.
	Greater than	Search for indexes that contain a larger number than what you type.
	Less than	Search for indexes that contain a smaller number than what you type.
Date	Equals	Search for indexes that exactly match the date you select from the date picker.
	Greater than	Search for indexes that that have a more recent date than the date you select from the date picker.
	Less than	Search for indexes that that have an older date than the date you select from the date picker.
	Range	Search for a date that lies on or between the two dates you select from the date pickers.

Each of the drop-down selectors will have a default choice such as ‘Equals’ set. The default can be changed from the ‘Default Operators’ button on the ribbon toolbar near the top of the window.

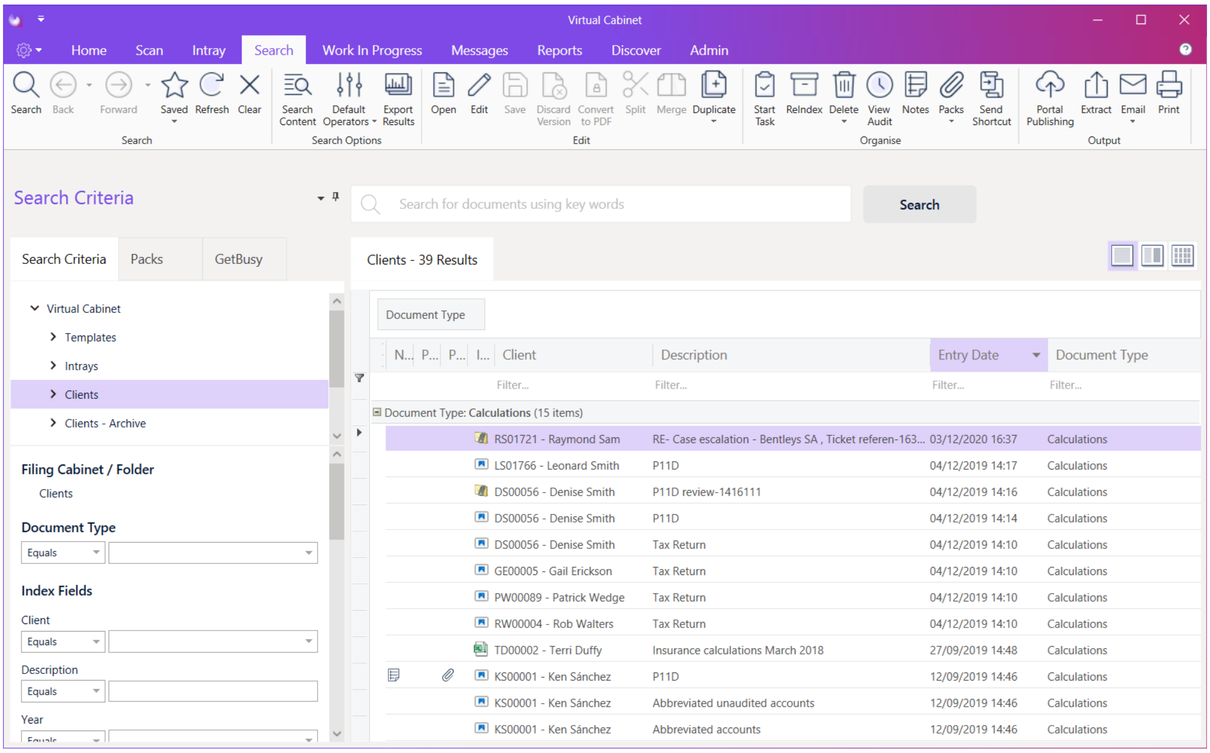


To search, type what you want to find in the box and click ‘Search’.

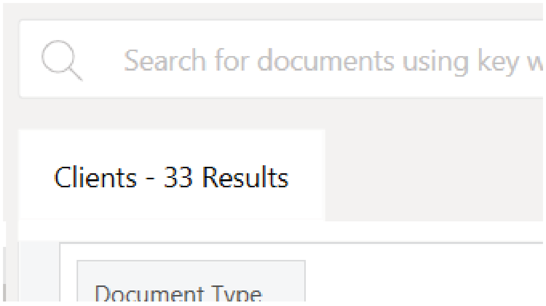


11.5 Search Results

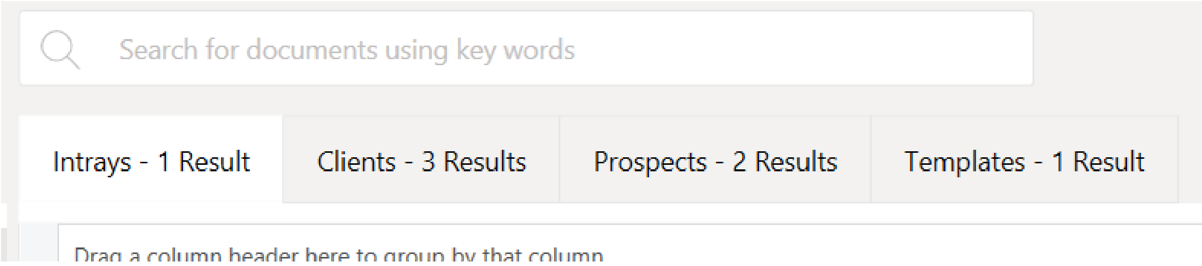
Once you have performed a search, you will be presented with a list of documents that match your criteria. The documents will be listed in a table with a different document on each row.



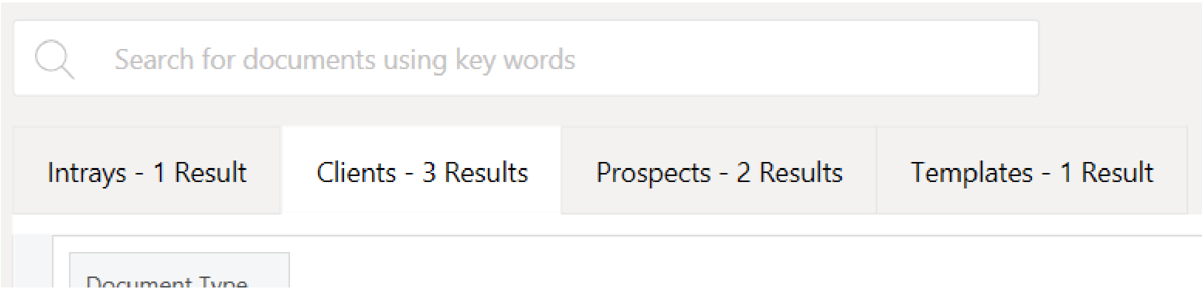
If you selected a folder or cabinet from the Cabinets list before searching then the results will be presented in a table with the name of the cabinet shown on a tab at the top.



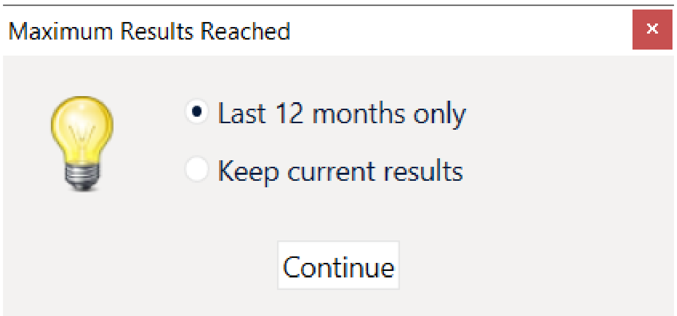
If you did not confine your search to a folder or cabinet from the Cabinets panel then your results will show a different tab for each cabinet where documents have been found.



You can look at the results for each Cabinet by clicking on the tabs at the top of your search results.



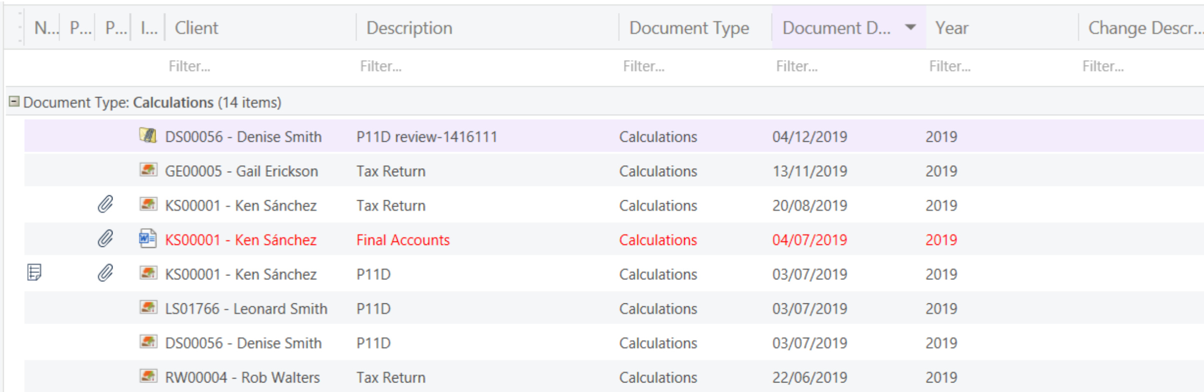
If your search has been limited to the maximum number of results then you may be presented with a chance to refine your search so it only includes documents from the last 12 months.



11.5.1 Showing results as thumbnail previews

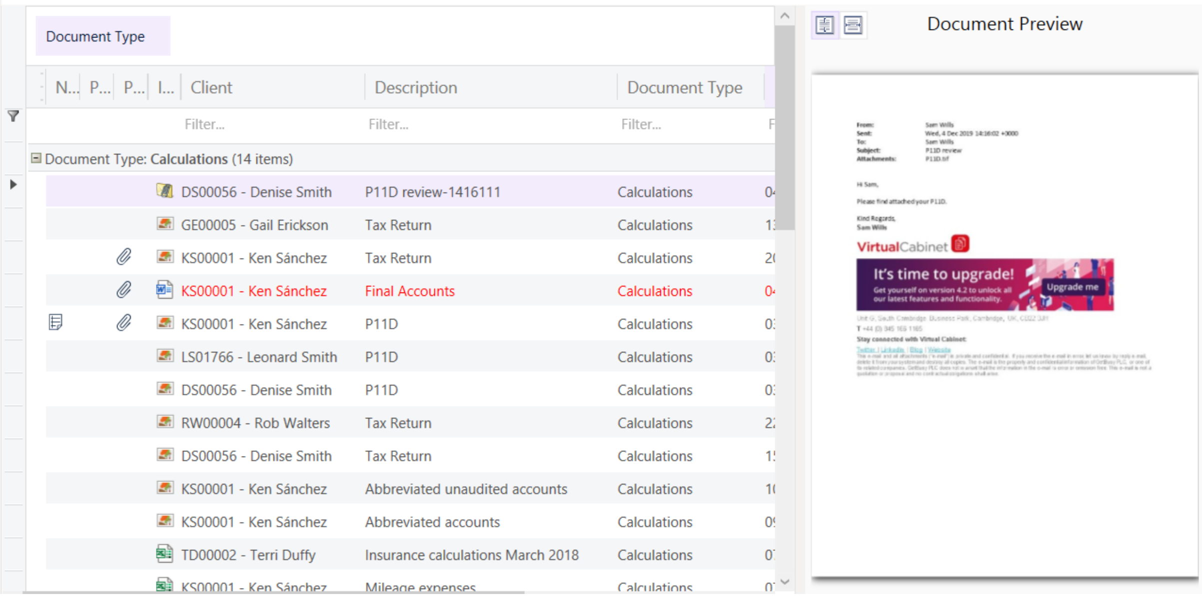
You can change your view of the search results by using the buttons in the top right-hand corner to switch between 'list' view, 'thumbnail' view, and 'Preview' view.

'List' view shows the results in a table with one document on each row.

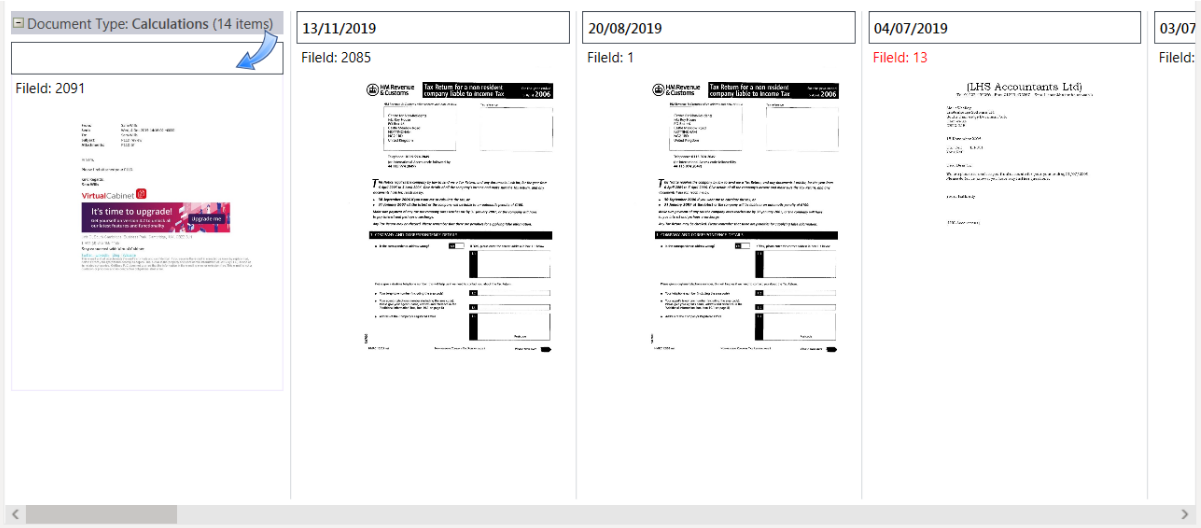


N...	P...	P...	I...	Client	Description	Document Type	Document D...	Year	Change Descr...
				Filter...	Filter...	Filter...	Filter...	Filter...	Filter...
Document Type: Calculations (14 items)									
				DS00056 - Denise Smith	P11D review-1416111	Calculations	04/12/2019	2019	
				GE00005 - Gail Erickson	Tax Return	Calculations	13/11/2019	2019	
				KS00001 - Ken Sánchez	Tax Return	Calculations	20/08/2019	2019	
				KS00001 - Ken Sánchez	Final Accounts	Calculations	04/07/2019	2019	
				KS00001 - Ken Sánchez	P11D	Calculations	03/07/2019	2019	
				LS01766 - Leonard Smith	P11D	Calculations	03/07/2019	2019	
				DS00056 - Denise Smith	P11D	Calculations	03/07/2019	2019	
				RW00004 - Rob Walters	Tax Return	Calculations	22/06/2019	2019	

'Preview' view shows the results in a table with a preview of the first page of the selected document on the right hand side.



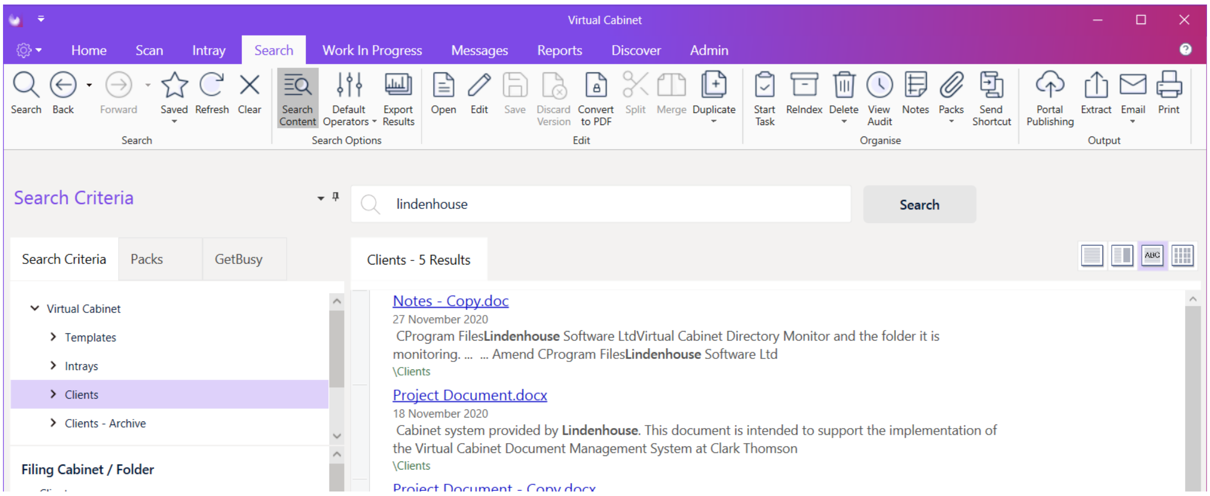
'Thumbnail' view shows a small thumbnail preview of each document in the search results.



11.5.2 Showing results in content view

If 'Search Content' is turned on then Virtual Cabinet will search through the text inside the documents. 'Search Content' can be turned on or off by clicking on the button on the ribbon toolbar.

When you do a 'content search', the search results will be listed with a preview of the text where the word was found.



The document view buttons in the top-right corner of the document list will change to the 'Content' option. You can change back to the List or Thumbnail view if you want.

The blue hyperlink at the top of each result can be clicked to open the document; this is the original filename of the document. The entry date of the document is also displayed and below this the word/s searched on will be highlighted in bold where they appear in the document. Finally the filing structure (Filing Cabinet \ Folder Structure) the document is stored in is displayed at the bottom of the result.

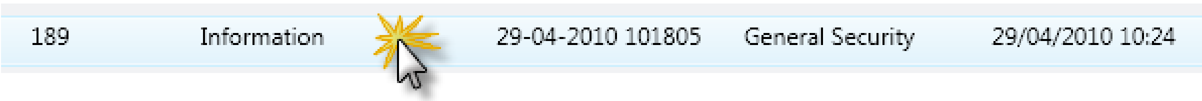
If the image is a scanned .tif image Virtual Cabinet is able to automatically open the document on the page the word appears on.

Note that all grouping and sorting from the list view are carried through to this content view.

Further information on the range of Content Searching options available can be found in Appendix A.

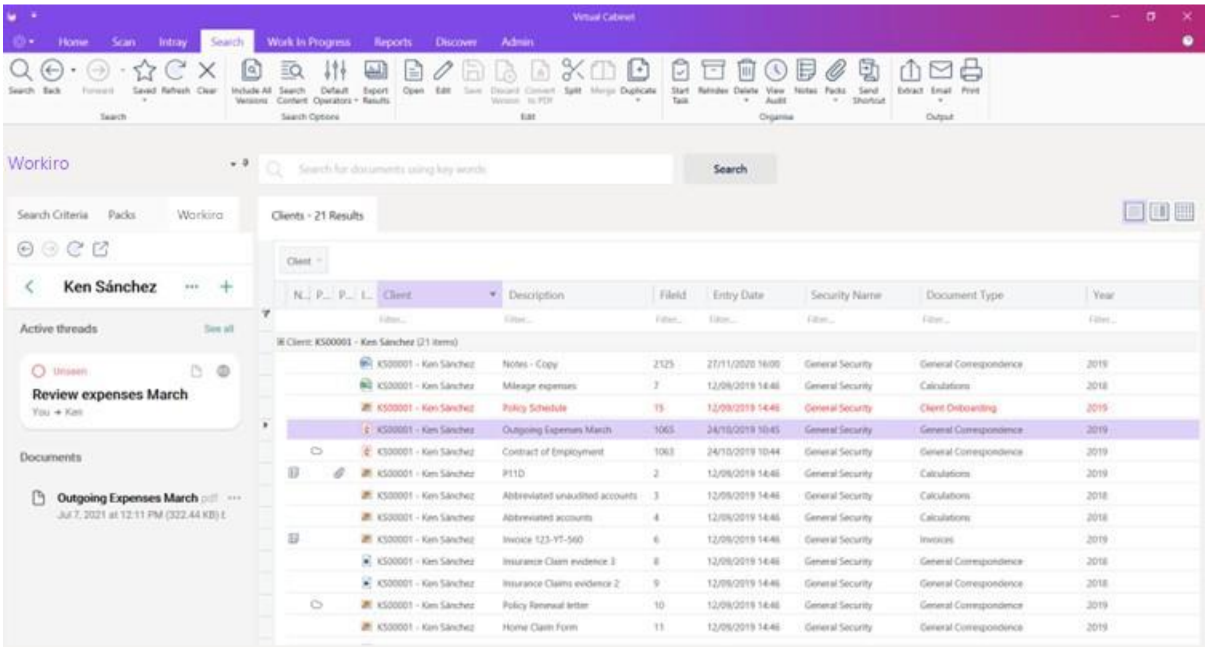
11.5.3 Viewing a document

Documents can be viewed by double-clicking on them with the mouse. Alternatively, you can select the document and click the 'Open Document' button on the Ribbon near the top of the window. Documents will either open in the Virtual Cabinet Document Viewer or in the Windows program for that type of file.



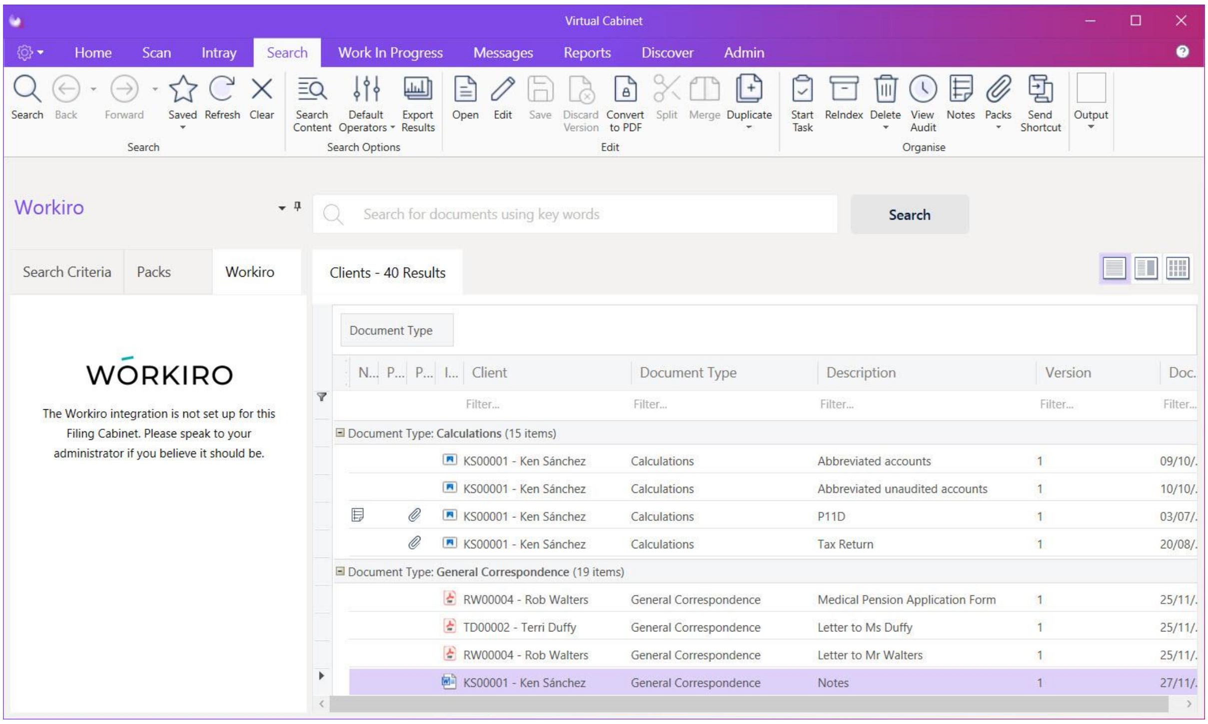
11.5.4 Workiro

The Workiro panel will show you the work being done in Workiro for the related client you have searched on, giving you one place to see everything you need.



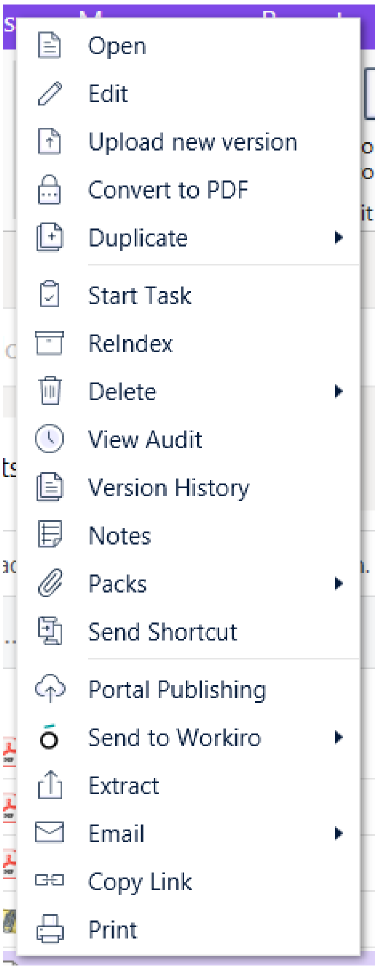
From Workiro you can see the work you are doing with the client, the work your team is doing for them, and the related documents stored against them in Workiro. You can also create new threads to communicate with the client, communicate about the client with your team, or set yourself a personal task to do work for this client.

This feature will become available once you have installed the Workiro Windows app and configured which Filing Cabinets this applies to and how they are related to Workiro. Speak to your administrator about setting this up and integrating with Workiro.



11.6 Document options

A full selection of actions are presented on a context menu when you right-click the mouse on a document in the search results.



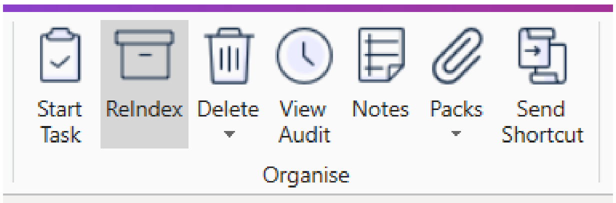
Option	Description
Open	Opens the selected document for viewing in a new window. The document will either open in the Virtual Cabinet Document Viewer or the program associated with the type of document you are opening.
Edit	Opens the document for editing in a new window. The document will open in the program associated with that type of file.
Upload new version	Browse to a file on your computer and upload it as a new version of this document.
Convert to PDF	Convert the selected document to a PDF. Creates a new version of the existing document as a PDF. E.g. version 1 is a .docx and version 2 is a .pdf.
Split	Opens a seperate window allowing you to split individual TIF or PDF images (exclusively) at a particular page, or into

	a seperate document for every page. Newly created documents will be sent to your Intray.
Merge	Opens a seperate windows allowing you to merge multiple TIF or PDF images (exclusively). Newly created documents will be sent to your Intray.
Save	Will be available if the selected document is currently being edited by you. Saves the newest version of the document back into Virtual Cabinet.
Discard	Will be available if the selected document is currently being edited by you. Discards the newest version of the document with any changes you have made.
Duplicate	Creates an exact copy of the selected document. Only the selected version of the document is copied. The new copy is sent to your Virtual Cabinet intray.
Start Task	Opens an embedded window allowing you to start a task that includes the selected document(s)
ReIndex	Opens a new window, allowing you to re-index the selected document.
Delete	Opens a popup window that asks you to confirm that you want to delete the selected document. If you delete a document then you will be unable to find it or open it again. If you have rights to destroy a document, you will also have this option under Delete. Destroy permanently deletes every trace of the document.
View Audit	Opens the View Audit window, showing the history of the selected document.
Version History	Opens the Audit window and show a history of the versions of this document. You can then revert to a previous version, or destroy specific versions.
Notes	Opens a window that displays any notes attached to the selected document. The window provides the option to add, edit or delete notes.
Packs	Create a new pack for the selected documents. Packs allow you to group documents together.
Send Shortcut	Send a shortcut of this document to a user's Intray.
Portal Publishing	Opens a new window that enables you to 'publish' the selected document to a recipient through the online Document Portal. This option will only be available if your administrator has given you permission to publish documents to the online Document Portal. This window will also show you who the document/pack is currently published to, and enable you to retract from those receipients, or send them a reminder.

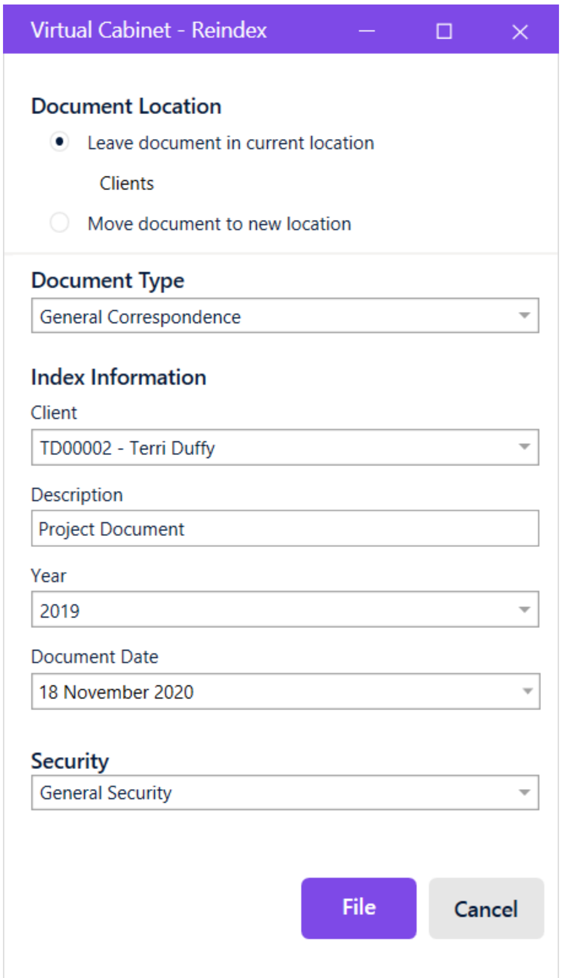
	Published documents are indicated by an icon to the left of the document in your search results.
Send to Workiro	Send the selected documents to Workiro to start a new thread of conversation with someone.
Send to Postworks	Opens a new windows that enables you to send the selected documents to Postworks to be printed and posted. See more detail below Choose the Postbox you want to send to, or the various posting options: colour, postage, splitting etc. You can also specify which of the documents are letters, and which are attachments that should be sent out alongside all the other letters. This is an integration with a third party company Postworks (https://www.postworks.co.uk/). Contact your VC supplier for more information.
Extract	Opens a window, allowing you to download a copy of the selected document to your computer.
E-mail	Opens a blank new e-mail with an attached copy of the selected document.
E-mail as PDF	Converts the selected document to a PDF file and attaches it to a blank new e-mail.
Copy Link	Copy a link to this document which can then be pasted in to Word/Excel/Outlook/PowerPoint etc.
Print	Prints the selected document.

11.6.1 Re-Index

Re-indexing enables you to re-locate a document and change its index values. A document's indexes will affect the search terms that people can use to help them find the document.



To re-index a document, first select it then click the 'ReIndex Document' button on the Ribbon near the top of the window. Alternatively, you can right-click on the document and then select the 'ReIndex' option. Multiple documents can be re-indexed at the same time by selecting them all before clicking ReIndex.

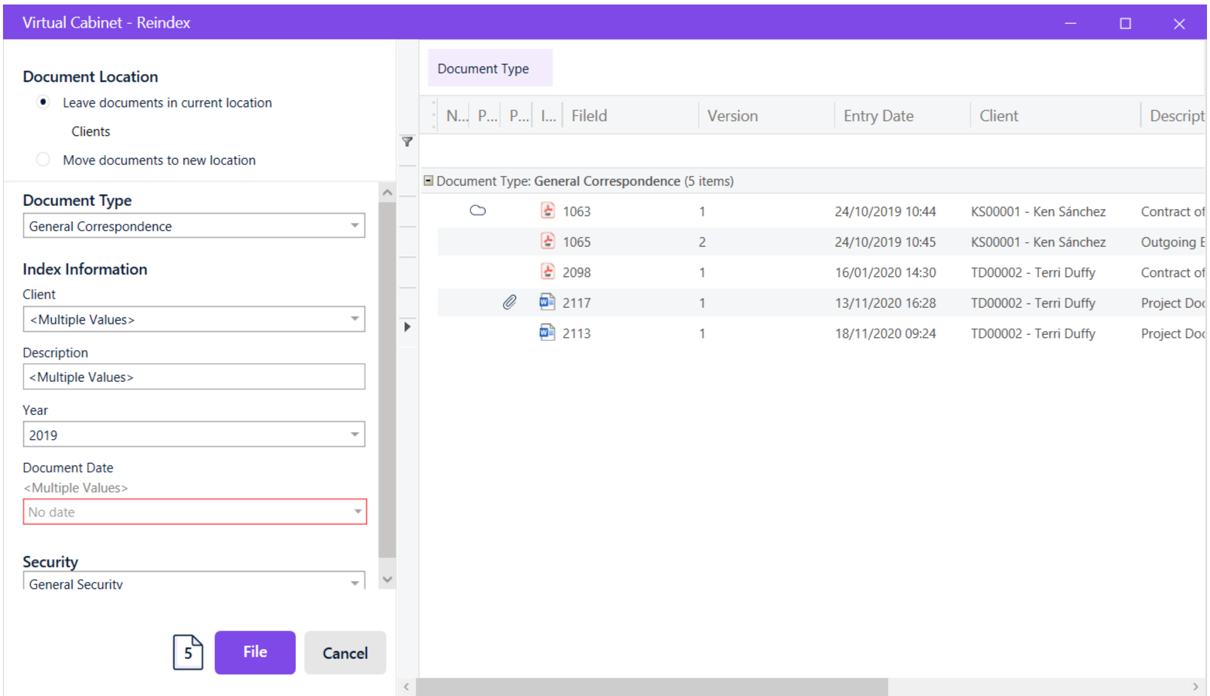


When selecting a single document to re-index the Re-Index window will open. The top section shows the current location of the document and by selecting 'Move document to new location' you can choose an alternative Cabinet or sub-folder.

Underneath the Document Location section you will have a section that resembles the Index panel of the Intray. Once you have edited the information appropriately, click 'File Document' at the bottom of the window. Alternatively, you can click 'Cancel' to close the window without re-indexing.

When selecting multiple documents and clicking on Re-Index you will be shown a slightly different window which contains the same Document Location and Index information sections as before, but also contains a preview of all the document indexes for the chosen documents.

Once you have edited the information, click ‘File Document’ at the bottom of the window. Alternatively, you can click ‘Cancel’ to close the window without re-indexing.



This preview enables you to see the how the documents will be affected before choosing to confirm the re-index.

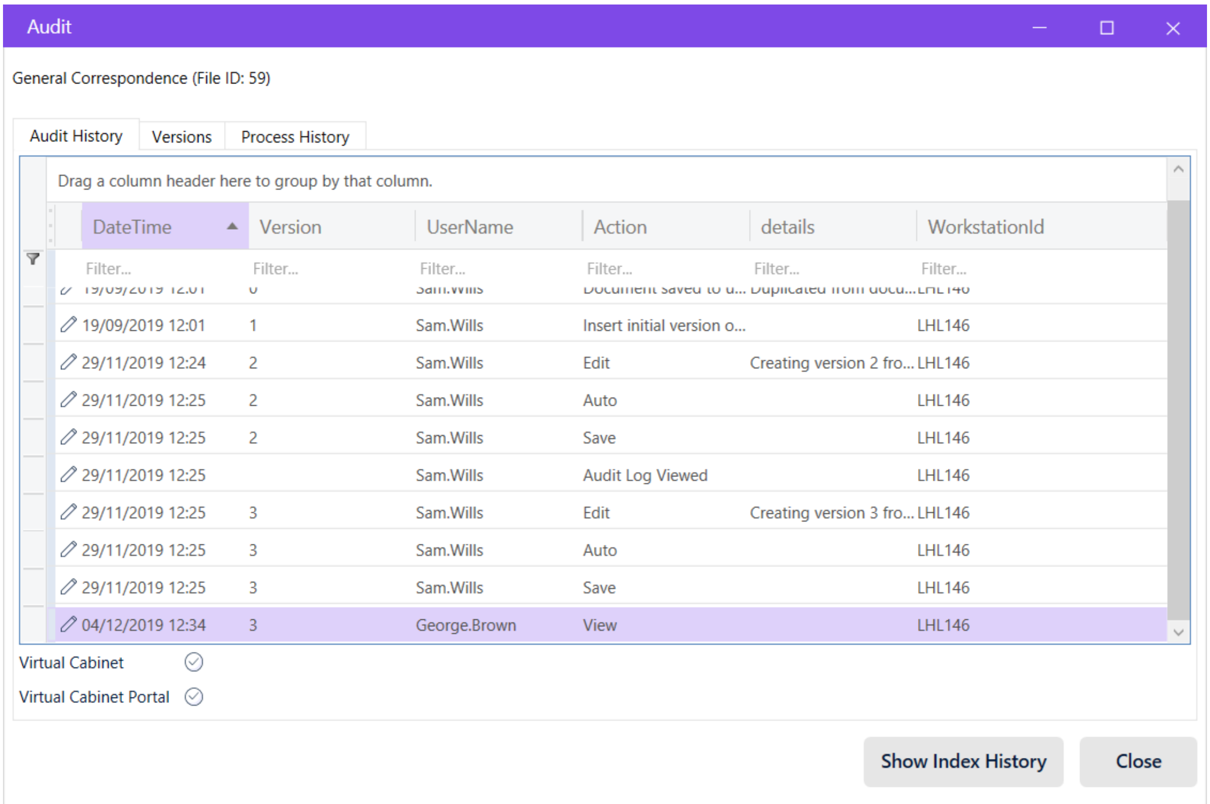
Where an index says “<Multiple Values>”, the documents have different indexing data for that index. **Editing an index will change that value for all the documents.** The window will warn you when you are about to edit an index containing <Multiple Values>.

You will also be asked to confirm your decision when clicking the File Documents button. This is because a multiple-document re-index can potentially delete large amounts of important data and cannot be undone. Please ask your support staff for help if you are unsure before using this functionality.

11.6.2 View Audit

The 'View Audit' option enables you to look at the history of a document. You can access the audit by selecting a document and clicking 'View Audit' on the Ribbon near the top of the window. Alternatively, you can right-click on a document and click the View Audit option.

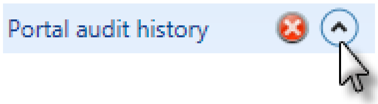
The Audit window lists the history of the document. By default, the oldest audit entry will appear at the top of the list and the window will scroll down to show the most recent audit entry.



Virtual Cabinet audit entries will be marked with a 'pencil' icon.

If your administrator has enabled the online Document Portal functionality and you have been named as a 'Publisher' then the Audit window will automatically use your Portal Login to download any **Portal audit** for the document. This extra Portal audit will show any actions that have taken place online, such as when a client downloads a document that has been published to them. Portal audit entries will be marked with a 'cloud' icon.

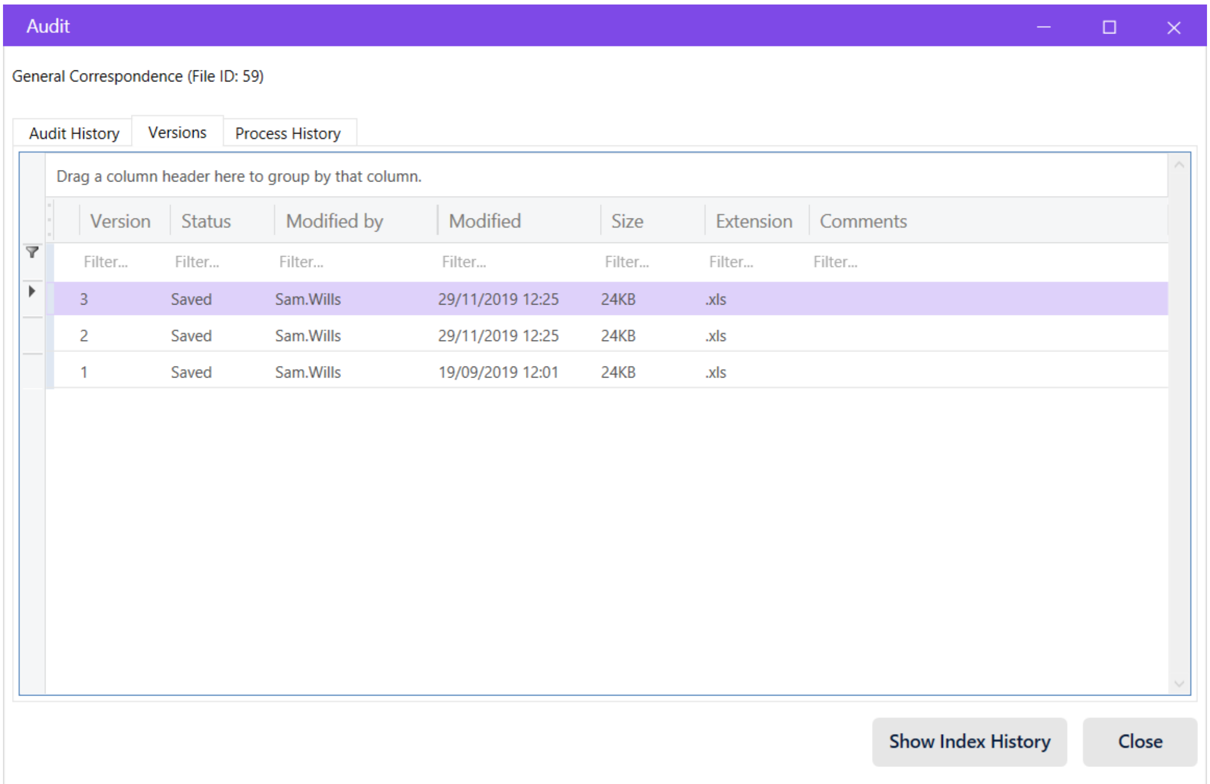
If you are a named Portal Publisher and you want to download the Portal audit for a document then the Audit window will need your Portal Login details. This is usually remembered for you and indicated by a green tick. However, if you are downloading audit from the Portal for the first time or you have recently changed your Portal password then you may have to change your details. Your login details can be revealed by clicking on the arrow next to the Portal Login label in the lower left-hand corner of the window. For more information, see the 'Portal Login panel' section of this guide.



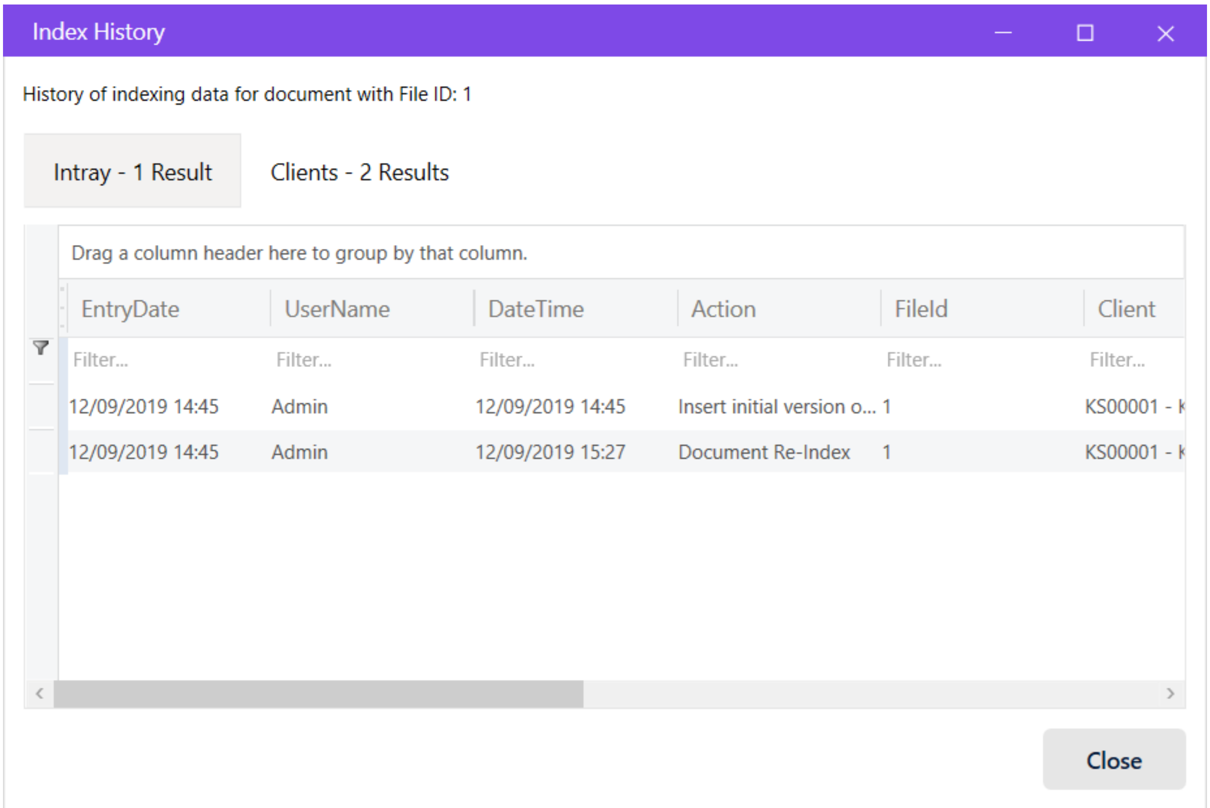
The Audit window also provides access to the **indexing history** of each document. To show the complete indexing history, click the 'Show Index History' button at the bottom of the Audit window.

Versions - the Versions tab will show a record of all the versions of the current document. Whenever a user edits a document it will create a new version. You can see who has done what to the document and when. You can also:

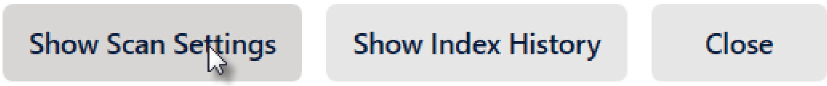
- **Revert** - revert to a previous version of the document. This will create a new version of the document that is a copy of the selected version. Useful if you want to go back to a document before certain changes were made.
- **Destroy** - destroy a version of a document. This will completely remove that version from the system, so that no one can view it and it can't be recovered. Useful if you have a version with sensitive content, or want to save server space.

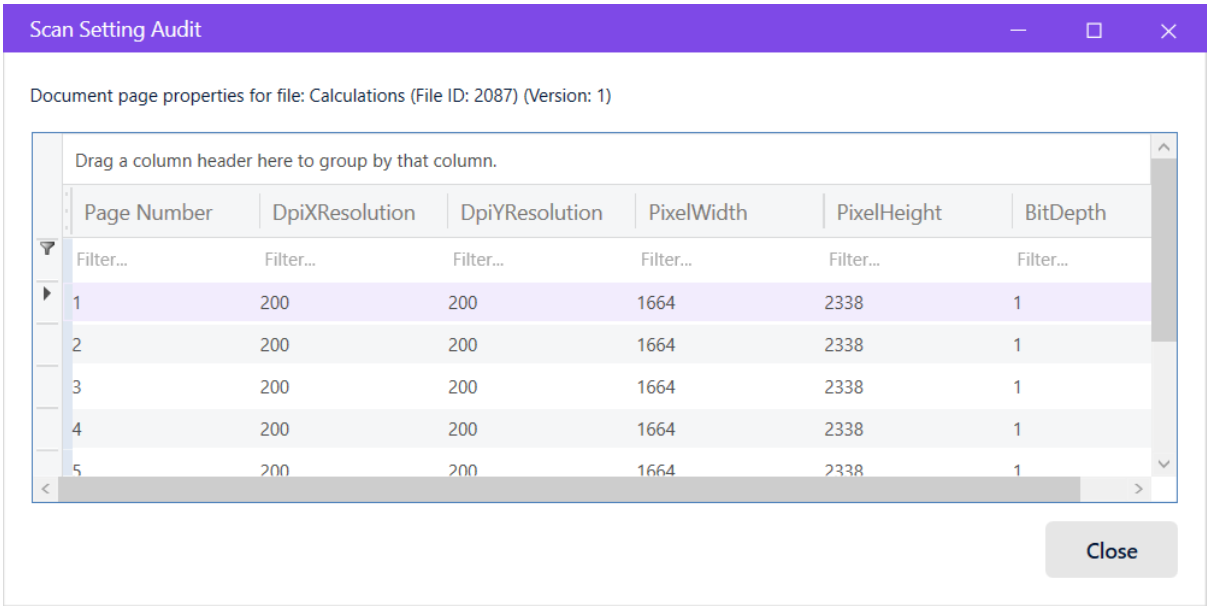


The 'Index History' window lists all the past indexes for the document, using a separate tab for each Cabinet that the document has been indexed under. To close this window, click the 'Close' button.

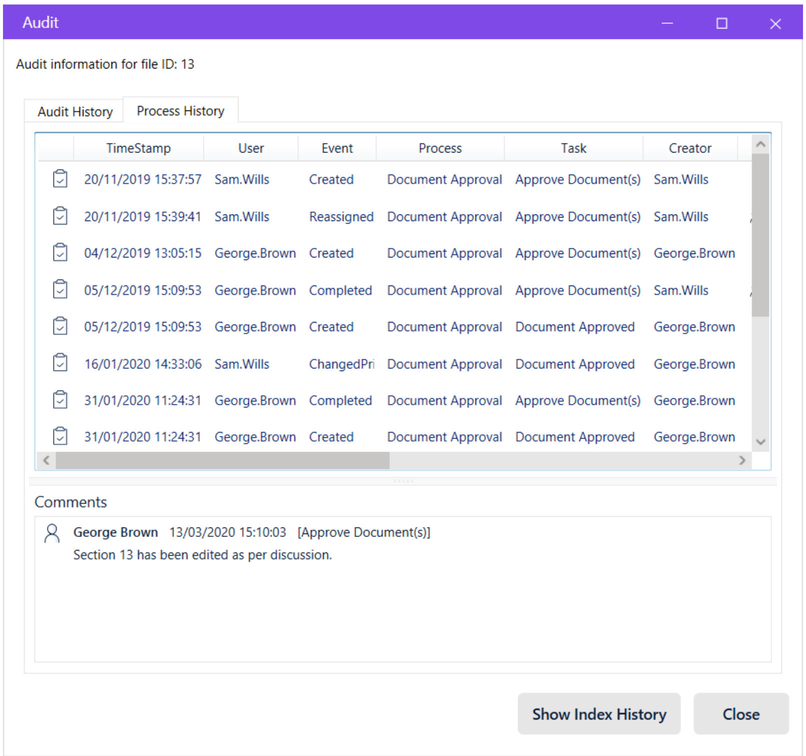


If the document is a tiff then the Audit window also provides access to the Scan Settings that were used to scan in each page of that document.





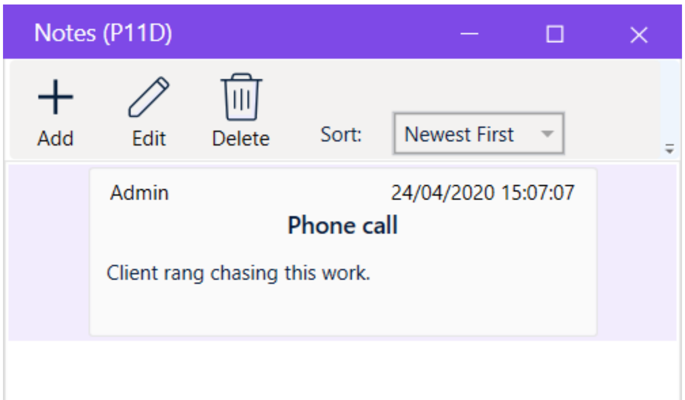
If the selected document has been through a Process, you will be able to access all Process and Task history via the Process History tab


Audit
Audit information for file ID: 13
Audit History
Process History
TimeStamp
User
Event
Process
Task
Creator
20/11/2019 15:37:57 Sam.Wills Created Document Approval Approve Document(s) Sam.Wills
20/11/2019 15:39:41 Sam.Wills Reassigned Document Approval Approve Document(s) Sam.Wills
04/12/2019 13:05:15 George.Brown Created Document Approval Approve Document(s) George.Brown
05/12/2019 15:09:53 George.Brown Completed Document Approval Approve Document(s) Sam.Wills
05/12/2019 15:09:53 George.Brown Created Document Approval Document Approved George.Brown
16/01/2020 14:33:06 Sam.Wills ChangedPri Document Approval Document Approved George.Brown
31/01/2020 11:24:31 George.Brown Completed Document Approval Approve Document(s) George.Brown
31/01/2020 11:24:31 George.Brown Created Document Approval Document Approved George.Brown
Comments
George Brown 13/03/2020 15:10:03 [Approve Document(s)]
Section 13 has been edited as per discussion.
Show Index History
Close

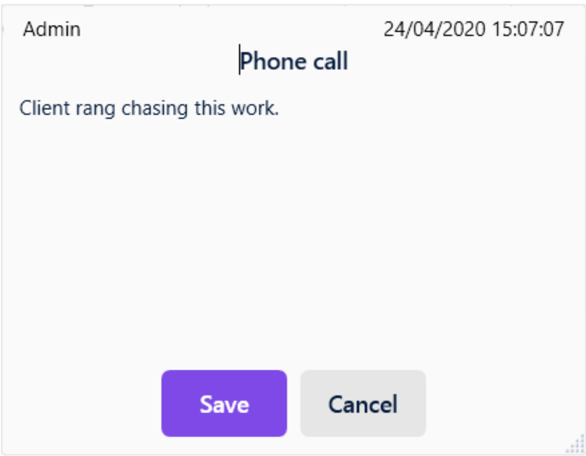
11.6.3 Notes

Virtual Cabinet enables you to attach short 'notes' to documents. These notes can then be seen by other users who have the appropriate permissions. To view the notes for a document, select a document and then click the 'Notes' button on the Ribbon near the top of the window. Alternatively, right-click the document and select the Notes option.

The Notes window lets you add, edit or delete notes. You can also sort the notes Newest First or Oldest First.



You can edit your note by clicking the 'Edit' button, typing text and then clicking the 'Save' button.

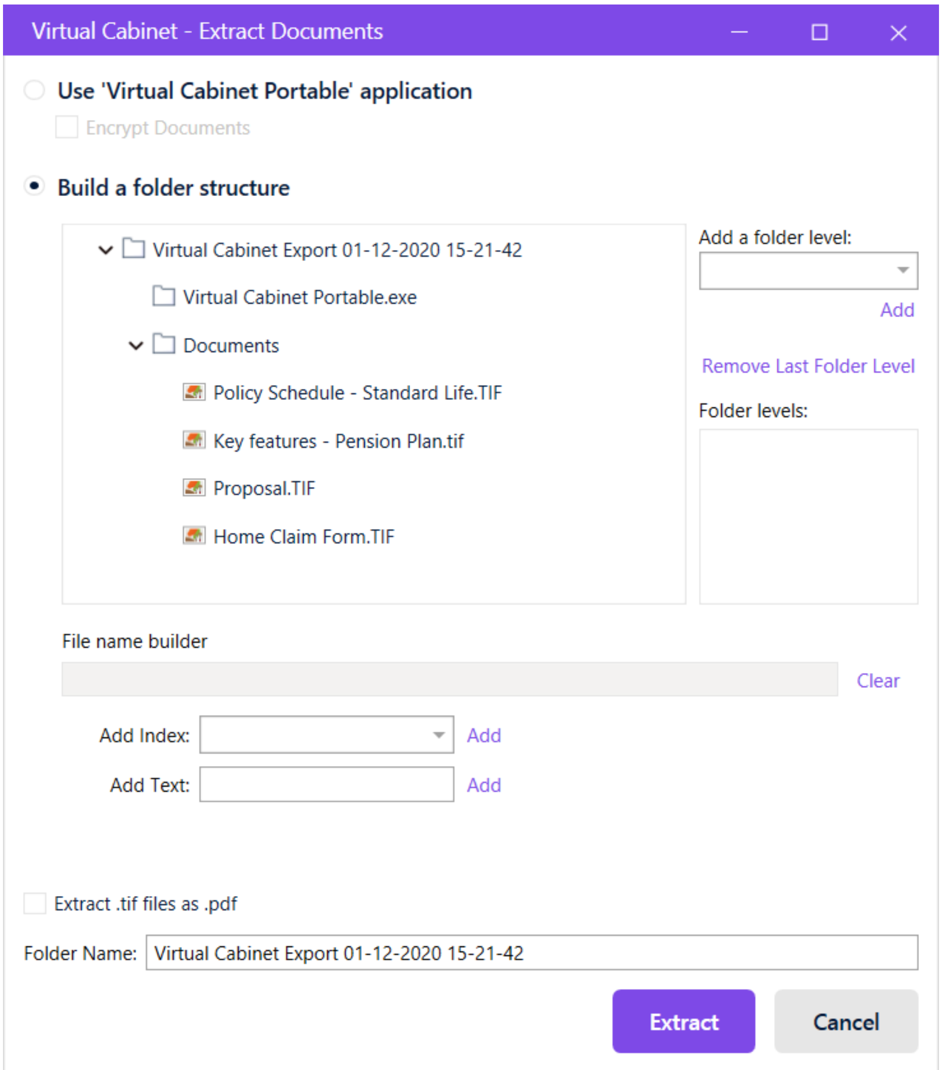


11.6.4 Extract

The 'Extract' feature enables you to take copies of documents out of the Virtual Cabinet system. This can be useful if you are visiting a client and want to refer to their documents while you are away from the office.

To extract a single document, select it in the search results and then click the Extract button. A 'Save File' window will open, enabling you to choose the name of the file and where to save it, such as your Windows desktop.

To extract multiple documents at the same time, select them all in your search results and then click the Extract button. An 'Extract Documents' window will open so you to customise the file names and choose the folders that they go into.



The Extract Documents window is split into three areas:

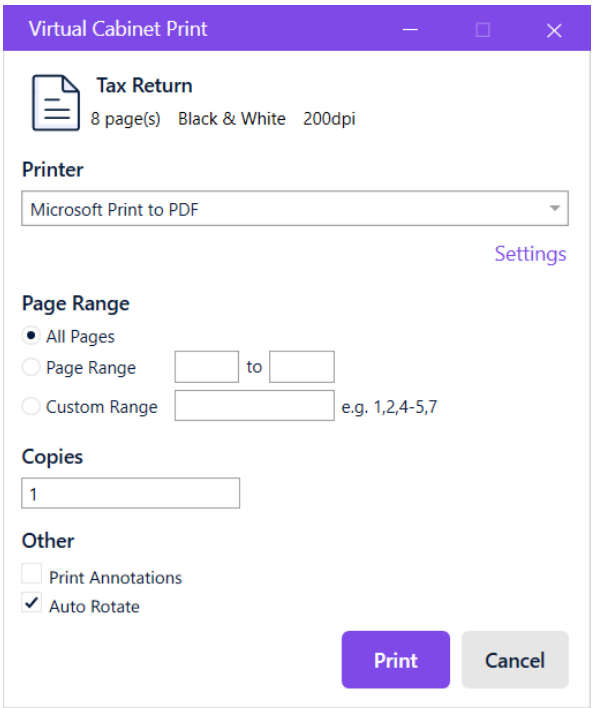
> **Use 'Virtual Cabinet Portable' application** is a quick option that extracts all the files into a folder and also provides a Virtual Cabinet Portable application. The application lists your documents in the same way as Virtual Cabinet, but can be run independently from the rest of the system. If this option is picked, you can then choose the **Encrypt Documents** sub-option to password-protect the documents. Encrypted documents can only be opened from within Virtual Cabinet Portable and will require the password you entered on this Extract Documents window.
>
> **Build a Folder Structure** enables you to specify the folders and file names you want to use for your export. This option does not use Virtual Cabinet Portable. Your folder structure is shown in a central preview pane so you can see the results of the extract. You can add folder levels by selecting them from the drop-down and clicking 'Add' on the right-hand side of the window. You can also assemble your own file names through the 'File name builder' section by selecting indexes from the drop-down and clicking 'Add'.
>
> The area at the bottom of the window has an option to tick if you want the export to automatically convert .tif files into .pdf files. This can help if you will be opening the files on a system that cannot view .tif files, such as an IPad. There is also a text box that lets you type a name for the extract folder.

When you have defined the extract, click 'Extract...' to choose a folder to save the results onto your computer.

Alternatively, you can click 'Cancel' at any time to close the window without extracting any files.

11.6.5 Print

The 'Print' window provides options to set up your print job.



Printer – Select the printer that you want to send the document to. The Settings button shows your printer's driver dialog box which can be used to choose settings particular to your printer, such as duplex printing or paper tray selection.

Page Range – This section allows you to specify exactly which pages of the document you wish to print.

Copies – Specify how many copies of the document you wish to print.

Print Annotations – Tick if you want the document to print out with annotations visible.

Auto Rotate – If selected all landscape pages will print in landscape mode.

11.6.6 Publish Documents to the Portal

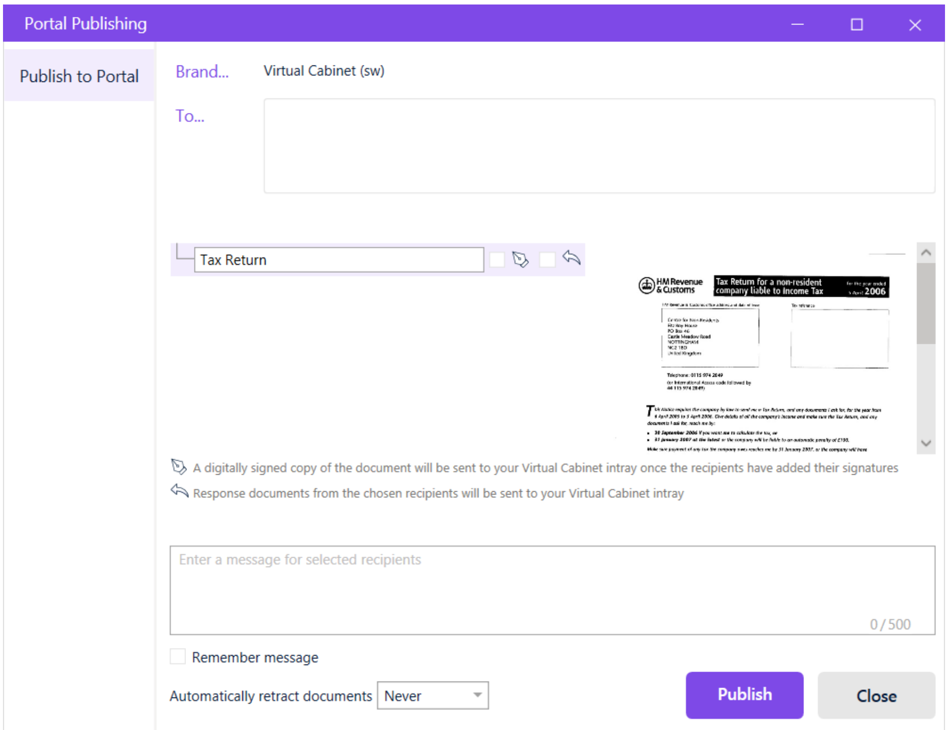
The ‘Publish to Portal’ feature enables you to make documents available to customers and contacts outside of your Virtual Cabinet system. You can ‘publish’ a document to the online Document Portal, and the intended recipient will receive an e-mail notifying them that they can access the document.

You will only be able to publish documents if your administrator has enabled the feature and identified you as a ‘Publisher’.

To publish a document, find one or more documents and select them in your search results. Then click ‘Portal Publishing’ on the ribbon toolbar near the top of the window.

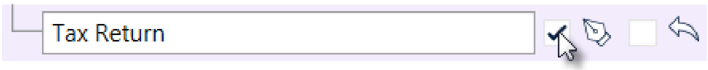
The Portal Publishing window will open, enabling you to enter the email addresses of the Recipients, set the titles of the documents, request a signature and/or documents by return, change the order of the documents and enter a message.

If you have not used the Portal via Virtual Cabinet before, you will be prompted to enter you Portal Email Address and Portal Password.

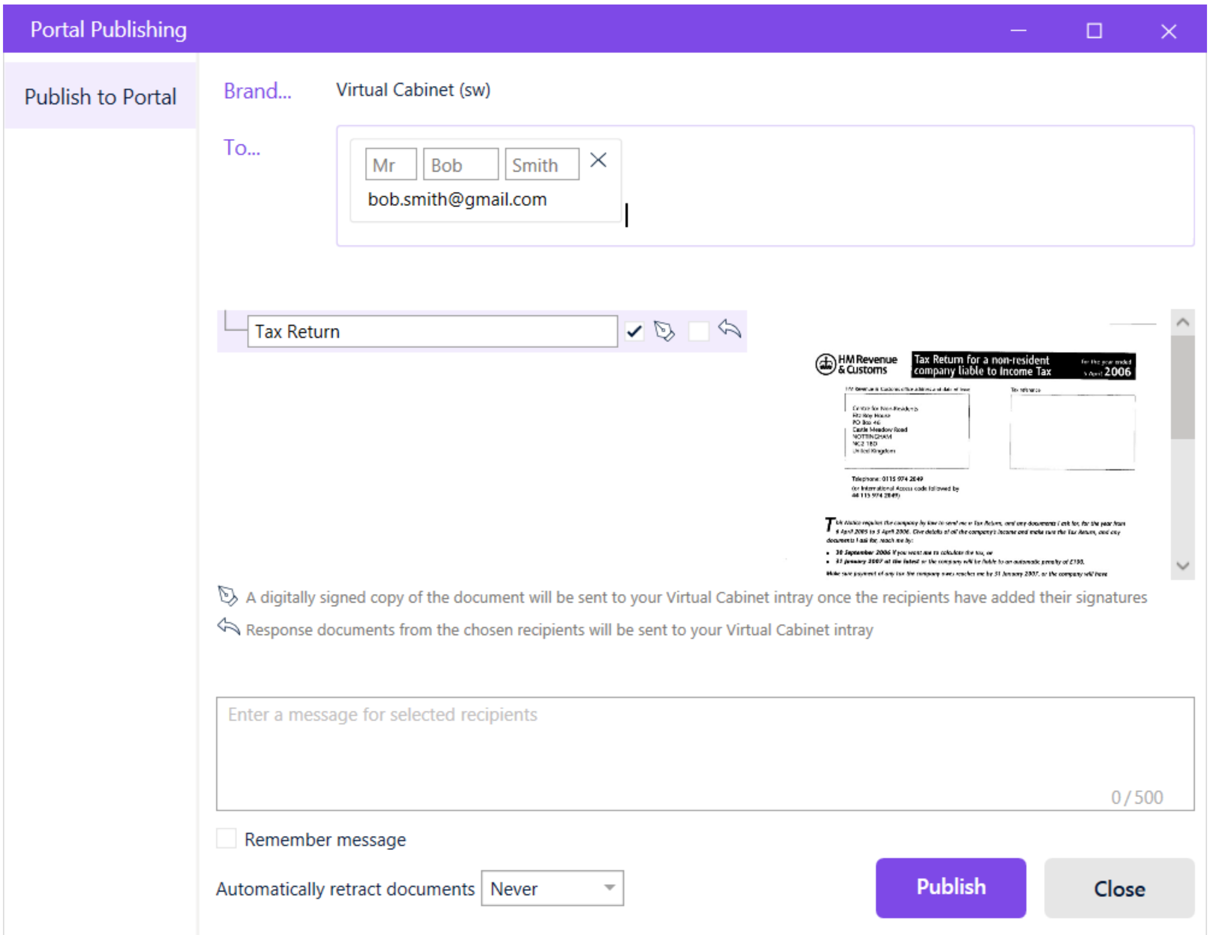


Once you have entered a recipient e-mail address, you can click 'Publish' to publish the document to the Portal. Alternatively, you can click 'Close' to close the window without publishing.

Should you require the document to be electronically signed select the 'Request a signature for this document' checkbox. You can also check an option to request the recipient sends a document in response.

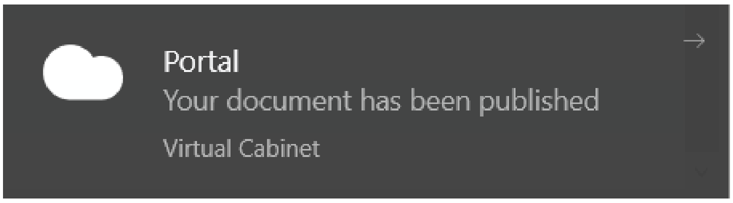


Signed documents are returned to your intray and you will be notified by email. For ease of re-indexing the signed document will present the indexing information from the original unsigned document.



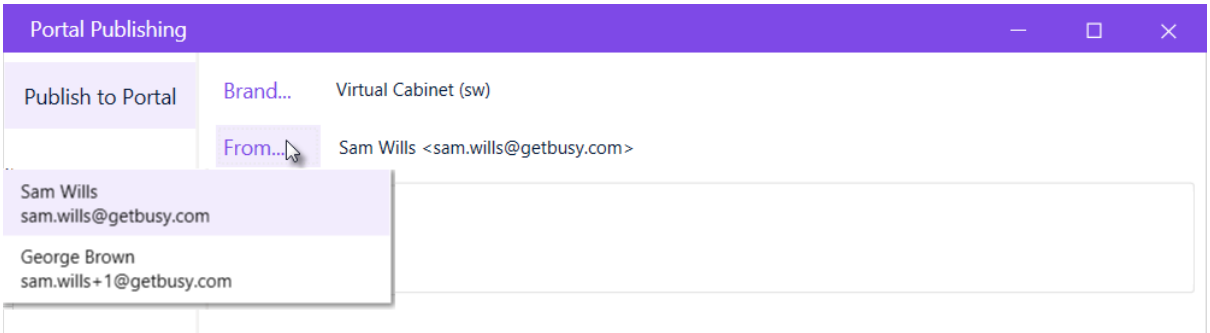
The documents may take a short while to process and package for publishing to the portal.

A successful upload will be indicated by a small pop-up window containing a confirmation message if you remain logged on to Virtual Cabinet. You will be informed about any problems encountered publishing your documents by email.



Publish Delegation

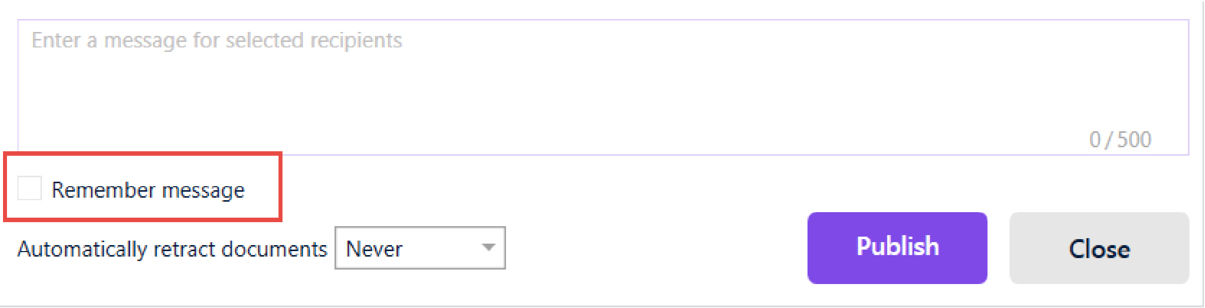
If your administrator has enabled publish delegation you may be able to publish documents on behalf of other users. In this case a 'From' option will be available in the Portal Publishing window. You can choose who the document should be published from by clicking on the option and selecting a user. It should be noted that when publishing on behalf of another user any signed documents will be returned to their intray not yours.



Automatic Retraction

If your administrator has enabled portal documents to automatically retract you may optionally be able to alter the retraction time period when you publish the document. In the example below the document will be automatically retracted after 4 weeks.

Remember Message

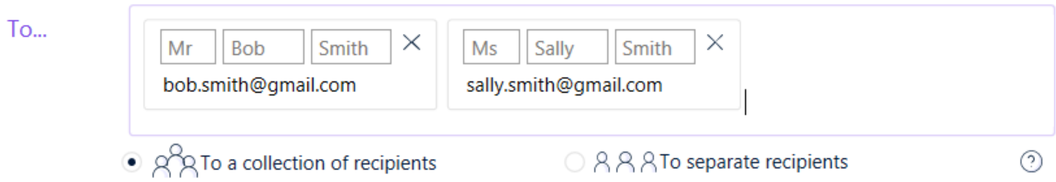


Tick the "Remember Message" option at the bottom of the publishing window in order to remember the message you've typed for the next document you publish.

Multiple Recipients

If you are publishing one or more documents to multiple recipients then you can send them in one of two ways:

- To a collection of recipients
- To separate recipients



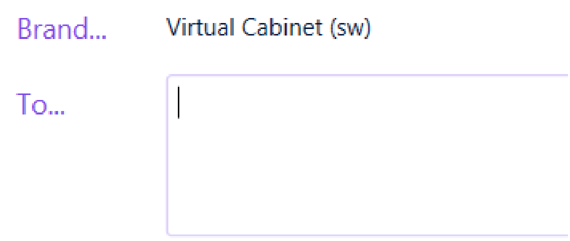
Publish to a collection of recipients when all recipients are related and will share the document(s) you publish. If a signature is requested for any document then all recipients must sign the one document.

Publish to separate recipients when recipients are unrelated and should not be aware of the other recipients. If a signature is requested then each recipient will sign their own copy of the document.

Brands

If you have multiple companies then you can use Brands to distinguish each company. Your recipients will see a different company name, logo, branding colours and social media links.

When you're publishing a document you will see an option to change the Brand from your company's default. Click on "Brand" to choose the Brand for the document you are currently publishing. A recipient can be published to on behalf of any number of Brands.

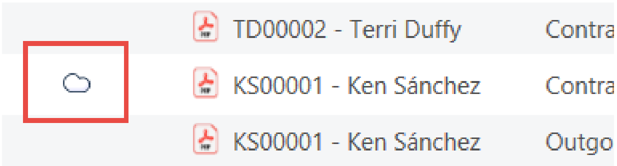


As an administrator, you can manage your Brands by going in to the Admin tab of VC and using the Company Administration section of the Portal.

Speak to your Account Manager about creating new Brands for your company.

11.6.7 Retract documents from the Portal

If a document is already published to the online Document Portal, the document will be marked with a 'published' icon.



While a document is published, it will be in a restricted state that may prevent actions such as deleting, re-indexing and editing.

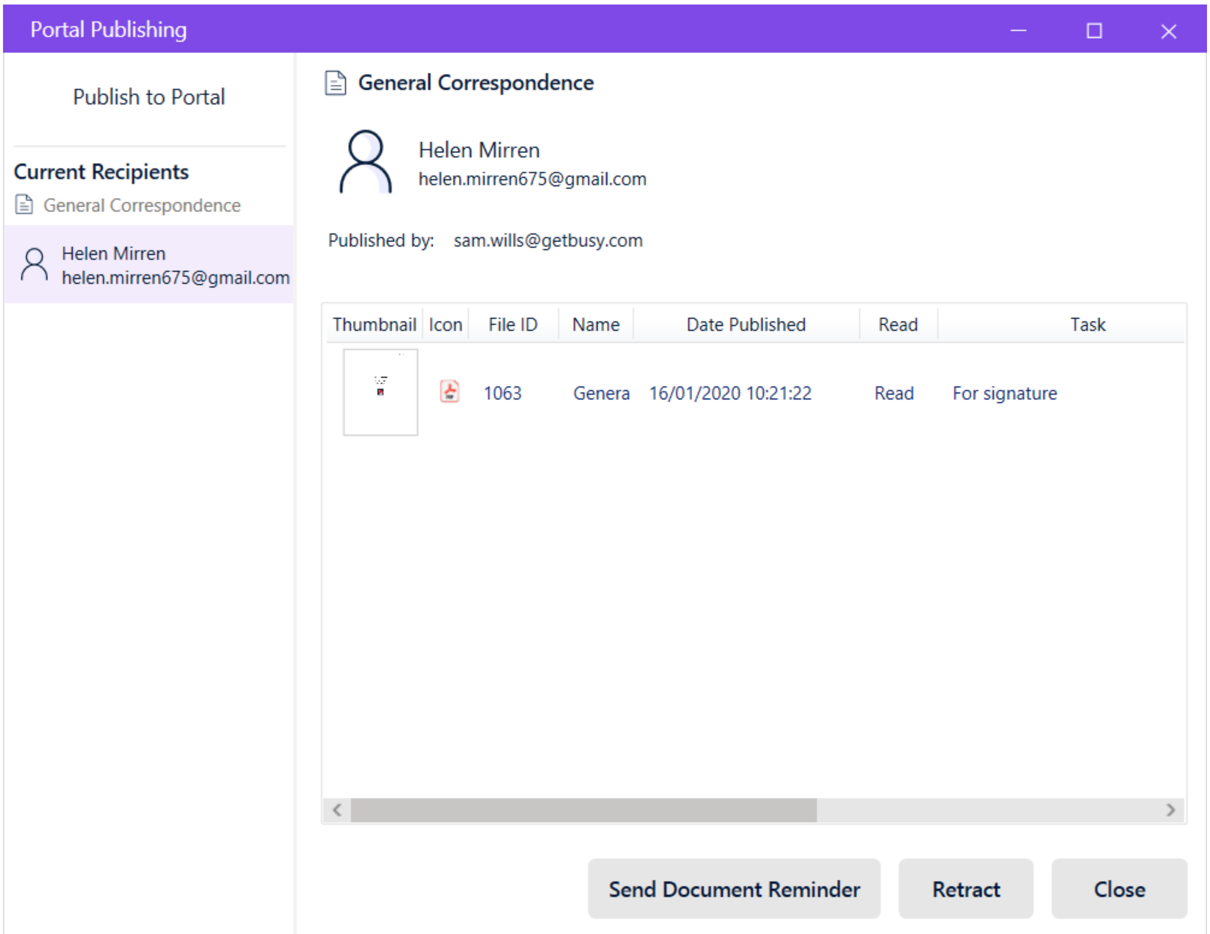
A document can be 'retracted' from a recipient. That recipient will no longer be able to see the document when they log into the Portal.

You will only be able to retract documents if your administrator has enabled the feature and identified you as a 'Publisher'.

To retract a document, select it in your search results. Then click 'Portal Publishing' on the ribbon toolbar near the top of the window.

The Portal Publishing window will open, enabling you to select a Recipient from whom you wish to retract a document.

If you have not used the Portal via Virtual Cabinet before, you will be prompted to enter you Portal Email Address and Portal Password.



When you have selected a recipient, you can retract the document by clicking the 'Retract' button. Alternatively, you can click the 'Close' button to close the window without retracting the document.

11.6.8 Send to Postworks

PDF documents stored in Virtual Cabinet can be sent to Postworks to be printed and posted using our in-built integration. Postworks is a third-party company, please see more detail from their website - https://www.postworks.co.uk/.

Choose the documents you want to send, right click and choose Send to Postworks. You'll be asked to log in with your Postworks credentials the first time you use the integration. After you've logged in you'll be presented with a list of the documents you selected and all the options you have available to send them to Postworks.

- **Letters** - these are the documents that you will be sending to Postworks. You can see a preview of the selected letter on the right hand side of the window. Click on the X symbol to remove that letter if you've selected it by accident. The letter should contain the address it is to be sent to on the first page. See Postworks for more details/requirements.
- **Attachments** - these are the documents that will be printed and attached to each of the letters you've selected. Usually accompanying documentation and further information.
- **Posting Options -** the options for how you want these documents to be printed and sent. They apply to all the documents that you are sending.
    - **Postbox** - a postbox is a set of default options that you can quickly use to send letters. These are set up from the Postworks website. You can either choose a postbox, or leave it blank and choose from the other individual options.
    - **Colour** - print out the documents in Black & White or Colour.
    - **Postage** - 1st or 2nd class
    - **Sided** - double or single sided
    - **Split by page number** - if the documents you selected are a combined list of many documents within the one PDF they can be split down based on the number of pages.

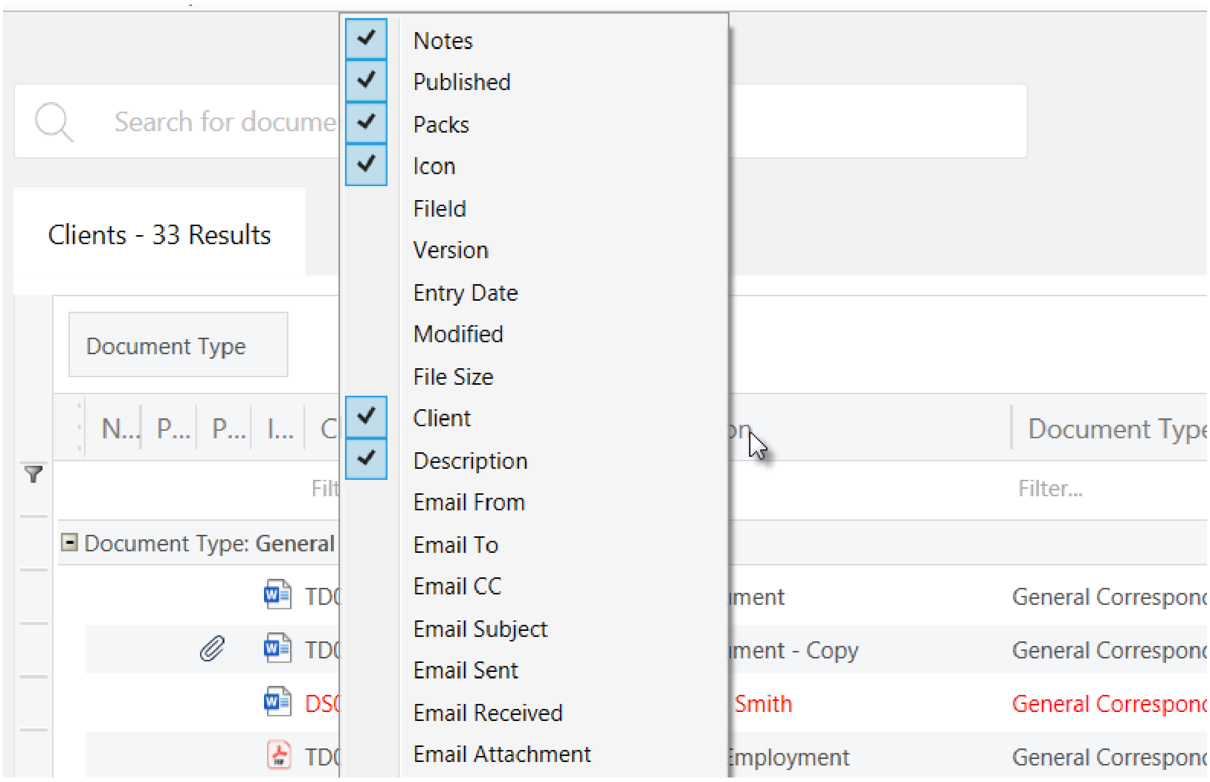
When you're happy with your selection choose Send. You'll see the progress of the documents being sent to Postworks, and it will report any failures at the end for you to review.

11.7 Organising Your Search Results

You can use the search results 'list' view to quickly group, sort and filter your documents. This can help you to identify the correct document amongst your search results. You can switch to the 'list' view by using the view buttons in the top right-hand corner of your search results.

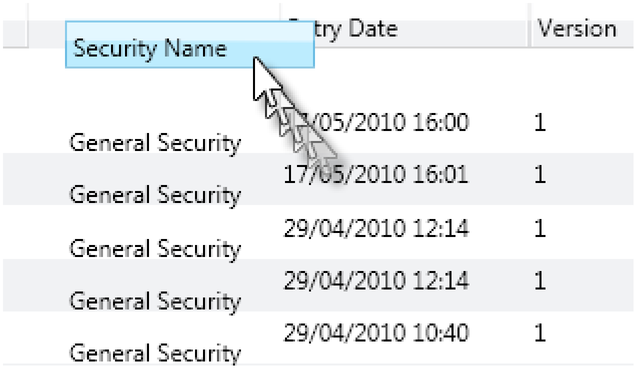
11.7.1 Showing and hiding data columns

By default, the search results will show a large number of columns in the results table. You can easily show or hide data columns by right-clicking on any column header. A menu will display a list of available data columns with ticks next to the visible columns. You can show a column by clicking to put a tick next to it. To hide a column, click to untick it.



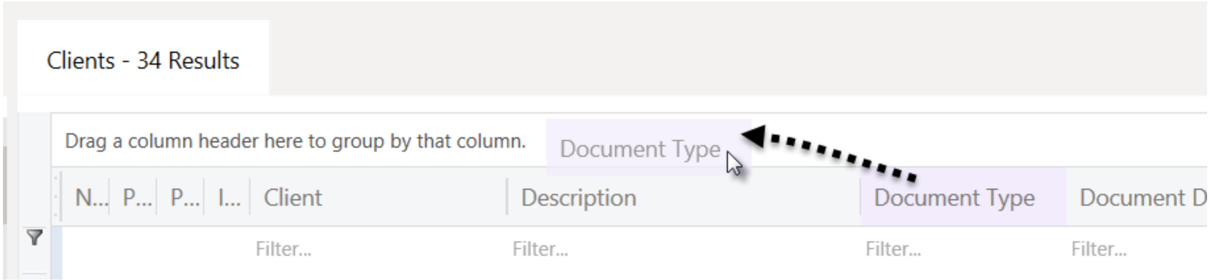
11.7.2 Re-ordering data columns

The data columns in the search results table can be re-ordered. This enables you to put the most relevant columns close together so they are quicker to read. To re-order the columns, use your mouse to drag a column header into a different position.



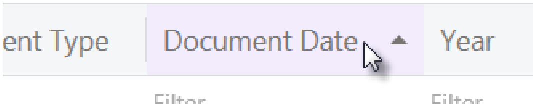
11.7.3 Grouping documents

You can group your documents together so that they are easier to look through. Use the mouse to drag a column header onto the region that is labelled "Drag a column header here to group by that column". You can create multiple groups and sub-groups. To remove a grouping, drag it out of the box.



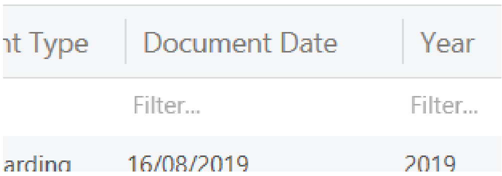
11.7.4 Sorting documents

Documents can be sorted by according to the data in a column. To sort your documents, click on a column header. A small arrow will appear to show the direction of the sort.



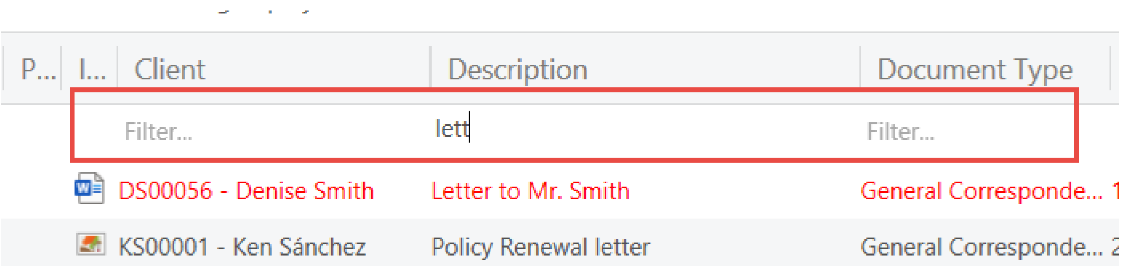
A second click will reverse the sort direction. The small arrow will point in the opposite direction.

Another click will remove the sort, returning your documents to their original order.



11.7.5 Filtering documents

You can filter your search results by clicking in the space below a column header and typing the text that you want to filter by.

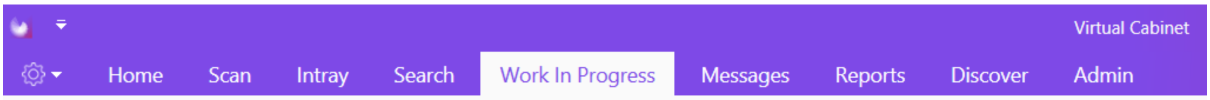


12 Work In Progress

Documents are stored as Work In Progress while you are editing them. Other users can see that you are working on the documents and will not be able to edit them until you have finished. People will still be able to view the document.

12.1 The Work In Progress Tab

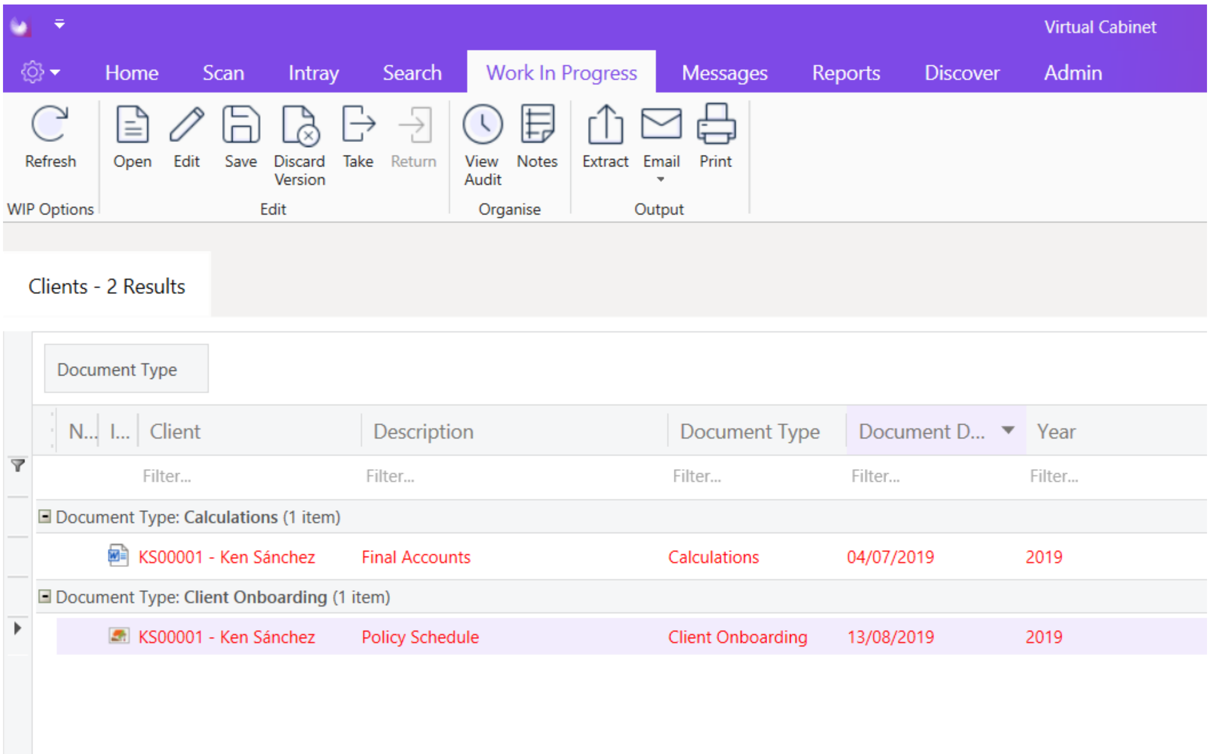
You can reach the Work in Progress tab by clicking 'Work In Progress' on the Ribbon near the top of the window.



The Work In Progress tab has two main elements:

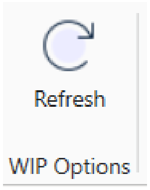
A selection of Ribbon buttons along the top of the window.

A Current Work In Progress panel that lists the documents you are currently working on.

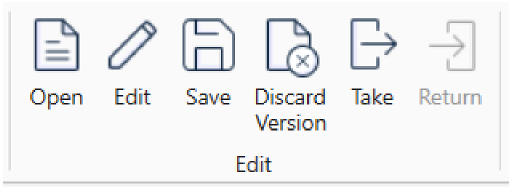


12.2 Ribbon Buttons

The Ribbon buttons are located along the top of the window. They can be used to perform a number of document-related actions.



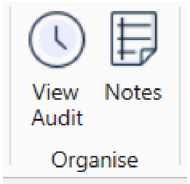
Button	Description
Refresh	Refreshes the list of documents that you are currenlty working on.



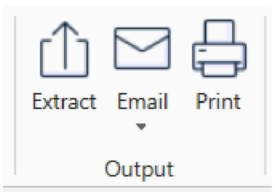
(These options are also available on the document Rick-Click menu)

Button	Description
Open	Opens the selected document for viewing in a new window. The document will either open in the Virtual Cabinet Document Viewer or the program associated with the type of document you are opening.
Edit	Opens the document for editing in a new window. The document will open in the program associated with that type of document.
Save	Saves the selected document back into Virtual Cabinet as a new version of the document. The document will leave your Work In Progress and other users will be able to view and edit your new version of the document.
Discard Version	Opens a pop-up window asking you to confirm that you want to discard the changes that you have been making to the selected document. If you choose to discard then the document will leave your Work In Progress and any changes will not be saved. Other users will then be able to edit the document.
Take	Opens a window that enables you to save the selected document to your computer. You have ‘taken’ your version of the document out of the system.While the file is taken, you are free to transfer and edit it without any restriction imposed by the system. Once you have finished editing the document, you should ‘return’ it.

Return	Opens a window that enables you to locate a previously taken file. That file will then be 'returned' to the system as the new version of the selected document.



Button	Description
View Audit	Opens the View Audit window, showing the history of the selected document.
Notes	Opens a window that displays any notes attached to the selected document. The window provides the option to add, edit or delete notes.



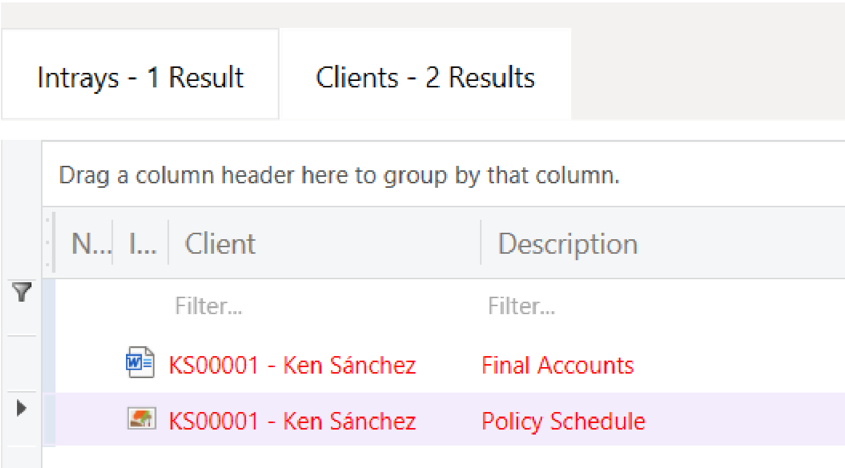
Button	Description
Extract	Opens a window, allowing you to download a copy of the selected document to your computer.
Email	• Email - Opens a blank new e-mail with an attached copy of the selected document. • Email as PDF - Converts the selected documents to PDF files, opens a blank new e-mail and attaches the PDFs. • Email as Link – Attach selected documents to a blank email as an internal hyperlink.
Print	Opens up the Print window to configure your print.

12.3 Current Work In Progress

The Work In Progress tab shows the documents that you are currently working on. These documents are your ‘current work in progress’.

In Virtual Cabinet, a document is listed in red whenever it is being worked on. All the documents in your Work In Progress will therefore be listed in red.

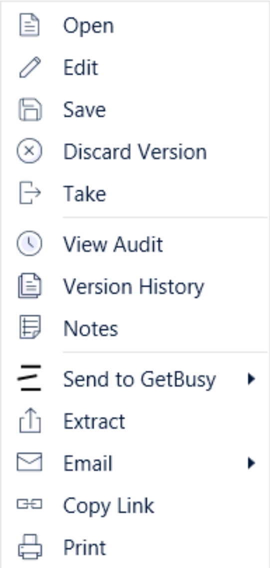
If you are editing documents from more than one cabinet then there will be a tab at the top of the list for each Cabinet.



You can switch to another tab by clicking on it. The other tabs will show the documents you are currently editing in other Cabinets.

12.3.1 Document options

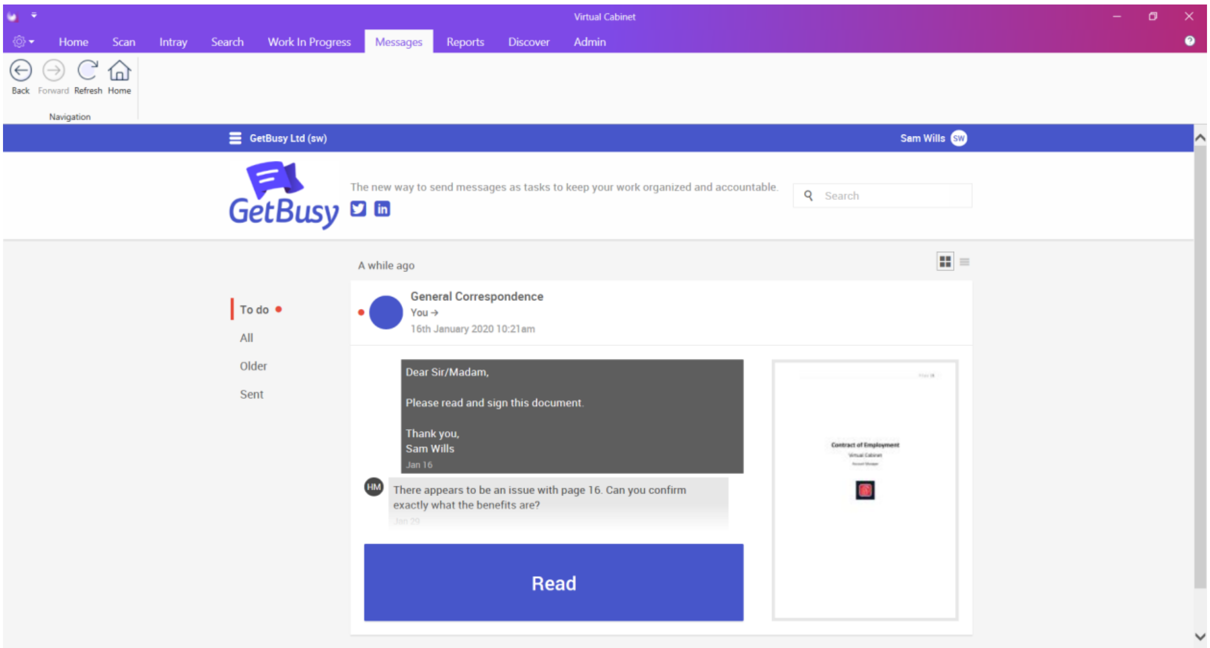
A full selection of document actions are presented on a context menu when you right-click the mouse on a document in the Work In Progress. These are the same actions that can be performed through the buttons on the Ribbon and have been discussed already.



13 Portal Messages

The Portal Messages tab is available for all users that have a Portal Publishing license. This area allows you to manage the documents that you have published to the Portal, view secure messages that your clients have sent you and respond to them.

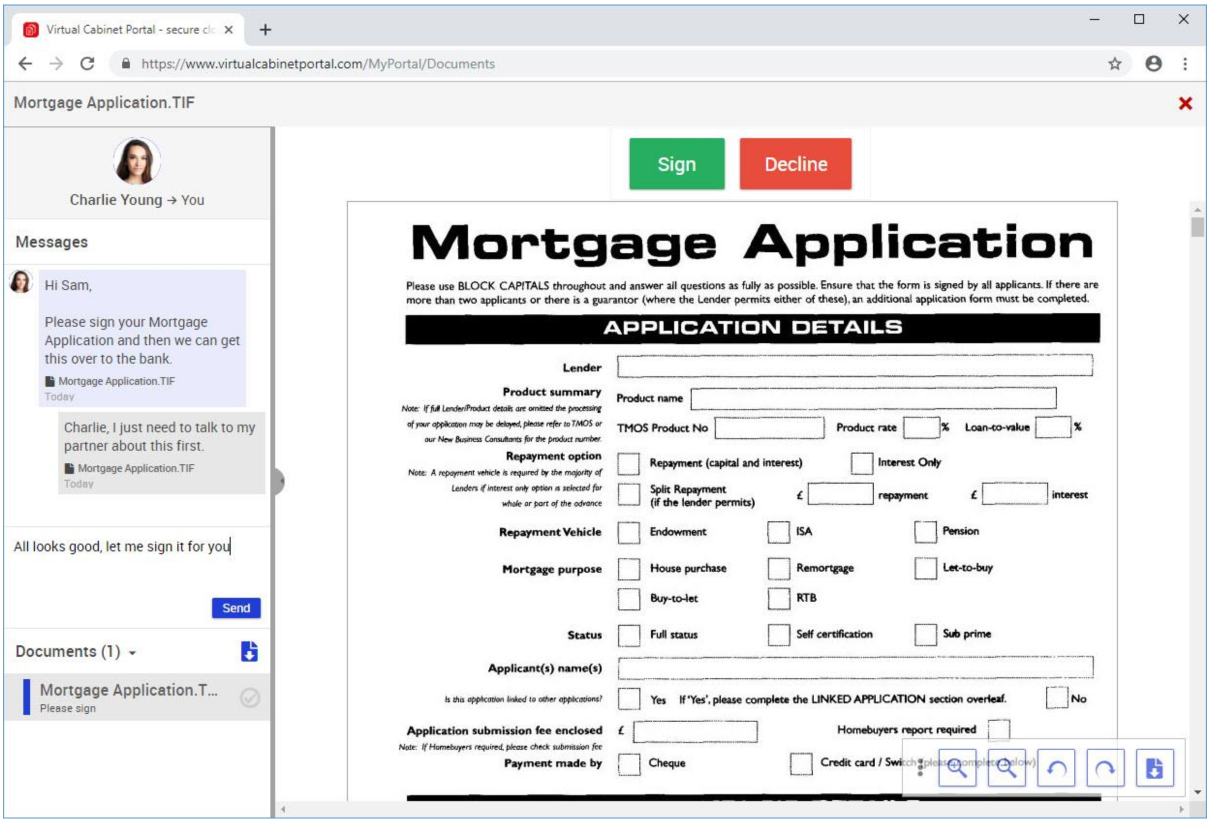
If prompted, use the Portal credentials that you would use to publish documents. Did you know you can use these same credentials to log in to the Portal website from any web browser: https://www.virtualcabinetportal.com/MyPortal/Login



When you publish a document you have the option of adding a message for your client. This will be the first message the client sees when viewing the document in the Portal. Underneath this message your client has the option to add new messages for you.

You will receive an email notification about the new message, with a link to the document in the Portal. You can open the document in the Messages tab in Virtual Cabinet, or if you're accessing your emails from a mobile device you can log in to the Portal website and view the message.

Respond to your client and they will receive an email notification about the new message, with a link to the website to open the document and see your new message. New messages are clearly highlighted as unread.



If the document was published to a collection of people, then everyone will receive an email notification about a new message that was added to the document.

When you are finished with your client communication you will retract the document, or the document will expire and be automatically retracted. At this point the Portal message history will be downloaded and added as a note to the document in Virtual Cabinet, allowing continued access to the messages after the document has been removed from the Portal.

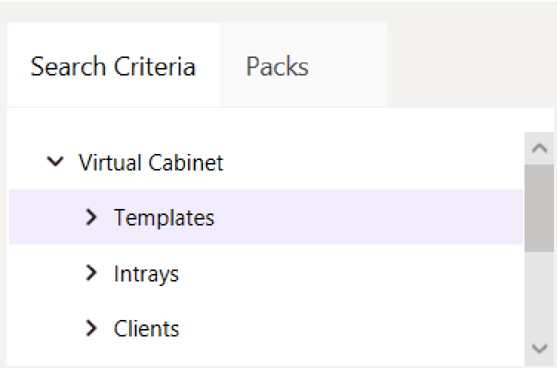
Top tip: by default, the text of your message is not added to the email notification that you and your clients receive. Email is not a secure method for transferring data and so we want to keep your messages private. If you do want to view these messages within the email, then there is a company-wide setting available in the VC Admin tab -> Portal -> Company Administration -> Security Options -> Messages in Email.

14 Document Creation

Virtual Cabinet contains Document Creation functionality that provides a way to create new documents based on Templates.

Documents created in Virtual Cabinet based on Templates can be configured to index automatically. Microsoft Word documents can be created using MERGEFIELDs configured in Virtual Cabinet.

Templates are stored in a dedicated and specially configured Filing Cabinet. When enabled, the Template Filing Cabinet will appear at the top of the Filing Cabinet List.



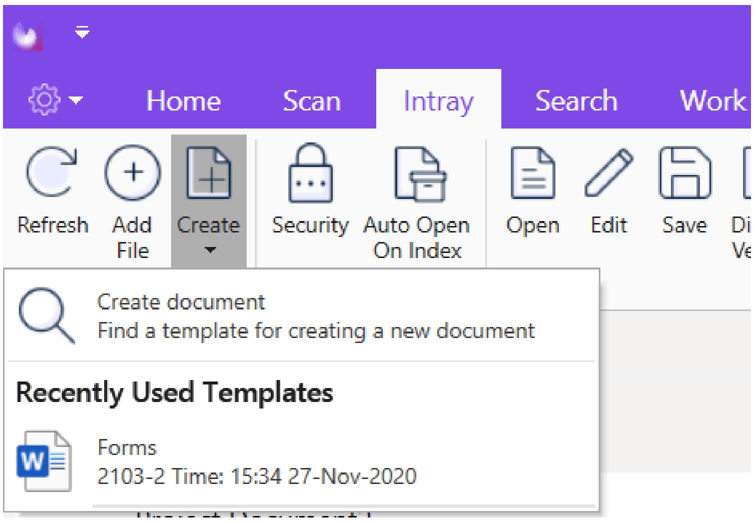
Document Creation is not turned on and configured by default. See the Virtual Cabinet Admin and Document Creation Guides for further information.

14.1 Creating a Document

There are several ways to start the Document Creation process in Virtual Cabinet.

14.1.1 Creating a Document from the Intray

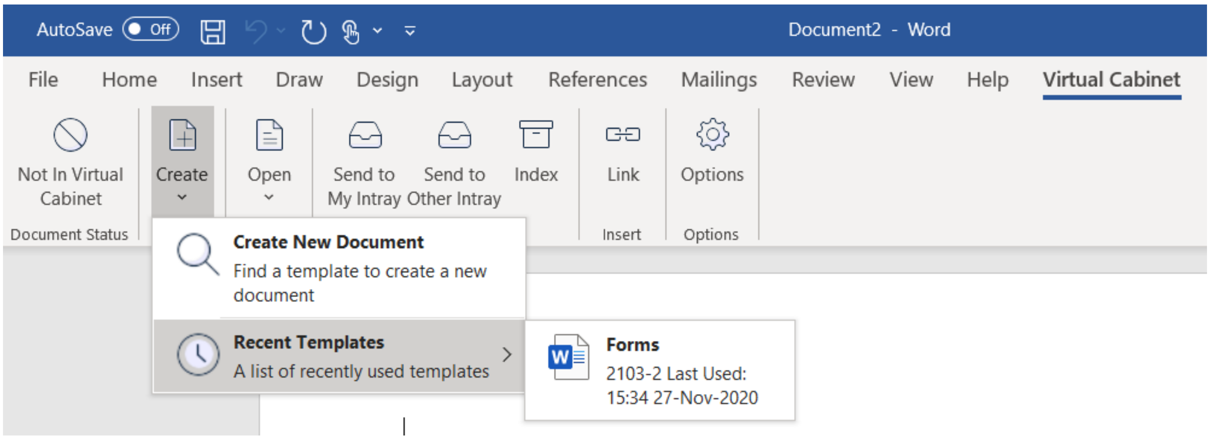
The Document Creation ribbon button in the Intray allows you to search for a Template or create a document using a recently used template.



You can add the document creation button to the Quick Access Toolbar by right clicking on it and selecting 'Add to Quick Access Toolbar'. The button can then be accessed at any time

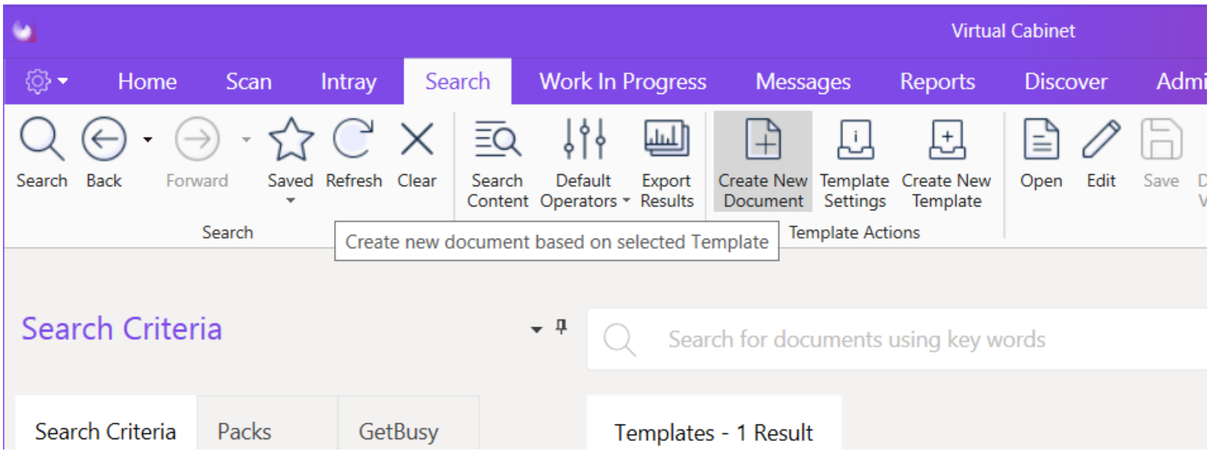
14.1.2 Creating a Document from Microsoft Word or Excel

The Document Creation ribbon button in the Virtual Cabinet Office Addin allows you to search for a Template or create a document using a recently used template.



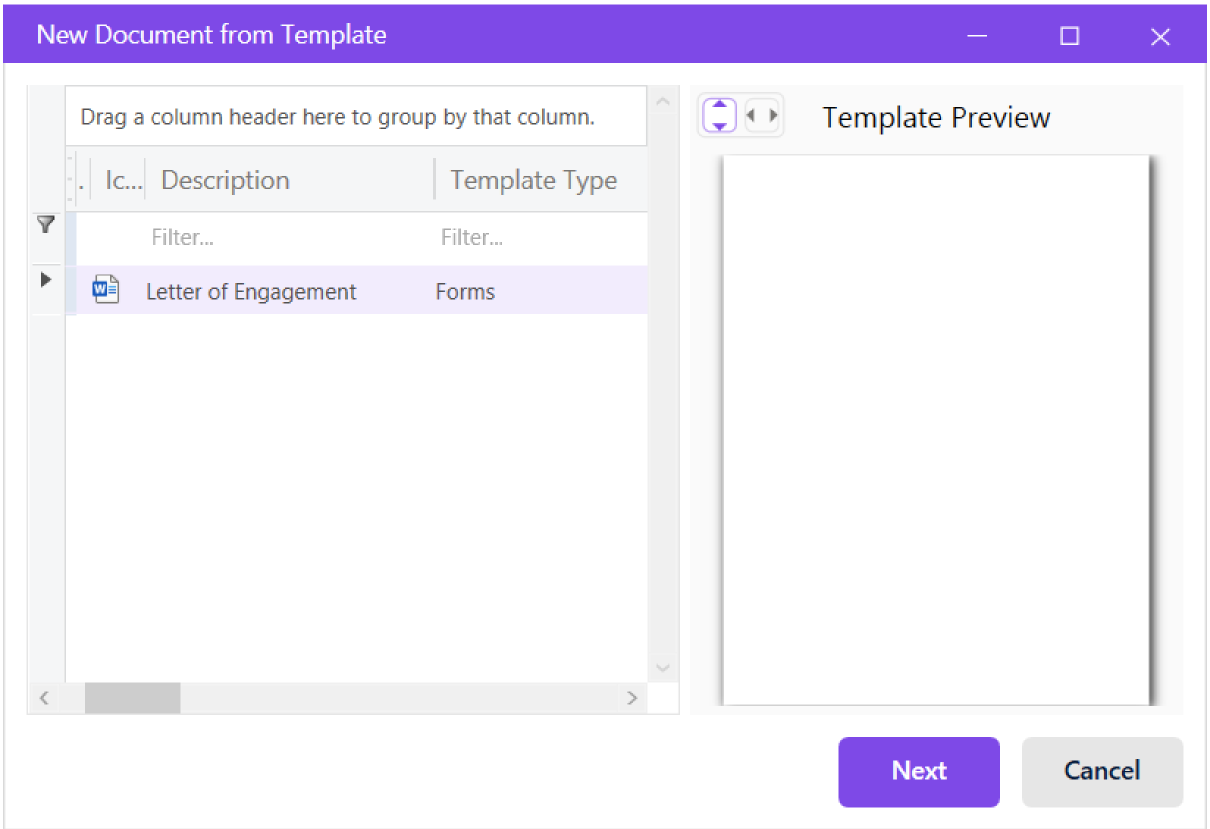
14.1.3 Creating a Document from the Template Filing Cabinet

You can search for Templates in the Search Tab and double-click a Template, or highlight a Template and click the **Create New Document** button.



14.1.4 Choosing a Template

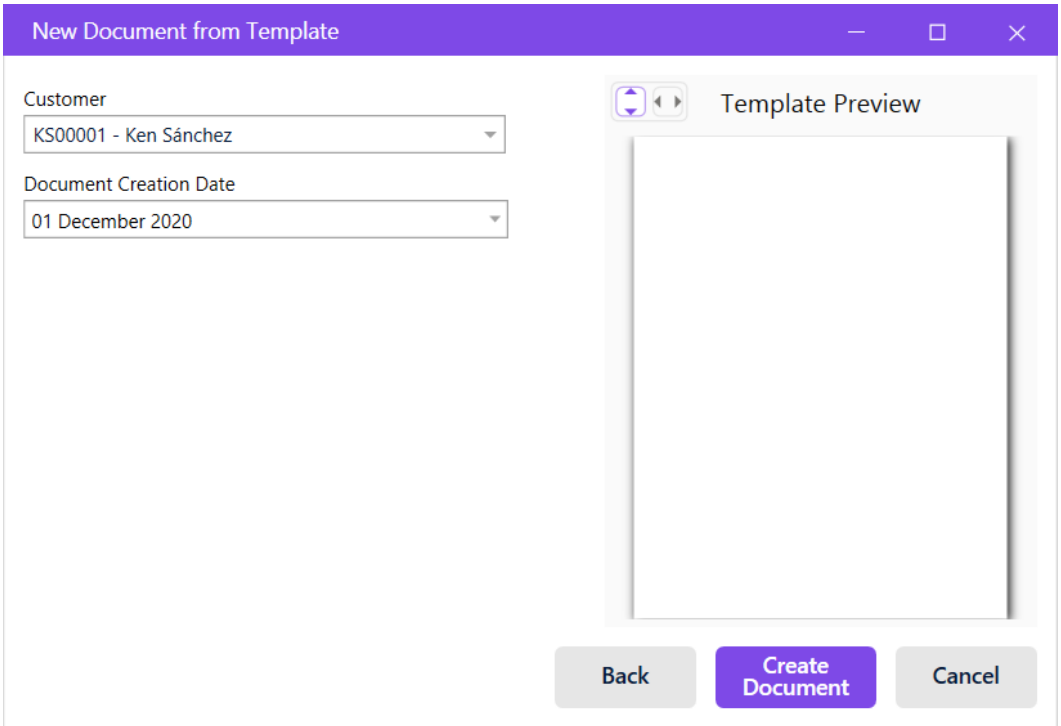
If the Document Creation process is started without selecting a specific template from the Intray or the Office Addin, you will be prompted to choose a template in the following window and click the **Next** button.



14.1.5 Completing Template Fields

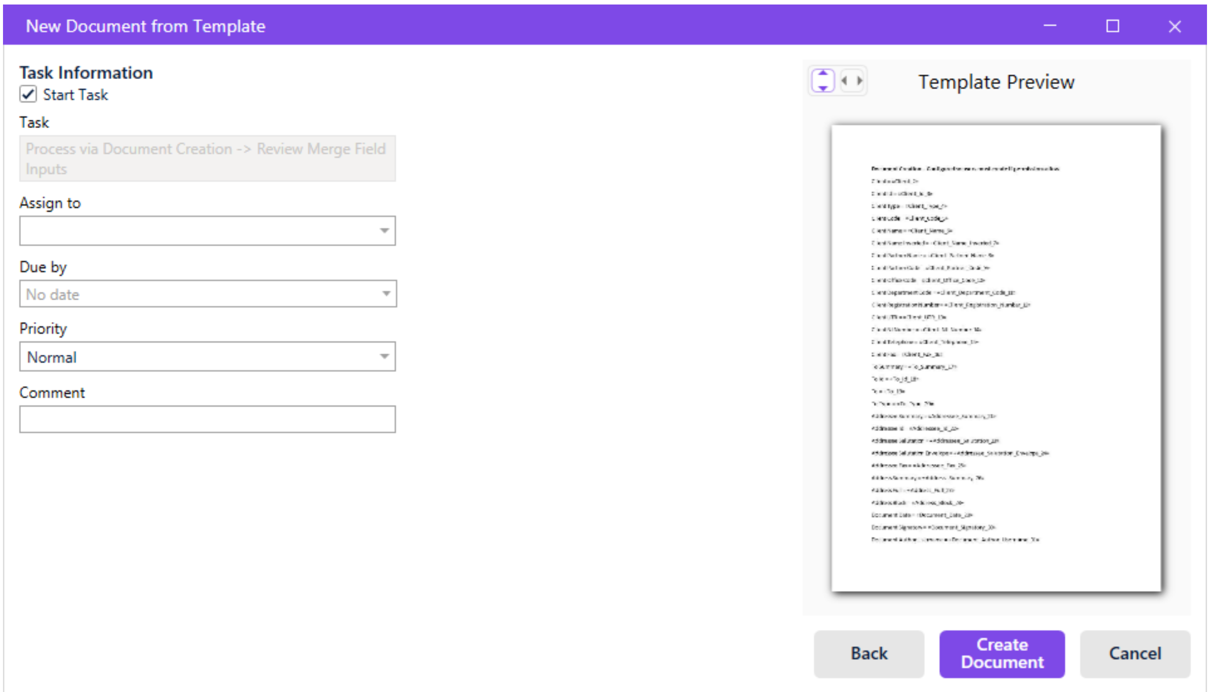
Some Templates may be configured to prompt you for information before a document can be created. This process is similar to Indexing a document, with Mandatory fields displayed with a red border.

Once all required fields are completed, click the **Create Document** button to create the document.



14.1.6 Completing Task Information

Some Templates may be configured to prompt you to enter Task Information before a document can be created.

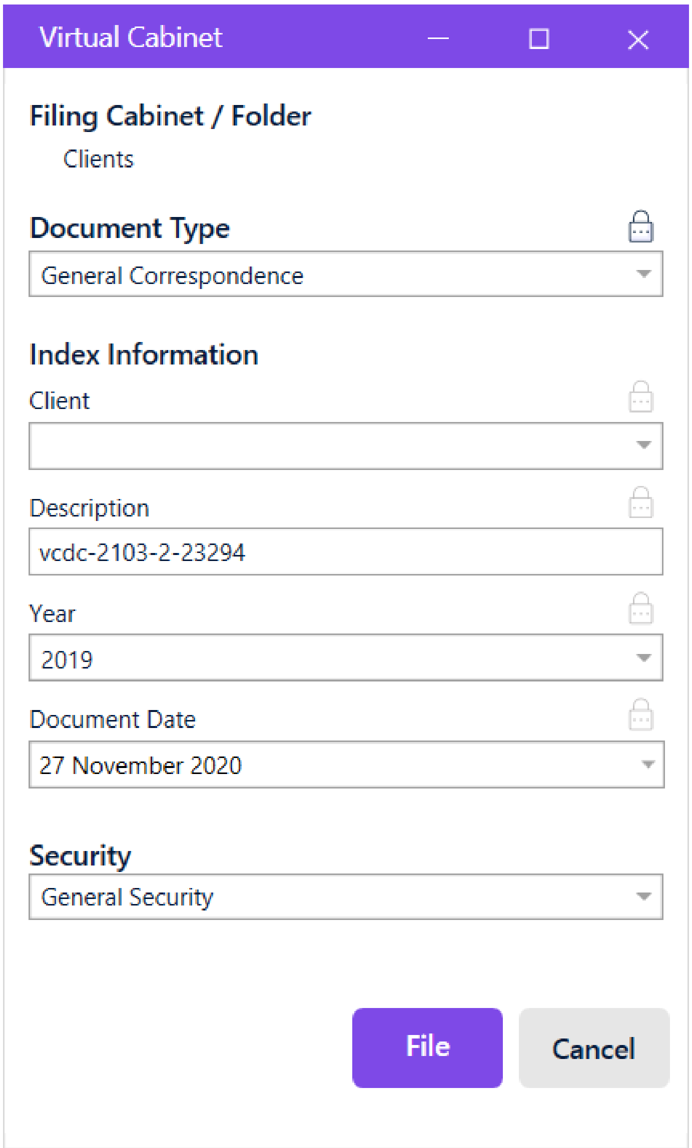


When the Document is created, the configured Task will also be started against the Document.

You will not see the Task Information Page if the Template Settings are not configured to Start a Task.

14.1.7 Indexing Created Documents

Depending on how a selected Template is configured, you may be prompted to Index the new document. The Indexing window may be pre-populated with some information, requiring you to complete the rest.



You will not see the Indexing window if the Template Settings are configured to Auto-Index documents.

14.1.8 Editing Created Documents

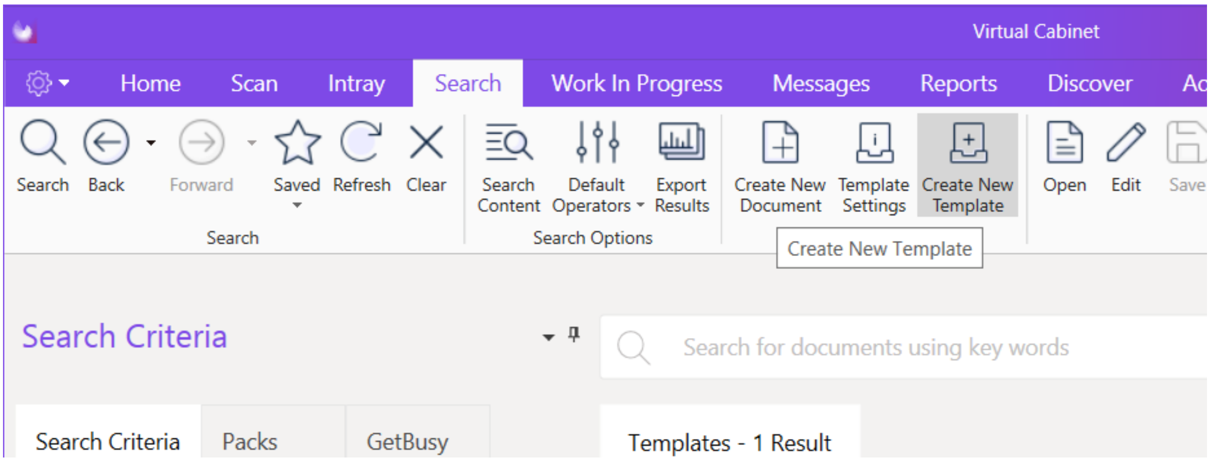
Once a new document is indexed to Virtual Cabinet, it will be opened for editing. If the document is based on a Microsoft Word template and the Template has been configured with MERGEFIELDs, the data will have been merged into the document before it is opened for editing.

During the editing of a newly created document, the edited version will be available in your Work In Progress Tab until you save it to Virtual Cabinet as a new version, in the same way as any other document you edit.

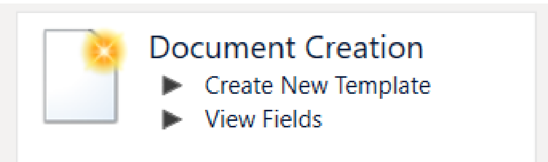
14.2 Creating a Template

There are a number of ways to create and store a new Template in Virtual Cabinet such as:

- Indexing a document to the Template Filing Cabinet
- Using the **Create New Template** ribbon button in the Search Tab, having performed a search on the Template Filing Cabinet



- Using the **Create New Template** option in the Admin Tab



See the Virtual Cabinet Document Creation Guide for further information.

14.3 Editing a Template

If you wish to edit or change the content of a Template, you must search for it in the Template Filing Cabinet and select the **Edit** ribbon button, available from the Document Actions ribbon group, or on the Right-Click Menu.

14.4 Configuring Template Settings

A Template without Settings simply prompt people to provide indexing information for new documents and then open them for editing.

Template Settings provide configuration options to prompt people for information required to create new documents, and to specify how documents created using the Template should be indexed.

Template Settings can be accessed by searching for and selecting the Template in the Search Tab and clicking the **Template Settings** ribbon button, also available on the Right-Click Menu.

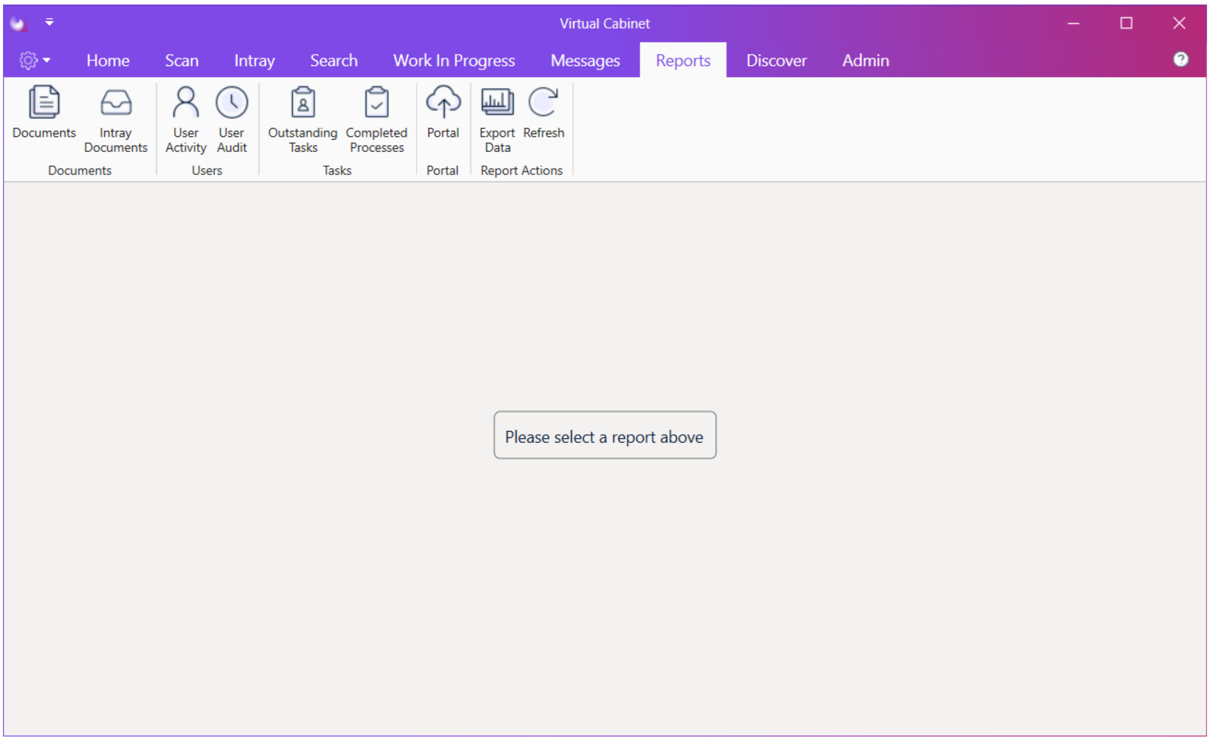
See the Virtual Cabinet Document Creation Guide for further information.

15 Reports

Virtual Cabinet provides reports to help managers understand their work, what users are doing and how they can get the most out of Virtual Cabinet.

15.1 The Reports Tab

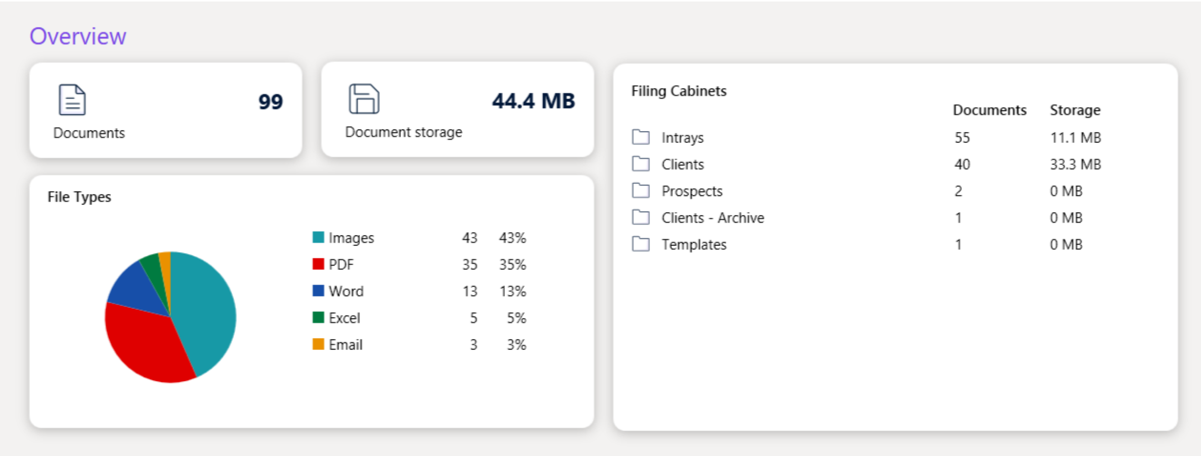
The Reports tab can be reached by clicking on 'Reports' on the Ribbon near the top of the window. The Reports tab will only be available to users that are granted access to one or more reports via Access Settings (See the Virtual Cabinet Admin Guide for further information about Access Settings).



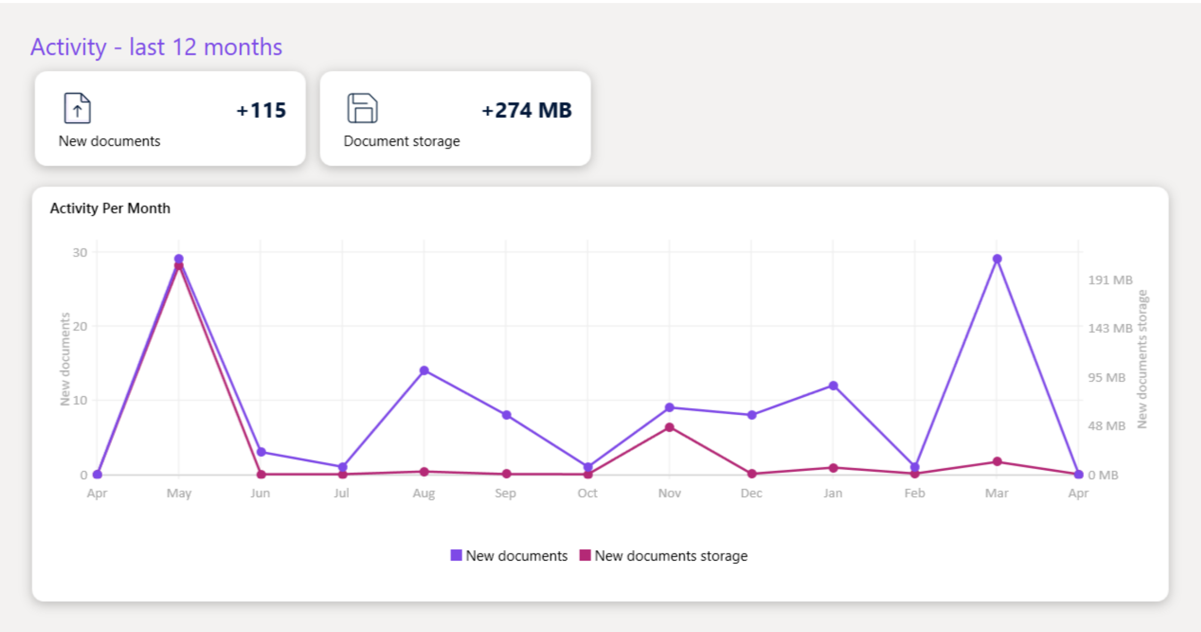
15.1.1 Document Report

The Documents report gives you an overview of all the documents in Virtual Cabinet.

Overview shows you the total number of documents stored in your Virtual Cabinet system, and the amount of space those documents take up. You can see these numbers broken down per filing cabinet, highlighting where your documents are stored, and which areas aren’t as well used. N.B. there are other system and database files stored on your server that will take up additional space.

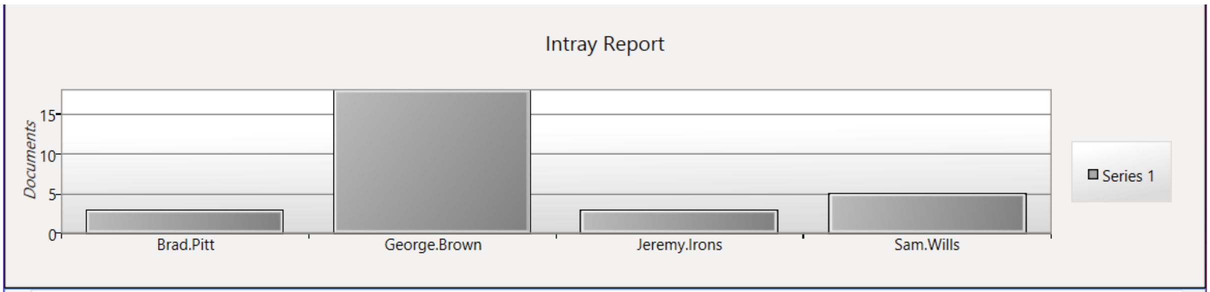


Activity shows you how many documents have been added over the last 12 months (excluding the current month). You can see trends in document storage over the year, allowing you to predict future usage and prepare your infrastructure accordingly.



15.1.2 Intray Report

The ‘Intray Report’ button generates a graph showing the numbers of documents that each user, or group has in their Intray. Below the report, there is a table that lists the figures that were used to create the graph.



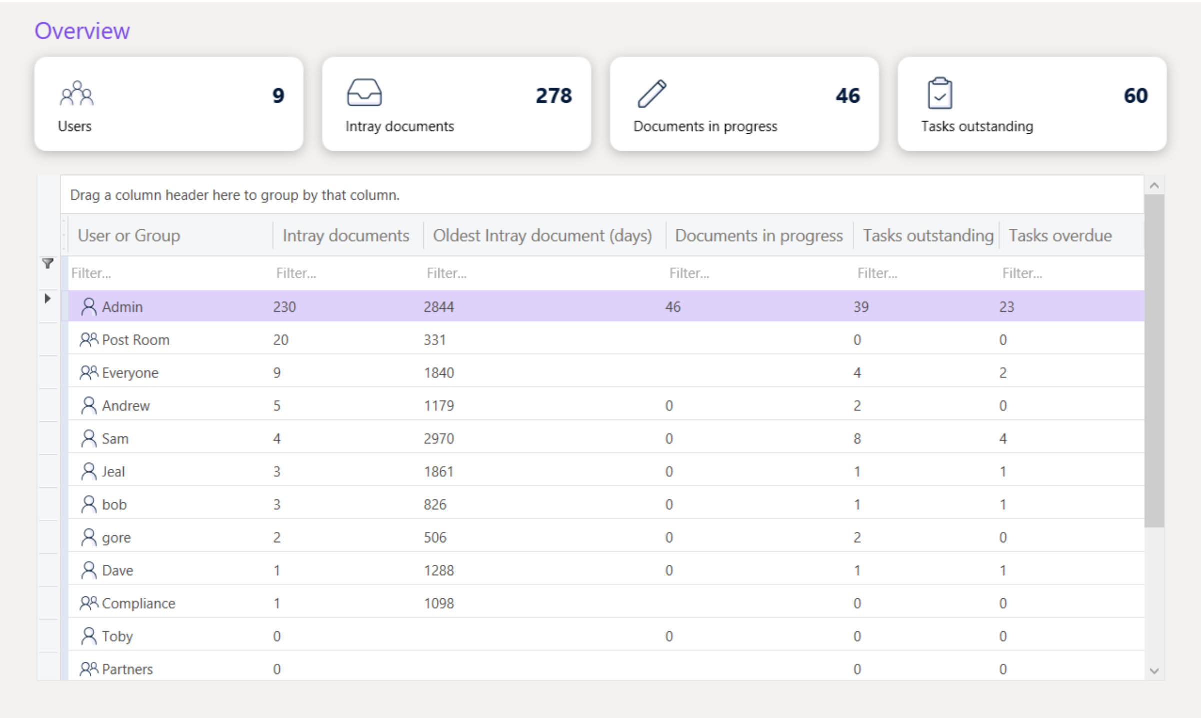
Drag a column header here to group by that column.

Users Intray	Count
Filter...	Filter...
Brad.Pitt	3
George.Brown	18
Jeremy.Irons	3
Sam.Wills	5

15.1.3 User Activity Report

The User Activity Report gives you an overview of how users are using Virtual Cabinet, and what work they have outstanding.

Overview shows you how many users you have in your system, how many documents are in Intrays, how many documents are checked out for editing, and how many Tasks are outstanding. You can also see this broken down per User and Group to see where issues may lie. Documents shouldn't be left in Intrays for too long as they are not visible to the rest of the business. Documents left checked out for editing can be edited by anyone else, and the changes can only be seen by everyone once they've been saved as a new version.



Overview

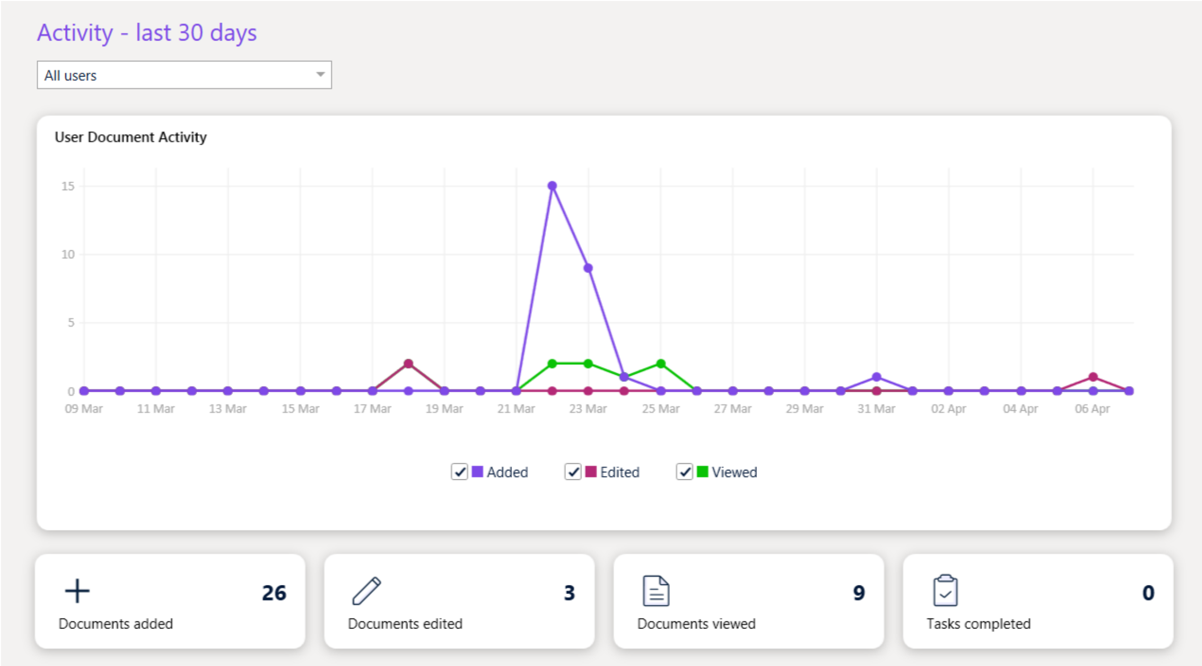
Users	Intray documents	Documents in progress	Tasks outstanding
9	278	46	60

Drag a column header here to group by that column.

User or Group	Intray documents	Oldest Intray document (days)	Documents in progress	Tasks outstanding	Tasks overdue
Filter...	Filter...	Filter...	Filter...	Filter...	Filter...
Admin	230	2844	46	39	23
Post Room	20	331		0	0
Everyone	9	1840		4	2
Andrew	5	1179	0	2	0
Sam	4	2970	0	8	4
Jeal	3	1861	0	1	1
bob	3	826	0	1	1
gore	2	506	0	2	0
Dave	1	1288	0	1	1
Compliance	1	1098		0	0
Toby	0		0	0	0
Partners	0			0	0

The Activity section shows you what users have been up to over the last 30 days. You can see who is using the system effectively, and how they're using it. This may help to target further staff training.

You can filter this section by a group of users using the drop-down list under the Activity title. For example, to see all the activity for your team of users only.

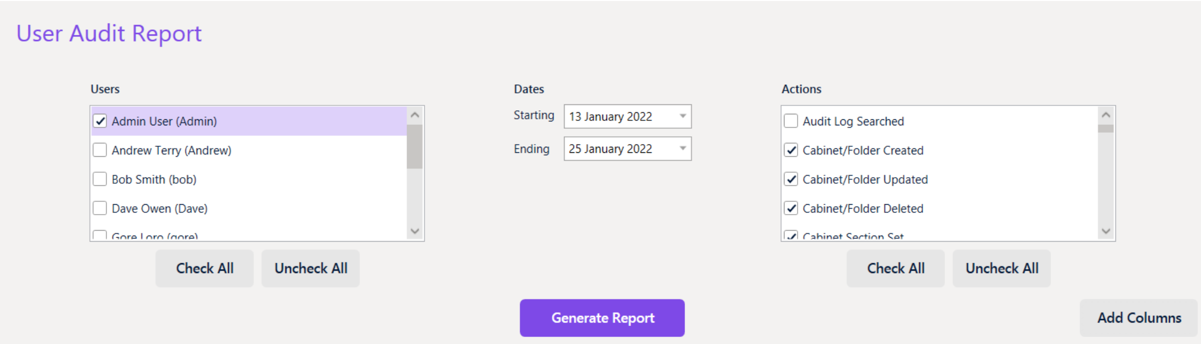


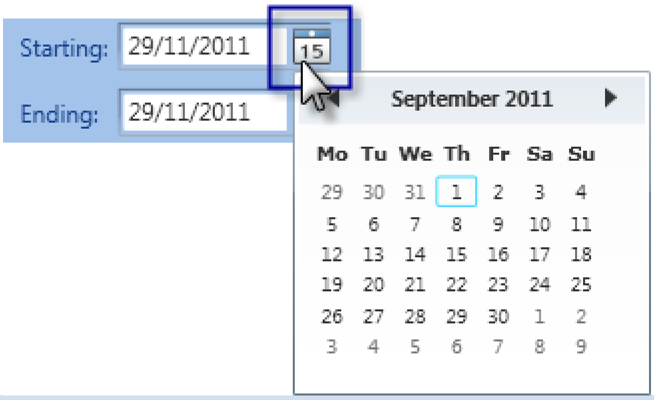
Drag a column header here to group by that column.

User	Last active	Documents added	Documents edited	Documents viewed	Tasks completed
Filter...	Filter...	Filter...	Filter...	Filter...	Filter...
Admin	06/04/2022	26	3	9	0
Andrew		0	0	0	0
bob	26/05/2021	0	0	0	0
Dave		0	0	0	0
gore	31/03/2022	0	0	0	0
Jeal	21/09/2021	0	0	0	0
Sam	28/10/2020	0	0	0	0
Toby	18/02/2019	0	0	0	0
VCServices	01/12/2021	0	0	0	0

15.1.4 User Audit Report

The User Audit Report enables you to generate reports about specific people or actions that have happened within the system. The screen is split into two halves. The Search Criteria panel fills the upper half, and the resulting report is displayed in the lower half.



Option	Description
Users	Lists all the Virtual Cabinet Users in the system. Each ticked User will be included in the report. Check All — Ticks all the Users Uncheck All — Unticks all the Users
Dates	Lets you choose the range of dates that you are interested in. Only audit actions between the two dates will be included in the report. The 'calendar' icons display pop-up calendars to help you select dates. 
Actions	Lists all the different types of action that can be audited. Each ticked action will be included in the report. Check All — Ticks all the actions Uncheck All — Un-tick all the actions
'Generate Report' button	Generates a new report based on the supplied search criteria.

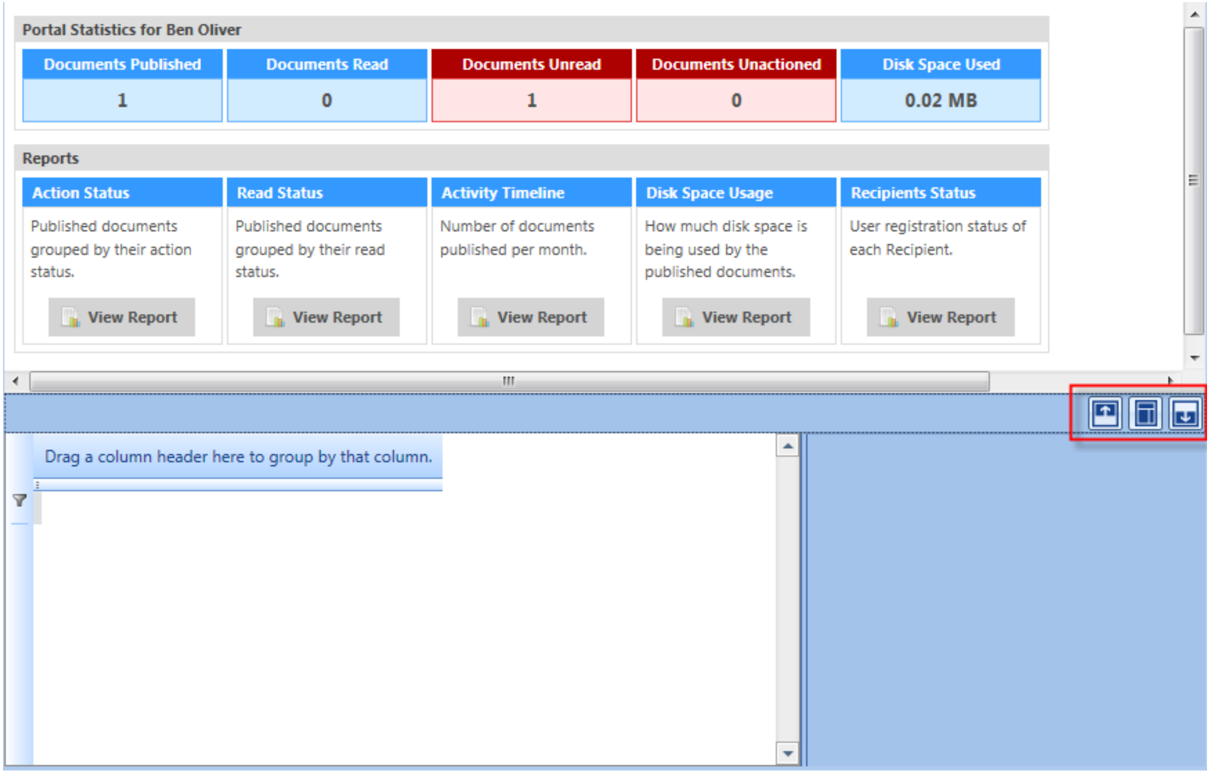
Add Columns

Use the Add Columns button to add additional document index columns, for example: Client Name, Document Description. Where an audit action relates to a document you can see the information about that document for more context. If you do not have access to that document you will not see the document indexes, you will instead see <no access>.

15.1.5 Portal Report

The Portal Report ribbon button provides access to multiple reports related to usage of the Virtual Cabinet Portal and is only available to Virtual Cabinet Portal Publishers. The screen is split into two halves. The top half provides a window to the Portal itself and displays reports in Chart form. The data used to build the charts is displayed in the bottom half of the window.

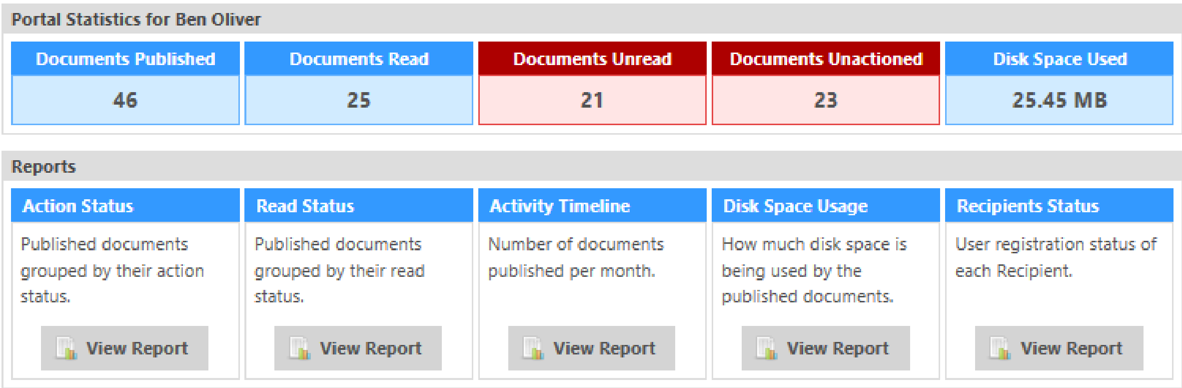
This screen is ideally suited to large monitors due to the nature of the information displayed, but options to maximise each half of the screen have been provided for those with smaller monitors.



15.1.5.1 Portal Report Dashboard

The Portal Report Dashboard appears when the Portal Report button on the ribbon is clicked. If you are not already logged on to the Portal through Virtual Cabinet, you will be prompted to enter your Portal Email Address and Portal Password.

The Dashboard provides headline statistics of your personal portal usage and access to all available Portal Reports.

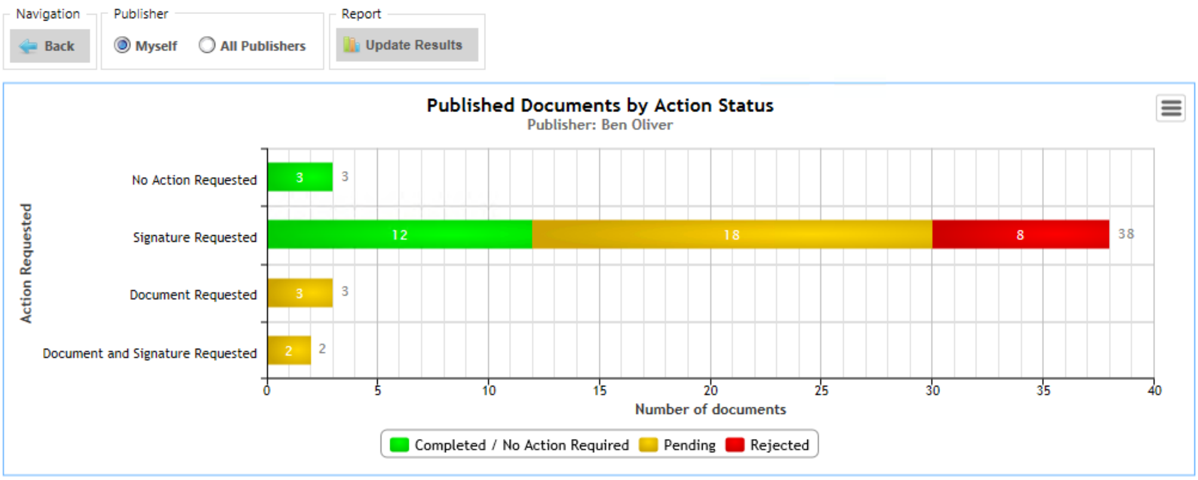


Statistic	Description
Documents Published 46	Documents Published is the current number of documents you have published on the Portal.
Documents Read 25	Documents Read is the current number of documents you have published to the Portal that have been read (opened) by the Recipient.
Documents Unread 21	Document Unread is the current number of documents you have published to the Portal that have NOT been read (opened) by the Recipient.
Documents Unactioned 23	Documents Unactioned is the current number of documents you have published to the Portal with an Action for the recipient to complete (e.g. Sign), where the Recipient has NOT completed the Action.
Disk Space Used 25.45 MB	Disk Space Used is the current amount of Portal Disk Space being consumed for all the documents you currently have published to the Portal.

To view a particular Portal Report, simply click the **View Report** button for the corresponding Report in the Reports section of the Dashboard.

15.1.5.2 Action Status Report Chart

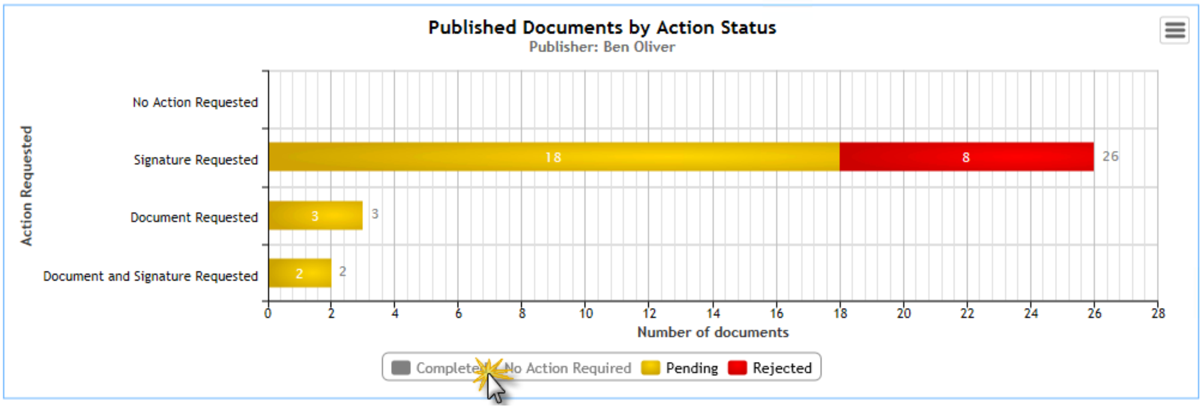
The Action Status Report provides information about currently published documents, segregated by related Actions e.g. Signature Request, Document Request.



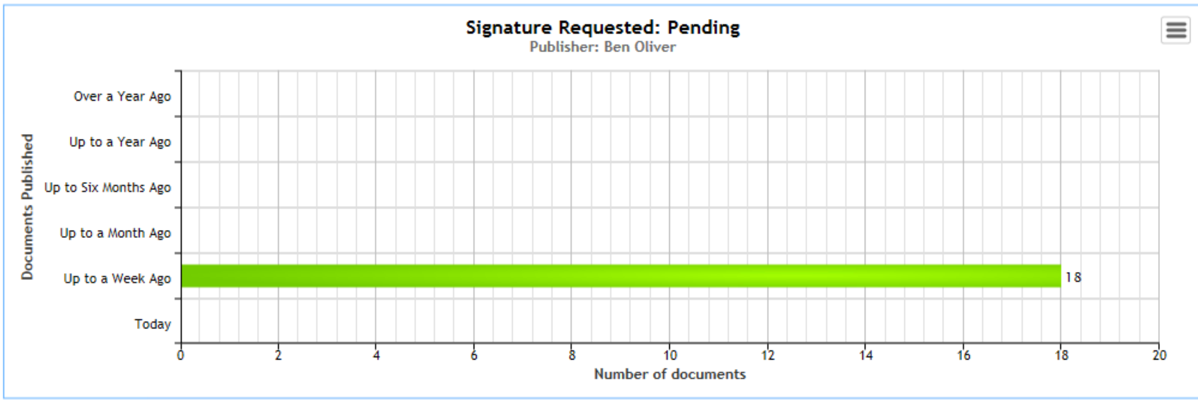
The Report defaults to only showing documents on the Portal published by you, but you can select **All Publishers** and click **Update Results** to see information for other Publishers. You can get back to the previous level in the Portal Report by clicking the **Back** button.

The Chart is interactive in a number of ways:

- You can hide information for an Action Status by toggling the corresponding item in the Chart Legend.



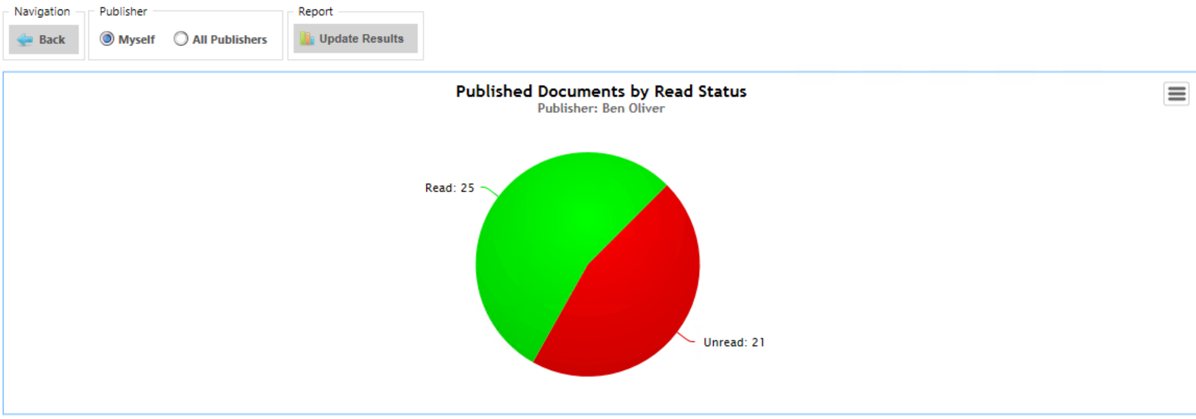
- You can click any bar segment to drill down into an Aged Sub Report that segregates the data be the period in which they were published.



You can further refine the data you see in the bottom half of the screen by clicking a bar in the Aged Sub Report.

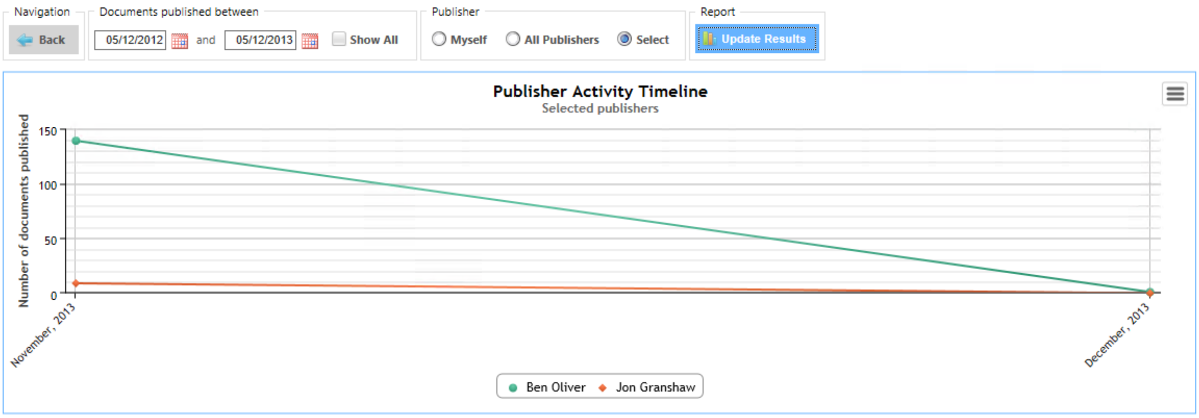
15.1.5.3 Read Status Report Chart

The Read Status Report provides a simple pie chart showing the current summary read status of each document published to a recipient. If the recipient has opened the document on the portal it will be Read. If the recipient has not opened the document it will be Unread.



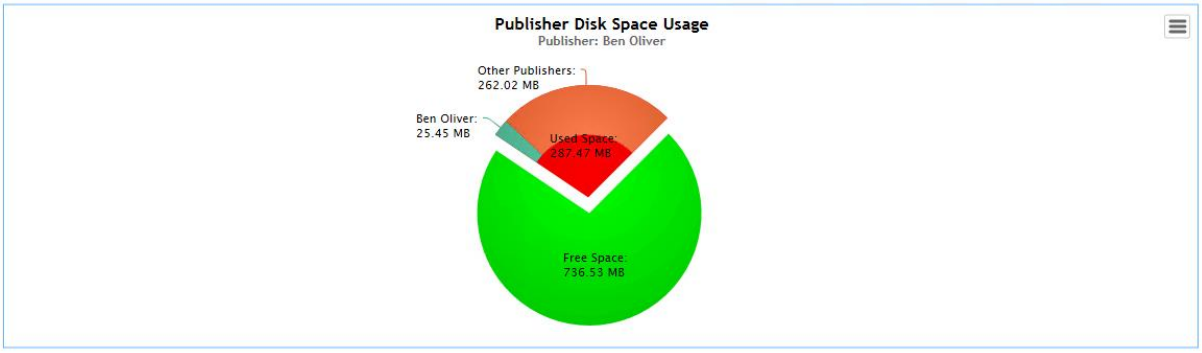
15.1.5.4 Activity Timeline Report Chart

The Activity Timeline Report is designed to provide you with statics about your Portal usage over time. The line graph shows the total number of documents published to the Portal by you, or other selected Publishers, by calendar month during the specified Date Range.



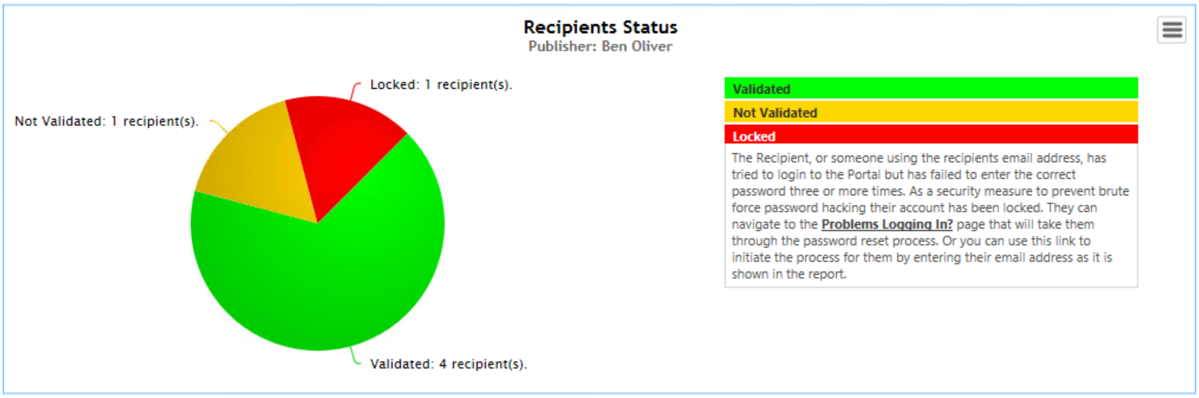
15.1.5.5 Disk Space Usage Report Chart

The Disk Space Usage Chart provides a pie chart that shows the amount of available and used Portal disk space by Publisher



15.1.5.6 Recipient Status Report Chart

The Recipient Status Report enables you to see the Status of Recipients to whom you have published documents, classifying their Portal accounts as Validated, Not Validated or Locked. The harmonica legend to the right of the pie chart provides and explanation of each status and guidance on how to remedy any issue a recipient may be experiencing when attempting to access the document you have published to them.

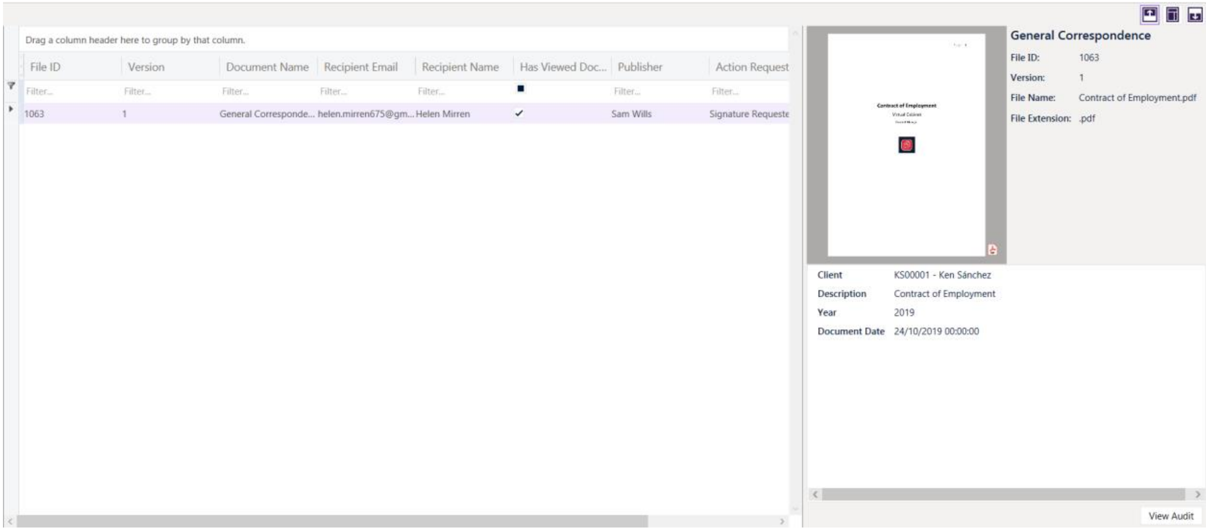


15.1.5.7 Report Data

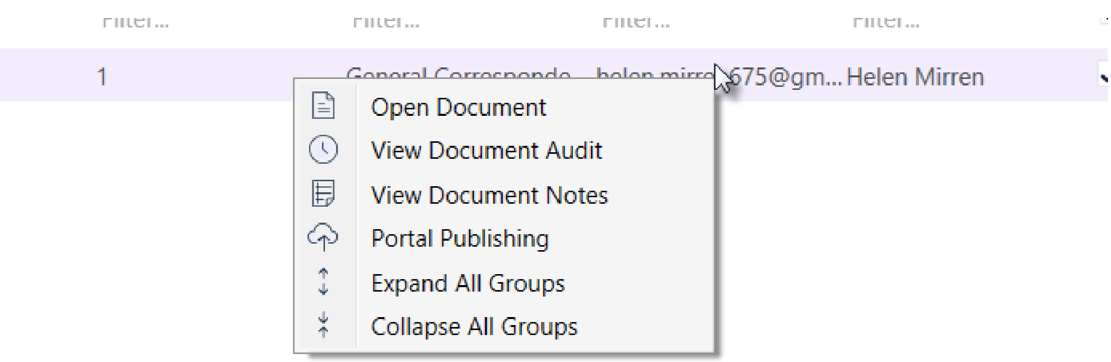
As you interact with the Report Charts in each Portal Report, the data in the bottom half of the screen will change to reflect your selection (with the exception of the Activity Timeline Report).

The data grid shows relevant information about the Portal documents available from within the Portal. You can group, filter and sort the data in the the same way as the Virtual Cabinet Search and Intray screens to suit your preferences.

Selecting a row in the grid will fetch information about the document stored in Virtual Cabinet (the Portal does not know about this data) and present it to the right of the grid, along with a thumbnail of the document and an option to open the document Audit window.

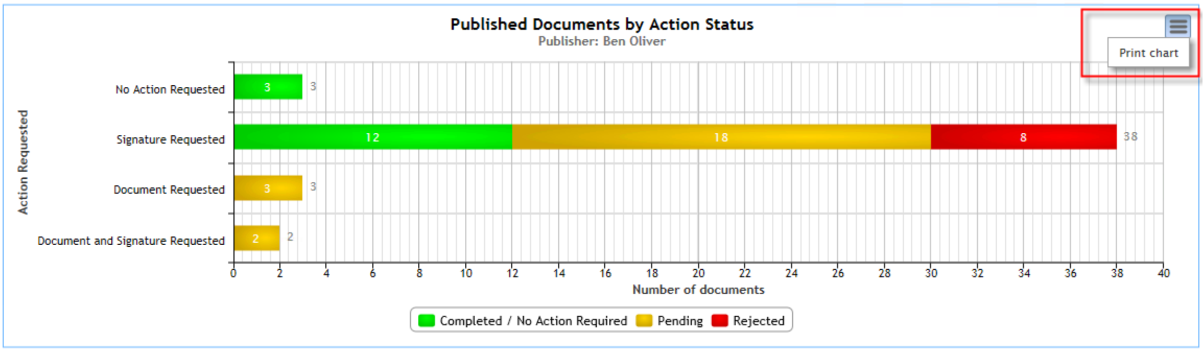


You can Right-Click a document to access appropriate Document Actions, including **Portal Publishing** which will provide further information and access to the Publish and Retract features.



15.1.5.8 Printing Portal Report Charts

Portal Report Charts can be printed using the button in the top right hand corner of the chart area.



15.1.6 Outstanding Tasks Report

The Outstanding Tasks report shows you an overview of what is currently being worked on throughout the business.

You will see Tasks in here where you are either the Worker, Owner, Creator or Supervisor. For security purposes you will not see tasks that you don't have a relationship to.

If, as an administrator, you do need to view all Tasks in the system, then we would recommend utilising the Supervisor Task role. A user can see and action any Tasks they are a Supervisor of. If you assign a Group to the Supervisor role then you can control which users should be able to administer those Tasks.

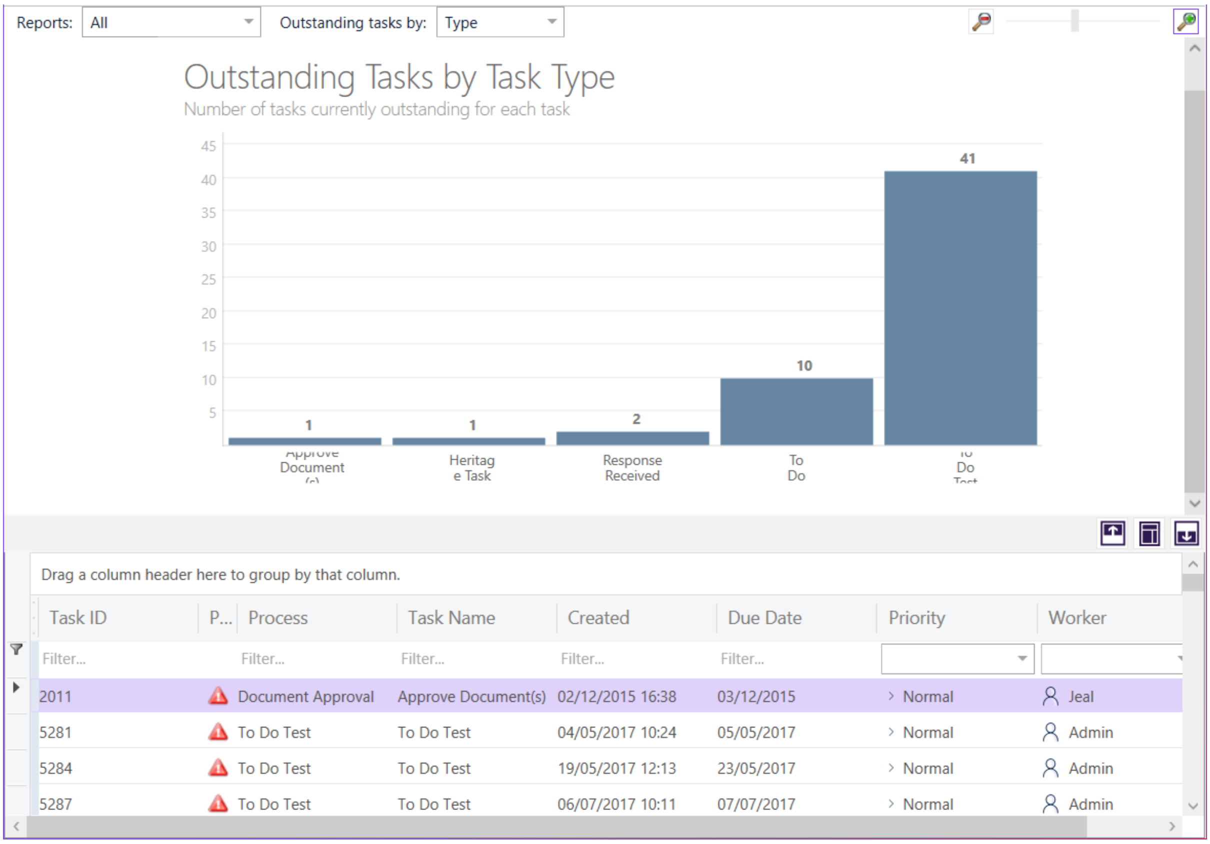
This report can be displayed in several different ways.

1) Show reports for all tasks of just those allocated to yourself in different roles, supervisor, creator, worker and owner.

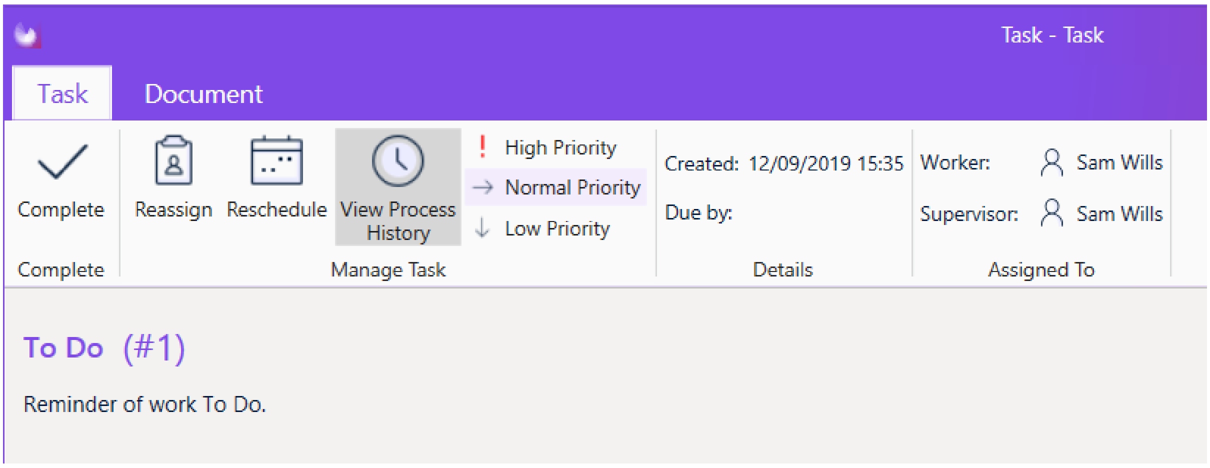
2) Filter by Type, Process and Worker.

3) Sort, filter or group by columns.

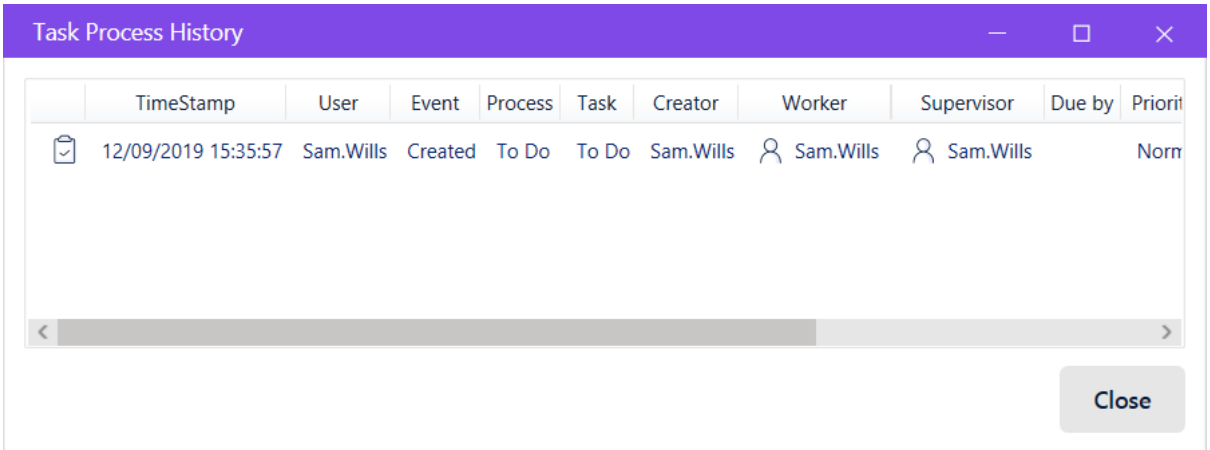
A task can be opened from the report by simply double clicking on the row.



Opening a task from the outstanding tasks report provides you access to the history of the process which the task is a part of.



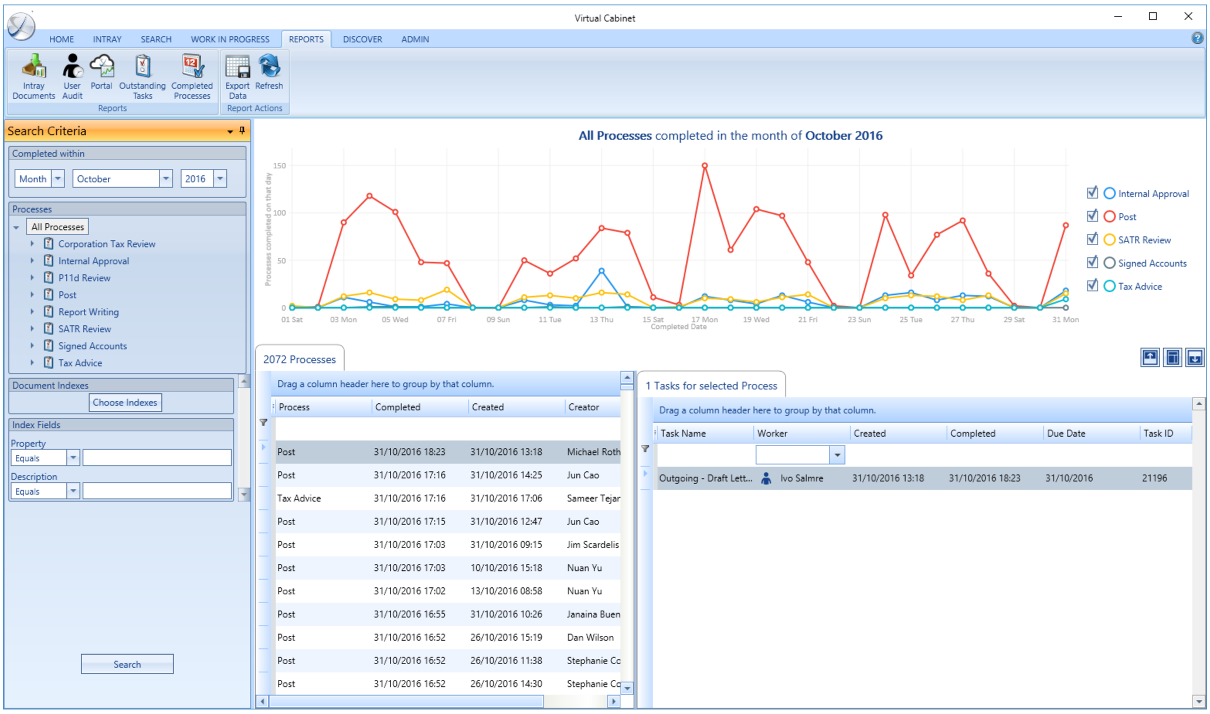
Viewing the history of the process provides granular reporting on the tasks that have been completed up to this point.



15.1.7 Completed Processes Report

The Completed Processes report allows you to search for Processes that have been completed by users.

A **Process** is a collection of **Tasks**.

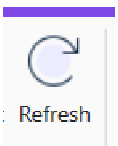


Use the Search Criteria on the left to search for Completed Processes. Find Processes completed within a range of dates, a particular Week, Month, or Year. Choose from a list of all your Processes and find particular types of work.

The search results will display a list of matching Processes. Select a Process and see a list of all the Tasks for that Process in the grid on the right. Double click a Task to see the history of that Task, the documents that it refers to, and any comments added by users.

For security purposes you will only see Processes where you can search for the primary document of the Process. This is to ensure that Processes of a sensitive nature are not accessible by users that can't see the related document.

Sort, filter or group by any of the columns in these grids to visualise the data to your advantage.



Use the Refresh button to refresh the current results and see any new completed Processes.

Document Indexes

You can search on information about the documents that these Processes are linked to. For example, all Processes that are linked to documents for the client "ACE Concrete Ltd".

Click on "Choose Indexes" in the Search Criteria panel to specify which document indexes you are interested in. The indexes will be displayed at the bottom of the Search Criteria panel. Enter values in these indexes and click Search to find Processes that have documents with these values.

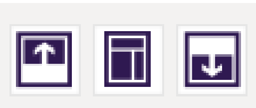
Use the full range of Search functionality you are used to, including Equals, Starts With, and Contains searches.

N.B. Please be aware that the search is performed on the primary document of the latest Task in the Process.

Graph

The accompanying graph shows you how many Processes you have completed and the spread of those Processes throughout your chosen time period. Hopefully, this will give you an insight in to the work your company is doing and your busy/slow periods.

Hover your mouse over any data point in the graph to see a breakdown of the results for that day/month. If you're not interested in a particular Process then simply untick it from the legend and the graph will hide it.

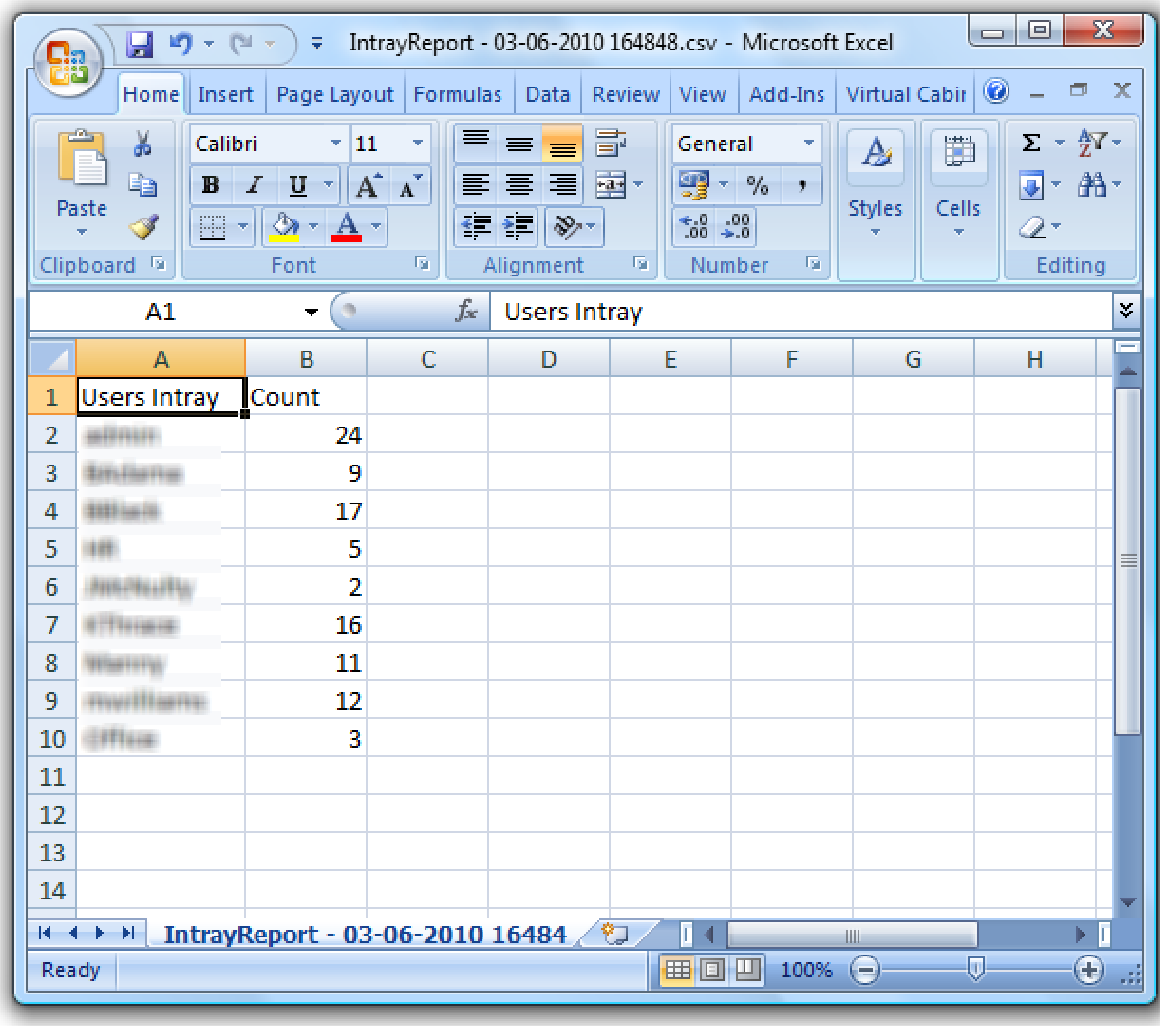


If you want to focus on the lists of Processes then use the icons above to show/hide the graph.

15.1.8 Export to CSV

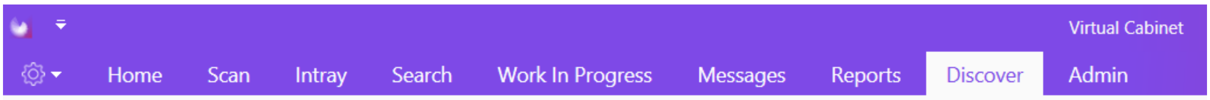
The 'Export to CSV' button exports the report data contained in the data grid. This button will open a new window so you can specify a location to save the data file.

The CSV data file can be opened in other Windows programs such as Microsoft Excel.

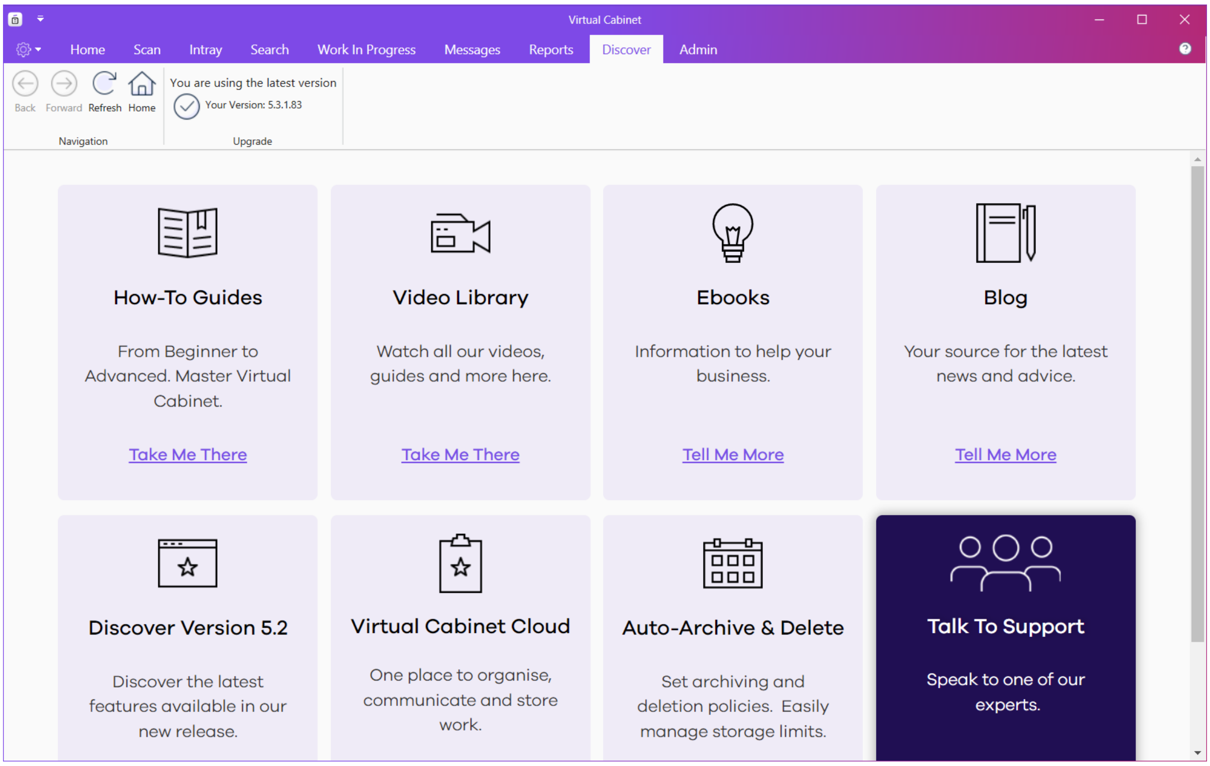


16 Discover

The Discover tab is accessible through the Ribbon at the top of the window, and provides access to online Virtual Cabinet news, guides and support. Resources in here will be updated regularly to keep you informed about the latest releases, as well as tutorials on how to get the best from your Virtual Cabinet system.



You can navigate through the site using the Navigation buttons in the ribbon.



16.1 Navigate

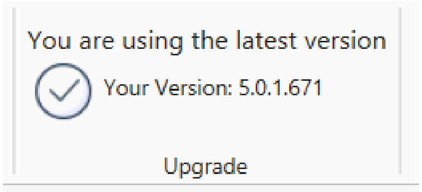
keep you informed about the latest releases, as well as tutorials on how to get the best from your Virtual Cabinet system.

Access to the Discover tab will require an

Button	Description
Back	Goes to the previous page.
Forward	Goes to the next page, after clicking Back.
Refresh	Re-fetches a fresh copy of the page.
Home	Returns to the main Discover page.

16.2 Upgrade

The Upgrade section shows your current version number and will keep you informed when a new version of Virtual Cabinet becomes available. We recommend upgrading because the most recent version always has the newest features and fixes.



When an upgrade is available, the panel will show you your current version and the newest available version.

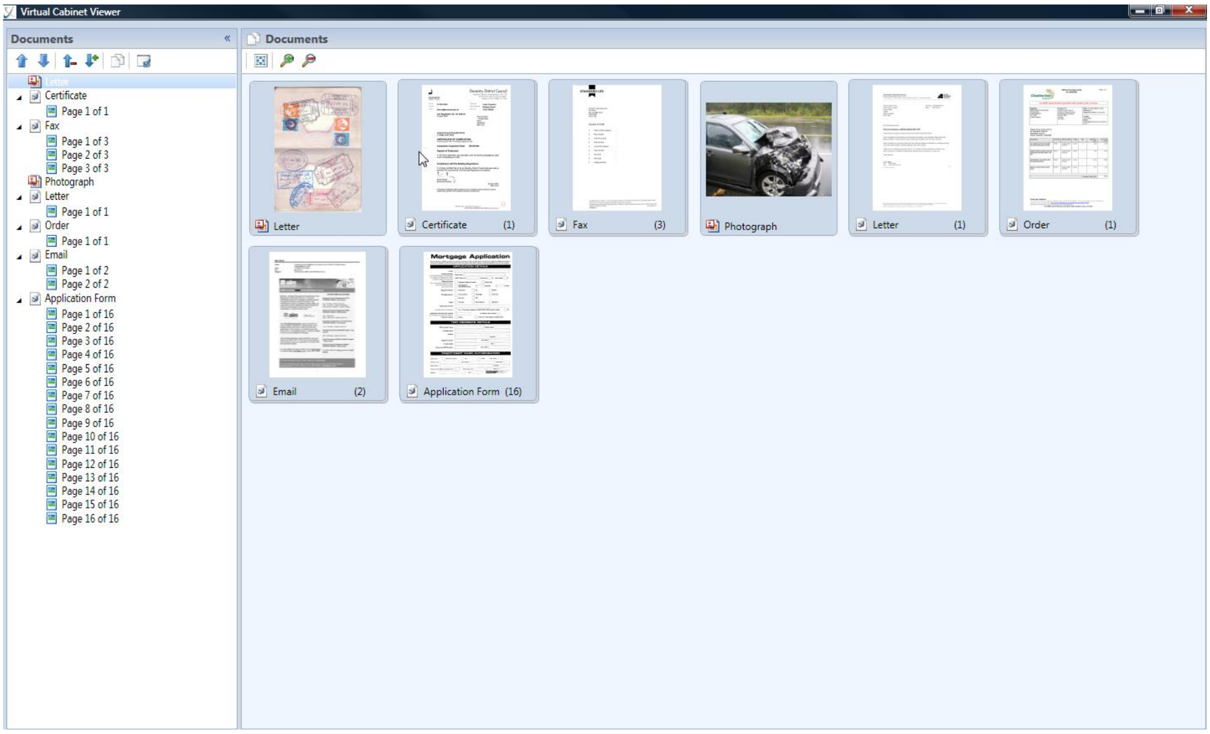
17 The Document Viewer

Virtual Cabinet contains a Document Viewer that can present multiple documents in a single window. This enables you to quickly navigate between documents while reading, rotating and comparing pages.

17.1 The Viewer Window

The Viewer appears throughout Virtual Cabinet and will provide differing functionality depending on the type of document you are looking at.

The Viewer has a large central viewing area and also displays a list of documents and pages.



17.2 Viewer Options

There are several options available for the Virtual Cabinet Viewer. The Viewer Options Window can be accessed by clicking on the ‘Options’ button near the top of the window.

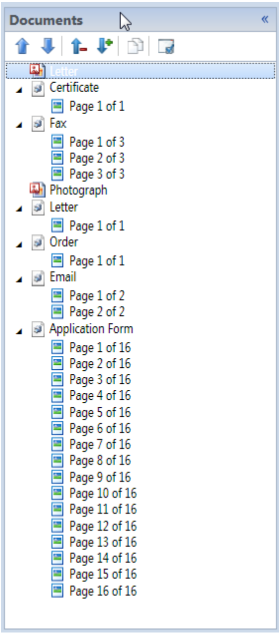
The Viewer Options enable you to change the behaviour of the Viewer.

Option	Option type	Description
Use classic TIFF viewer	Tick box	If ticked, TIFF documents will open up in the old TIFF viewer from Virtual Cabinet 2.3.0 and earlier.
Render Office documents as XPS	Tick box	This functionality is only available with Microsoft Office 2007 or later. If ticked, Microsoft Office documents will be converted into the XPS format before being shown. An XPS document is similar to a print preview and has simplified navigation. There are separate options for rendering different Microsoft Office products.
Show link for unknown items	Tick box	If this option is ticked and the Viewer is unable to display a document for any reason then a link will be displayed in the document viewing panel. You can then click the link to open the document with another program on your computer.
Show first page by default	Tick box	If ticked, the first page of the first document will be displayed when the Viewer opens. If this option is not ticked then the Viewer will display small thumbnail images of all the pages in the first document.
Maximum simultaneous documents	Number	The maximum number of documents that you can open at any one time.

Once you have edited the options you can click the ‘OK’ button to save your changes and close the Viewer Options window. If you do not want to save your changes, click ‘Cancel’ to close the window without saving.

17.3 The Documents List

The panel on the left-hand side of the Viewer displays a list of all the documents you have opened. Beneath each document, you will see a list of its pages.

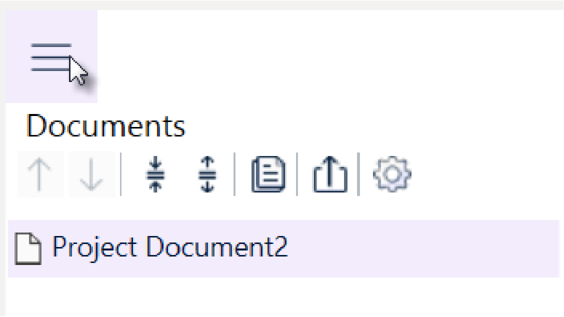


The toolbar presents several buttons that can be used to navigate around your documents.

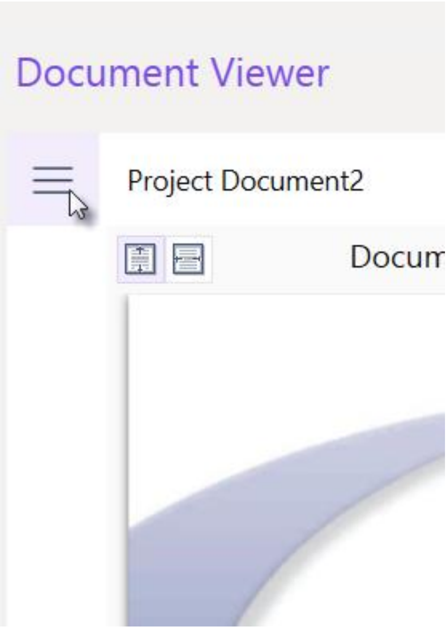
Button	Description
Previous	Selects the document above in the list.
Next	Selects the document below in the list.
Contract all	Hides all the individual pages in the list so you can quickly see the list of documents.
Expand all	Reveals all the pages for each document in the list so you can easily navigate around your documents.
Show all	Shows a thumbnail preview of all the documents in the viewing area, giving you a general overview of your documents.
Open in new window	Opens the selected document in the windows associated program outside of the Virtual Cabinet Viewer.
Options	Opens the Viewer Options window, allowing you to change the behaviour of the Viewer.

17.3.1 Hiding the list

You can hide this list at any time by clicking on the ‘expand’ button in the top corner of the panel.



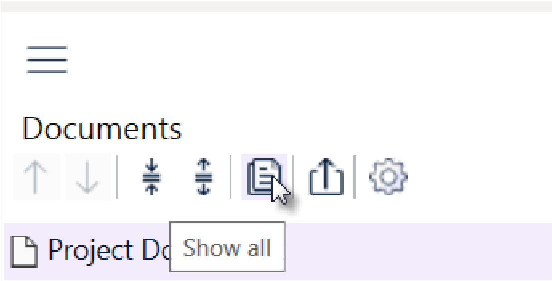
Once the panel is hidden, you can restore it by clicking on the ‘expand’ button again.



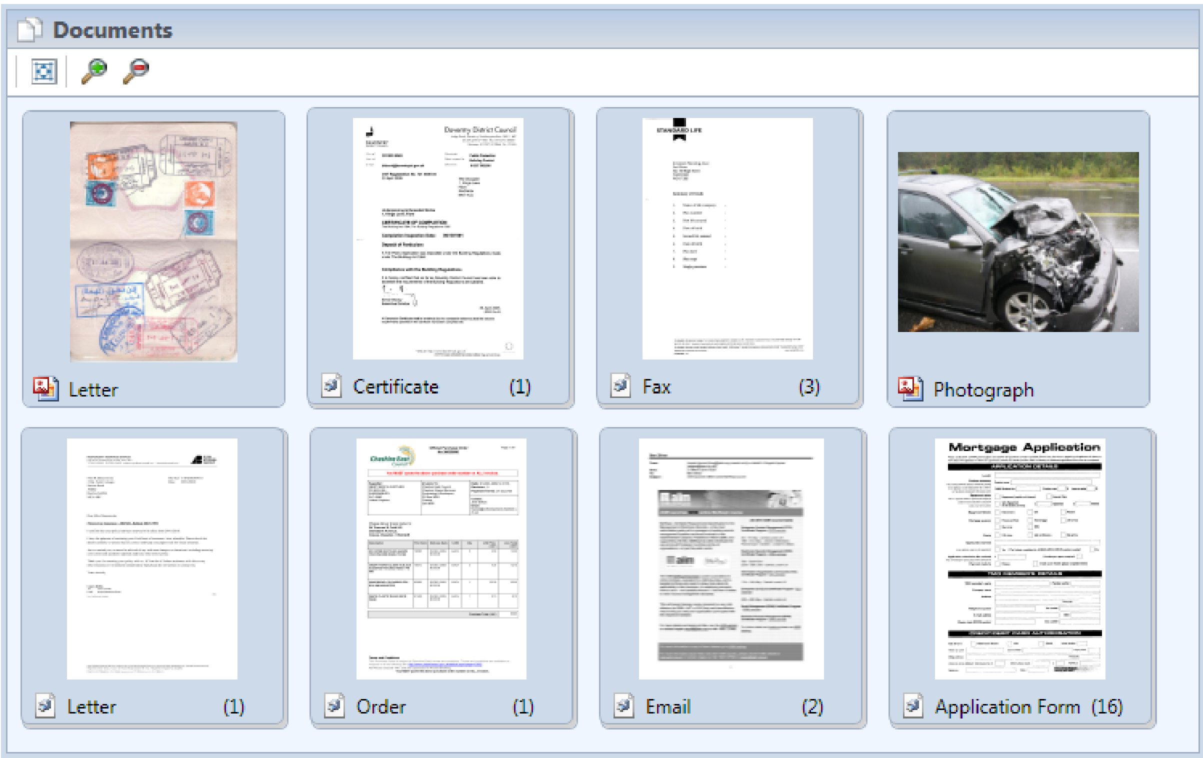
17.4 The Viewing Area

The Viewer displays thumbnail images and full-sized content in the central viewing area of the window. The viewing area can handle a large variety of different file types and document formats. You can use the Viewer to view scanned images, read Microsoft Office documents and play a variety of media.

To see an overview of all the documents you have opened, click the 'Show All' button near the top-left of the window.



The viewing area will show a collection of thumbnail images. Each image shows a preview of the content in that document. Documents with multiple pages will show a preview of the first page. The label at the lower left-hand corner of each thumbnail indicates the type of information contained in the document, while the bracketed number in the lower right-hand corner shows the number of pages in that document.

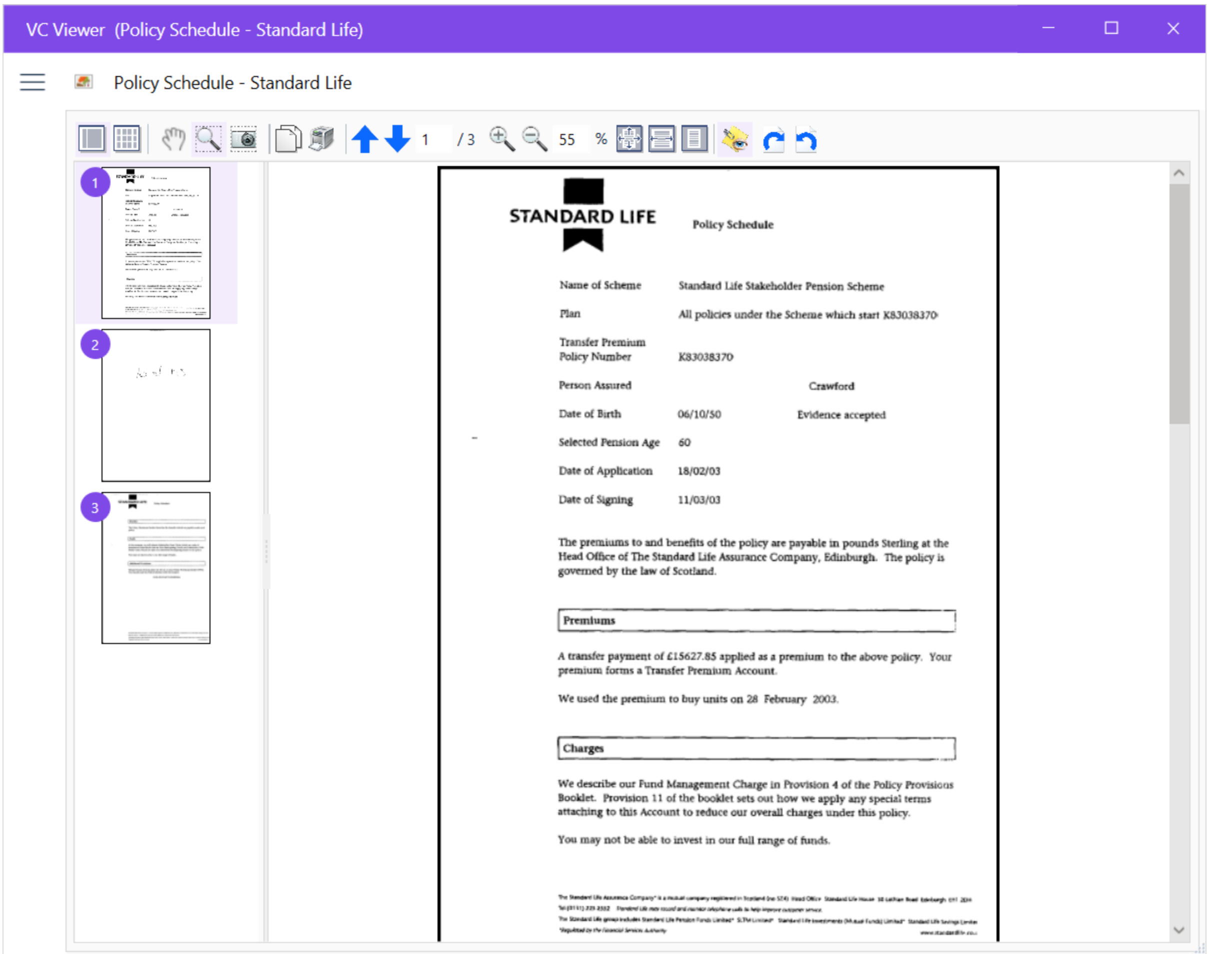


The toolbar has buttons that let you change the size of the thumbnails.

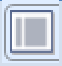
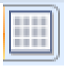
Button		Description
	Normal size	Resets the size of the thumbnail images.
	Zoom in	Makes the thumbnail images larger so that the documents are easier to identify.
	Zoom out	Reduces the size of the thumbnail images, fitting more on-screen.

17.4.1 Opening TIFFs

When you open up a TIFF document in Virtual Cabinet you will be presented with Virtual Cabinet's own TIFF Viewer.



You can scroll through all the pages of the document using the scroll bar on the right hand side of the document or the scroll wheel of your mouse. On the left hand side is a thumbnail view of each page in the document, the page highlighted in Orange is the page you have currently selected.

Button		Description
	Document View	The standard view with pages of the document viewable on the right hand side and a strip of Thumbnails of pages of the document on the left hand side.
	Thumbnail View	When selected this will show a zoomed out view of the document displaying a thumbnail image of each page spread out across the entire window. Page ordering goes from left to right, top to bottom.
	Hand Tool	Whilst this option is selected you can move around the page by left clicking on the page and dragging it.
	Selection Zoom	Left click anywhere on the page, hold down the left mouse button and drag a rectangle over the area you would like to view in more detail.
	Snapshot Tool	Left click anywhere on the page, hold down the left mouse button and drag a rectangle over the area you would like to copy to the clipboard.
	Copy page to Clipboard	Copies the entire of the selected page to your clipboard so that you can paste the image into another program (e.g. MS Word).
	Print	Opens up the Print window to select what you want to print and where to.
	Previous Page	Selects the previous page.
	Next Page	Selects the next page.
1 / 2	Page Selection	In the text box type the page number you wish to view and press Return to jump to that page.
	Zoom In / Out	Makes the page appear larger/smaller.
44 %	Zoom	Select a zoom percentage between 30% and 200% and press return to zoom to that size.
	Fit to Page	Zooms until the whole page fits onto the viewing area.
	Fit to Width	Zooms the page until it is the same width as the viewing area.

	100% View	Zooms the document to 100%, this should be similar to the size of the document in reality, before it was scanned in.
	Show Annotations	Shows or hides Tiff annotations. This is only valid on tiff files that already contain embedded tiff annotations.
	Rotate clockwise	Rotates the current page(s) clockwise through 90 degrees.
	Rotate anti-clockwise	Rotates the current page(s) anti-clockwise through 90 degrees.

N.B. rotating pages of a document will no rotate them permanently; you must edit a document to make this kind of a change.

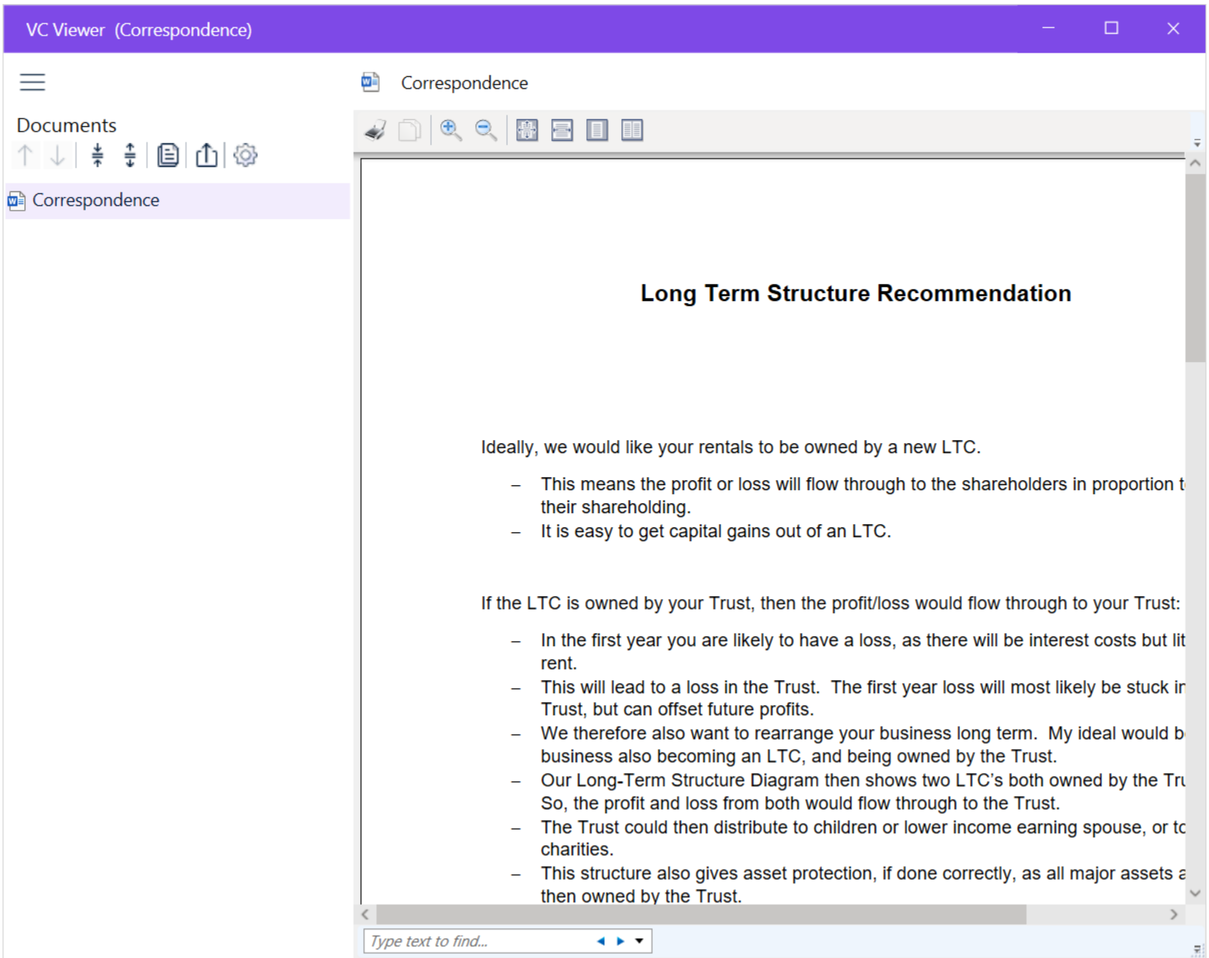
If you are editing a tiff document you will be given a number of extra buttons in the toolbar:

Button		**Description**
	Redact	Left click anywhere on the page, hold down the left mouse button and drag a rectangle over the area you would like to obscure with black.
	Save	Save the change you have made to this document. You will also be asked to save the changes when you close the Viewer.
	Undo	Undo the previous edit of this document.
	Redo	Redo the previous edit of this document.
	Move page up	Move the selected page up one place in the order of pages of this document.
	Move page down	Move the selected page down one place in the order of pages of this document.
	Rotate page clockwise	Rotates the current page(s) clockwise through 90 degrees.
	Rotate page anti-clockwise	Rotates the current page(s) anti-clockwise through 90 degrees.
	Delete page	Delete the selected page(s).
	Add pages before selected page	Opens up a separate scanner window that will enable you to append extra pages before the selected page.
	Add pages after selected page	Opens up a separate scanner window that will enable you to append extra pages after the selected page.

When you are editing a document please be aware that you can select multiple pages by holding down the Ctrl or Shift buttons on your keyboard and selected the appropriate pages from the thumbnail area.

17.4.2 Viewing Microsoft Office documents

If you have the "Render Office documents as XPS" option ticked for a particular Microsoft Office product in the Viewer Options then the Viewer will render Microsoft Office documents in the XPS format. This will show Microsoft Office documents through a simplified read-only panel within the Viewer.



The XPS toolbar presents a selection of options to enable you navigate around the Office document:

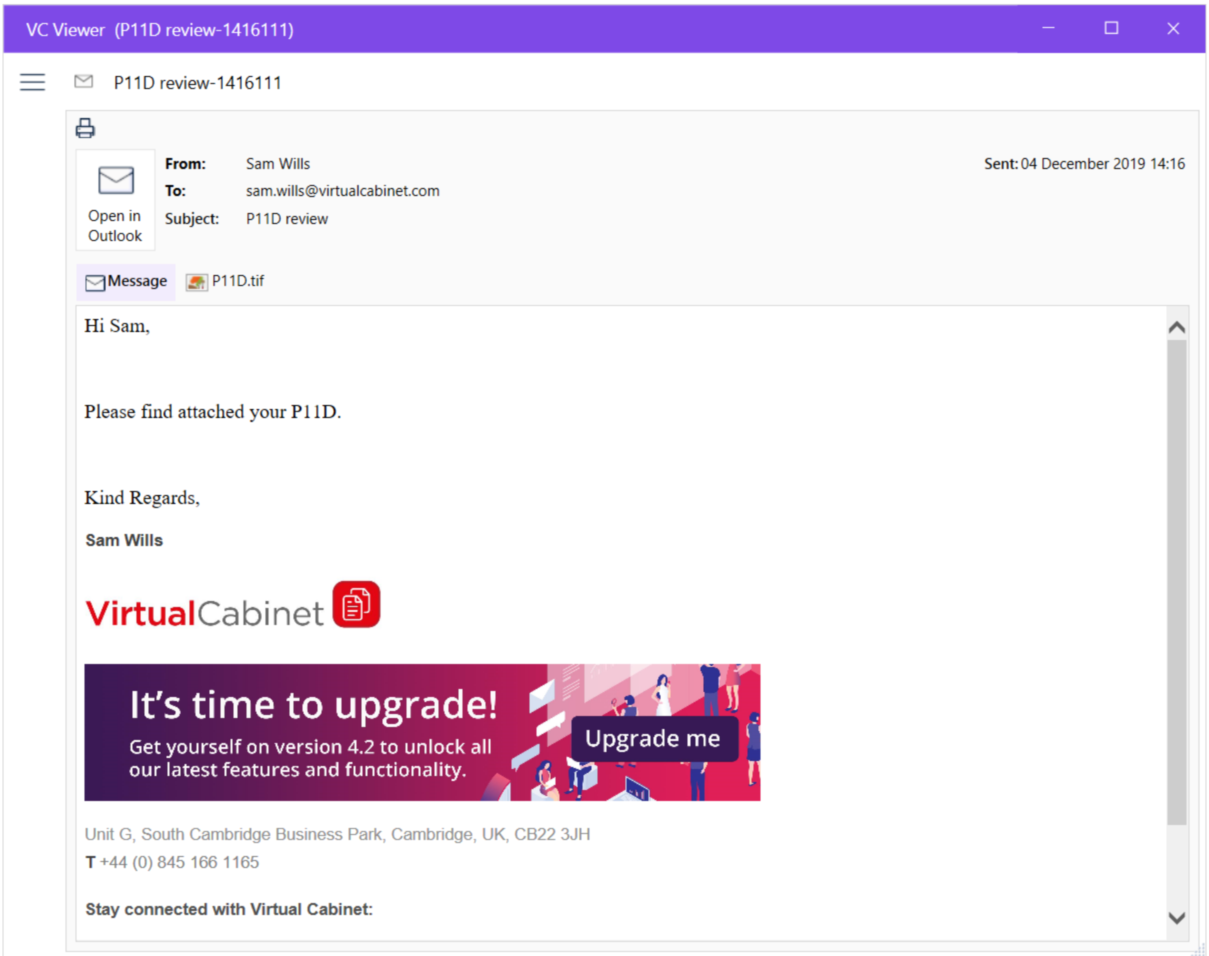
Button		Description
	Print	Prints the document.
	Copy	Copies any selected text to the Windows clipboard.
	Increase page size	Makes the document appear larger.
	Decrease page size	Makes the document appear smaller.
	100% size	Zooms the page to actual size.
	Fit to width	Zooms the page until it is the same width as the viewing area.
	Whole page	Zooms until the whole page fits into the viewing area.

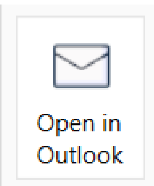
	Two pages	Zooms until two whole pages fit into the viewing area.

There is a search box in the lower left-hand corner of the XPS viewing area. You can type text into the box and press Enter to search through the document.

17.4.3 Emails in the Viewer

Emails indexed into Virtual Cabinet will open up in the viewer in this view:

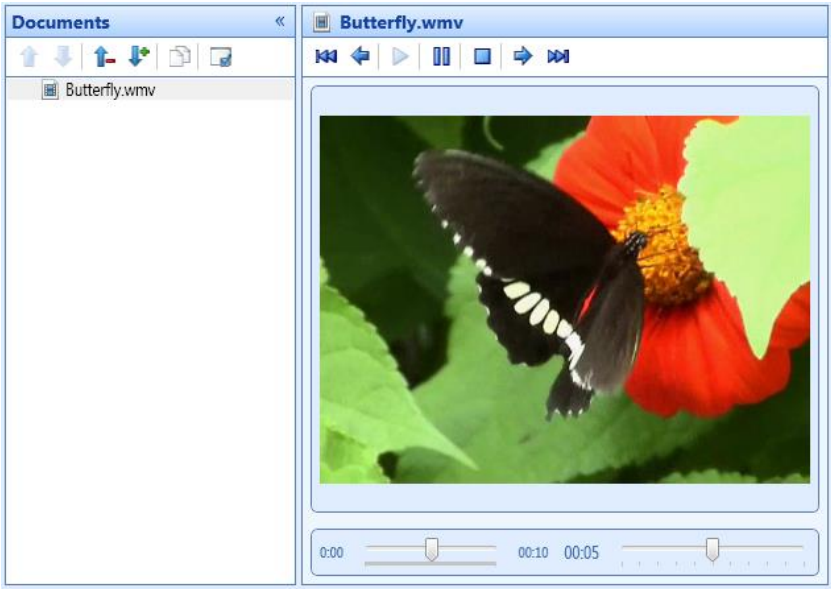




Click on “Open in Outlook” to open the email outside of the Virtual Cabinet in Outlook.

17.4.4 Viewing other media

You can also play various types of media in the Viewer.



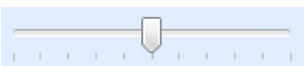
When viewing media, the toolbar will display a set of controls that can be used to control playback:

Button	Description
Beginning	Takes you to the start of the media.
Back	Moves you backwards through the media.
Play	Plays the media file.
Pause	Pauses playback of the media file.
Stop	Stops playback of the media file.
Forward	Moves you forwards through the media.
End	Moves you to the end of the media.

There are also two controls located below the media.

The first is a marker that shows your current position relative to the start and end of the media. You can use the mouse to drag the marker and move forward or backward through the media.

The second control is a slider that affects the volume. You can use the mouse to drag the marker and make the media quieter or louder.



18 Processes and Tasks

In Virtual Cabinet a Process is simply a collection of Tasks. Tasks can be completed using Actions. Actions can optionally start other Tasks in the Process. Tasks are assigned to users or groups. It's a powerful combination that provides simple but effective workflow capability with built-in reporting.

18.1 Starting a process

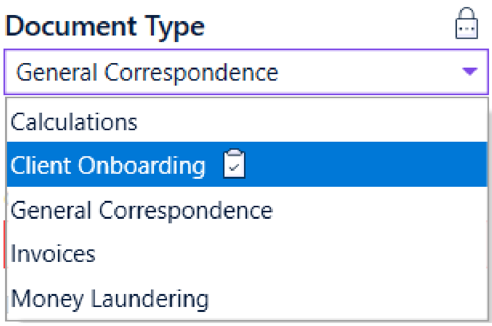
18.1.1 Starting a process during indexing

A business process can be started right at the beginning of the document lifecycle when task creation is triggered during initial indexing. This can occur in two places. A task may be linked to selection of an indexing section value, or triggered when using an indexing profile.

Where appropriate a task icon will be displayed against a section value when

indexing a document

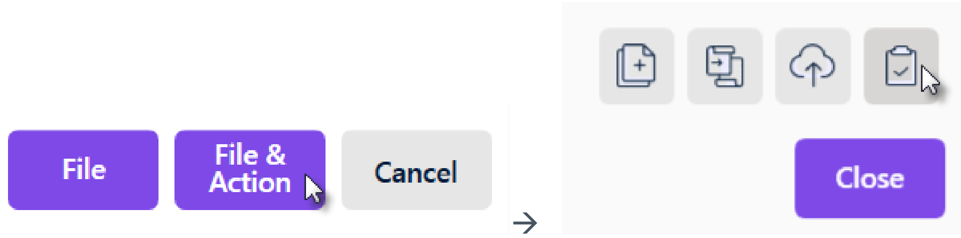
Task details may also be shown when selecting an indexing profile to index a document



When indexing a document with a task linked the start task options are subsequently displayed.

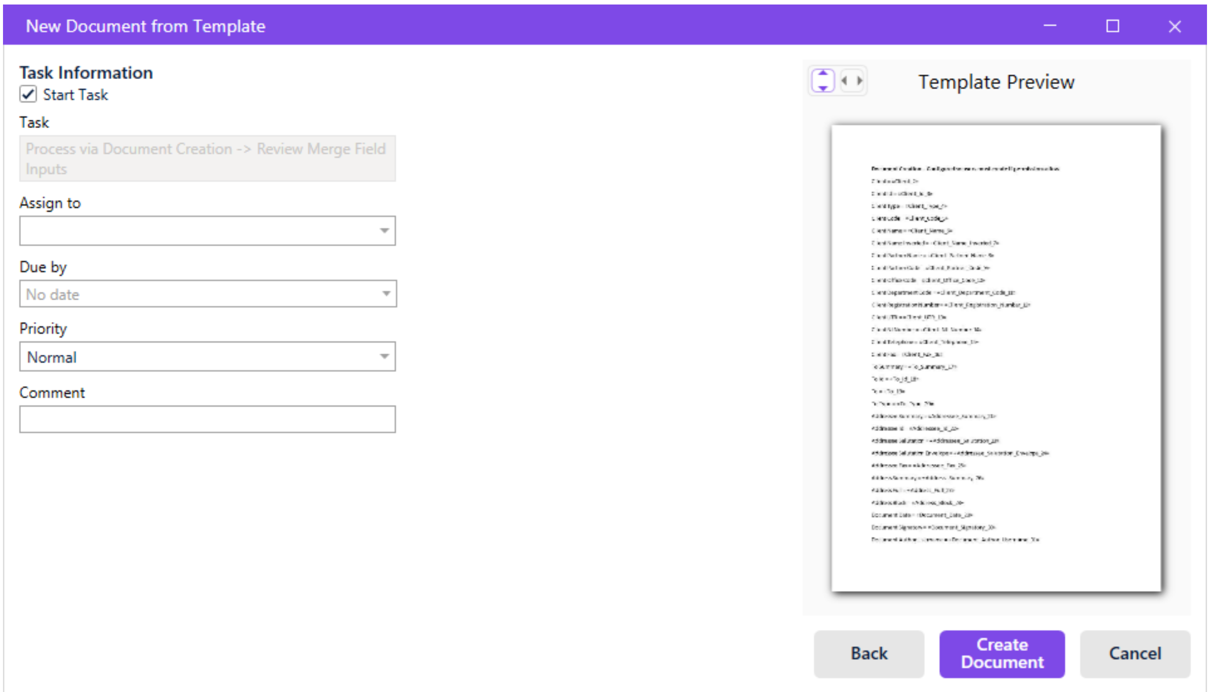
18.1.2 Start a process after indexing

Where a process should apply early in the document lifecycle the 'File and action' option can be used to create a task directly after that document is indexed for the first time. The Start Task button will display after choosing this option if applicable.



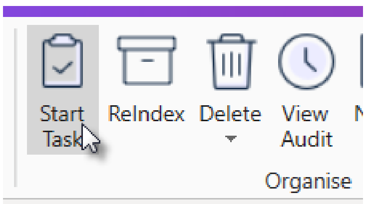
18.1.3 Start a process during document creation

A Process can also be started at the point when a Document is Created if the Document Template has been configured to Start a Task. See the Virtual Cabinet Document Creation Guide for further information.



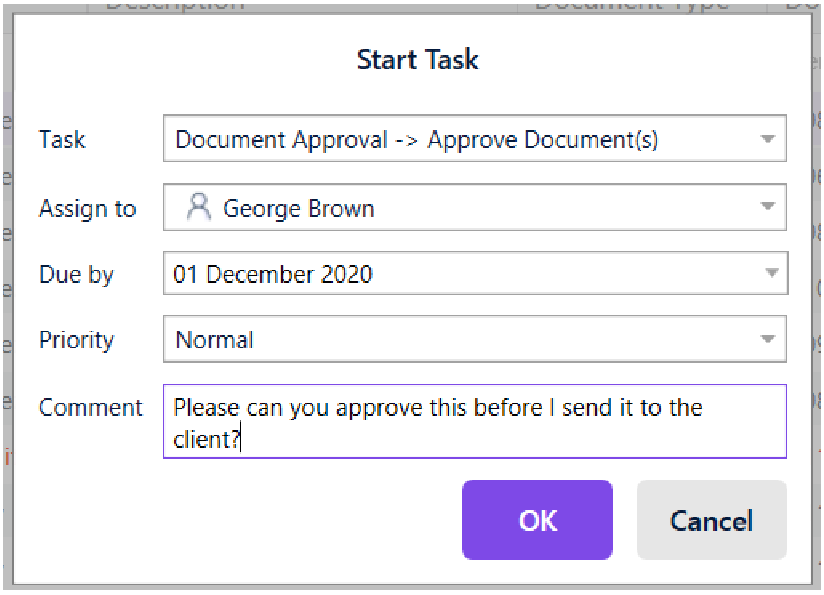
18.1.4 Start a process from document search results

The simplest way to start a process on an 'ad hoc' basis is to search and select a document *after* it has been indexed. A task can be started using the Start Task button in the Document Actions group ribbon or by right clicking.



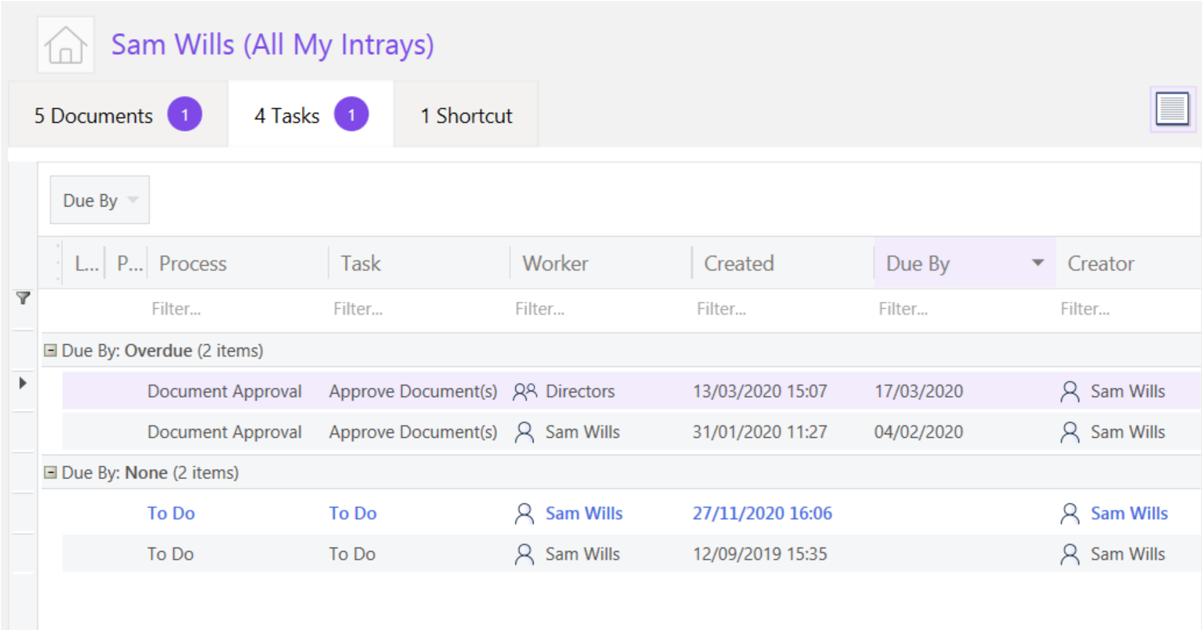
18.1.5 Start Task Options

After starting a process using one of the options above the Start Task window appears and you can select the task you wish to start. If you have appropriate permissions you can assign the task to a user or group, set the due by date, priority and add a comment.

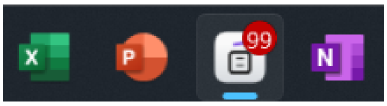


18.2 The Intray Tasks List

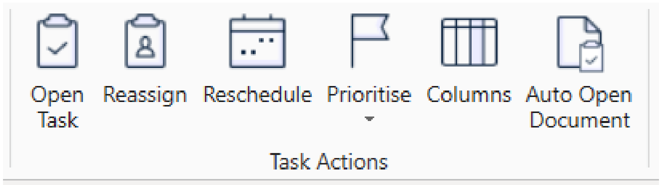
The tasks tab in your intray includes a red notification badge and a count of new tasks. Open the task by double clicking on it *or* from the task actions in the ribbon at the top of the screen.



If you have notifications enabled (check this by clicking on the Orb and then User Settings) then you will see a number in a red circle on the Virtual Cabinet Task Bar icon. This indicates the number of unread documents and Tasks currently assigned to you.



The task actions ribbon displays when you have a task selected.



The task actions ribbon is comprised of the following.

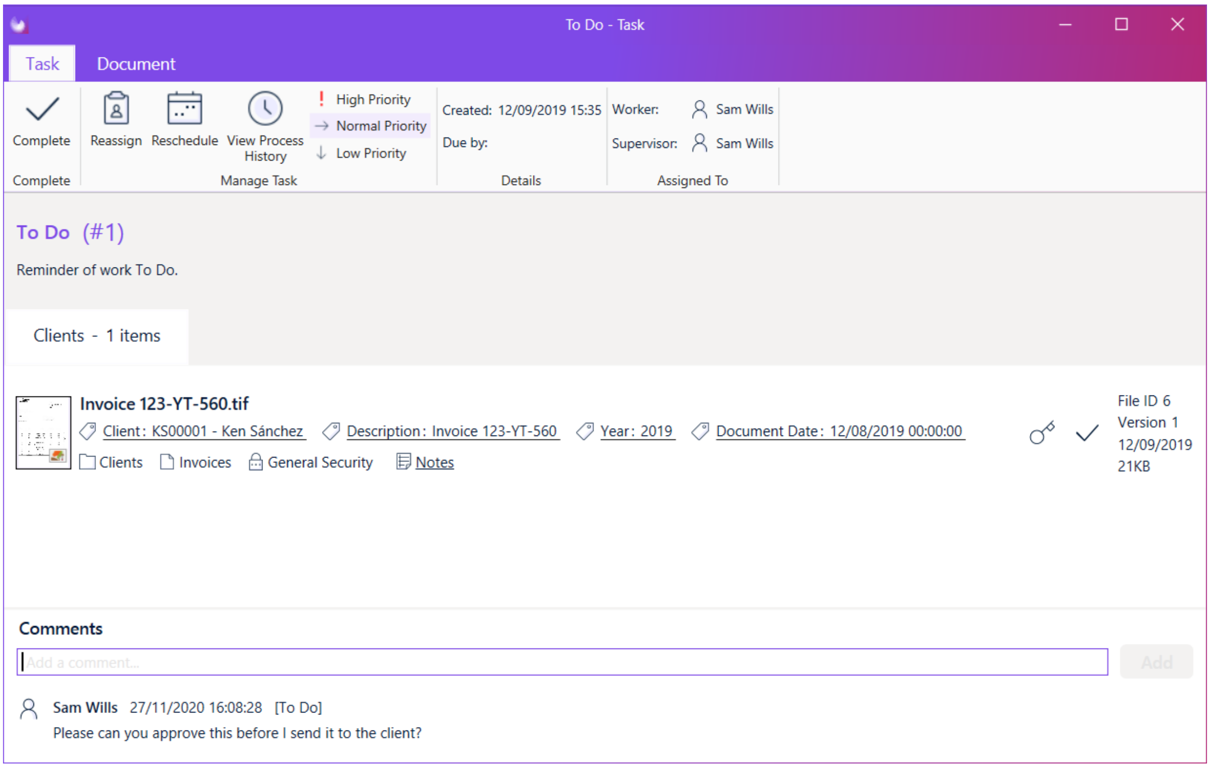
Button	Description
Open Task	Open the selected task in a new window.
Reassign	If privileges allow this opens a window so you can reassign the selected task to a new group or user.
Reschedule	If privileges allow this opens a window allowing you to reschedule the selected task.
Prioritise	If privileges allow this option allows you to re-prioritise the selected task.

Columns	Allows you to show/hide columns in the tasks tab. Folders / Cabinet Indexes / Section Indexes / Email Indexes.
Auto Open Document	When selected this option opens the primary document associated with the task when the task window is opened.

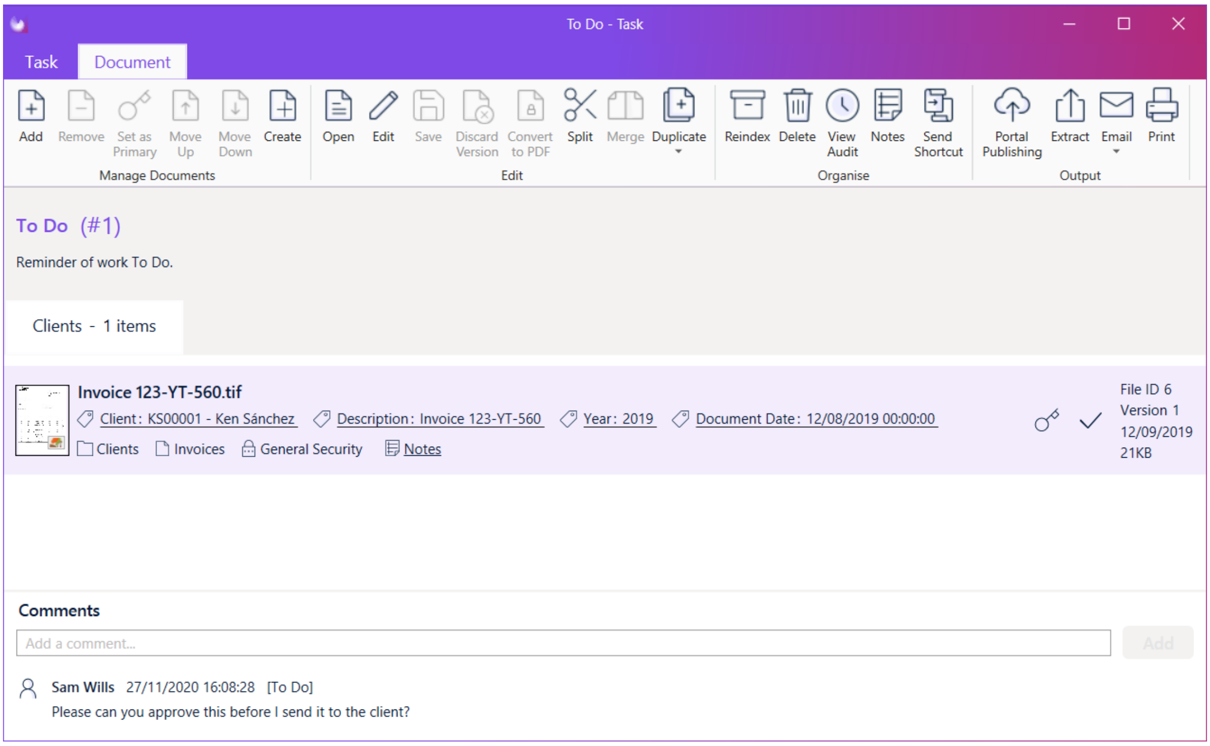
18.3 The Task Window

On opening a task from your intray the task window is shown. It is broadly composed of four main sections:

1. The task action buttons. These are unique to each different task.
2. Options to manage the task (if appropriate permissions are granted), view the task details, who it is assigned to and further information about the task.
3. The document(s) attached to the task. This area includes direct links to cabinet search results for index information used by the document.
4. A comments area to allow discussion around the task.



You will also notice the documents tab, from where you can access a range of familiar document specific actions, including the ability to change their order.



Powerful reporting is available on outstanding tasks. Please see the Reports section of this user guide for more information.

17 Hot Folder

The Virtual Cabinet Hot Folder is a location/application that makes it easier to store certain files in Virtual Cabinet.

Microsoft Office applications have a dedicated Office Addin that allows you to easily store documents from within Microsoft Word, Excel, PowerPoint and Outlook.

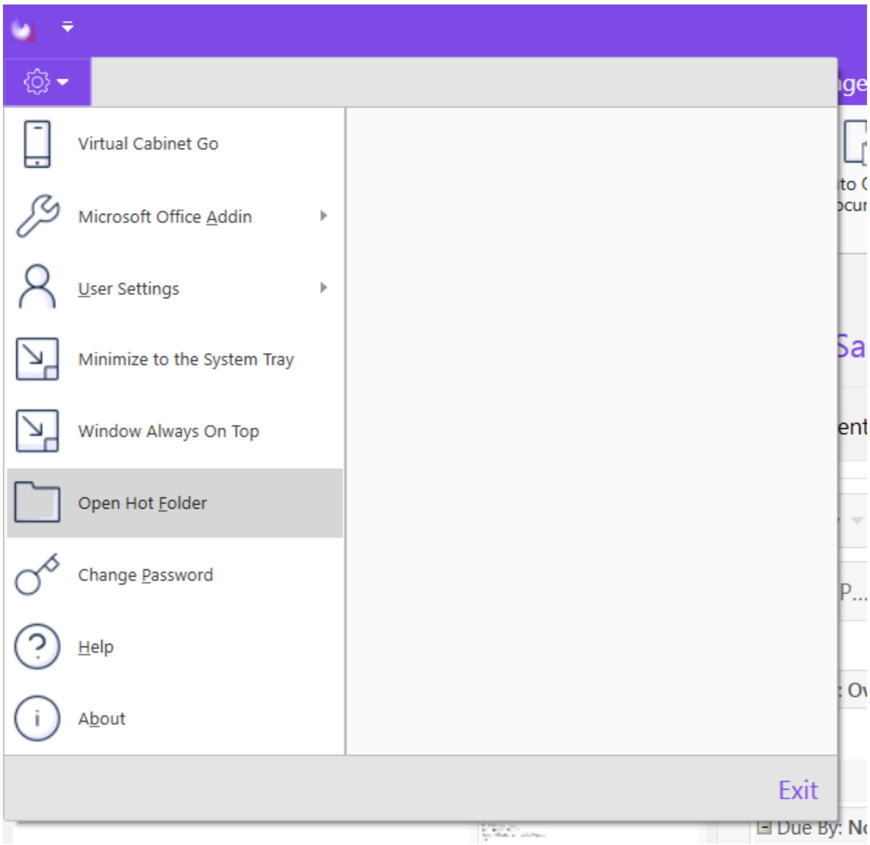
Other commonly used applications, such as PDF viewers and editors, do not have an Addin that enables you to store documents directly in Virtual Cabinet.

The Hot Folder is a windows folder that is watched by a running application in your Windows System Tray.

Any files that are saved, copied or moved to the Hot Folder automatically initiate a process to send those files to a location in Virtual Cabinet.

17.1 Starting the Hot Folder

If you wish to use the Hot Folder, you can start it by clicking the Orb button in the top left corner of the Main Virtual Cabinet application and selecting the option to 'Open Hot Folder'.



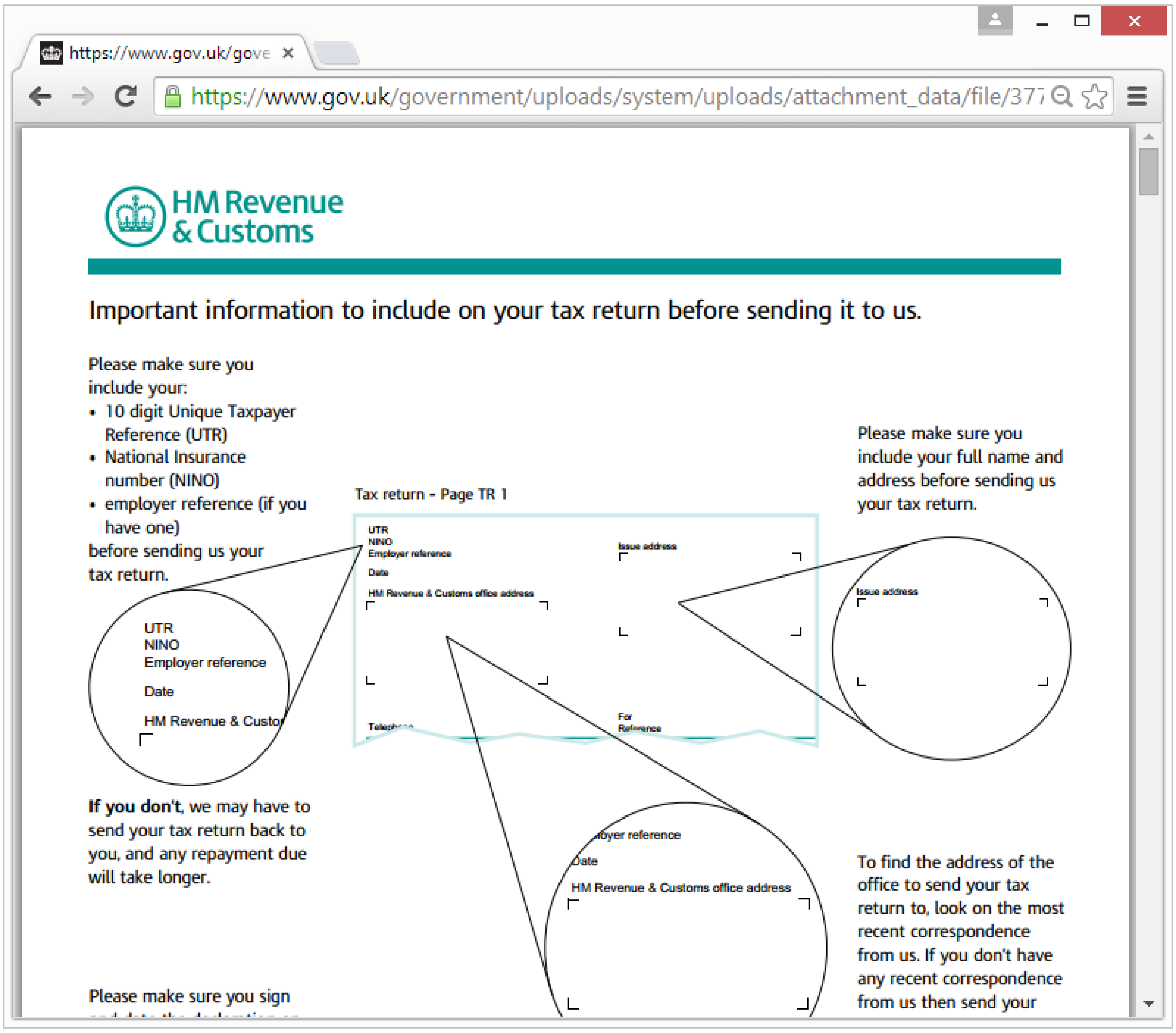
From that point on, the Hot Folder application will start every time you log into Windows.

When running, the Hot Folder application places a icon in your Windows System Tray.

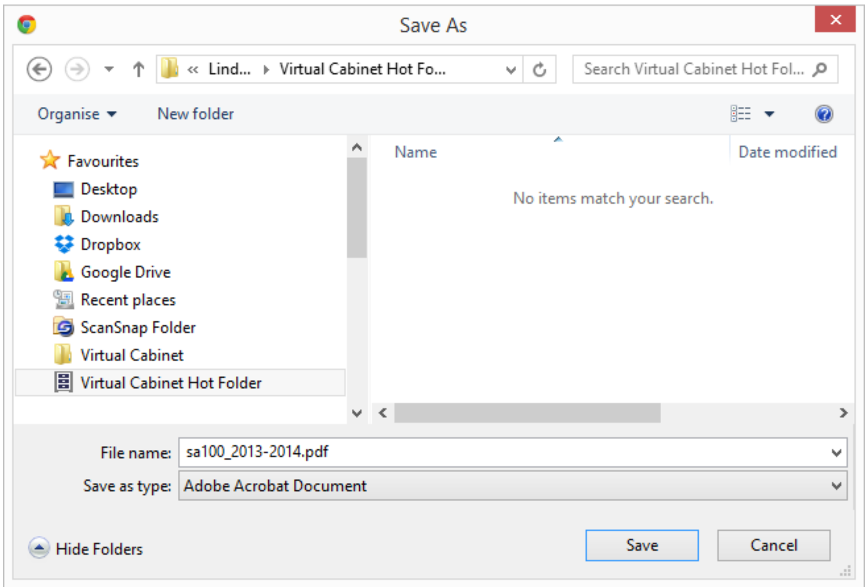
17.2 Using the Hot Folder

After starting the Hot Folder, you can save files to Virtual Cabinet by dragging and dropping files on to the Windows Desktop shortcut, or saving to the Hot Folder from within a running application.

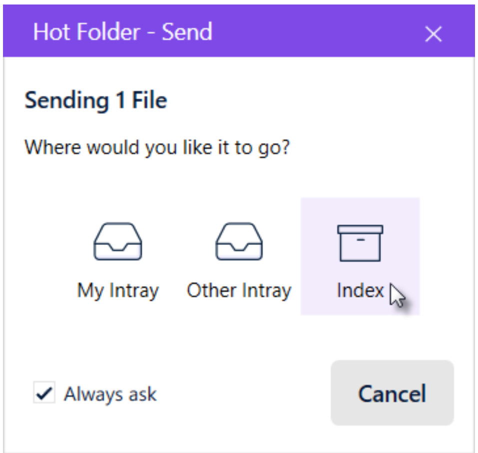
The following example of saving to the Hot Folder from within an application depicts the Google Chrome web browser containing an open PDF file, embedded within the browser window.



Choosing to save the PDF file opens the Windows Save As dialogue as normal. The Virtual Cabinet Hot Folder is presented as a favourite location. The Hot Folder can be selected, the file can be given a name and the Save button can be clicked.



Now that a file has been saved to the Hot Folder, you will be asked where in Virtual Cabinet you wish to store it.

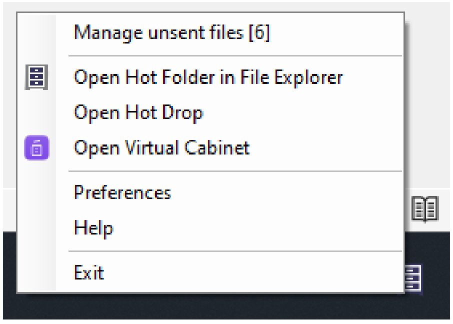


The options are the same as in the Microsoft Office Addin: Your Intray, a different Intray or index it in a Filing Cabinet.

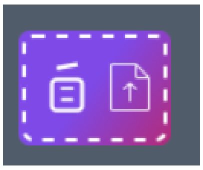
You can choose whichever option you require and the file will be sent to that location. If you untick the 'Always ask' option, the Hot Folder will remember your selection.

17.3 Hot Drop

If you right-click the Hot Folder system tray icon, you will see an option to 'Open Hot Drop'.



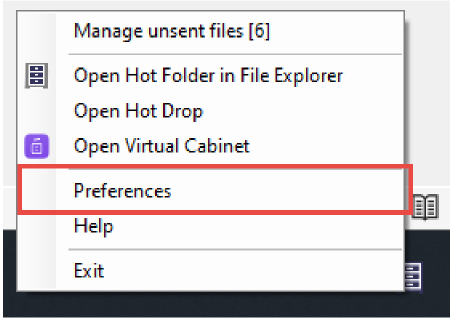
Hot Drop can be a useful option if you like dragging files to Virtual Cabinet. It places a hovering and moveable drop area on your desktop that you can drag to at any time.



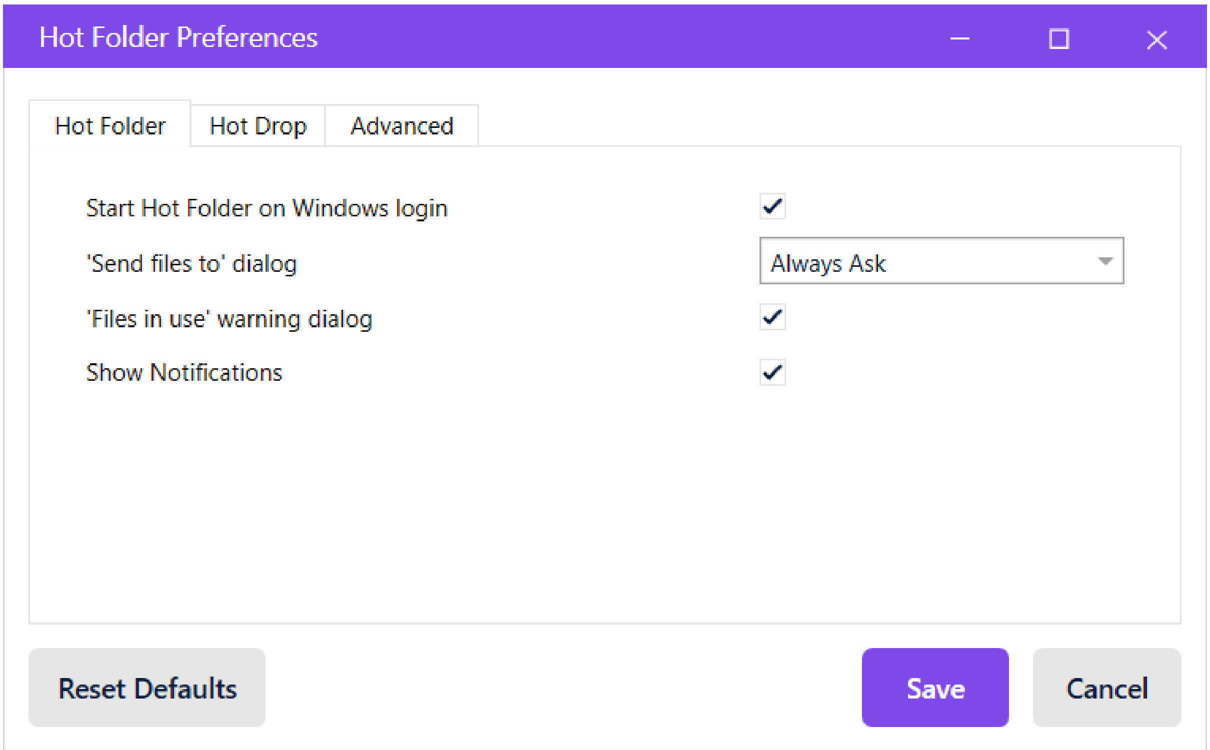
The behaviour is the same as dragging or saving files directly to the Hot Folder.

17.4 Preferences

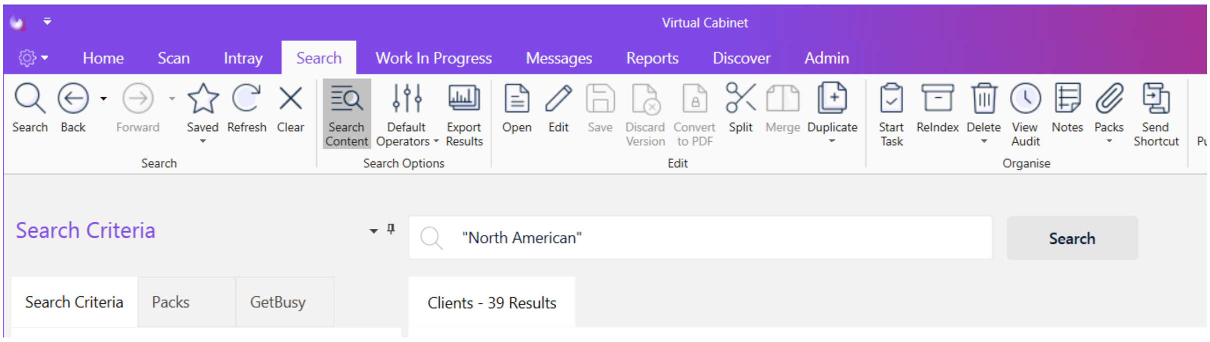
If you right-click the Hot Folder system tray icon, you will see a ‘Preferences’ option.



Whilst you shouldn’t need to change these, the Hot Folder Preferences window contains useful and intuitive settings for the Hot Folder and Hot Drop, and some Advanced Options.



18 Appendix A - Content Searching



Virtual Cabinet contains powerful content searching capabilities such as phrase queries, wildcard queries, proximity queries, range queries and more.

Content searching of email attachments is available, allowing you to search for data within the content of documents attached to emails in Virtual Cabinet.

Some common useful search terms can be found below, with an example 'results count' for comparison between the different types of search:

Search Term	Results	Results Count
air	contain the word air	35
quality	contain the word quality	123
air quality	contain the words air or quality or both	148
air AND quality	contain both words air and quality	10
air OR quality	contain the words air or quality or both	148
air NOT quality	contain the word air but not quality	25
"air quality"	contain the words air and quality directly after each other	7
"air quality"~10	"air" and "quality" within 10 words of each other	2
quali*	containing words starting with quali	5
quolity~	documents containing words like quolity. This will find similar words to quolity, e.g. quality. (especially useful for things like reference numbers)	160
te?t	Look for words that match with the single character replaced. This will return results containing "*text*" or "*test*"	10
FILEID:16	only documents with FileId 16	1
EXT:.pdf	Return documents with the file extension .pdf	250
INDEX09:Invoice	Return documents with a section value of Invoice	700

ENTRYDATE:[20101121 TO 20101126]	Only return those documents which were entered into the system between 21/11/10 and 26/11/10	20
ORIGINALFILENAME: Policy421.pdf	Those documents with an original filename of Policy421.pdf	1
METADATA:ABC123	Search all the metadata/indexes for ABC123	5

18.1 Terms

A query is broken up into terms and operators. There are two types of terms: Single Terms and Phrases.

A Single Term is a single word such as "Standard" or "Life".

A Phrase is a group of words surrounded by double quotes such as "Standard Life".

Multiple terms can be combined together with Boolean operators to form a more complex query (see below).

18.2 Fields

Virtual Cabinet supports searching index/metadata. When performing a search you can either specify a field, or use the default field (i.e. the content). The field names and default field is implementation specific.

You can search any field by typing the field name followed by a colon ":" and then the term you are looking for.

If you want to find the document with a section value of "Annual Review" which contains the text Financial:

INDEX09:"Annual Review" AND Financial

Note: The field is only valid for the term that it directly precedes, so the query

INDEX09:Annual Review

Will only find "Annual" in the section value field. It will find "Review" in the content.

Note: Any of the Virtual Cabinet INDEX fields can be used

18.3 Stemming

In order to help you find related documents Virtual Cabinet content searching supports stemming. Stemming is the process of reducing the words to their root form by removing any suffixes and searching on this instead.

For example, searching on the word “commitment” will also return documents which have the similar term “commit”.

18.4 Wildcard Searches

Virtual Cabinet supports single and multiple character wildcard searches within single terms (not within phrase queries).

To perform a single character wildcard search use the "?" symbol.

To perform a multiple character wildcard search use the "*" symbol.

The single character wildcard search looks for terms that match that with the single character replaced. For example, to search for "text" or "test" you can use the search:

te?t

Multiple character wildcard searches looks for 0 or more characters. For example, to search for test, tests or tester, you can use the search:

test*

You can also use the wildcard searches in the middle of a term.

te*t

Note: You cannot use a * or ? symbol as the first character of a search.

18.5 Fuzzy Searches

Virtual Cabinet supports fuzzy searches based on the Levenshtein Distance, or Edit Distance algorithm. To do a fuzzy search use the tilde, "~", symbol at the end of a Single word Term. For example to search for a term similar in spelling to "roam" use the fuzzy search:

roam~

This search will find terms like foam and roams.

An additional (optional) parameter can specify the required similarity. The value is between 0 and 1, with a value closer to 1 only terms with a higher similarity will be matched. For example:

roam~0.8

The default that is used if the parameter is not given is 0.5.

18.6 Proximity Searches

Virtual Cabinet supports finding words which are within a specific distance away. To do a proximity search use the tilde, "~", symbol at the end of a Phrase. For example to search for "air" and "quality" within 10 words of each other in a document use the search:

"air quality"~10

18.7 Range Searches

Range Queries allow one to match documents whose field(s) values are between the lower and upper bound specified by the Range Query. Range Queries can be inclusive or exclusive of the upper and lower bounds. Sorting is done lexicographically.

ENTRYDATE:[20101121 TO 20101125]

This will find documents whose entry dates are between 21/11/2010 and 25/11/2010, inclusive. Note that Range Queries are not reserved for date fields. You could also use range queries with non-date fields:

INDEX09:{Cheque TO Invoice}

This will find all documents whose section values are between Cheque and Invoice, but not including Cheque and Invoice.

Inclusive range queries are denoted by square brackets. Exclusive range queries are denoted by curly brackets.

18.8 Boosting a term

Virtual Cabinet provides the relevance level of matching documents based on the terms found. To boost a term use the caret, "^", symbol with a boost factor (a number) at the end of the term you are searching. The higher the boost factor, the more relevant the term will be.

Boosting allows you to control the relevance of a document by boosting its term. For example, if you are searching for

air quality

and you want the term "air" to be more relevant boost it using the ^ symbol along with the boost factor next to the term. You would type:

air^4 quality

This will make documents with the term air appear more relevant. You can also boost Phrase Terms as in the example:

"air quality"^4 "city centre"

By default, the boost factor is 1. Although the boost factor must be positive, it can be less than 1 (e.g. 0.2)

Note: Sorting takes precedence over boosting in Virtual Cabinet. E.g. If you performed a boosting search as above but have your results ordered by document date, then the results will be ordered by document date instead. If you wish to see the boosted search results simply remove the column sort ordering (via the list view in Virtual Cabinet).

18.9 Boolean Operators

Boolean operators allow terms to be combined through logic operators. Virtual Cabinet supports AND, "+", OR, NOT and "-" as Boolean operators(Note: Boolean operators must be ALL CAPS).

18.9.1 OR

The OR operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the OR operator is used. The OR operator links two terms and finds a matching document if either of the terms exist in a document. This is equivalent to a union using sets. The symbol || can be used in place of the word OR.

To search for documents that contain either "air quality" or just "air" use the query:

"air quality" air

or

"air quality" OR air

18.9.2 AND

The AND operator matches documents where both terms exist anywhere in the text of a single document. This is equivalent to an intersection using sets. The symbol && can be used in place of the word AND.

To search for documents that contain "air quality" and "city centre" use the query:

"air quality" AND "city centre"

18.9.3 +

The "+" or required operator requires that the term after the "+" symbol exist somewhere in a field of a single document.

To search for documents that must contain "quality" and may contain "city centre" use the query:

+quality city centre

18.9.4 NOT

The NOT operator excludes documents that contain the term after NOT. This is equivalent to a difference using sets. The symbol ! can be used in place of the word NOT.

To search for documents that contain "air quality" but not "city centre" use the query:

"air quality" NOT "city centre"

Note: The NOT operator cannot be used with just one term. For example, the following search will return no results:

NOT "city centre"

18.9.5 -

The "-" or prohibit operator excludes documents that contain the term after the "-" symbol.

To search for documents that contain "air quality" but not "city centre" use the query:

"air quality" -"city centre"

18.10 Grouping

Virtual Cabinet supports using parentheses to group clauses to form sub queries. This can be very useful if you want to control the boolean logic for a query.

To search for either "city" or "centre" and "quality" use the query:

(city OR centre) AND quality

This eliminates any confusion and makes sure you that quality must exist and either term city or centre may exist.

18.11 Field Grouping

Virtual Cabinet supports using parentheses to group multiple clauses to a single field.

To search for a title that contains both the word "annual" and the phrase "review" use the query:

INDEX09:(+annual +"review")

18.12 Escaping special characters

Virtual Cabinet reserves a number of special characters which have a special meaning to the search engine. These special characters are used to enable the searches seen on the previous page. The current list special characters are

+ - && || ! ( ) { } [ ] ^ " ~ * ? : \

However you may wish to search on one of these characters, to do this you must 'escape' the character.

To escape these character use the \ before the character. For example to search for (1+1):2 use the query:

\(1\+1\)\:2