DMS USER GUIDE (DocFinity Version 10)

Document Management Services

The Ohio State University

Business and Finance & Administration and Planning IT

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USER GUIDE INTRODUCTION

DocFinity version 10 is a web-based document management system developed by Optical Image Technology, Inc. and provided by The Ohio State University Office of Business and Finance & Administration and Planning IT (“BFAP IT”) to store and share documents within your department and throughout the university.

This user guide provides details on various aspects of the system that enable you to scan, index, upload, view, and share documents and work with business process models (“BPMs” or “workflows”).

Please note: Information in this user guide such as website addresses and application functionality is subject to change. Please visit https://dmsclients.osu.edu or contact dms@osu.edu for the most recent copy of this document.
HELP AND SUPPORT

SUBMITTING SUPPORT REQUESTS
Support for the DocFinity application (“DMS”) is provided by Business and Finance & Administration and Planning IT (“BFAP IT”). Please direct any issues or questions to the BFAP IT Help Desk team by sending an email to dms@osu.edu.

Relevant website links, helpful information, important system alerts, and an electronic copy of this document can be found online at https://dmsclients.osu.edu.

SELF-HELP
In-application help is provided by clicking the question mark icon when available, or by selecting ‘Contents’ from the ‘Help’ menu.

DMS ANNOUNCEMENT MAILING LIST
You may consider subscribing to the DMS announcement mailing list to have important system information delivered to you via email. To subscribe, send a message to listproc@lists.acs.ohio-state.edu with subscribe dmsannouncement in the body. You may also request to be added to the mailing by contacting DMS support at dms@osu.edu.
LOGGING INTO DocFINITY

The DocFinity application is primarily web-based, meaning most functions are accessed using a web browser from any computer on the OSU network. For customers who utilize custom applications to access DMS data or third-party tools to capture documents (i.e., Kodak CapturePro), please contact dms@osu.edu for more information.

To access the application, enter the web address for your area into your web browser:

https://imaging.ecm.osu.edu/docfinity/application

Please note the ‘s’ in ‘https’. This is required to establish a secure connection to the DocFinity server.

After you have successfully connected, the login prompt below will appear. (If you do not see this prompt, please contact dms@osu.edu.)

You must have an established DocFinity user account and password to access the system. If you are unsure of this, please contact the DMS representative in your area to request the necessary access.

To log in, enter your username (again, your OSU name.#) into the “Username” field and your password in the “Password” field. Click Login.

For password help, click here or jump to the “Password Help” section.
PASSWORD HELP

RETRIEVING YOUR PASSWORD
If you have an existing DocFinity user account and are unsure of your password, click the “Password help” link below the login prompt, enter your username, and click the Send Email button. Your DocFinity username should match your OSU internet username (name.#). Your password will be delivered to your name.#@osu.edu address.

Alternatively, you can contact dms@osu.edu for password assistance.

CHANGING YOUR PASSWORD
Once you are successfully logged in, you can change your password by selecting Change Password from the DocFinity menu. At the prompt, enter your current password, then your desired password and click Save.
**DocFinity Interface Basics**

**Interface Layout**

The DocFinity version 10 interface consists of groupings of related functions called “panels”. Together, one or more panels comprise a “workspace”.

**Workspaces**

DocFinity includes a number of default workspaces that group together commonly-used panels (i.e., the “Indexing” workspace, the “Searching” workspace, and so on). After logging in for the first time, you are taken directly to the “Searching” workspace (below). Note that, by default, the Searching workspace consists of three panels: Search, Document Viewer, and Search Results.

To change workspaces, select the desired workspace from the Workspace menu.
Changes applied to workspaces (adding new panels, resizing panels, etc.) are retained until the default workspace is reapplied. To return a workspace to its default layout, select it from the Workspace menu in the Navigation Bar.

**SAVING CUSTOMIZED WORKSPACES**

Customized workspaces can be saved permanently for future use either by overwriting the default workspaces or creating custom workspaces. To save a modified layout, select **Save Current As** from the Workspace menu, then select the desired workspace name to be used with the current layout. Selecting an existing workspace (i.e., “Indexing”) will overwrite its default layout. Selecting “Custom 1”, “Custom 2” and so on will assign the current layout to a new custom workspace while retaining the default layouts of the others.

Note that the default workspaces can always be restored by selecting the **Restore Default Workspaces** option from the Workspace menu.

**PANELS**

Workspaces consist of “panels”. Each panel groups related functionality (“Scan”, “Search”, “Search Results”, etc.). Panels can be resized, rearranged, and mixed together to create personalized workspaces.

*Note: BFAP IT recommends utilizing high-resolution displays or multiple-monitor workstations when using DocFinity version 10 to maximize the screen real estate available for multiple panels.*
**BUTTONS AND CONTROLS**

Interfaces across DocFinity share common features and options, as described below.

- **Left Click (a.k.a. Click)**
  Selects an item from a list or executes a command.

- **Shift+Left Click**
  Selects a range of items from a list.

- **Ctrl+Left Click**
  Selects multiple items from a list.

- **Right Click**
  Opens a pop-up menu with context-sensitive options.

- **List Page Controls**
  Displayed when a list of items is too long to display on a single page. Click the navigation controls to display the other pages in the list.

- **Help**
  Click to open online help for the pop-up window.

- **Options Menu**
  Click to open an options menu on panels.

- **Close Window**
  Closes the pop-up window.

- **Moveable Windows**
  Most pop-up windows can be repositioned. Hold the cursor over the window's top border until the movement arrows appear, then drag-and-drop the window to the desired position.

- **Resizable Windows**
  Most pop-up windows can be resized. Hold the cursor over the lower right corner, hold down the left mouse button, then drag-and-drop the window to the desired size.

- **Resizable Panels**
  Most panels can be resized. Click the icon and drag the panel to resize it.

- **Adjustable Column Widths**
  Most table columns can be resized. Hold the cursor over the header column divider until the resizing cursor appears, then click and drag the divider to adjust it.
Most tables can be sorted by column. Click a column header to sort in descending order, indicated by an up arrow (▲). Click again to sort in ascending order, indicated by a down arrow (▼).
SEARCHING

By default, after logging in you will be directed to the Searching workspace. This workspace consists of the Search panel, the Document Viewer panel, and the Search Results panel.

To execute a search, select the appropriate “search” from the drop-down menu in the Search panel. Options listed in this menu vary by department. Each “search” consists of a predefined set of search fields (OSUID, Last Name, First Name, etc.) and only return results from a predefined set of documents. For example, there might be a search called “Transcripts” consisting of OSUID and Last Name search fields, and only returns documents indexed as “Transcript”.

Users can search based on any, all or none of the displayed fields. Entering information in multiple fields will narrow results. Entering no information will return all available results for which the search is defined and your user account has access (in groups of 2000 documents).

Search results will appear in the Search Results panel. Note that each search displays results in a separate tab. This will allow previous search results to continue to be visible after performing a new search.
Double-click the desired document in the results list to display the document image in the Document Viewer panel. Alternatively, you can highlight the desired document and click the View Document button in the Search Results toolbar.

The selected document will display in the Document Viewer panel.

Order Invoice

Date of Order: 06/28/2009
Customer Account No.: 211136592
Name: Jillian Smith
Item No.: JX7923
Item Amount: $24.57
Quantity: 1
SCANNING DOCUMENTS

Scanning the document consists of a few steps. First, you configure the scan settings, such as choosing a scan profile, and then you scan. Once the document is scanned, you will make any necessary alterations to the document before saving it.

SCAN SETTINGS

To access the Scan workspace, select Scan from the Panels menu.

The Scanning workspace will open with the Scan panel on the left and a scan preview panel on the right.

In the Scan panel, note the Scan Configuration options. Here, you will select the options you will need to scan documents.

First, select your scanner using the **Scanner** menu.
Next, select the **Paper source** you would like to use. “ADF” means Automatic Document Feeder—the mechanism that feeds paper in one sheet at a time. “Flatbed” is to be used when scanning pages directly on the glass (typically used for small, oversized, rigid or delicate pages).

Now, either select **(Unindexed)** or select the **Category** and **Document Type** to assign the documents you will be scanning. Selecting **(Unindexed)** assumes the category and document type of these pages will be assigned during the indexing process later. Selecting a category and document type during the scanning process helps reduce time required to index the documents.

Finally, select the correct **Scan profile**. This menu will vary by department, but should indicate the scanner being used as well as the quality of the scanned image (for example, you might have “LANIER – COLOR” and “LANIER – B&W” options).

Other optional features such as automatically eliminating **blank pages** and displaying the scanner’s native driver window (**Scanner interface**) can be selected here.

![Blank pages: □ delete](blank_pages.png)

![Scanner interface: □ display](scanner_interface.png)

**SCANNING**

Once the desired settings are selected, scanning can begin.

Place documents either in the ADF or on the scanner glass (depending on the Paper Source option selected), then click the **Start Scanning** button in the Scan toolbar.

![Scan](scan.png)

The Scan Progress area displays the documents’ pages as they are scanned.

**Scan Progress**

Pages are listed here as they are scanned. Select a page to view, delete, or manipulate. Pages can be re-ordered, combined into documents, or separated.

![Scan Progress](scan_progress.png)

Pages: 9 pages / 4 documents
Select a page in the Scan Process area to view it in the **Document Preview** panel.

Below the Scan Progress area is the **Batch Properties** area. Add a meaningful name for this group of documents in the **Batch name** field (for example, “Transcripts – 10/31/11” or “DUNN.270 – Invoices – 10/31/11”).

Next, in the **Batch access** box, select the group(s) that should have access to this batch (either for indexing or quality control).

Finally, click **Save Batch**.
INDEXING DOCUMENTS

The Indexing workspace lets you check out and manage batches of documents, view documents, and enter indexing metadata. Batches of scanned, uploaded, or imported files will be indexed into the DocFinity database.

To index documents, go to the Indexing workspace. This will open the Batches and Index panels.

CHECKING OUT BATCHES

Under Available Batches, you’ll see the batches you scanned or have access to.
To begin indexing, check out the desired batch by selecting the batch name and clicking the **Check Out Batch** button.

Documents in the selected batch will appear in the **Batches** panel.

**Adding and Updating Metadata**

To index documents in the batch, go to the **Index** panel and begin adding the necessary metadata. Metadata are fields, keywords or “data points” that will allow users to retrieve documents by searching (i.e., Category, Document Type, OSUID, Last Name, First Name, etc.).

Note that the fields available will vary based on the chosen Category and Document Type. Some fields may be unavailable (“grayed out”) either to prevent modification to that field or because another field must be completed first.
After entering all necessary information for the document, click the **Save metadata** button. This will save the metadata entries for this document, not the entire batch. **This is not the final step.**

If the same metadata will be used for the remaining documents in the batch, you can click the **Index Rest** button to apply the same information to the rest of the documents.

Once all of the required information has been entered for all of the documents in the batch, you must “commit” the batch. Once this is complete the documents will be immediately available by searching.

Click **Commit Batch**.
CONCLUSION

For information on additional features not described in this guide or if this guide is inconsistent with the features available in your area, please visit https://dmsclients.osu.edu or email dms@osu.edu for assistance.