Eclipse Document Imaging

Release 8.6.4 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.4 (Eterm) Online Help System

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Document Imaging Overview

Use the Eclipse Document Imaging companion product to attach separate documents to any Eclipse record. Attach electronic documents to your Eclipse customer and transaction records. You can attach employee portraits to user files or signed packing lists to accounts payable records. Eclipse Document Imaging gives you extensive control over scanned images, to customize imaging to your own workflow. You can manipulate images, and you can attach scanned documents to records manually or automatically. Imaging works with:

- Sales Order Entry
- Purchase Orders
- Accounts Payable and Accounts Receivable
- Customer, Product, and Vendor records
- User Job Queue

Click to view the documents or forms directly from their related records.

Use Document Imaging to:

- Print or fax document images
- Group images
- Attach files, such as word processing files and spread sheets

Decrease paper filing, keep records, and retrieve documents directly through Eclipse records. Keep track of all types of forms:

- Invoices
- Purchase Orders
- Credit applications
- Product photos
- Pick tickets, and more

You can create a user-defined authorization key that controls a user's ability to edit an image. After creating the authorization key, add it to the Valid Imaging Auth Keys control maintenance record, assign it to an image profile in Document Profile Maintenance, and then to your users in User Maintenance.

Setup Requirements for Document Imaging

Following are the control maintenance records and authorization keys used for Eclipse Document Imaging.

Imaging managers can control the Eclipse security authorization keys available to profiles or to individual images. Assigning an authorization key during indexing can help prevent unauthorized users from viewing the image. For example, you can assign a security key that protects payroll record images from unauthorized viewing.

Control Maintenance Records

Set the following control maintenance records:

- Default Document Storage Location ID For WOE
- Default Imaging Profile ID For MSDS
- Enable Network File Utilities
- Parameters For Documents Imaged Onto Invoiced Sales Orders
- Valid Imaging Auth Keys

Authorization Keys

Assign the following authorization key:

- IMG.EDIT.ALLOWED

Eclipse Network File Utility Overview

The Eclipse Network File Utility program replaces SAMBA as the utility to write and retrieve images within a company's network.

SAMBA works in a UNIX environment and makes a UNIX server look like a Windows NT server. It does the routing and retrieving of images along with other functions not related to imaging. When using SAMBA, a request at one branch to see an image stored at another branch must go through a main server, then the image must follow that same path back.

Using the Network File Utility program, which resides on an NT server, a user in one branch can go directly to another branch to retrieve an image. This functionality greatly increases the speed of the retrieval.

To use the Eclipse Network File Utility service, you must do the following:

- Install the utility on all of the servers where it will be used.
- Define the settings for each branch's service on the Network File Utility Maintenance screen.
- Set the Enable Network File Utilities control maintenance record to **Y**. You must do this step last.

Configuring the Eclipse Network File Utility

Once you have installed the Eclipse Network File Utility on the PCs where it will be used, configure the settings for each utility running. Use the Network File Utility Maintenance screen to specify which network file utility services you have running on your network.

The system selects the most efficient service when transferring files. To utilize this feature, set up the proper branches on the Network File Utility Maintenance screen and set up local branches on the Document Storage Location Maintenance screen.

To configure the Eclipse Network File Utility:

1. From the **System > System Files** menu, select **Eclipse Network File Utility** to display the Network File Utility Maintenance screen.
2. In the **Stat** column, for each designated NT server, press **F10** and select whether to enable or disable the utility for that server. You must enable at least one utility within your network. Otherwise, you will see errors when you try to write and retrieve images. Enable at least one utility for each branch.
   - **On** – Enables the utility.
   - **Off** – Disables the utility.
3. In the **Brch** field, enter the branch where the service is running. The system uses this branch to find the most efficient service to perform an action.
4. In the **Host/IP** field, specify the machine name or the IP address of the NT server that runs the Eclipse Network File Utility.
5. In the **Port** field, enter the port number on the server where the service is running.
   - If running the utility as a service, go to the Microsoft Service Management screen to find the port number.
   - If running the utility as a program, click the handshake icon displayed in your system tray to find the port number.

   Note: When you install the Eclipse Network File Utility on your server, the system displays the port number to use as a default. You can change that port number as needed.
6. Use the **Edit Functions** hot key to enable the utility service functions.

   The Enabled Functions field displays the functions that you enabled for the utility. If more functions are enabled than the system can display in this field, an ellipsis (...) follows the last entry.

7. Use the following hot keys as needed:

Hot Key	Description
Description	Displays the Service Description screen, where you can record miscellaneous information about the designated NT server.
Edit Functions	Displays the Service Functions screen, where you can view, enable, or disable the functions that the indicated service will perform.
Select	Displays the Select Criteria screen, which you can use to filter the list of the NT servers displayed on the Network File Utility Maintenance screen. Enter data in any of the following fields and press **Esc**: • **Status** • Branch • Host/IP • Port
Copy	Copies the settings assigned for one Host/IP to a new line. You must then: • Assign the port number for the new Host/IP. • Change the copied Host/IP name to the new Host/IP name.
Update	Retrieves the latest version of the utility from the host and updates the utility on the selected server.
Version	Displays the version number of the utility running on the selected server. • Use this hot key to determine whether the utility is running correctly. If a version number displays, the utility is running correctly. • When new versions of the utility become available, Eclipse sends the latest version to the host. If a more recent version of the utility is installed on the host, use the **Update** hot key to update the selected server with the latest version.
Printers	Displays a list of printers connected to the selected server, if it is running the utility as a program.

8. Press **Esc** to save any changes and exit the Network File Utility Maintenance screen.

Installing the Eclipse Network File Utility

Before you can define the settings for each branch's network file utility, install the program on all the servers where it will be used. The utility must run with a local administrator and with sufficient permissions to write and delete on the imaging box shares. We recommend using the standard eclipse imaging network user for the system to work properly.

When run as a service, you can assign permissions through the Microsoft Service Manager.

Use the following procedures:

- Install the utility.
- Set NT service permissions.

To install the Eclipse Network File Utility:

1. Run the ENFU.exe install program on any Windows based machine.
   - On a PC, the utility runs as a program.
   - In an NT environment, the utility can run as a program on a PC or as a service. We recommend running the utility as a service unless you need it to control printing.

     Consider the following points when running the Eclipse Network File Utility as a service:

     - You can set service functions.
     - A service can run on a machine even though no user is logged on to that machine.
     - You can set up a service to start when a user turns on the computer.
     - In theory, the operating system manages a service in a more stable manner then it handles a program.
     - A service cannot print anything, because a service cannot execute programs that use an interface. This is a Microsoft limitation.
     - A service cannot run on Windows 95, 98 or ME.
2. If you are running the utility as a service, set the utility's permissions so that it has Read, Write, and Create permissions to all shares that the utility needs to access.

   Note: If you are running the utility as a program, it inherits the Read, Write, and Create permissions of the logged on user. The utility uses these permissions when attempting to access the appropriate share.
3. Make sure that the host is able to resolve the IP address of the computer on which the utility is running. Because the correct configuration may vary from network to network, consult you local network administrator for assistance, as needed.

To set NT service permissions:

Note: The names of windows, tabs, and fields in the following steps may vary from machine to machine.

1. On the machine where you are running the Eclipse Network File Utility as a service, in the system directory structure, right click the **My Computer** icon and select **Manage** to display the Computer Management window.
2. Double-click **Services and Applications**.
3. Double-click Services.
4. In the **Name** column, double-click the **Eclipse Network File Utility** service to display the utility's Properties window.
5. To set service permissions by assigning a user profile:
   - Select the **Log On** tab, and then select **This account**.
   - Under Hardware Profile, enter and enable the user profile for the service to run.
6. To set up a service to start when the computer is turned on:
   - Select the **General** tab.
   - In the **Startup type** field, click the dropdown box and select **Automatic**.
7. Click **OK** to save the settings and close the Properties window.

Enabling Eclipse Network File Utility Service Functions

The final step of configuring the Network File Utility for a server is to enable its service functions.

To enable Eclipse Network File Utility service functions:

1. From the **System > System Files** menu, select **Eclipse Network File Utility** to display the Network File Utility Maintenance screen.
2. Position the cursor on the server for which to enable service functions and use the **Edit Functions** hot key to display the Service Functions screen.
3. Place an asterisk (*) next to each service function you want to enable. To enable all the available service functions for the selected server, use the **Get Functions** hot key.

   The following table describes each service function:

Service Function	Description
Copy	Copies images and other data to another folder. The original information remains in its original folder.
Move	Moves images and other data from one folder to another.
Delete	Deletes images and other data from a folder.
Read	Reserved for future use.
Write	Reserved for future use.
Read to Host	Reads a file and stream the images and other data to the host.
Write from Host	Streams images and other data to a file the utility is writing.
Dir List	Displays a directory listing of all of the folders and subfolders on the indicated service.
Print	Prints images and other data, only if the utility is run as a program. **Note:** This function does not work in an NT environment.
Printer list	Enumerates the available printers.
Get Version	Determines the version of the other utilities displayed on the Network File Utility Maintenance screen.

4. Press **Esc** to exit to save this information and return to the Network File Utility Maintenance screen.

Image Management Overview

Store and organize your attached documents by creating a storage ID for commonly attached file types, and define storage directories for different types of documents.

Custom indexing profiles define document storage paths. You create the profile for the documents, and the system indexes the documents using the information on the profile.

You can test the directory locations that you have set up for storing different types of documents, and also test the accessibility of a document profile's file location.

Designating user IDs and passwords for network paths limit access to documents through your server. This ensures that the proper individuals have access to documents such as personnel records and vendor price sheets.

Make documents available from the Internet World Wide Web by defining a Web-enabled path for access those documents. This makes documents available to customers.

Schedule copies of images to be sent to other locations at convenient times by defining index profiles that use multiple Storage IDs. This can save storage space by maintaining a central repository for documents.

Use the Imaging Invoice Exception Report to determine which records have images attached. For example, if you want to see which documents have been attached to invoices on a particular day.

Manage images by performing the following tasks:

- Plan your file storage requirements.
- Set up storage locations.
- Plan your indexing profiles.
- Create custom indexing profiles.
- Test profiles for accessibility.
- Verify your file locations.
- Set up a link to the host server.
- Create a web path to your images.
- Manipulate images by copying, moving or deleting them.

Planning File Storage

Disk space eventually becomes an issue for everyone, but planning can help you manage your storage needs. First consider the quantity and types of files you expect to attach. Do you intend to replace all your filing cabinets, or just scan signed pick tickets? Prioritize your imaging needs.

Next investigate appropriate file format and compression options in the Image Indexer that reduce storage needs. For example, saving scans using the TIFF-CCITT Group 4 format is more efficient than using BMP files–often reducing files sizes up to 90%. Test any file formats you are considering and compare file sizes.

Now that you know your average imaging quantities and file sizes, forecast your needs over the next 3 months, 6 months, and a year. Also consider whether you will store images on only one server? Are you going to store images for branches remotely? Also, will your images be stored in separate folders or directories?

If, for example, you estimate that pick tickets will be taking up an enormous amount of space by the third quarter, consider storing pick tickets by quarter. That strategy makes it easier to backup and move those documents, or archive them off-site. Creating and using profiles makes it easy to separate your images by department or type.

Eclipse Document Imaging supports software for CD-ROM jukeboxes. These devices are useful for accessing numerous imaging files (or backup files) on multiple CD-ROMs. Check with your Eclipse sales representative about CD-ROM jukeboxes and on-site installation.

If you run out of storage space, the system warns users. However if the users continue to index regardless, their image files are not saved. The files' names, dates, and times are written to the storage location, but the file sizes are 0 KB. You cannot retrieve or open these image files.

Planning Backup Storage Location

It is important to backup your storage locations on a regular basis. This includes any files saved to users' personal computers. Many experts suggest a rotating set of backups for important files. For example, on one day you create a backup to one media set, the next day to another, and the following day you could bring in the media set kept off-site and use it.

For backup, we recommend the following guidelines:

- A backup tape drive, and multiple backup tape sets, including off-site storage.
- Mirrored harddrives, which protect data in case of harddrive failure.
- Using document replication to automatically backup image Storage IDs.

Defining Document Storage Locations

Manage the image storage locations on your computer or network by creating a suitably named Storage ID to store each type of file you normally attach.

Define and test the directory locations for storing different types of images. Once Storage IDs are defined, you can reference them by name within index profiles. Use profiles to automatically route images to the proper storage locations.

You need access privileges for all the image storage locations you are using. Otherwise you may get error messages during Attachment Indexing. You cannot, for example, use the Attachment Indexing screen's **Index** hot key to try and access a restricted network directory or storage location. If you do, the system tells you that you are unable to copy or write there. See your System Administrator if you need access to unavailable directories or storage locations.

To define a document storage location:

1. From the **System > System Files > Document Imaging** menu, select **Document Storage Location Maintenance** to display the Document Storage Location Maintenance screen.
2. In the **Storage ID** column, enter or edit name that describes each Storage ID, using up to 15 characters. These names also display in the Document Indexer's **Select Profiles** list.

   When editing an existing Storage ID name, you are prompted to confirm the change before the system updates all the references to the Storage ID.
3. The **T (type)** column displays each storage location's type. Press **F10** to select from the following types:

   - **Blank** – Online archive. An online storage location is accessible to either retrieve (read) or save (write) documents. This is most typical selection.
   - **A** – Read-only archive. The storage location is accessible, but you can retrieve only existing documents. You cannot save new documents to this location. For example, vendors' product information might be archived on read-only CD-ROMs that you can view, but not alter.
   - **O** – Offline archive. The location cannot currently be accessed. One example is a location on removable storage media that must be attached before you can access it. When creating a location of this type, use the **Offline Comment** hot key to enter the message users see when they try to access the images stored there, such as: "Please insert the 4th Qtr 99 Invoices CD."
4. In the **Network Path** column, enter the correct directory path for each storage ID.

   You cannot delete a storage location once it contains images, but you can change its network storage path. You are warned if changing the path affects existing image indexes.

   Note: The Samba software that allows file sharing between Windows and Unix systems cannot write to directories nested more than two layers deep. For

write access, do not use paths longer than the following:
//servername/sharename.

5. The **Count** column displays the total number of documents currently stored in each storage ID location. Use the **Show Size** hot key to toggle the column to **Size**, to display storage ID file size totals.
6. Use the hot keys as in the following table as needed:

Hot Key	Description
Test	Tests the accessibility of a document profile's file location and the access time for a storage location.
Offline Comment	Enter, edit, or view comments about Storage IDs that display when you access images stored on an offline location. For example, if you store old images offline on CD or DVD discs, tell users which disc to insert. Enter a detailed comment for each Offline storage location. The comment should tell users what action to take, such as "Please insert the 4th Qtr 99 Invoices CD."
Local Brchs	View or edit the local branches associated with the selected Storage ID. If no branches are entered, all branches are associated with the Storage ID.
Unix Security	View or edit server-level security settings that limit access to documents.
Web Path	Define a Web-enabled path to make documents available from the Internet World Wide Web.
Paths	Define the following: • **Web-enabled path** – Makes documents available from the Internet World Wide Web. • **Dynamic path** – Stores documents in subfolders at the storage location.
Expnd Path	View or edit the storage location path when the path is too long to display entirely within the **Network Path** column.
Dir Listing	List the files in the selected Storage ID directory. Enter one of the following at the prompt: • **Enter a filename** – Displays that file. • **Enter a wildcard** – Lists similarly named files. • **Leave field blank** – Lists all files.
Verify Location	Test and repair files, and determine if files are in the correct storage location. See Verifying File Location for more information.
Copy/Move/Delete	Copy, move, or delete images or their indexes.
Log	Displays the Maintenance Log Viewing screen, which reports the User ID, Date, Time, and Description of image file maintenance. Create the file IMG.ARCHIVES in File Definition Maintenance to store archived images.
Select	Displays storage IDs based on your selection criteria.
Show Size	Toggles the columns from **Count** to **Show Size**: • **Count** – Displays the designated storage ID image count totals • **Show Size** – Displays file size totals.

Selecting Document Storage Locations

Narrow the list of storage IDs displayed in Document Storage Location Maintenance based on your selection criteria. For example, enter a portion of a storage ID to display only IDs with similar names.

To select document storage locations:

1. From the **System > System Files > Document Imaging** menu, select **Document Storage Location Maintenance** to display the Document Storage Location Maintenance screen.

   A list of all storage IDs with their network paths displays.

2. Use the **Select** hot key to display the Selection Criteria screen.
3. Enter the selection criteria as described in the following table to narrow the list of storage IDs displayed:

To display a specific...	Enter...
Storage ID	all or part of the storage ID.
Type	one of the following: • **Blank** – online • **A** – Read-only archive • **O** – Offline archive
Network Path	all or part of the network path.

4. Press **Esc** to view the narrowed list of storage IDs on the Document Storage Location Maintenance screen.

Creating a Dynamic Path for Storage Locations

When defining image storage locations, start by setting up an imaging server. For example, the server for storing images might be named "imageserver." Under that server create directories to use for dynamic storage. For example, you might create directories described in the following table and the corresponding network paths:

Storage ID	Network Path
apinvoices	\\imageserver\apinvoices
signatures	\\imageserver\signatures
packinglists	\imageserver\packinglists

To create a dynamic path for a storage location the following criteria must apply:

- Install and configure the Eclipse Network File Utility (ENFU). Only ENFU, not SAMBA, has the ability to create sub-directories on a share.
- Define a path subroutine for the storage location on the Document Storage Location screen.

The path subroutine processes images being saved to the storage ID and creates an additional partial path to the storage location. This path is a combination of the base path defined for the storage ID and the dynamic path determined by the system information. The following table describes how the system creates the dynamic path:

For attachments to...	The system...
Entity records	adds the partial path \Entity ID\.
Activity logs	adds the partial path \Entity ID\.
Ledger records	adds the partial path \Entity ID\Shipping Br\Date\. The date displays as a two-digit month followed by a two-digit day followed by the four-digit year (mmddyyyy). For example, May 12, 2003 displays 06122003.
All other records	stores images in the base folder. In this example, images would be stored in imageserver.

For example, if you attach an image to a ledger record, the system first creates a new folder for the customer or vendor ID. It then creates a sub-folder within that folder named with the branch number. Finally, it creates a sub-folder to the branch folder named with the eight-digit date naming scheme, followed by the file name. An A/P entry person would do the following to use dynamic storage:

1. Create an A/P Entry record.
2. Activate the imaging software.
3. Ensure the profile is correct.
4. Select the A/P invoice image.
5. Click Attach to attach the image to the record.

The base storage path on the Document Storage Location Maintenance screen is \\imageserver\apinvoices. The system does the following to create the dynamic path to the storage location:

1. Checks the ledger record to which the image is attached.
2. Reads the vendor's ID (for example, 1234).
3. Reads the record's shipping branch (for example, Branch 2).
4. Reads the record's date (for example, 08152002).
5. Assigns a file name to the image (for example, 00012345.tif).
6. Creates the following dynamic path: \\imageserver\apinvoices\1234\2\08152002\00012345.tif.

The system creates a new path for every image. If the record has an entity ID that is the same as an existing entity ID, the system looks at the branch, and either stores the image in an existing branch folder or creates a new entity folder. It then looks at the date and either stores the image in an existing date folder or creates a new date folder.

From the A/P example above, the following table describes more examples of paths the system creates for dynamic storage:

If you attach...	The system stores the image in...
another image for an A/P invoice and the vendor ID is 3746, the branch is branch 1, the date is 08152002, and the file name is 34567.tif	the dynamic path \\imageserver\apinvoices\3746\1\08152002\00034567.tif.
another image to the same vendor, but for a different branch (branch 2), with the same date, and the file name is 00056789.tif, the path is the same through the vendor number (\\imageserver\apinvoices\3746)	a new system-created folder for the vendor for Branch 2 before adding the date and the file name. The dynamic path to this image is \\imageserver\apinvoices\3746\2\08152002\00056789.tif.
an image to a product record, because there is no associated customer or vendor ID, no branch, and no date	in the base directory.
an image to a record that is not tied to a branch and a date (for example, a customer record)	the customer ID folder.

Planning Profiles

Route images to storage locations and manage security access to images through profiles.

You can create profiles for different departments, each with different types of document images. The profiles determine the storage location for the images, and who has access to the images. Plan profiles carefully, as shown in the following table.

File Type	Department	Storage ID & Location	Profile ID	Security
Credit Reports	Credit	ID: Credit 99\\image_server\crdrpt99	CREDIT.REPORTS	Credit Dept (Only) = Full Access
Photos of Authorized Buyers	Credit	ID: Buyers \\image_server\buyers	AUTH.BUYERS	All Depts. = Full Access
Employee Reviews	HR	ID: Reviews99 \\image_server\hr	REVIEWS99	HR Dept. = Managers Only

Creating a Custom Indexing Profiles

Create custom indexing profiles to define document storage paths and define how the system indexes the images using the profile. Once you create a custom index profile, you can use that profile by selecting it from the Document Indexer's dialog box. See the Document Indexer's help for more information.

Use document profiles to control image access and locations. For example, create a profile for A/R images where you define a network path that stores all A/R image files on a network to which only A/R employees have access. Or, if you have extremely sensitive personnel file attachments, create a profile that stores those files only on the personnel manager's computer. Assess your document imaging uses, and create permissions and profiles for each category of images you use.

You need access privileges for all storage locations you use, otherwise you may get error messages during file attachment or retrieval. You cannot, for example, use the Attachment Indexing screen's **Index** hot key to access a restricted network directory or storage location. See your System Administrator if you need access to unavailable directories or storage locations.

You can create a user-defined authorization key that controls a user's ability to edit an image and assign that authorization key to an indexing profile.

Designate image storage information in your profiles, and view summary details from the document storage and location information.

Set print status parameters for documents imaged onto invoiced sales orders in the Parameters For Documents Imaged Onto Invoiced Sales Orders control maintenance record.

To create a custom indexing profile:

1. From the **System > System Files > Document Imaging** menu, select **Document Profile Maintenance** to display the Document Profile Maintenance screen.
2. In the **Profile ID** field, enter a short, descriptive name, up to 15 characters long.
3. Press **Enter** to confirm that you are creating a new profile ID.

   Note: Press **F10** to select an existing profile. You can list fewer choices by entering the first letter of the profile name before pressing **F10**. For example, enter **G** to list only profiles starting with that letter.

4. In the **Description** field, enter a full description of the profile, up to 60 characters. To augment the shorter Profile ID name, you can enter a more complete description, such as Accounts Payable or Customer Contracts. This description is the default entry in Attachment Indexing's **Description** field, important when a profile is set to bypass a **Prompt on Each Index**. If you do not enter a description, each file name is used as the default entry.

5. In the **Prompt on Each Index** field, enter one of the following:
   - **Y** – Displays the Attachment Indexing screen for each index, where you can enter additional indexing information. This is the default.
   - **N** – Does not display the Attachment Indexing screen during indexing.
6. In the **Reference Only** field, enter one of the following:
   - **Y** – Uses the profile only for reference and reporting, as with inactive profiles. For example, you assign the profile "DEC03_PICKTICS" for pick tickets during December. After December, you make the profile available for reference only. A profile for reference only is available for reporting, or when selecting images to copy, move, and delete, but is no longer available as a choice for saving new images.
   - **N** – Makes the profile available as a choice when saving new images. This is the default setting.
7. In the **Disable Temp Folders** field, enter one of the following:
   - **Y** – Saves this profile's documents only to their designated final location, instead of temporarily saving them to intermediate directories. The temporary folders may require more security precautions than the profile's designated folder. This is the default.
   - **N** – Permits the option of using temporary folders that can take advantage of Eclipse network replication features.
8. In the **Index Desc for Recall** field, enter one of the following:
   - **Y** – Makes this profile's documents available for search and recall by searching for one or more keywords in the documents' descriptions. For example, enter **payable** to display a list of all documents that include "payable" anywhere in the description.
   - **N** – Protects the images from being recalled by description. You can still view the images by opening them from the records they are attached to, but you cannot search and recall the images by description.
9. In the **Viewable in WOE** field, indicate if you want the document to be accessible for web order entry.
9. In the **View Auth Key Reqrd** field, press **F10** and select an authorization key for the profile. This prevents unauthorized users from viewing the profile's images. For example, assign an authorization key that protects payroll record images from unauthorized viewing. By default, no view authorization is required.

   The authorization key selected must be listed in the **Valid Imaging Auth Keys** control maintenance record.
10. In the **Storage ID** column, press **F10** to select from a list of existing storage IDs. You can designate additional storage IDs on additional lines.

11. In the **Brch** field, do one of the following for each storage ID:
    - **Enter the local branch** – Restricts images attached to ledgers to the pertinent branches. The system compares the ledger's pricing, shipping, and G/L branch to the storage ID's local branch. If any of the ledger's branches match the local branch, the system stores the image in that storage ID. The field does not allow Territory IDs.
    - **Leave it blank** – Does not restrict the storage location, and images attached to ledgers are always stored in all locations with a blank **Brch** field.
12. In the **Force** (**F**) column, enter one of the following:
    - **Yes** – Forces all documents saved using the profile to the designated network path. If this path is unavailable during imaging, a warning message displays.
    - **No** – Does not force saving to the defined network path. Entering **No**, or leaving this field blank permits the use of temporary storage locations.

    Note: If a forced storage location is associated with a branch, but the pricing, shipping, or G/L branch on the ledger is not the same as the forced location, the image is not stored at the forced location.

    For more information on temporary storage, see Setting Up Document Replication.
13. The **Network Path** column displays the directory path to the storage location. Because storage IDs can include multiple storage locations, more than one path may display for a storage ID. This field is read-only.
14. The **Count** column displays the number of documents currently stored in the storage ID location.
15. Use the **Delete** hot key to delete this profile. The system prompts for confirmation.
16. When finished making changes, press one of the following:
    - **Esc** – Saves the profile and displays a blank Document Profile Maintenance screen.
    - **F12** – Displays a blank Document Profile Maintenance screen without saving the profile.

Testing a Document Profile

Test the accessibility of a document profile's file location and the access time for a storage location.

If a location is inaccessible, the location may be offline or you may not have access privileges. You must have full file read/write access privileges to test a location. To check , try copying a file to that location using Windows Explorer.

You can test the access time from either your own personal computer, or from the Eclipse host system.

To test a document profile:

1. From the **System > System Files > Imaging** menu, select **Document Profile Maintenance** to display the Document Profile Maintenance screen.
2. Populate the necessary fields to display a document profile.
3. Use the **Test** hot key, enter one of the following at the prompt:

- **PC** – Tests the permissions from your personal computer.

  To access from your PC, the system tries to copy the file C:/Config.sys from your computer to the defined network path. A file by this name exists on most computers, but if not, you can temporarily create a file with this name and location, then delete it after a successful test.

- **HOST** – Tests permissions from the Eclipse host system using the user *eclipseimage* set up in UNIX security.

  One of the following occurs:

- If the test runs successfully, a message displays saying the file successfully wrote to the directory.
- If the test runs unsuccessfully and an error message displays, call Eclipse Support for assistance.

Copying a Profile

You can copy a document profile and give it a new name. Use this feature to save time creating similar profiles.

To copy a profile:

1. From the **System > System Files > Document Imaging** menu, select **Document Profile Maintenance** to display the Document Profile Maintenance screen.
2. In the **Profile ID** field, enter a document profile ID to copy.

   The document profile displays.
3. Use the **Copy** hot key and enter one of the following at the prompt, then press **Enter**:
   - **Y** &endash; Saves your current changes for the new profile.
   - **N** &endash; Copies the profile without your current changes.
4. Enter a name for the new profile, and press **Enter**.
5. Enter necessary changes for the new profile.
6. Press **Esc** to save your changes and clear the Document Profile Maintenance screen.

Verifying File Location

Test and repair the files in a storage location. This is helpful for troubleshooting or error recovery, as may be required when moving image directories. Verification accomplishes the following:

- Checks, and fixes, where possible, the file integrity of all documents in the designated location.
- Checks the file names, file extension types (.tif or .doc, etc.), indexes, and internal cross-reference information, such as whether the files exist in all the required locations.
- Renames duplicate images and flags missing images for replacement during document replication.

To verify a file location:

1. From the **System > System Files > Document Imaging** menu, select **Document Storage Location** to display the Document Storage Location Maintenance screen.
2. Use the **Verify Location** hot key to display the Storage Location Verify Utility screen.
3. In the **Storage ID** field, enter the storage ID to verify. By default, the field entry is the storage ID at your cursor position on the Document Storage Location Maintenance screen, however, you can enter another storage ID in the field.
4. In the **Delete References Not Found** field, enter one of the following to determine how to handle cross-references when attached image files cannot be found:
   - **Y** – Deletes any internal file cross-references from Eclipse records to images that cannot be found.
   - **N** – Leaves all cross-references intact. This is the default setting.

   Note: Network errors can temporarily prevent the system from finding images, even when the Eclipse records have accurate index cross-references. To protect against the inadvertent loss of these necessary cross-references, select **Y** only when you are positive the image files no longer exist.

Setting Up a Link to the Host Server

Limit access to documents through your server by designating a user ID and password for a network path.

Because these security settings are only effective at the server-level, use Windows security features when necessary to protect directory folders.

To set up a link to the host server:

1. From the **System > System Files > Document Imaging** menu, select **Document Storage Location** to display the Document Storage Location Maintenance screen.
2. Use the **Unix Security** hot key to display the Unix/NT Security screen.
3. In the **Net Path** field, enter the server name.
4. In the **User ID** field, enter **eclipseimage**.
5. In the **Password** field, enter **imageeclipse**.
6. Press **Esc** to save the settings and exit the screen.

Using Barcode Image Indexing

Automatically index scanned documents without using Document Indexer. This option is active for customers using Eclipse Release 6.064 and earlier.

To use barcode image indexing

1. From the **System > Custom > Imaging** menu, select **Barcode Image Indexing** to display the Image Indexing with Barcodes screen.

   The system goes into input mode to automatically process images with barcodes.

2. Press **Esc** when finished to return to the Document Imaging main menu..

Creating a Web Path

Designate a Web-enabled path to make documents available from the Internet World Wide Web.

When you create a Storage ID for Web-enabled use, use your Igate, not your Imaging server. Store images on the Igate under your web directory, for example www.route/inetpub or yourcompany.com. Then define the normal internal network path to that server.

Establish Storage ID naming conventions and train employees on your documents saving requirements for Web-enabled Storage IDs. You do not want sensitive employee or vendor information available this way, for example. We recommend that all Storage IDs intended for Internet use begin with the word "WEB," for example: WEB-PRODUCTS. Train employees to know when to use these Web-enabled Storage IDs.

Web storage locations are defined in the Default Document Storage Location ID For WOE control maintenance record.

To create a web path:

1. From the **System > System Files > Document Imaging** menu, select **Document Storage Location Maintenance** to display the Document Storage Location Maintenance screen.
2. Use the **Down Arrow** key to place the cursor on the storage ID to which you want access from the web.
3. Use the **Path** hot key, and enter the path to the directory containing documents you want available from the Internet..

   For example, entering a path, such as /webdocs/images makes all documents stored in the www.mycompany.com/webdocs/images directory available to Eclipse Web Commerce software. For details, consult with your company's System Administrator for Eclipse Web Commerce.
4. In the **Path Subroutine** field, enter the normal internal network path to that server in the Network Path column after you have created a Storage ID for Web-enabled use. For better performance, use your Web server, not your Imaging server.
5. Press **Esc** to save the path and exit the screen.

Purging Images

Run the Image Purge Scheduler utility to ensure files in temporary storage locations that have reached their defined *days to delete* are removed from those locations. Schedule the utility to run at a convenient time, such as overnight, or on the weekend, when users are least affected.

The purge does not delete files from a temporary storage ID:

- Unless the file exists elsewhere.
- If the file has a pending location.

To purge an image:

1. From the **System > System Files > Document Imaging** menu, select Image Purge Scheduler to display the Image Purge Scheduler screen.
2. In the **Storage ID to Purge** field, enter the name of the storage ID to purge.
3. In the **Stop Time** field, enter the time the operation will stop.
4. Select one of the hot keys described in the following table:

Hot Key	Description
Backgnd Now	Runs the purge as you continue working in the system.
Temp Br Maint	Displays a screen for assigning a temporary storage location for the purged files.
Schedule	Schedules the utility to run at another time.

The phantom messages you when the process is complete.

Document Replication Overview

As an image manager, you can administer image storage over networks. You can define index profiles that use multiple Storage IDs, and schedule copies of images to be sent to other locations at convenient times.

Companies with multiple branches can use document replication to store new images in each branch during the day, for example then replicate all the images at the main branch at night, when network traffic is low enough to sustain the transfer of many large file images.

During replication, the system copies images to every storage ID designated on in the document profiles. For example, images from a temporary branch storage locations could be copied to one or more central image storage location.

Setting Up Document Replication

Before using document replication, image managers must set up the necessary storage IDs and safeguards for their intended workflow. This means creating permanent and temporary storage ID locations, and deciding how long images are kept in temporary storage for fastest recall at the branches. It is also essential for imaging managers to ensure that correct paths and permissions are set up for all storage IDs and all imaging users.

To set up document replication:

1. After considering your typical workflow and network needs, create a series of storage IDs for permanent and temporary images. Keep in mind the following information:
   - Create at least one permanent storage ID for keeping images in their final storage location, which might be your main branch or main computer location.
   - Create one temporary storage ID for each of the branches or other locations that are creating images.
   - Create one *error* storage ID to store images if all other network directories are temporarily unavailable. This error storage location must always be accessible.

   Note: Establish proper storage ID naming conventions and perform proper employee training to ensure all storage IDs clearly identify their purpose. We recommend all storage IDs intended for temporary use begin with the word TEMP. For example, TEMP-BRANCH1. Name the error storage location ERROR. Train all employees how and when to use these storage IDs.

2. From the **System > System Files > Imaging** menu, select **Branch Local Storage Maintenance** to display the Branch Local Storage Maintenance screen.
3. In the **Error Storage Location** field, enter the storage ID used to store images when all other directories are temporarily unavailable.
4. In the **Temporary Storage Location ID** column, enter a storage ID for each branch listed in the **Br** field.
5. In the **Days to Delete** column, enter the number of days to temporarily keep each storage ID's images before deleting the images. Consider storage space requirements, but because it is quicker to recall and view images stored locally, you may want to store images locally for 15-60 days, or until frequent viewing is no longer needed.
6. When finished setting up storage locations for each branch, do one of the following:
   - Press **Esc** to save and close the screen.
   - Press **F12** to abort, closing the screen without saving changes.

7. Check the following to finalize the document replication set up:
    - **Local branch settings** – Ensure branch settings match the local branch settings for each storage ID.
    - **Local branches overrides for each storage ID** – View or edit the local branches overrides designated for each storage ID by using the **Local Brchs** hot key on the Document Storage Location Maintenance screen. If no branch overrides are designated, the system uses the branch settings in Imaging's Control Parameter Maintenance screen, where you determine the default storage location for each branch in Control Maintenance.
    - **Branch settings for Imaging users** – Ensure each Imaging user has the appropriate branch settings, so their new images are stored in the proper locations. It is normally not necessary to change a user's branch settings. However, you can enter or edit the storage location branch designated, if necessary, by using the **Storage Loc Br** hot key on the Terminal Setup screen (**System > System Files > Terminal Setup**). If no storage location branch is defined here, the user's storage location defaults to the user's home branch defined in User Maintenance.
    - **Imaging a user's home branch assignment** – Ensure each Eclipse Imaging user has the appropriate **Home Branch** field setting in their Accessible Branches screen (**System > System Files > User Maintenance**). Then with a user ID entered, use the **Branches** hot key. If necessary, you can define a different home branch.

Replicating Documents

Once you have set up permanent and temporary storage ID locations, you can start document replication manually or schedule it to run automatically. For most purposes, schedule regular, automatic replication of all storage IDs. Then use document replication to automatically back up image storage locations, while also scheduling replication for the optimum time for your system's host computer system and network.

During document replication, the system copies images from every storage ID location defined in the document profiles. Depending on the profiles, for example, images are copied from temporary branch storage locations into one or more central image storage location.

To replicate a document:

1. From the **System > System Files > Imaging** menu, select **Document Replication Scheduler** to display the Document Replication Scheduler screen.
2. In the **To Storage ID** field, do one of the following:
   - Press **F10** and select the name of the storage ID you want to replicate.
   - Leave the field blank to replicate all storage IDs.
3. In the **Stop Time** field, do one of the following:
   - Enter the time to stop the replication process.
   - Leave the field blank to let the replication continue until complete.

   Note: The Phantom processor notifies you when either a scheduled or background replication is complete, and it summarizes any errors. A Document Replication Error Report is generated if any errors, such as copying errors or inaccessible storage ID errors, are encountered during replication.
4. Use the hot keys described in the following table to finalize the document replication.

Hot Key	Description
Backgnd Now	Starts the replication now, but runs in the background. The Phantom processor notifies you when the replication is complete.
Foregnd Now	Starts the replication now, using the current Eclipse screen to display the progress. At the prompt, determine whether to replicate using the Eclipse Host system, or using your personal computer. The foreground mode is useful for testing a document replication job, such as checking if all storage ID locations are accessible.
Schedule	Display a standard Phantom Scheduler screen, in which you can specify when and how to replicate the documents. We recommend scheduling automatic replication and backup of every storage ID location.
F12	Aborts, and closes the screen without performing the replication.

Document Replication Reference

Use the following tables as a quick reference for information concerning document storage and recall.

Rules for Document Storage Hierarchy

The following table describes the hierarchy rules for document storage.

The system checks the following, in order	Actions and results, if found. The system...
Document profile for any F (forced) storage IDs.	stores the image. If unable to store the image in first designated location, the system continues in order through next designated locations until it reaches the default storage location. The system stops searching when successful.
Other storage IDs for local (not network) storage location.	stores the image. If unable to store the image, the system continues until it reaches the default storage location. The system stops searching when successful.
The temporary storage location designated in Branch Local Storage Maintenance.	stores the image. If temporary storage location does not exist or if unable to store, the system continues through each network storage ID. The system stops searching when successful.
Error storage location.	stores the image. If error storage location does not exist or if unable to store, the system continues to default storage location. The system stops searching when successful.

Note: If any document profile storage ID operations are not completed, the system flags the images. This alerts the Phantom to finish synchronization later.

Document Recall for Viewing Rules

The following table describes the viewing rules for recalling documents.

The system checks, in order:
Searches for the document in local, online storage ID locations.
Searches for the document in network, online storage ID locations.
Prompts to mount the document's offline storage (for example, a CD-ROM disc).

Running the Imaging Invoice Exception Report

Use the Imaging Invoice Exception Report to determine which records have images attached. For example, you can determine which shipped orders have pick ticket images attached.

To run the Imaging Invoice Exception Report:

1. From the **System > System Files > Imaging** menu, select **Imaging Invoice Exception Report** to display the report screen.
2. In the **Br/Tr/ALL** field, enter the branch or territory number you want on this report. Enter **ALL** to include all branches and territories.
3. In the **Start Date** field, enter the first date in a range of dates to include in this report.
4. In the **End Date** field, enter the last date in a range of dates to include in this report.
5. In the **Transaction** field, select the type of transaction, for example, purchase orders or cash receipts, to include in the report. Leave this field blank to include all transaction types.

   If you select to report on cash receipts, select the bank in the **Bank** field at the bottom of the screen to report on only cash receipts for one particular bank.
6. In the **Profile** field, press **F10** to select a document profile.
7. In the **Exception/Scanned** field, press **F10** and select one of the following:
   - **Exception** – Reports all records without images.
   - **Scanned** – Reports all records with images.
   - **All** – Reports on all records. In this case, asterisks indicate the records with images.

8. If you selected **Invoice** in the **Transaction** field, complete the following fields to further filter which invoices to include in the report:

Field	Description
Prt Status	Enter one of the following statuses to confine the report to one invoice status category that does not have an image attached for the designated profile: • **ALL** – Includes all invoices that do not have images attached. This is the default. • **P** – **Detailed Invoice Preview Report** – Includes invoices that do not have images attached in the Detailed Invoice Preview report. • **Q – Invoice Preview Queue** – Includes invoices that do not have images attached in the Invoices Preview Queue. • **H – Hold - No Batch Print** – Prevents printing this report as part of a batch through the Print Invoices program. • **N – No Print** – does not print the report. • **T** – **Temporary Ship Ticket** – Includes invoices that do not have images attached on a ship ticket. **Note:** To report using a different status, **Ship Date** must be entered in the **Select by** field. If the field is set to **Invoice Print Date**, the status of **All** is used, regardless of the invoice print status specified.
Select	Add any additional report selection criteria, including: • **All** • **Normal (Stock/Non-Stock)** • **Directs** • **Credits** • **Service Charges** • **Cash Sales**
Select By	Select one of the following to report by: • **Ship Date** • **Invoice Print Date**
Batch #	Enter a batch number for the report, if necessary.

9. Set options, if needed, and generate the report.

Note: Image managers may also want to run the Detailed Invoice Preview report, before invoicing. The report shows an asterisk following the invoice number for each Eclipse record with an image attached. Summary information at the end of the report lists the number of invoices, as well as the number of invoices with images.

Running the Msg-Ack Utility

Run the Reprocess Msg-Ack utility if files or file attachments do not reach their intended destination, for example if a document reaches its intended destination but its attached signature capture does not.

To reprocess the Msg-Ack:

1. From the **System > System Files > Document Imaging** menu, select **Reprocess Images in MSG-ACK** to display the Reprocess Msg-Ack screen.
2. Use the **Begin** hot key to reprocess the files located in the Msg-Ack directory.
3. Press **Esc** to return to the Imaging main menu.
4. Check the intended destination to ensure the files were processed correctly.

Attaching Images to Eclipse Record

You can attach scanned images to Eclipse records and transactions. Attach any scanned image, such as invoices, product photographs, or packing lists.

You must first set up a default indexing profile for the user attaching the images, and set that profile to **Prompt on Each Index**. If the user is not set up with a default profile, the profile defaults to the profile used when attaching the previous image.

To attach images to an Eclipse record:

1. From any record or transaction in Eclipse, do one of the following to display the Attachment Indexing screen:
   - Have your Windows file manager, such as Explore, open, and select the image you want to attach. Right-click the image and drag it over the Eclipse screen, and then release the mouse button.
   - From the Eterm menu bar, select **Attachments**. Then, browse to the image you want to attach, select it, and click **Open**.
2. The file name of the image displays in the **Image ID** field.
3. In the **Description** field, enter the image file identification. By default, the Image ID is repeated here, but you can enter a more memorable name to help you identify the file attachment.
4. The **Document Profile** field displays the name of the document profile used for the file. A profile is required because it lets Eclipse know how to index and store the file.

   Note: If you change the profile, enter **Y** at the prompt to replace the current profile with the new profile. Entering **N** retains the existing profile.

5. To require authorization to view the image, in the **View Auth Key** field, select an authorization key for the image. This prevents unauthorized users from viewing the image. For example, assign an authorization key that protects payroll record images from unauthorized viewing.
6. To indicate that the image can be recalled using a description search, enter **Y** in the **Index Description for Recall** field. To prevent searches, enter N.
7. Enter the following information in the **Index Points** column for the following index types to make your image file available from more than one Eclipse record. For example, you could make the same blanket purchase order image accessible from both the customer (Entity) and the sales order entry (Ledger) records.

Index	Index point description
User ID	Enter additional pointers to user records.
Entity	Enter extra index pointers to vendor or customer records.

Index	Index point description
Ledger	Enter additional index pointers to any ledger records, including sales orders, purchase orders, and accounts payable.
Product	Enter extra index pointers to any product.
Activity Log	Attach images to user and customer trackers.
Product Cat	Attach images to Eclipse Web Commerce product categories. This lets you display an image next to its product category on a web page, for example.
MSDS Sheets	Attach an image to all products found in the **Product** option from an MSDS.

8. To attach the image to the record, use one of the following hot keys:
   - **Index** – Attaches the image to the record and deletes it from the directory from which you copied it.
   - **Index W/O Delete** – Attaches the image to the record and leaves a copy of it in the directory from which you copied it.

   Note: To verify that the image was attached, exit the record and reopen it. Click the Image Indicator (*i*) at the top of the screen to display the attachment list.

Opening File Attachments

If an Eclipse record displays an Image Indicator (*i*), usually in its top-right corner, it has an image or document attached to it. Open the document or image directly from the record for viewing or output. Opening a scanned image enlarges that image's display in an Image Information screen. Opening any other file type launches its associated application.

For example, if your system has Microsoft Word available and is registered for ".doc" files, that program launches when you use the Attachment Viewer to open that file type. As long as you have the appropriate application programs on your computer, you can use the Attachment Viewer for audio files, movies, documents, and image files.

See the Attachment Viewer Help for more information about using that program.

To open file attachments:

1. Display an Eclipse record that has a file attached. This record displays an Image Indicator (*i*).
2. Press **Shift-F8** or click the Image Indicator to display the File Attachments screen.

   The columns on the Attachments screen list each file name, index profile used, the date and time each file was attached, plus each file's three letter extension. For example, scanned images often have a .tif extension, word processing files often have a .doc extension, and so on. The files are listed in the order they were attached, with the newest files at the top of the list. The **View All** category lists the total number of file attachments–8 in this example.
3. Do one of the following to launch the appropriate program and open the document:
   - While the cursor is on the **View All** field, press **Esc** or **Enter** to display the Attachment Viewer screen. Then double-click on the document or image you want to view.
   - Use the **Down Arrow** key to move the cursor to the document or image you want to view, then press **Esc** or **Enter**.

   The document or image displays in its associated application or in the Image Information screen.
4. Click the **Close** button to close the document and return to the Attachments screen.
5. Press **Esc** to exit the Attachments screen.

Deleting or Editing Images in the Index

Edit indexes in the following ways:

- Add or delete information from the Attachment screen.
- Delete images, so they are no longer attached to Eclipse records.

You must have the IMAGE.EDIT.ALLOWED authorization key to delete or edit images.

To delete or edit an image in the index:

1. Attaching scanned images to an entity or product record.
2. Display an Eclipse record that has an image attached, as indicated by the Image Indicator (*i*).
3. Press **Shift-F12**, and then select **Edit Images** to display the Images screen.

   The Images screen includes images currently indexed to the record, as well as any images with deleted indexes. A deleted index (identified by **Deleted** in its description) was once attached to the record, but was later removed. For example, you might want to delete the index from an old MSDS, so the more recent sheet is displayed instead of the old sheet. However, since the deleted index is still listed, you can still manually select and retrieve the old sheet for comparison.
4. Select the image to delete or edit, and press **Enter** to display the Delete/Edit Indexes screen.

   Note: You can retrieve a deleted index. Select a deleted index, identified by a ~Deleted~ profile. The **Delete Entire Index** hot key changes to **UnDel. Entire Index.** When you use the hot key to retrieve the index, you can enter a new description and profile before closing the Delete/Edit Indexes screen.
5. The **Image ID** field displays the name of the image file.
6. In the **Description** field, enter up to 40 characters of added image file identification. By default, the Image ID name is repeated here. But you can enter a more memorable name, to help identify the file attachment.
7. The **Doc Profile** field displays the name of the document profile used for the file. A profile is required, because it lets Eclipse know how to index and store the file. If you change the profile, enter one of the following at the prompt:
   - **Y** – Replaces the current description with the new profile's description.
   - **N** – Retains the existing description.

8. In the **Index Desc for Recall** field, enter one of the following to determine whether the image can be recalled using a description search:
   - **Y** – Allows searches on this image.
   - **N** – Prevents searches.
9. To require authorization to view the image, in the **View Auth Key** field, assign an Eclipse security key to the image. This helps prevent unauthorized users from viewing the image. For example, assign a security key that protects payroll record images from unauthorized viewing. Press **F10** to select a security key, then press **Enter**.
10. In the **Index Points** field, enter additional index pointers for each item in the **Type** field, to make your image file available from more than one Eclipse record. For example, you could make the same blanket purchase order image accessible from both the customer (Entity) and the sales order entry (Ledger) records.

    In the **Index Points** field, enter the following information, if needed. Use the **Multi** hot key to enter multiple items in each field:

In the field...	Enter...
User ID	additional pointers to User Maintenance records.
Entity	additional index pointers to Vendor or Customer Maintenance records.
Ledger	additional index pointers to any ledger records, including Sales Orders, Purchase Orders, and Accounts Payable.
Product	pointers to product descriptions in Web Commerce. First set up a default profile for *WOE-Images.* We recommend naming the folder in the Internet ROOT directory the same as the profile.
Activity Log	pointers to user and customer trackers.
Product Cat	pointers to Eclipse Web Commerce product categories. This displays an image next to its product category on a web page, for example. For information about using product categories, see the Eclipse Web Commerce documentation.
User Defined	pointers to any custom user defined screens. For example, to index test reports to products, or reviews to employee screens.

11. Use the following hot keys as needed:
    - **Delete Index Point** – Deletes a specific index point. When more than one index point exists, you can delete that specific index point by positioning the cursor on that line, then using this hot key.
    - **Delete Entire Index** – Deletes all (one or more) index pointers.
    - **Multi** hot key – Edit multiple index points (*Multi* displays in fields with pointers to multiple records).
    - **F12** – Closes the Delete/Edit Indexes screen without saving changes.

    Note: To permanently delete the attachment, manually remove it or run the Document Copy/Move/Delete Utility.

Manipulating Indexed Images

Use the Document Copy/Move/Delete utility to manipulate images or their indexes. For example, to move your accounts payable image files to another storage location, you can move the images and update the index cross-references so records can still find the images. Or, you may need to add or remove just an index, and not deal with the cross-referenced image files themselves.

To manipulate indexed images:

1. From the **System > System Files > Document Imaging** menu, use one of the following paths to display the Document Copy/Move/Delete Utility screen.
   - Select **Document Storage Location Maintenance** to display the Document Storage Location Maintenance screen, and then use the **Copy/Move/Delete** hot key.
   - Select Document Copy/Move/Delete Utility.
2. Complete the following fields as needed:

In the field...	Enter...
Operation Type	one of the following: • **Copy** – Copies images from one Storage ID to another. • **Move** – Moves images from one Storage ID to another. • **Delete Duplicates** – Deletes duplicate copies of images from a Storage ID. The system retains one copy of each image, while all duplicates are deleted. • **Delete All** – Deletes all images from a Storage ID. • **Remove Index** – Removes index cross-references from a Storage ID. • **Add Index** – Cross-references images in the *from* storage location with those in the *to* storage location. The system does not copy or move the images. • **Replicate** – Moves or copies images to pre-determined locations. The operation occurs during the next scheduled replication. With this option, you can schedule network-intensive operations for a convenient time. In contrast, a **Copy** or **Move** occurs immediately.
From Storage ID	one or more storage ID on which to perform the operation.
To Storage ID	the destination of the storage ID for copies or moves.
Indexed Starting on Date	the earliest index date of the targeted files. For example, if you want to copy all files indexed on or after 02/01/2006, enter that date.
Indexed Starting at Time	the earliest index time of the targeted files. For example, if you want to copy all files indexed on or after 2:00 P.M., enter that time.
Indexed Ending on Date	the latest index date of the targeted files. For example if you want to copy files indexed before and on 02/15/2005, enter that date. You can specify a date range for indexed files by using both date fields. For example, specify all files indexed on 02/01/2006 and through 02/15/2006.
Indexed Ending at Time	the latest index time of the targeted files. For example, if you want to copy all files indexed on or before 2:00 P.M., enter that time. You can specify a time range for indexed files by using both time fields. For example, specify all files indexed at 1 P.M. and after for a specific date or date range.

In the field...	Enter...
Document Profile	a profile created on the Document Profile Maintenance screen. Press F10 to select a profile.
Description Pattern	a file name pattern the system recognizes. For example, "invoice" or "A/R," that exists anywhere within the description for the desired images.
Indexed by User ID	the user ID of the person who indexed the files you are targeting for the operation. Files not indexed by this user are ignored when copying, moving, or deleting.
Document Type	the target file type for this operation, such as ".doc" or ".tif.." This way you move only the word processing files from a storage ID, for example, while ignoring all other image types.
Document Size	a file size or range of sizes. For example, to operate on files greater than 3 bytes, but less than 4 bytes, enter 3001 in the **Document Size (Bytes)** field, and 3999 in the **and/or <** field. You can enter a size in either or both fields, as needed.

3. Use one of the following hot keys to finalize the copy, move, or delete operation:
   - **Backgnd Now** – Starts the operation in the background.
   - **Foregnd Now** – Starts the operation using the current Eclipse screen to display the progress.
   - **Schedule** – Displays the Phantom Scheduler screen, where you specify when and how to perform the operation.
   - **List Docs** – Displays a list with statistics regarding the affected image files.
   - **F12 –** Aborts the operation, closing the utility screen without performing an operation.

   Note: Press **Ente**r to stop an operation in progress.

Retrieving Images by Keyword

Retrieve images by searching for one or more keywords in the document's description. For example, enter **personnel** to display a list of all documents that include that word anywhere in their description.

To retrieve images by keyword:

1. From the **System > System Files > Document Imaging** menu, select **Document Recall by Keyword** to display the Document Recall by Keyword screen.
2. In the **Keyword** field, enter one or more keywords for the keyword search. If you are entering multiple keywords to narrow the search, separate each by a space. Searches are not case sensitive.
3. Do one of the following to continue the search:
   - Press **Enter** – Begins the search.
   - Use the **Edit Documents** hot key – Begins the search, and gives you the ability to edit the indexes for recalled documents.

     Eclipse displays a list of any documents that meet your keyword search criteria.
4. Select a document to recall or select all documents listed for viewing.
5. Press **Enter** to recall your selection.

   The Attachment Viewer opens or the document's program launches.

   If you used the **Edit Documents** hot key in step 3, the Delete / Edit Indexes screen also displays. You can simultaneously view a document and delete or edit its indexes.

   Note: You can recall documents no longer attached to records by entering the keywords: **not found**. Any images with broken cross-reference records are listed. Using the **Edit Documents** hot key, you can view the documents and reattach them to any desired records.

Storing Images Offline

When you move images from your imaging server to an off-line storage location to save space, for example, to a DVD-ROM, CD-ROM, or other removable media, you need to create an off-line storage ID, define the network path as offline, and change the path of your storage ID.

To store images offline:

1. From the **System > System Files > Document Imaging** menu, select **Document Profile Maintenance** to display the Document Profile Maintenance screen.
2. In the **Profile ID** field, enter the profile ID that you want to store.
3. Remove the storage ID from any profiles pointing to it by pressing **Alt-Delete**. DO NOT press **Alt-D**, because you will delete the Storage ID instead of removing it from profile maintenance.
4. Repeat steps 1-3 for any storage ID you want to store.
5. Copy all image folders from the profiles you just deleted to a removable storage device. See the instructions for your computer's software for more information.
6. To share the folders on the removable device, in Windows Explore, right-click on the folder, and select **Sharing and Securities** to display the All Users Properties window. Click the **Sharing** tab and select **Share This Folder**. Give it a share name, such as CDpick_tickets2004.
7. From the **System > System Files > Document Imaging** menu, select **Document Storage Location Maintenance** to display the Document Storage Location Maintenance screen.
8. In the **T** column, enter O-Offline as the storage ID.
9. Select the storage ID you want to store offline, change the path to point to the CD Rom share, such as, //imaging/CDpick_tickets2004.
10. Use the **Offline Comment hot** key to enter a message that people will receive when they try to access an image that is tied to the offline storage ID. For example, "Please have your system administrator place CD pick_tickets2004 into the CD drive. Press **Enter** to continue after the CD has been loaded."
11. Use the **Unix Security** hot key to display the UNIX/NT Security screen, and verify the user ID and password.
12. Use the **Test** hot key, and test each option to verify that you can read from this path.

Troubleshooting Imaging

If you experience problems with Eclipse Document Imaging, consult the following notes:

How can I use my old TWAIN scanner with the new Document Imaging?

Although this version of Eclipse Document Imaging provides built-in controls for ISIS scanners, you can continue to use TWAIN (Technology Without An Interesting Name) scanners. Control your scanner using its own software. Once you have scanned images into the image queue folder, you can open them from the Image Indexer and index them.

Why isn't my scanner listed in the Scanner Selection dialog box?

Only installed ISIS (Image and Scanner Interface Specification) compatible scanners are listed. This means that a corresponding ISIS driver file is installed in the Windows\pixtran folder. If the ISIS scanner driver was installed improperly, you can try reinstalling the driver.

Where can I get more information about available ISIS drivers?

A full list of ISIS scanner drivers is available on the Pixel Translations Web site, at the following URL: http://www.scannerdrivers.com/scaninfo.nsf/zScanner_List

What should I do if thumbnail images display in black and white?

You can change the display of thumbnail images using the Image Indexer's View menu commands, or the Display Settings command in the Attachment Viewer. The Normal setting in either program displays color image thumbnails.

Why is my JPEG file showing as an icon, not an image, and why can't I annotate it?

Imaging for Windows 95 cannot read certain JPEG (.jpg) or TIFF (.tif) compression formats. Use an image-editing program like Adobe Photoshop to open the file, and resave it in another file format or without compression. Or upgrade to Imaging for Windows 98 or later.

Why do the wrong file-type icons sometimes display for file attachments?

The Windows system software substitutes the wrong icons sometimes. This is not a serious problem, and can often be fixed temporarily by restarting your computer. If the wrong icon is always associated with certain files types, see the Windows Help or other system documentation about associating file extensions (".doc" or ".xls," as examples) with particular programs.

What should I do if images print black?

Contact your printer manufacturer for the latest printer driver software. You can often download drivers from the manufacturers' web sites. If you are using a PCL 6 printer driver, you may need to change the active profile for your printer. For assistance, see the color management topics in the Windows (98 or greater) Help file.

What should I do if annotations print black?

There are some incompatibilities between PCL 6 printer drivers and the Professional Edition of Imaging for Windows. For this version of Eclipse Document Imaging, Eclipse recommends that you uninstall the Professional Edition, and install the standard version. You could also hide the annotations before printing, or install and choose another printer driver (for example, a PostScript or PCL 5 printer driver) designed for your particular printer.

Why do my annotations disappear?

If you still have the Professional Edition of Imaging for Windows installed on your scanning workstations, you should immediately save (**File**/**SaveImage**) each note you create. That edition sometimes deletes more than one note when you use the Image Indexer to undo or delete a note. When all notes are saved, you can click **Revert to Disk** to restore inadvertently deleted notes. For this version of Eclipse Document Imaging, Eclipse recommends that you uninstall the Professional Edition, and install the standard version.

Why can't I fax images?

Faxing requires VSI-FAX Gold Series Windows Network Client Interface software or similar products. The VSI-FAX system includes its own modem hardware to transmit faxes. If you are using other software for faxing, access to modem hardware or phone lines may also be required. Check with your System Administrator.

Why aren't profiles displaying in the Image Indexer's Profiles list?

An active Eterm screen must be open when starting the Image Indexer, or when using the Image Indexer's **Refresh Document Profiles** (**File** menu) command. If you have used this command with Eterm running, and no profiles are listed, it is possible that none have been defined.

Why aren't my barcodes being recognized?

See Barcoding Basics for more information.

Why is there no Image Indicator (*i*) in the top right-corner of a record that I know has a file attached?

Due to various design considerations, some Eclipse screens have to indicate images in ways other than the image indicator (*i*). For example, an image indicator may appear in the top-left corner instead, although you can open file attachments as usual.

Or, in the case of the A/P Inquiry screen, the image indicator appears in a different spot altogether. If an invoice has an image attached, an asterisk (*) shows in the **Age** column. To view an attachment in this case, you can first select and open the record using either the **View** or **Edit** hot keys. Once the desired record displays, open attachments as usual. There is also an **Img** hot key on the A/P Inquiry screen that lets you view images.

Why does the Image Indexer keep going behind other program windows?

If you have the Image Indexer's **Make Eterm Active Window** (**View** menu) command enabled, the window focus automatically switches back to Eterm. Uncheck the menu command to disable this feature.

What do I do if I attach a file to the wrong record, or attach the wrong file?

Once you have deleted the index, start over by rescanning or attaching the document as you usually do.

Error Messages

What does an error displaying image mean?

In some cases, you may simply be trying to open an unrecognized file type. For example, a file format that is not associated with any application program on your computer. Try opening the file with another program, then resave in a supported format.

An error message can also occur when using outdated versions of Eterm or the Attachment Viewer. Update to the current versions of the programs, which support more file formats and attachments.

In the most serious cases, corrupt or missing files can cause this error. For instance, if your company ran out of storage space, yet continued to attach files despite the warnings.

Why do I get an out of memory error?

If you are running both the Image Indexer and Attachment Viewer at the same time, you need more than 16 MB of RAM memory. Microsoft recommends a minimum of 32 MB of RAM for the Windows 95/98/2000 system alone, not including application programs. You should add more RAM (memory) to your computer. In the meantime, you can try closing some of the programs running, or use a lower (for example, **Binary** or **4 bit Gray**) display resolution for thumbnails.

What does an error writing file (for example, to C:\InBasket\...) mean?

You may not have access privileges to the directory, in which case you need to see your System Administrator. Or if you have spaces in file names, use names without spaces.

What should I do if I get a link notification error from the Visioneer Paperport version 5 software?

Upgrade your Visioneer software. This known bug does not cause problems when indexing manually, though it does require users to click OK to proceed. However, when indexing automatically, this problem prevents images from being indexed properly.

What does a *Can not copy a File onto itself* error mean?

A file by the same name already exists in the same storage location. You may see this message when using the Document Copy/Move/Delete Utility to copy or move an index. The program

skips over the duplicate files (preserving the files that already exist), while the rest of the copy or move proceeds as usual. If needed, you can rename any identically-named files and use the Document Copy/Move/Delete Utility again.

What does an *invalid Unix networking path error* mean?

The Samba software that lets Windows and Unix systems share files cannot write to directories nested more than two layers deep. Samba can read files from nested directories, but it cannot write to them. For write access, do not use network paths longer than: //servername/sharename.

Why do I get an error about not having a valid profile?

You may not have a profile selected in the Image Indexer's **Profiles** list. This is often the case when a new user opens the Image Indexer for the first time. Or a profile chosen earlier may have since been deleted. Select a valid profile from the list.

An error can also occur if Eterm is not running when you start the Image Indexer. Without Eterm running, the Image Indexer is unable to download the latest profile information. In that situation, restart Eterm, then restart the Image Indexer.

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