Digital ArcHound™

DA Document Manager

User's Guide

Windows Home Server Edition
Version 3.1

Notice: Screen Shots and/or other information contained within this document may differ from your installed application due to enhancements, corrections or new features that have been added.

Legal Notices

DA Document Manager User's Guide
Windows Home Server Edition
January 2010

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Introduction

DA Document Manager is a tool for everyone. It is built to archive all of your documents, and put them into one place where they are easy to retrieve. DA Document Manager is quick: scan or print your document to ArcHound, fill in a few brief keywords about the document and SAVE. You're done. It's really that simple!

The benefits of archiving are numerous. Whether you are an individual or a business, you need your important documentation protected from disaster. DA Document Manager provides a solution: back up your archives to a USB flash drive or an external hard drive. Put the copies in a safety deposit box or other secure location. Now you're ready for anything!

Are you Green? DA Document Manager is! It allows you to save electronic statements securely. This gives you the ability to reduce the number of papers and bills you receive by mail. Save a copy of your financial statements to DA Document Manager by printing directly to the program.

DA Document Manager works with nearly all scanning solutions (hardware and software) that scan to PDF. Further, you can launch and control most scan applications directly from DA Document Manager.

Installation Basics

There are **two parts** to installing DA Document Manager for Windows Home Server:

1. **The WHS Add-In**: software that runs on the WHS server that stores documents and information in centrally located folders and database.

2. **The DA Client Connector**: end-user software that runs on a PC that is connected to your WHS. This software allows you to acquire or create electronic copies of your documents through scanning, printing, drag-n-drop, monitoring and importing.

Optionally, you can download and install the DA Digitizer that will allow you to print any document, email, image or web page directly into the DA Client Connector workspace.

Highlighted Features

- Easily add PDF documents and snapshots of almost any document through importing, drag and drop, printing into the workspace, scanning and auto-detecting new PDFs.

- Quickly and easily add pages to saved PDF files using drag and drop.

- Add password protection to PDF files.

- Select a folder to automatically watch for new PDF documents to archive. Detect new PDFs in My Documents, Desktop, and Application Data folders.

- Split a multi-paged PDF into single page documents with the click of a button. Rearrange the pages and recombine them into PDFs for archiving or emailing.

- PDF documents in the workspace may be combined, split, rotated, re-ordered, emailed, printed and viewed as needed in the Workspace.

- Drag and Drop a PDF directly on the workspace. Drag and Drop non-PDF files (TIFF, JPEG, GIF, BMP files) from Windows or Emails directly onto the Workspace.

- Resizable windows

  - Workspace Viewer and Workspace Form windows are resizable for better viewing of documents and images.

  - Based on your Video Display settings, all windows in the DA Client Connector support 96DPI, 120DPI and higher DPI settings so that high resolution documents such as Medical Scans, X-Rays, Maps, etc., can be viewed in detail.

- Scanning

  - Control scanners that support industry standard TWAIN and WIA compatibility. You can also rearrange the scanned document order in the Workspace.

  - Search

  - View your search results with a robust and powerful "Google" like search engine

  - Search Custom Categories or Subcategories. You can Add New, Edit, and Delete categories and subcategories.

  - Search Results may be sorted by Title or various dates in both ascending and descending order.

  - Perform your Searches using a complete range of filters to quickly find what you need.

Understanding the User's Guide – Helpful Icons

Confirmation Required
This icon indicates a confirmation is required before you continue. Once you have confirmed the item, you will not necessarily need to refer to it again. This will pertain to the setup and/ or configuration of your DA Document Manager application.

Important Notification
This icon indicates an important feature or function that is essential when using DA Document Manager. These items often will contain information about frequently asked questions or common errors that a user might encounter.

Helpful Tip
These tips will help you with your overall efficiency and productivity while using DA Document Manager. These tips are designed to save you time so you may want to refer back to them or review them from time to time.

Advanced User Tip
These tips will benefit those that have an advanced understanding of Windows and the Windows operating system. Attempting to implement these features without advanced experience may lead to undesired results.

Understanding the User's Guide – Search Results Icons

Normal Document Icon
This document has no Document Rights Management (DRM) applied. This means that a user may combine, split, rotate and archive with embedded information. A user may also choose to add a password to the document to prevent other users from opening the document for privacy.

Warning Document Icon
This document has DRM applied such as copy prevention, document modification, etc. DA Document Manager fully complies with DRM and the Document Restrictions Summary for each PDF. Documents displaying this icon prevent the user from being able to combine, split, rotate and archive embedded information.

Password Protected with Warning Document Icon
This document requires a Password to View the document. In this case the Password may have been applied before adding it to DA Document Manager. Documents displaying this icon prevent the user from being able to combine, split, rotate and archive embedded information.

Password Protected Document Icon
This document requires a Password to View the document. Documents displaying this icon prevent the user from being able to combine, split, rotate and archive embedded information.

System Requirements

Windows 7 Requirements
1 gigahertz processor
1 gigabyte of system memory (32-bit) or 2 gigabytes (64-bit)
1 gigabyte of available hard drive space
DirectX 9 class graphics card with WDDM 1.0 or higher driver

Windows Vista Requirements
1 gigahertz processor
1 gigabyte of system memory
1 gigabyte of free hard disk space
DirectX 9 class graphics card 128 megabytes of graphics memory

Windows Vista Home Basic Requirements
800 megahertz processor
512 megabytes of system memory
1 gigabyte of available hard drive space
DirectX 9 class graphics card 32 megabytes of graphics memory

Windows XP Requirements
233 megahertz processor
64 megabytes of system memory
1 gigabyte of available hard drive space

DA Document Manager Requirements
DA Document Manager requires the minimum system requirements as provided by Microsoft for each respective operating system.

Actual storage requirements vary depending on your specific archiving needs. Most home users will find that 100 to 200 megabytes is sufficient storage space for their PDF files, while 500 megabytes to 1 gigabyte or more is recommended for home office and business users.

A video display setting of 1024 x 768 DPI is the recommended minimum, while a setting greater than 1024 x 768 is preferred.

Installation Guide

Downloading the DA Document Manager WHS Add-In

Confirm that you are connected to the Windows Home Server (WHS) from your PC, then, download the DA Document Manager WHS Add-In and save it to Add-Ins on your Windows Home Server. Follow the steps below.

WHS system tray

WHS tray Icon

1. Download the DA Document Manager WHS Installer and Save it to your Desktop

2. Right Click the DA Document Manager WHS Icon and Click Cut

3. Right Click the WHS Icon in your System Tray

4. Click on Shared Folders

5. Double Click on Software

6. Right Click on Add-Ins and then Click Paste

Installing the DA Document Manager WHS Add-In

Add-Ins are installed from Settings on the Windows Home Server Console. Follow the steps below.

1. Right Click the WHS Icon in your system tray, and click Windows Home Server Console. If prompted, enter the Windows Home Server password

2. Click Settings on the console

3. On Settings, click Add-Ins

Important

Uninstall any currently installed versions of DA Document Manager or Digital ArcHound prior to installing a new version on your WHS. When uninstalling, select "Yes" to preserve your existing documents and database.

4. Click the Available tab

5. Click Install to install the Add-In

6. Click OK on the Installation succeeded dialog box to restart the console

7. Reconnect to the console. The DA Document Manager tab now appears on the console

Important

It is highly recommended that you <u>disable</u> the Sleep mode on your Windows Home Server (WHS). If you choose to use the Sleep mode on your WHS, close the DA Document Manager application on each *Workstation* prior to initiating the WHS Sleep mode. Failure to do so will cause undesired connection related issues with DA Document Manager running on your *Workstations*.

A *Workstation* running the DA Document Manager application configured to use the Sleep or Hibernation mode will reconnect to the WHS after waking up and function without any issues.

Recommended settings for sleep or hibernation mode:
- Windows Home Server - disabled
- Workstation Client - as desired

Important

The Windows Home Server Client Connector must be installed on your PC and the DA Document Manager Server Console must be installed on your Windows Home Server before the DA Document Manager Workstation Client connector is installed.

Note

During Add-in installation if you did not use the default Software location, but instead created a custom shared folder location, the Setup Client connector will be located in the DA Document Manager folder in your custom created shared folder location.

Installing the Client Connector software
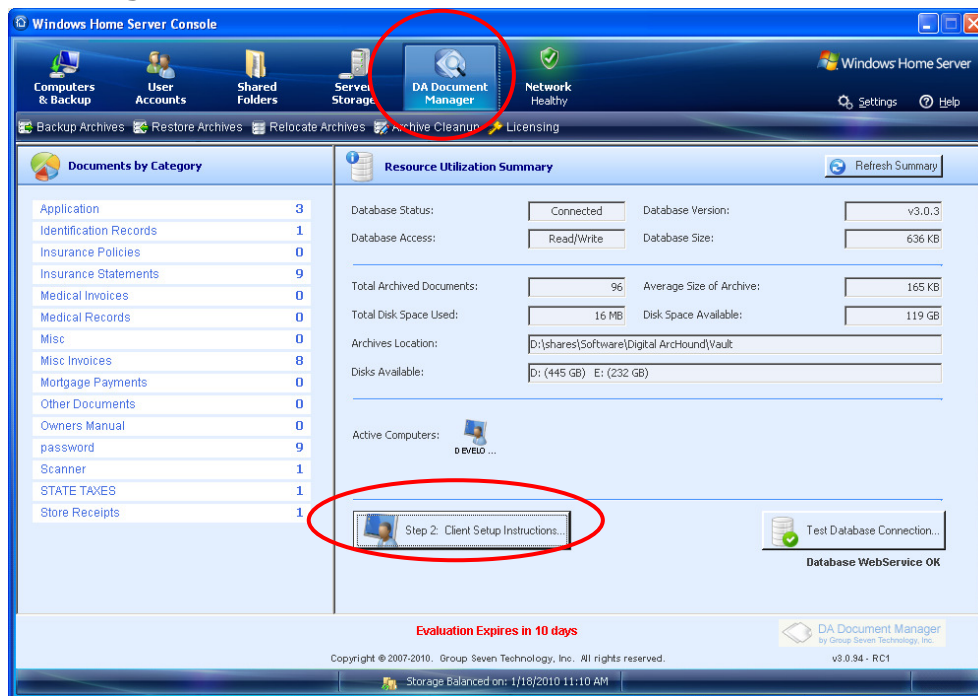
From the Windows Home Server Console:
1. Select "DA Document Manager"
2. Click on "STEP 2: CLIENT SETUP INSTRUCTIONS"
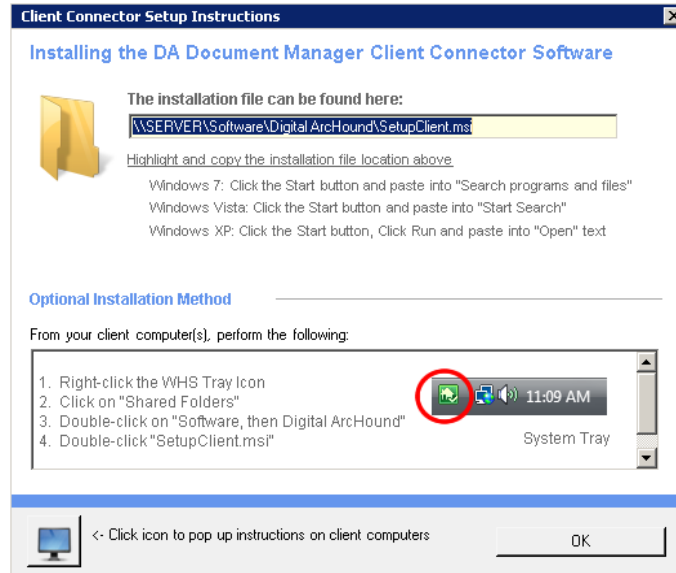
There are two methods for installing the DA Document Manager Client Connector:

METHOD No.1
Highlight and copy the installation file, then:
For Windows 7: Click the start button and paste the installation file into "search programs and files".
For Windows Vista: Click the start button and paste the installation file into "Start Search".
For Windows XP: Click the start button, Click "Run" and paste the installation file into "Open" text.

METHOD No.2
1. Right Click the WHS Tray Icon
2. Click on Shared Folders
3. Double Click on Software
4. Double Click DA Document Manager
5. Double Click "SetupClient.msi"

Your DA Document Manager Workstation Client Connector installation is now complete for this computer. Complete these steps for each Workstation computer on your network, depending on the number of user licenses that you purchased.

Installing the PDF Digitizer Printer (Optional)

The PDF Digitizer is actually a virtual printer that allows you to print any document to the Workspace so your important documents can be stored in DA Document Manager. (Not yet available for Windows 7 64-bit or Vista 64-bit)

To download the PDF digitizer:
• Download directly from http://digitizer.ArcHound.com **OR**
• Click the DA PDF Digitizer button in the DA Client Connector/Tools ribbon

The Three DA Document Manager Task Modes

There are three Task Modes for managing your documents. Each task mode has associated Ribbon Groups (described later) that allow you to perform actions based on the task mode.
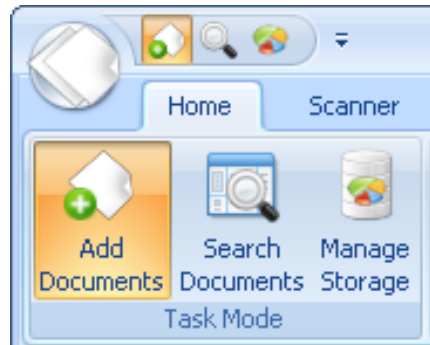
1. **Add Documents** - Add Documents allows you to Drag and Drop, automatically detect new PDFs to import, manually import PDFs or scan documents. Once the documents are in the Workspace, you can choose from various options to split, rotate or reorder them before you save them.
2. **Search Documents** – Search Documents allows you to Search for any Document in the Vault and refine the search using a variety of search filters. Once the Document(s) are in the search results window, you may View, Email, Edit their information, or Delete them. You may also Copy or Move them to the Workspace.
3. **Manage Storage** – Manage Storage allows you to View a list of all Documents in the Vault by Category, View all documents in the category. You may View your services such as: database size and version, disk space used and space available, archive location, active computers.

What are Ribbon Groups?

Ribbon Groups are displayed along the top of the DA Document Manager and show controls related to the selected Task Mode. When a ribbon group is collapsed, you can still access the controls by left-clicking on the collapsed group or tab.

For a better understanding of the three task modes, let's get started…

Quick Start

Saving Your First Archive

1. Start the DA Document Manager application.
2. Drag and drop a PDF into the Workspace.
3. The PDF will automatically be loaded into the PDF Viewer window on the DA Document Manager Workspace.
4. Complete the Workspace Form to describe the document(s) that you want to archive. You may provide as much or as little information as you desire. You may choose categories and subcategories or create a new category or subcategory, enter dates or complete any other field you want to use to describe the archive.
5. Click *Save & Clear Form Info* to save your document to the DA Document Manager Vault and database.

Congratulations! You have just completed your first archive to the Vault. You are now on your way to discovering what so many others have: DA Document Manager allows you to quickly save and archive your documents.

Retrieving Your First Archive

Retrieving an archived document is even faster. Click the **"Search Documents"** task mode button, type any part of the Title or Keywords that you entered into the Workspace Form, then press the "Enter" key or click the "Search" button. Now you have retrieved your first archived document.

Yes, it is that easy!

Digital ArcHound™
DA Document Manager
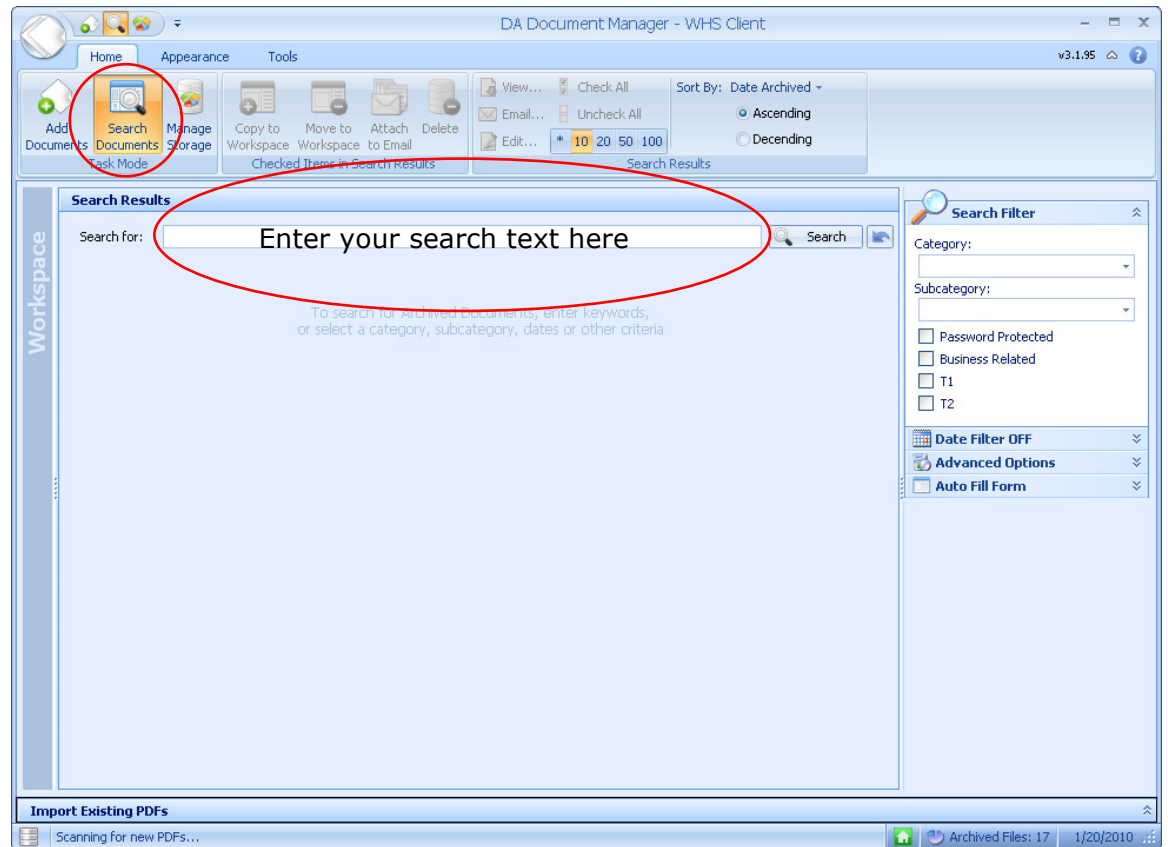
Begin a habit today of saving your documents in DA Document Manager and you will soon have a powerful library of important documents.

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Task Mode: Add Documents

Ribbon Groups: Workspace, Folder Monitoring, Import, Scanner Tab, Scanner Mode, Scanner Settings, Image Cleanup, PDF Viewers

Add Documents task mode enables the Workspace for you to add documents. There are three sections of the Workspace: **Document Viewer**, **New Document Form** and the **Action Bar**.
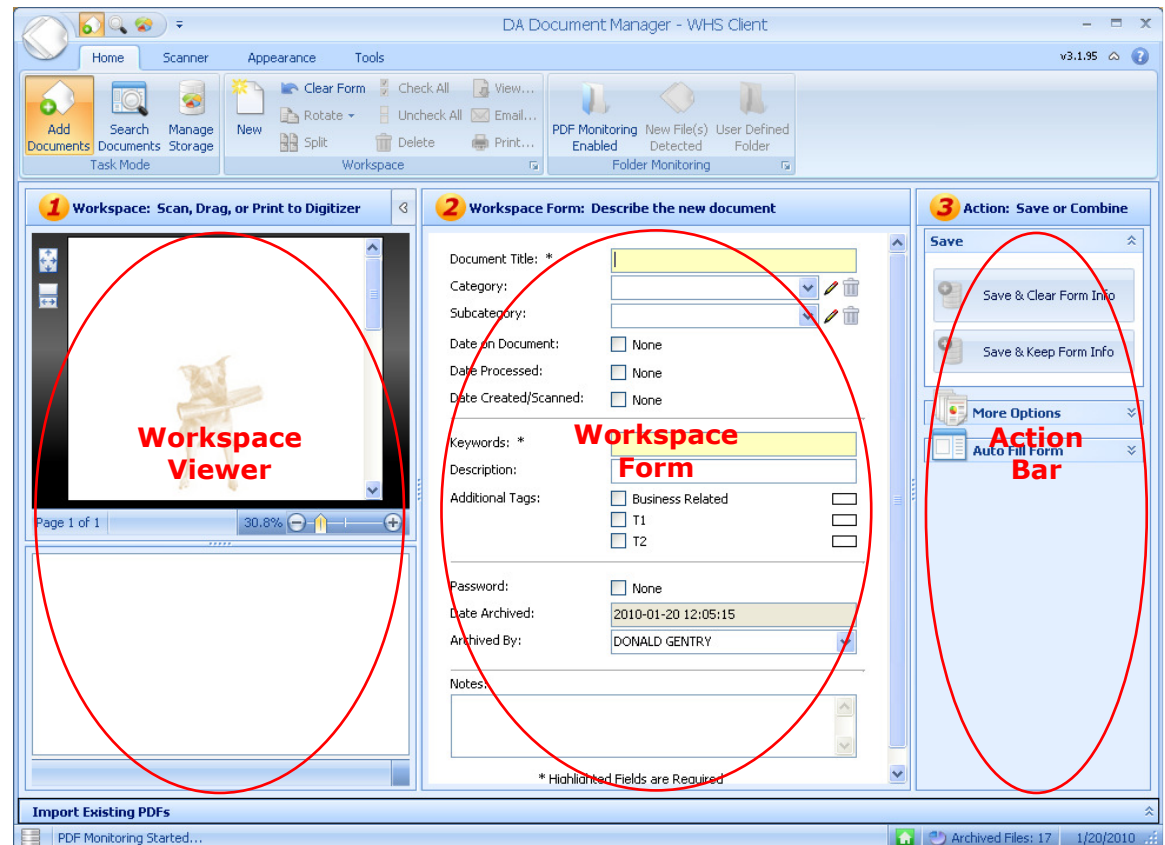
Workspace Tips

1. To create a PDF from TIFF, BMP, JPEG, GIF, PNG and other image types, Drag and Drop the image into the DA Document Manager Workspace for archiving.

2. The workspace window is resizable and supports a large PDF display

3. Prior to saving a PDF, you may email it or combine and view it, eliminating the extra step of searching for it later.

4. Using the *Save & Keep Form Info* button allows quick archiving when you have a number of similar documents to archive.

Add Documents Home Tab

Workspace Ribbon Group
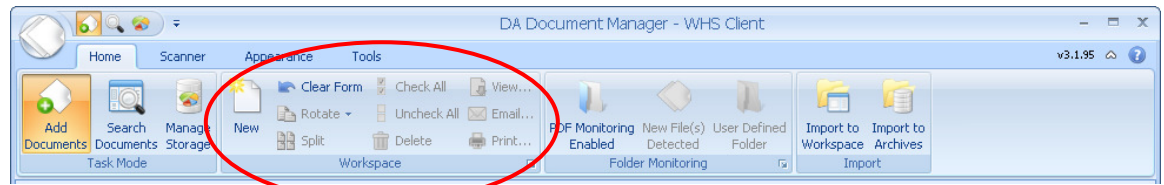
New
Removes all PDF files in the Workspace and clears the contents of the Workspace Form after a user confirmation.

Clear Form
Clears the contents of the Workspace Form

Rotate
Allows rotation of the PDF in the viewer

Split
This will split the highlighted PDF into single page documents. Used to eliminate unneeded pages or reorder pages in a document prior to archiving.

Check All
Selects all of the PDF files in the Workspace

Uncheck All
Deselects all of the PDF files in the Workspace

Delete
Opens a dialog box for selecting Checked or unchecked PDFs to be deleted from the Workspace

Print
Prints the PDF shown in the document viewer

Email
Emails the PDF shown in the document viewer

View
View the highlighted PDF from the Workspace in your default PDF Viewer. Move the mouse cursor over any PDF in the Workspace to see it in the viewer.

Folder Monitoring Ribbon Group
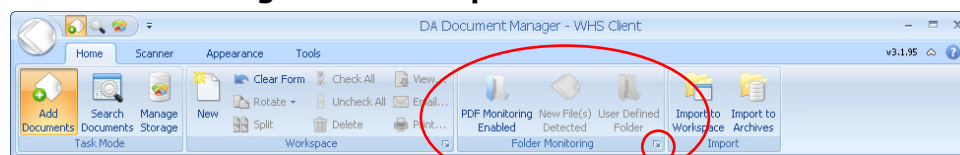
PDF Monitoring

Enables or disables automatic detection of new PDF documents. If a PDF document is detected, it will optionally copy, move or notify you (import window) that a new document is available.

New File(s) Detected
This button is enabled if a new file has been detected and is available in the import window for you to add to the workspace. Click to display the import window.

User Defined Folder
This button is enabled if a user defined folder has been configured. Click to display the contents of the folder.

Group Caption Button
To configure a User Defined folder to monitor, click on the Ribbon Group "Caption Button" icon in the lower right-hand corner of the Folder Monitoring Ribbon Group.

Import Ribbon Group
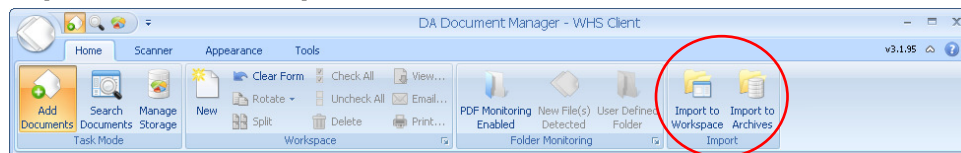
Import to Workspace
Clicking Import to Workspace opens the "Import Existing PDFs" window and the dialog that allows you to select a folder from which to import a PDF document.
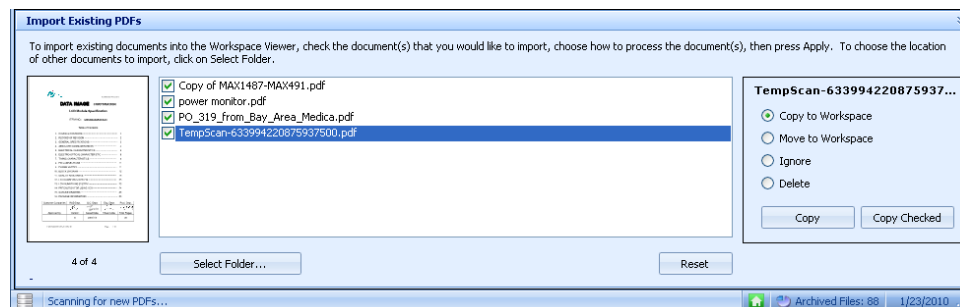
Import to Archives
Import to Archive will open a dialog which will allow you to directly import PDF documents into the DA Document Manager Vault and Database.

Workspace Form Tip: Automatic filling the Workspace Form

Click a Search Results Item in the DA Document Manager Workspace and any available Workspace Form information will appear in the Auto Fill Form window. Click the Apply button to automatically fill in the Workspace Form with this information. You may also update this information in the Workspace Form as needed before saving it.

Password Protection

DA Document Manager cannot unlock a file that has been password protected. Users should exercise great care with respect to password protecting and recording the passwords used to protect their files.

A PDF may include any number of different types of protection on a particular document. Though the types of protection are rather involved, we have attempted to familiarize you with the most common types of protection below.

Two types of passwords may have previously been applied to a PDF. A Viewer password requires a password in order to view a file. An Owner password is required to modify Document Rights Management or DRM. DRM is any Protection which includes, but is not limited to printing, extracting, inserting, editing or any other type of document modification.

Once a password has been added to a document, DA Document Manager is limited to the functions available without the password. A password protected or an encrypted file must be archived as an individual file; the file cannot be combined or merged with another file without owner's the password.

Embedding is the function that the DA Document Manager uses to include the Title, Description, Keywords and Tags in the PDF file. These files will archive but without the embedded fields. A warning will display during the archiving process if this is attempted.

No View Password and No Protection

This type of PDF is the most common. PDF files created using your scanner have no View Password or Protection. Many of the PDF files you may download have no View Password or Protection. DA Document Manager can fully process these files.

No View Password with Protection

This type of PDF is the second most common. PDF files you download may have no View Password with Protection. These often come from financial institutions and online statements. DA Document Manager can file these PDF files however; it cannot embed, split or combine these files.

View Password with no Protection

This type of PDF is the uncommon. These PDF files sometimes come from an employer. DA Document Manager can file these PDF files however; it cannot embed, split or combine these files.

Owner Password with Protection

This type of PDF is the becoming more common. These PDF files may be found online or even with software applications. The creator does not want the PDF to be changed or maybe copied so DRM ownership privileges protect the document from being pulled apart or copied other than in whole. DA Document Manager can file these PDF files however; it cannot embed, split or combine these files.

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Scanner Tab
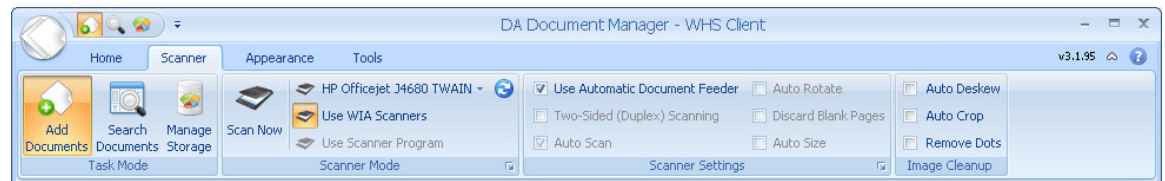
DA Document Manager controls TWAIN and Windows Image Acquisition (WIA) compliant scanners. Scanners may be attached to a workstation or directly to your network for paper or image acquisition and archiving. Local and Network Scanners are supported.
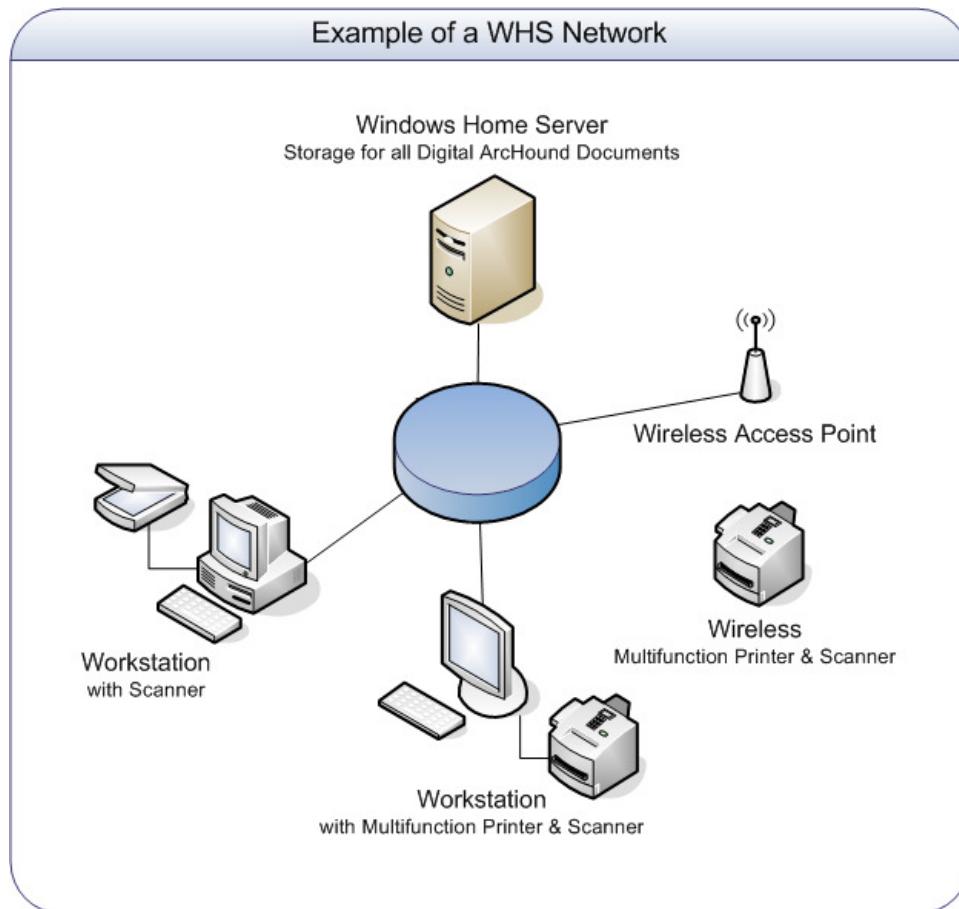
The DA Document Manager built in scanner controls properly function with a large number of scanners. We try to support most scanners. However, drivers are written by many manufacturers and as such many are not fully compliant with Twain or WIA. If you receive and error while attempting to scan using the DA Document Manager Scanner Controller, your scanner may be experiencing a drive issue that will not allow you to use it this way.

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Scanner Options Ribbon Group
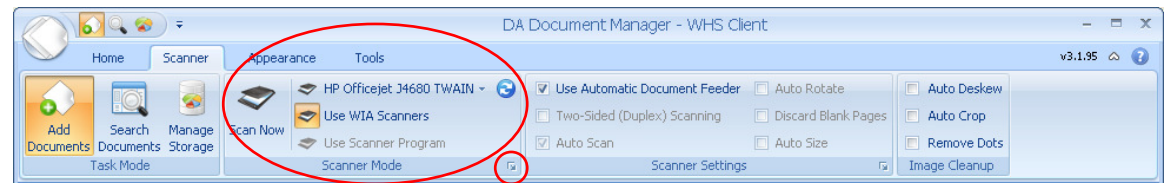
DA Document Manager can control TWAIN and Windows Image Acquisition (WIA) compliant scanners. It can also launch a third-party scanner application to acquire images to PDF.

Select one of the Scanner Mode options below. The "Scan Now" button will invoke the scanning option of your choice.

Option 1: **List of Scanners** detected on your PC: You may select a scanner from the list of scanners detected at startup. If your scanner was turned off when you started DA Document Manager, click the refresh button to the right of the scanners list and your scanner will appear in the list.

Option 2: **Use WIA Scanners**: For backward compatibility with previous version of Digital ArcHound, select this as your default scanning option. If you select "Use WIA Scanners," you may define the Scanner Output PDF Paper Size: Letter, Legal, and A4 sizes. Click the Ribbon Group "Caption Button" icon in the lower right-hand corner of the Scanner Mode Ribbon Group.

Option 3: **User Scanner Program**: You may choose to set up a path to launch your third-party scanner application. If your third-party scanner application scans to a PDF file, DA Document Manager can be configured to automatically detect, notify, copy and/or move the new documents directly into the Workspace.

Scanner Issues
If you seem to experience issues with your particular scanner, you will want to use this configuration. First setup the software that came with your scanner to automatically save your scans to a folder in PDF format. Then use a User Defined Folder in DA Document Manager to monitor the same folder you have configured in your scanner software to save your scanned PDF files. Set the monitored folder to "Move to Workspace" so all you need to do is name and categorize and click save to archive your scan.

Scanner Program
Attempting to assign a Scanner Program that does not scan to a PDF or is not configured to scan to a PDF will not function properly with the DA Document Manager.
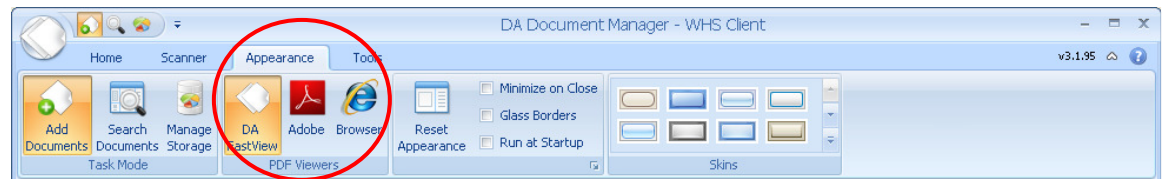
Appearance Tab

PDF Viewers: Selecting a Document Viewer

1. Click on the Appearance Tab to display the Ribbon Group: PDF Viewers
2. Click on the viewer you wish to use.

Browser PDF Viewer

If you select the Browser option, if you are attempting to view a document that is password protected, some third party PDF viewers will display their password dialog behind the DA Document Manager application. If this happens, it will appear that DA Document Manager is locked up. Simply press Alt-F4 key and the password dialog will appear.

Task Mode: Search Documents

Ribbon Groups: Checked Items in Search Results, Search Results, PDF Viewers

Search Documents task mode allows you to search your save documents. There are two sections: **Search Results** and the **Search Filter Bar**.
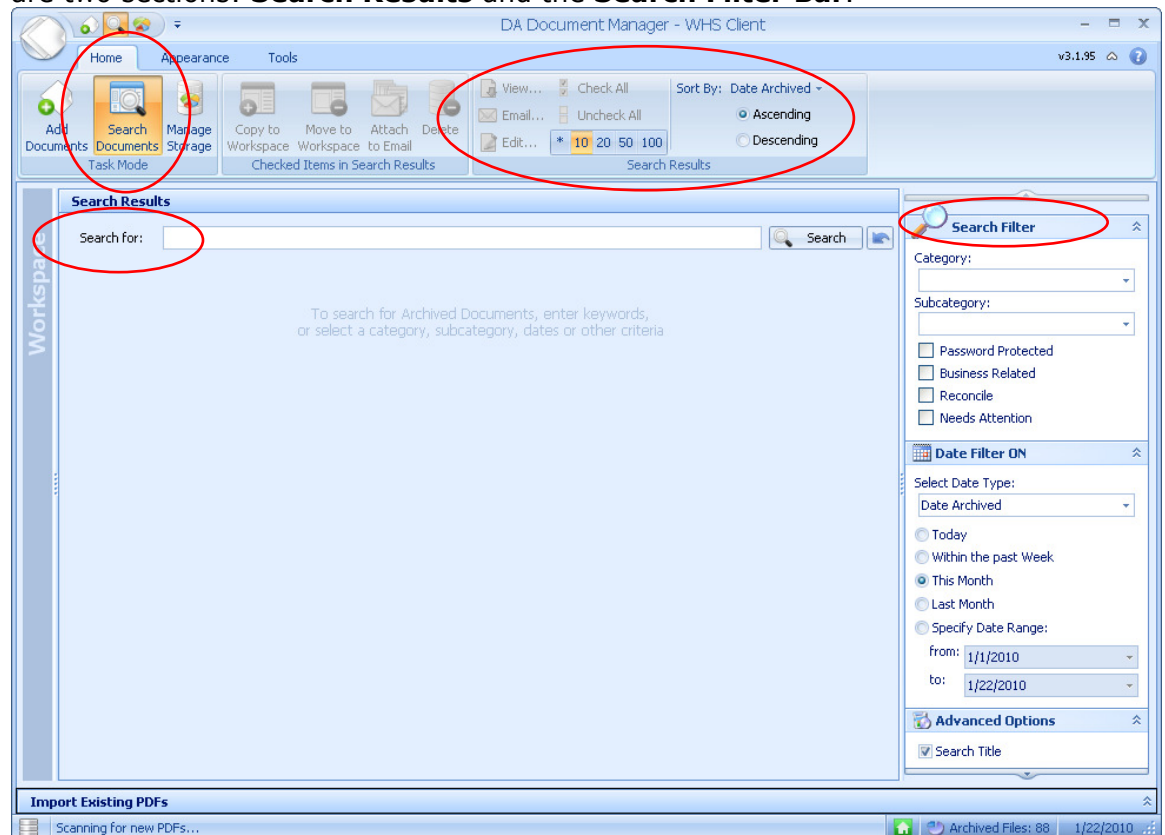
Search Documents Home Tab

Document Search using the "Search Results" Ribbon Group

1. Select the maximum quantity of documents to display (*, 10, 20, 50, 100). Note: "*" will return all documents that match the search criteria. Performing a Search with all filter criteria blank will cause all records in your database to be displayed. This can be very slow and cannot be cancelled once the Search button has been selected.
2. Select ascending or descending order by Title or various dates.
3. Type any portion of a document Title or Keyword into the "Search for" text box and press "Enter" or click "search", or use the Search Filter

Search Filter Bar

DA Document Manager has a Google type search engine; you are also able to apply sorts and filters to your searches. This means you can change the order of how the results are displayed and filter for only certain date ranges.

Category
Choosing a Category will narrow your Search to include only archives from the vault that match the Category you have selected.

Subcategory
Choosing a Subcategory will narrow your Search to include only archives from the vault that match the Subcategory you have selected in addition to any Category if selected.

Password Protected
Checking Password Protected will narrow your Search to include only archives from the vault that are password protected.

Additional Tags
1. Additional Tags include Business Related and two User Definable fields.
2. Unchecked Additional Tag items will always display when searching.
3. Checking an Additional Tag will narrow your Search Filter allowing only the checked Additional Tagged item(s) to display in Search Results.

Date Filter

1. Choose the Date to Filter: Date on Document, Date Processed, Date Archived or Date Created.
2. Specify a Date Range or click on one of the predefined Date Filters: "Today", "Within the past Week", "This Month", "Last Month", or specify a date range.

Advanced Options

By checking any or all five of the respective checkboxes a Search including the Title, Keywords, Description, Notes, and Text within your PDF will also be applied. By default, Title and Keywords are selected.

Searching with Text within PDFs checked
The DA Document Manager will allow you to search the text inside your PDF files too. So that you will end up with the desired results it is important to be aware of how this Advanced Searching Feature functions.

1. Due to significant and lengthy search times, no more than 100 PDF files may be searched at one time
2. If you have selected "*" in Search Results, the Text within PDFs option will be greyed out and not available for searching
3. The DA Document Manager will first build search for the results as you have specified with your Filter first. Then search the PDF files based on those results.
4. If no Search Filters have been applied, the first 10, 20, 50 or 100 Search Results will be searched
5. Larger documents and a larger number of documents will significantly increase the time to search for your text within a PDF

Search Results for "*"
Selecting all **"*"** and leaving Keywords, Category and Subcategory blank with a large number of archives may take several minutes or much longer to display the results.

"Checked Items in Search Results" Ribbon Group
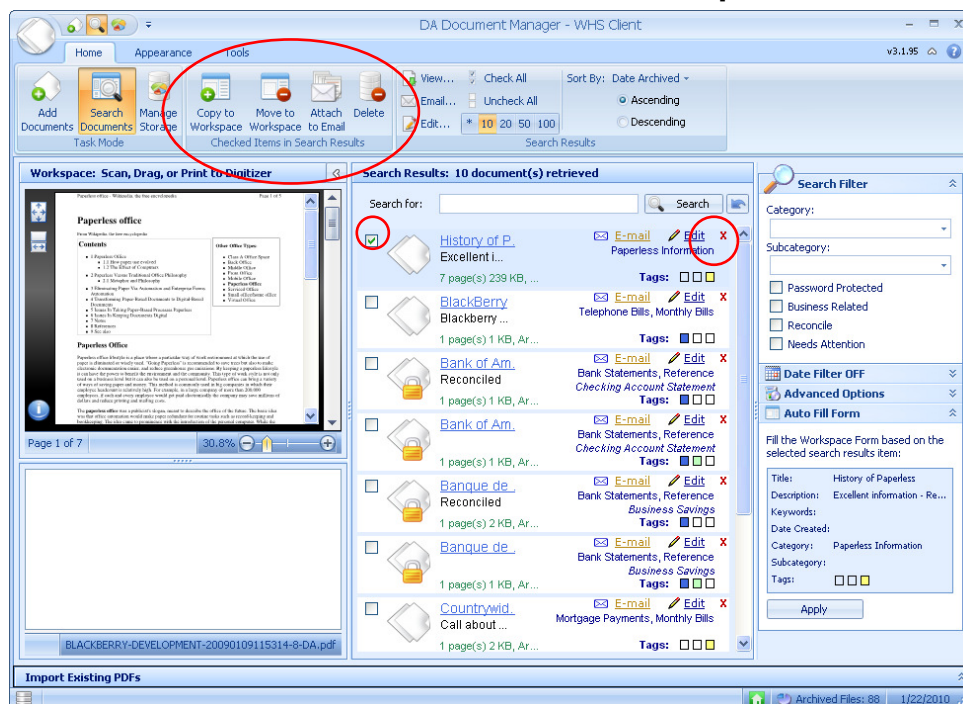
1. You may Copy to Workspace, Move to Workspace, Email as Attachment, or Delete. These buttons are only enabled once you have selected at least one archive by clicking the Check Box in the Search Results.

2. View an archive by clicking the blue hyperlinked document "Title".

3. If the Workspace is not expanded, click on the vertical "Workspace" bar on the left side of the search results window to view the PFD in the Workspace Viewer.

4. To open a document in an external viewer, double-click the "Title" or click on "View" in the "Search Results" Ribbon Group.

5. Clicking **X** will allow you to delete a specific archive or you may delete by checking the Check Box next to each item in the Search Results window and then clicking the Delete button in the Ribbon Group "Checked Items in Search Results." You will have the choice to delete only the archive information contained in the DA Document Manager database or the actual PDF file as well.

6. Clicking the "Email" hyperlink or icon will create a new email message with the select archive as an attachment using a default desktop email application like Outlook, Outlook Express or Windows Mail.

7. The "Edit" hyperlink or icon will allow you to update the Workspace Form information you have used to describe your archive. Every field in the Update Document Information, except one, may be updated. The *Date Archived* will always display the date archived.

Web Based Email
Web based email accounts like Gmail and Yahoo are not directly supported by the Email feature in DA Document Manager. In order to send an archive using the Email feature you must first configure a desktop client email system on your computer. Desktop client email systems are applications like Outlook, Outlook Express or Microsoft Mail. Instructions on how to configure a Desktop email client may be found at http://OnlineHelp.ArcHound.com and use the click **HERE** link from the "Emailing an Archive" help page.

Note
Microsoft limits the number of files to be attached at one time to 20 attachments. Additional files may be attached but no more than 20 at a time.

Task Mode: Manage Storage

The "Manage Storage" Task Mode reports all documents managed by DA Document Manager. The summary shows the number of documents by category. Clicking on any hyperlink will open the "Search" Task Mode: and display all Documents in that Category in the "Search Results" window.

The Resource Utilization Summary shows the status of the database as well as the disk resources used. Active Computers shows the computers currently using DA Document Manager in your network.

Customizing your DA Document Manager

Appearance Tab

Ribbon Group: PDF Viewers

DA Document Manager supports up to three PDF Viewers with the click of a button

1. *DA FastView*: The built in DA Document Manager FastView tool is the fastest tool to preview all of your PDF files.
2. *Adobe*: Will use Adobe Acrobat Reader or Adobe Acrobat Professional if installed on your computer, to preview your PDF files.
3. *Browser*: Is a way to use any other third party PDF file viewer, install the viewer as your system default viewer and DA Document Manager will use that viewer to preview all of your PDF files.

Occasionally you may encounter an issue with a PDF that will not properly open or display when using the Browser or Adobe PDF Viewer. To correct this issue use the ArcHound PDF Viewer built in to DA Document Manager to open the PDF file.

Ribbon Group: Appearance

DA Document Manager supports some of the display features available in the latest versions of Microsoft Windows.

1. Reset Appearance: Resets your Skin, Layout, window position and size of the DA Document Manager
2. Minimize on Close: Will minimize the application rather than exiting it.
3. Glass Borders: Displays the Vista type transparent borders, if your computer operating system will support it.
4. Run at Startup: Causes DA Document Manager to run when Windows boots up.

Ribbon Group: Skins

The Skins will allow you to choose various colors, backgrounds and border styles from a built in library of skins.
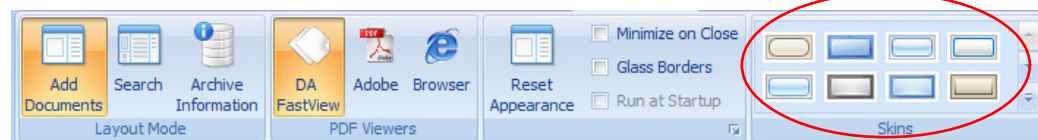
Tools Tab

Ribbon Group: General

Settings will allow you to customize DA Document Manager to conveniently function in the way that is best for you. Also, you may choose which folders to monitor and scanner settings.

The "More Options" button displays a dialog with several user definable functions available. These options are broken into groups which may be found on each Tab

of the Options dialog window.

"More Options" button and the "Options" Tabbed Dialog

Workspace Form Tab

DA Document Manager supports 3 flags or "tags", one business tag and 2 user definable tags. To configure the Additional Tag Options: enter the name for each tag in the respective field. To configure the Search Results Indicator: choose the color you would like to represent each of the 3 tags. These user defined colored icons will display in Search Results.
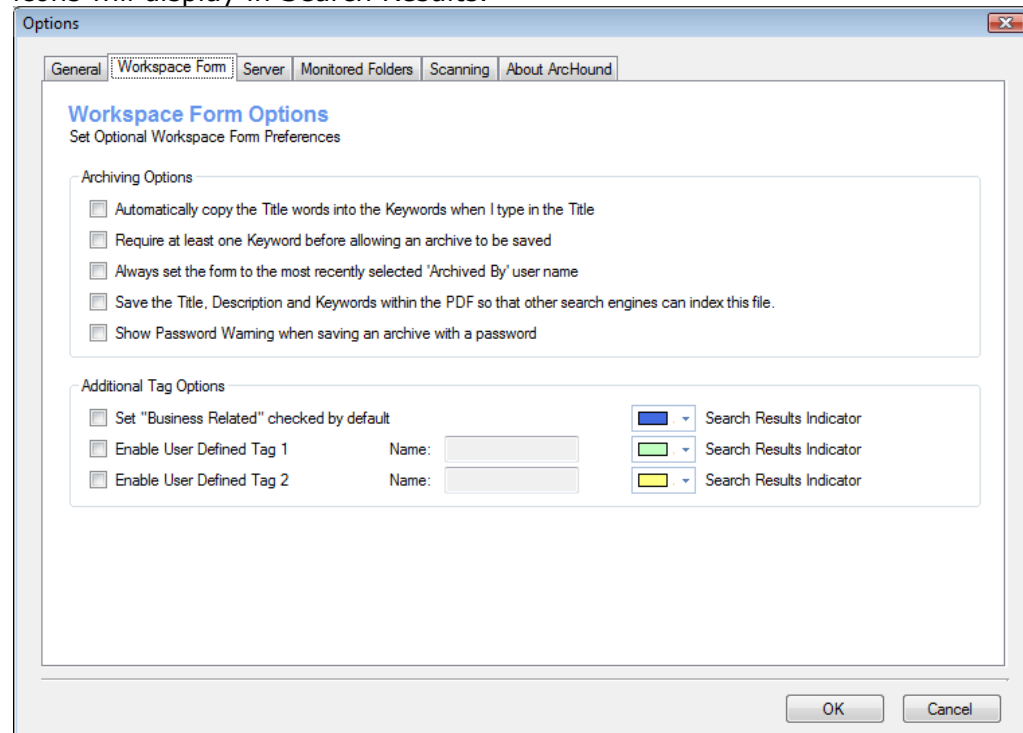
Monitored Folders

You may specify the folders DA Document Manager will monitor for new documents. You may choose to include or exclude subfolders. You have four possible actions for each monitored folder.

1. Copy to Workspace: copies the document the Workspace.
2. Move to Workspace: moves original document to the Workspace
3. Notify Me: will allow you to choose file by file
4. Exclude: ignores any files in the respective folder and/or sub folders.
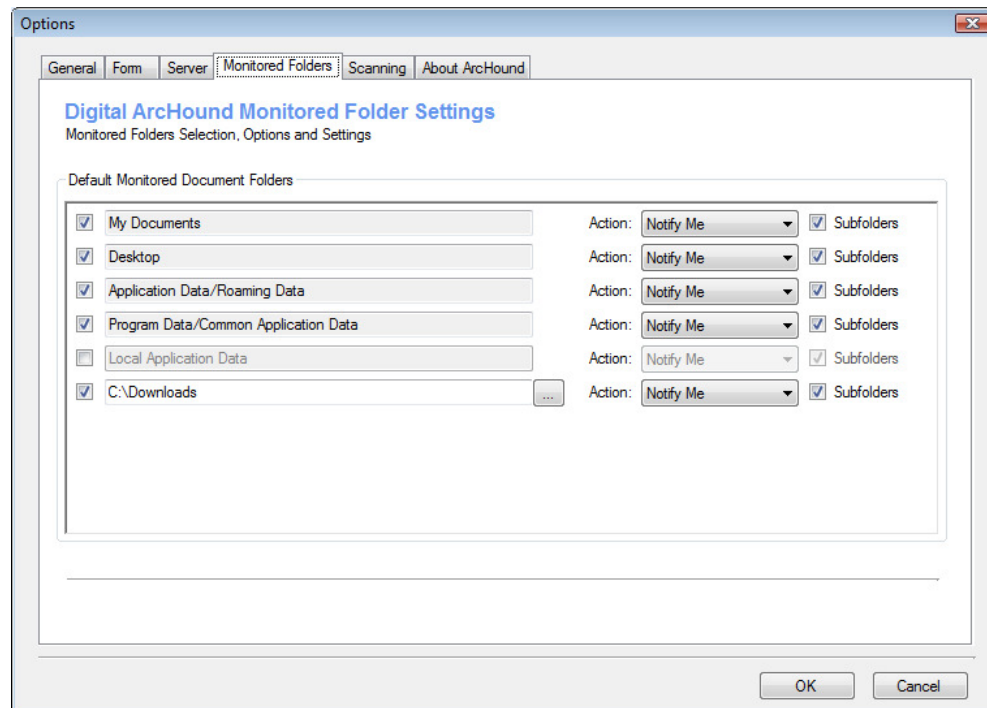
Important

To map your custom Default Monitored Document Folder (The last folder reference on the list in the screen shot above) to a network location, enter the mapped network drive letter, not networking mapping.

Example: Should be entered using X:\FolderName not \\computer\share\folder formatting.

Move to Workspace

1. If you have changed the default folder location for the Desktop in the Registry, the Desktop Folder Monitor may not function properly.
2. If you mouse over a folder field in Default Monitored Document Folders, DA Document Manager will display the actual folder location as it is defined in the Registry.
3. If you are running Vista and have mapped the root of a drive, you must run DA Document Manager as the Administrator or file moving and deleting will fail due to the strict privileges required by Vista in the root folders.

Advanced User Notes

If you mouse over a folder field in Default Monitored Document Folders, DA Document Manager will display the actual folder location from the Registry. When you are running Vista and have mapped the custom folder location to the root of a drive, you must run DA Document Manager as the Administrator or file moving and deleting will fail due to the strict privileges required by Vista in the root folders.

Folder Monitoring Scenarios

Monitored Folders are the user definable settings that determine how the Smart PDF Detection will function. Smart PDF Detection is a powerful feature within the DA Document Manager framework and can present unexpected results if you are not careful with your setup and configuration settings.

Unless you are an Advanced User, it is recommended that you make minimal changes to the setup and configuration settings of the Monitored Folders.

DA Document Manager is intelligent enough to monitor you entire computer for new PDF files to archive. You may want a folder (or several folders) in which to save a PDF that DA Document Manager *DOES NOT* monitor. This is where the "Exclude" Action for Folders or Sub Folders will be useful. Also, using the Action "Notify Me" may be very helpful.

Depending on your configuration, when you Drag and Drop from an email or other Windows applications the file being Dragged and Dropped may show up in a Temporary Folder. When the file appears in the Temporary Folder, DA Document Manager could process the file based on your settings. You need to be aware of this when choosing Folders to Monitor and which Actions are to take place. For instance a Custom Folder of "C:\" with the Action "Copy to Workspace" or "Move to Workspace" may often yield some undesirable results since this will monitor every Folder on your entire hard drive.

Monitoring a Root Folder on a Drive

If you choose to add "C:\" as your Custom Monitored Folder, it is highly recommended that you use the Action "Notify Me"

If you have overlapped your Folder Monitoring (example: Custom Folder "C:\" Action "Exclude") and are also using all the other Default Folder Monitoring settings PDF Monitoring will never return any files. This is because exclusions are processed before inclusions.

If you have overlapped your Folder Monitoring (example: Custom Folder "C:\" Action "Move to Workspace") and are also using Desktop Folder Monitoring set to "Exclude", PDF Monitoring will return files as long as they are not placed on the Desktop. If Subfolders is unchecked, this means that PDF files placed in any Desktop Subfolders will be processed, however, the Desktop will be excluded.

In this scenario, you may use your Desktop as a work area the DA Document Manager will not process. Saving files as needed right to the Desktop. If you create a Folder on the Desktop and name it "Archive"(for example) any time a file is placed in this particular Folder it will be processed based on the Actions you have chosen. Now you can work with the file on your Desktop and Drag and Drop it into "Archive" as soon as you are ready to archive it.

No matter which configuration you choose for Folder Monitoring, test your Folder Monitoring after you change the settings. This will insure that using DA Document Manager will not yield any unexpected results.

Windows Home Server Console

DA Document Manager Tab

Manage your archives

Manage your archives easily from the DA Document Manager Tab on the Windows Home Server (WHS) Console. The WHS console gives you several options for managing your DA Document Manager archives:

1. *Backup Archives*: Backup to another device, drive or folder.
2. *Restore Archives*: Restore a previously saved backup.
3. *Relocate Archives*: Move your vault to another drive location.
4. *Archive Cleanup*: Remove temporary files left from a power failure.
5. *Licensing*: Setup one time on the WHS at initial installation.

View the health of your configuration
Test database connection: The "test database connection" button confirms necessary Web Services are properly configured and working on your Windows Home Server.

View DA Document Manager Statistics
1. Information about services
2. Database Size
3. Drive Space Used and what is Available
4. Application and Database Version numbers
5. Archive Statistics; number of archives based on categories
6. Active Users currently logged on and using DA Document Manager

Backup Archives

You can back up your archives from this console. This feature allows you to choose the backup destination. This could be another drive on your server, an external drive or USB flash drive (Recommended). You may make as many backups as you wish and keep them at another location (in a safe deposit box for instance). We also recommend that you use the root of a folder for your location as DA Document Manager will automatically create the Folder named "DA Document Manager Backups" to create and store your backup with the name you provide as a Description.

1. First, click on the Backup Archives button.
2. Enter the Description to create a subfolder name.

3. Choose the destination for the backup.
4. Now save by clicking on the Back Up NOW button.

Restore Archives

If you have a backup then you can restore your archives. Clicking the WHS Console "*Restore Archives*" button allows you to select a backup to restore and reset your archives to that previous state.

1. Locate the drive containing the folder "DA Document Manager Backups"
   (A drive may include flash drives, network drives or local folders).
2. Choose the backup set you wish to Restore
3. Click the Restore NOW button

Relocate Archives

Change the location of your archives Vault folder on the WHS console by clicking the "Relocate Archives" button.

1. Click on "new destination" in the pop up window to open the selection of folders.
2. A new pop up window will show all possible locations to relocate your Vault. You may use the default selection or any other folder listed.

Archive Cleanup

This feature is rarely needed. Archive Cleanup will remove temporary files stored, but not processed due to a power failure or improper WHS shut down.

Licensing

Follow the steps provided for licensing contained in your welcome email to install your license for DA Document Manager on your Windows Home Server. Licensing is done only on the Windows Home Server and not each workstation computer.

Note:
DA Document Manager Licenses are purchased for concurrent users. This means that if you purchase a 3 user license and you have 5 computers connected to your Window Home Server, 3 of those computers can run the DA Document Manager application at one time. You are allowed to install the DA Document Manager Client on all of your computers. Anytime an attempt to run the DA Document Manager application exceeds the number of Licenses purchased, you will receive a Licensing warning message and that computer will not be able to access DA Document Manager until a current user exits.

If you find that you are consistently receiving a Licensing warning message, you may contact DA Document Manager for additional Licenses. Additional licensing packages are available for upgrade and only the difference in cost is required to purchase an upgrade for more Licenses.

Troubleshooting

Problem: Password fails no matter what password I enter for WHS Connection

The issue with connecting to your WHS server may be due to what Windows refers to is a credential conflict. Windows keeps the connection to the WHS server based on the original login that was used to connect to the WHS server when it was installed on the workstation. It may be resolved by one of the following.

1. When you connect, type in your WHS user account name, but leave the password blank and try to connect.
2. Right click on the WHS icon on your workstation (lower right tray area), then click on Shared Folders. Once the shared folders are opened, try to connect using Digital ArcHound. (first with a blank password, then with your password)
3. Try using the Administrator account to connect, but leave the password blank.
4. Try using the Administrator account to connect, then use the administrator password.
5. Your password on your workstation may not match the password on your WHS server. Right click on the WHS icon on your workstation, then click on Update Password. The passwords may be out of sync.
6. Make sure that the date and time are correct and are the same on both your workstation and Windows Home Server.

Problem: Default Web Site/ ISS Setup/ DAWebService

If you have changed from the Default Web Site in IIS on your WHS you will need to follow these steps to create the necessary new Web Service for DA Document Manager to properly function.

To setup a New DAWebService
1. Open IIS
2. Right click on your New Default Web Site
3. Click Virtual Directory, Click Next
4. Enter DAWebService and click Next
5. Select the path to the DAWebService
6. Typically it is C:\Inetpub\wwwroot\DAWebService
7. Click Next
8. Check Read and Run scripts (such as ASP)
9. Click Next then Finish
10. Right click on your new DAWebService and click Properties
11. Change the Application pool to DAAppPool
12. Click the ASP.NET tab and confirm ASP.NET version is 2.0.xxxx
13. Test Your settings by opening a browser and enter:
    http://localhost/dawebservice2/dawebservice.asmx

Important
Only advanced users should attempt to change their IIS settings. Any troubleshooting required by a member from Customer Support will result in a service fee.

Problem: Connection Problems with the WHS

Run Toolbar/Tools/Diagnostics and email the results to
customersupport@archound.com

Problem: My scanner is not working correctly with DA Document Manager

The DA Document Manager built in scanner controls properly function with a large number of scanners. We try to support most scanners. However, drivers are written by many manufacturers and as such many are not fully compliant with Twain or WIA. If you receive and error while attempting to scan using the DA Document Manager Scanner controller, your scanner may be experiencing a drive issue that will not allow you to use it this way.

You may turn on the scanner diagnostic tool, shown below in red by clicking the button to toggle it on.
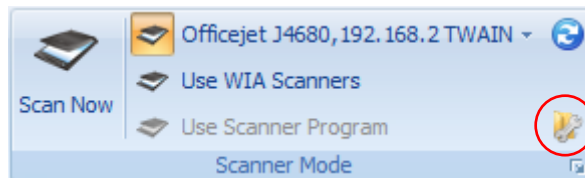
While the scanner debug tool is on, perform a scan and then turn it off by clicking the button once again. You will be asked if you would like to view the Scanner Debug Log, answer Yes to open the log. If Customer Support has requested a copy of your Scanner Debug Log you may copy the contents into an email and send to CustomerSupport@ArcHound.com for diagnostic purposes.

DA Document Manager on Privacy

Privacy important Notice

Group Seven Technology, Inc. is committed to your privacy, and will never sell or otherwise distribute your private information.

> The Digital ArcHound Team thanks you for your purchase wishes you the best.
>
> Happy Archiving!

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