



User's Guide

Desktop Edition
Release 1.3.50

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Digital ArchHound User’s Guide
Desktop Edition

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Understanding the User's Guide



Confirmation Required

This icon represents that you need to confirm something important before you continue. Once you have confirmed the item in the User's Guide, you will not need to refer to it again. This is going to pertain to setup and/ or configuration of your Digital ArchHound application.



Important Notification

This icon represents that you need to be aware of an important feature or function that is essential when using Digital ArchHound. These items frequently will contain information about frequently asked questions or common mistakes that the average user might typically encounter.



Helpful Tip

You want to observe these tips because they will help you with your overall efficiency and productivity when it comes to using Digital ArchHound. These tips are designed to save you time and money so you may want to refer back to them from time to time.



Advanced User Tip

If you consider yourself to be an advanced user, you may find these tips particularly helpful or useful. These tips are going to benefit only 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. Use these tips with caution.

System Requirements



Windows Vista Requirements

1-gigahertz (GHz) 32-bit (x86) processor or 1-GHz 64-bit (x64) processor
1 GB of system memory

Windows Aero-capable graphics card

Note: This includes a DirectX 9-class graphics card that supports the following:

A WDDM driver

Pixel Shader 2.0 in hardware

32 bits per pixel

128 MB of graphics memory (minimum)

40-GB hard disk that has 15 GB of free hard disk space (the 15GB of free space provides room for temporary file storage during the install or upgrade.)

Internal or external DVD drive

Internet access capability



Windows Vista Home Basic Requirements

800-megahertz (MHz) 32-bit (x86) processor or 800-MHz 64-bit (x64) processor

512 megabytes (MB) of system memory

Note: On system configurations that use system memory as graphics memory, at least 448 MB of system memory must be available to the operating system after some memory is allocated for graphics.

DirectX 9-class graphics card

32 MB of graphics memory

20-gigabyte (GB) hard disk that has 15 GB of free hard disk space

Internal or external DVD drive

Internet access capability



Windows XP Requirements

Pentium 233-megahertz (MHz) processor or faster (300 MHz is recommended)

At least 64 megabytes (MB) of RAM (128 MB is recommended)

At least 1.5 gigabytes (GB) of available space on the hard disk

CD-ROM or DVD-ROM drive

Keyboard and a Microsoft Mouse or some other compatible pointing device

Video adapter and monitor with Super VGA (800 x 600) or higher resolution

Internet access capability

NOTE:

Digital ArchHound requires the same minimum system requirements as provided by Microsoft for each respective operating system. Actual storage requirements will vary depending on your specific archiving needs. A storage requirement estimate may be calculated by estimating the number of files you desire to archive multiplied by the average size of your files. Because most PDFs tend to be smaller files, 100 to 200 megabytes is typically sufficient for most home users and 500 megabytes to 1 or more gigabyte is recommended for most office or business users.

Supported Features

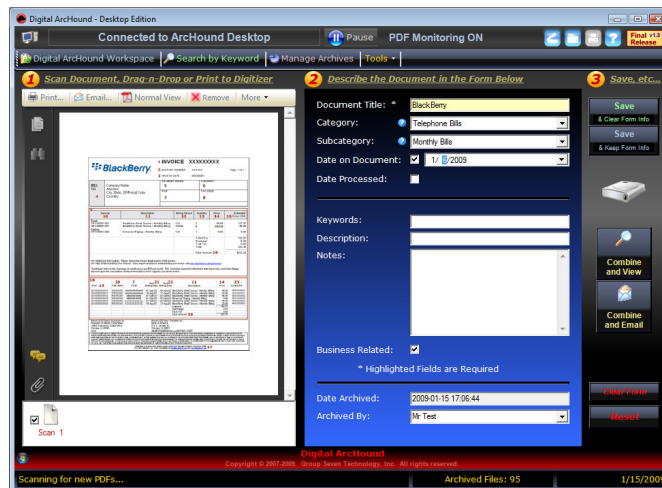
- Custom Categories or Subcategories, right click on a category, to Add New, Edit, or Delete – Yes, it is that easy!
- When leaving the Digital ArcHound application minimized; it will notify you when you have a new scan ready to be archived.
- Drag-n-drop Reordering: The individually scanned documents can be reordered before saving them to the Vault – drag the document icons into the order that you want them stored in the archive.
- You can select an optional folder to automatically watch for new PDF documents to archive by clicking on the Tools/Settings button.
- You may also turn “on” or “off” a set of predetermined Monitored Folders to watch for archiving like; My Documents, Desktop, Application Data and Common or Local Application Data folders.
- Split a multi-paged PDF into single page documents with the click of a button, using “More”. The pages may be reordered or deleted as needed.
- Combine multiple documents into one document and email them. Open the documents in the Digital ArcHound Workspace, rearrange them into the correct order, and then click on the Combine and Email button.
- A robust and powerful Google type search engine provides enhanced searches, sorting by title and dates, and also filters by document date, archive date, date processed, by business document and date ranges.
- It is simple to go back and add or edit document information. Just recall the document in the Search by Keyword Tab and click edit for the document you desire to edit.
- Provides Smart PDF Detection; active monitoring of folders for PDF activity.
- Supports 90° CW, 90° CCW and 180° document rotations, using the “More” button.
- A Context Menu is available by right-clicking the document icon from the Workspace. This menu provides ease of file rotation, splitting and deleting.
- Drag and Drop from Windows or an Email anywhere onto the Workspace.
- Drag and Drop to create a PDF from BMP, JPG, GIF, PNG and other image types.
- Workspace window is resizable for better viewing of documents and images.
- Supports both 96DPI and 120DPI for Medical, X-Rays, Maps, Genealogy and other important images and documents.
- Added control with scanners that support WIA (Windows Image Acquisition).
- New Document Detection Notification Popup Window - allows for batch and delayed processing of detected documents, even process existing PDFs in folders.
- Auto check all or uncheck all after archiving, plus manually check items to be including in an archive
- Clicking on the GRAY printer icon in the status bar of the application will allow you to automatically download and install the ArcHound PDF Digitizer – it makes the experience of working with Digital ArcHound much easier when archiving online documents. Best of all...it's FREE. The GRAY printer icon changes to BLUE when the printer is installed – don't forget to restart Digital ArcHound after installing the PDF Digitizer (Not yet available for Vista 64-bit).
- Digital ArcHound Client supports Windows XP, Vista and Vista 64-bit operating systems.

Getting Started



Quick Steps to Saving Your First Archive

1. Start the Digital ArcHound application
2. Drag and drop a PDF right on to the Workspace (Shown below).
3. The scan will automatically be loaded into the Adobe Acrobat Reader viewer window on the Digital ArcHound Workspace.
4. Complete the Form portion of the Workspace to describe the document(s) that you want to archive. You may provide as much information or minimal 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. Press "Save" to save your document to the Digital ArcHound 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 other's have; Digital ArcHound allows you to very quickly save and archive your documents. The best part is that recalling an archived document is really fast and easy.

For more detailed instructions on the use of the Digital ArcHound Workspace, it is suggested that you continue reading the next section.

The Digital ArcHound Workspace

The Adobe Acrobat Reader in the Workspace

The Adobe Acrobat Reader in the Digital ArcHound Workspace has a number of powerful features such as drag and drop and a context menu.

Drag and Drop

Places to drag from:

1. Your Desktop
2. Any Windows Folder
3. An Email with a PDF (or Image) attachment

Place to Drop to:

1. Anywhere on the Digital ArcHound Workspace
2. Onto the PDF viewer in the Workspace, this feature is dependant on the current version of Adobe Acrobat Reader installed on your computer.

Context Menu

A Context Menu is a power feature available in Windows. Rather than going to the top of an application for a menu, a user has the option to see a menu within the context of only functions that pertain to the object being right clicked.

Places to right click:

1. PDF Viewer on the left hand side of the Workspace
 2. Icons just below the PDF Viewer in the Workspace
- Use the “More” button or the Context Menu to implement document rotation right from the Digital ArcHound Workspace. Digital ArcHound supports 90° CW, 90° CCW and 180° rotations.
 - You may split a PDF into single page documents with the click of a button, using “More” or the context menu while on the icon of the PDF to split. This is great to eliminate unneeded pages or reorder a document prior to archiving.
 - You may delete a PDF from the Workspace using the Remove button or the context menu while on the icon of the PDF to delete.



Other helpful tips on the Workspace

- To create a PDF from BMP, JPG, GIF, PNG and other image types Drag and Drop the image anywhere onto the Digital ArcHound Workspace for archiving.
- Workspace window is completely resizable and supports a large PDF display for better viewing of documents.
- Prior to saving a PDF you may want to email or combine and view it. You may do this before saving it to eliminate the extra steps of recalling it later.
- If you have a number of similar documents to archive, use the “Save & Keep Form Info” button. This will allow you to change the date, title or any other fields as needed and at the same time to quickly archive a number of documents.
- To create a document that combines any number of documents already archived; search for the documents to combine and print them to the Digitizer. This will send each one to the Workspace where a single larger file can then be archived.
- To email a number of documents to someone all as one single attachment,

search for the documents and print each one to the Digitizer. Then click the “Combine and Email” button. When you are done you can answer “Yes” to remove those documents from your Workspace.

- Need to reorder the pages in a document already archived? Search for the document and print it to the Digitizer. Next right click the icon for the document and click “Split into single page documents”. Drag the pages into the order you desire, fill out the form as needed and save the file back to the Vault. The original can now be deleted and you’ll be left with the document you have reordered.



Important

In order to archive a password protected or an encrypted file, the file must be archived as an individual file; it **cannot** be combined or merged with another file.

If you attempt to combine or merge password protected or encrypted documents, the PDF Binder may take several minutes to process and will eventually report an error while attempting to save the archive.

Digital ArchHound does not support embedding of Title, Description and Keywords in Acrobat password protected and/ or files containing cross-referenced streams. These types of files will archive but without the embedded fields. A warning will display during the archiving process if this happens.

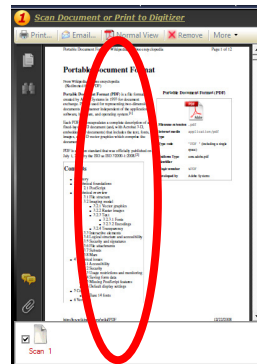
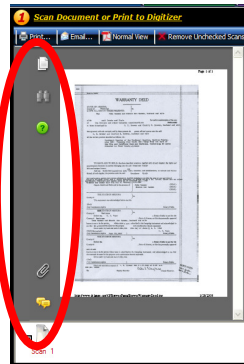
Using Various versions of Adobe Acrobat Reader



Important

Adobe Reader version 7 or higher is required to be installed on each of your Client computers prior to installing Digital ArchHound.

Your Workspace will look slightly different depending on the version of Adobe Acrobat Reader installed on your computer.



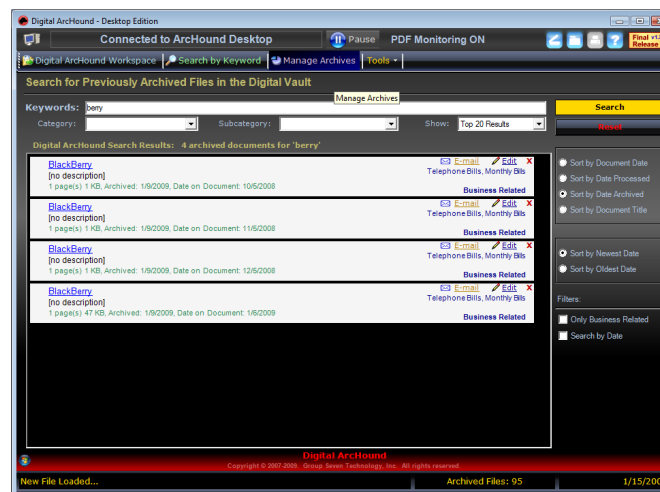
The buttons that are available to the left of your PDF viewer are a built in function of the Adobe Acrobat Reader. It is recommended that you use the same version of the FREE Adobe Acrobat Reader on all computers using Digital ArchHound.

Search by Keyword Tab

Search using Keyword Search

Digital ArcHound has a powerful Google type search engine. You can type any portion of a Document Title or Keyword. In the example below we wanted to see the document titled “BlackBerry” and to find it we were able to by typing “berry” in all lower case. Just like a Google search, Digital ArcHound does not care if it is upper case or lower case or if the Document Title or Keyword being searched starts at the beginning or is in the middle of the word or phrase.

- Extensive search capabilities include:
 - Title and/ or Keyword
 - Category and/ or Subcategory
 - Date Range of Date Archived, Processed and Document Date
 - Business Related filter
 - Upper and lower case is ignored
- Custom search results shows 10, 20, 50, 100 or All results.
 - Using All and leaving Keywords, Category and Subcategory blank with a large number of archives may take several minutes to display the results.
- Show Search by Date results either newest or oldest results first.
- Show Document Title results either descending or ascending results first.
- Clicking “Reset” will remove all search criteria, reset the sort and remove any date or Business Related filters that may have been applied

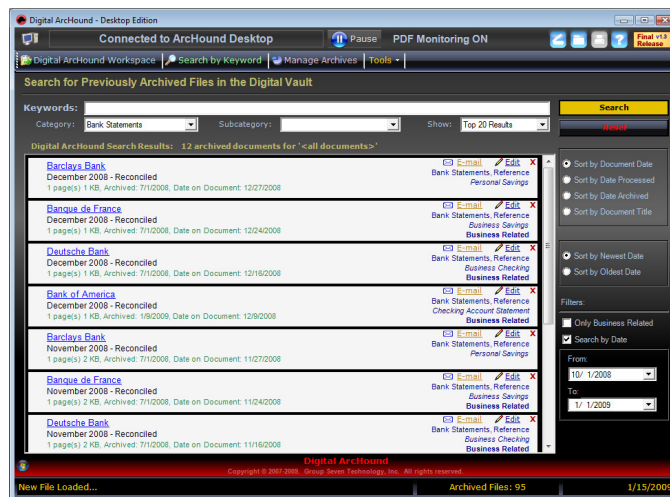


Search using Category & Date

Digital ArchHound has a powerful Google type search engine; you are also able to apply sorts and filters to your searches. This means we can change to order of how the results are displayed and filter for only certain date ranges and/ or Only Business Related checked archives.

- Only Business Related check box
 - Business Related items will always display when searching unless you check the Only Business Related box which will cause the items only with the box checked to show on your search results listing.
- Search by Date
 - First click to check the Search by Date box
 - The From and To range fields appear
 - Enter the range of dates you would like to see

You will notice in the example below that all bank statements from all banks within the date range specified show on the results page.



Digital ArchHound - Desktop Edition

Connected to ArchHound Desktop

Digital ArchHound Workspace | Search by Keyword | Manage Archives | Tools

Search for Previously Archived Files in the Digital Vault

Keywords: Category: Bank Statements | Subcategory: | Show: Top 20 Results

Digital ArchHound Search Results: 12 archived documents for "call documents"

Bank Name	Month	Year	Pages	KB	Archived	Date on Document	Business Related
Barclays Bank	December	2008	1	1 KB	7/1/2008	12/27/2008	Yes
Banque de France	December	2008	1	1 KB	7/1/2008	12/24/2008	Yes
Deutsche Bank	December	2008	1	1 KB	7/1/2008	12/16/2008	Yes
Bank of America	December	2008	1	1 KB	1/8/2009	12/9/2008	Yes
Barclays Bank	November	2008	1	2 KB	7/1/2008	11/27/2008	Yes
Banque de France	November	2008	1	1 KB	7/1/2008	11/24/2008	Yes
Deutsche Bank	November	2008	1	2 KB	7/1/2008	11/16/2008	Yes

Sort by: Document Date, Date Processed, Date Archived, Document Title, Newest Date, Oldest Date

Filters: Only Business Related, Search by Date

From: 10/1/2008 To: 1/1/2009

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New File Loaded... Archived Files: 95 1/15/2009

View, Email, Edit or Delete from search results

From the Search by Keyword tab is the ability to view, email, edit, or delete your archives.

- View an archive by click the blue hyperlinked document title.
- Clicking the Email hyperlink will create a new email message with the select archive using a default desktop email application like Outlook, Outlook Express and Windows Mail.
- The Edit hyperlink will allow you to update the information describing your archive.
- Clicking the small red “X” will allow you to delete an archive. You will have the choice to delete only the archive information contained in the Digital ArcHound database and the actual PDF file too.



Important

Web based email systems like Gmail and Yahoo are **not** supported by the Email feature in Digital ArcHound. In order to send an archive using the Email feature built into Digital ArcHound you must have a desktop client email system configured on your computer. Desktop client email systems are applications like Outlook, Outlook Express and Microsoft Mail.



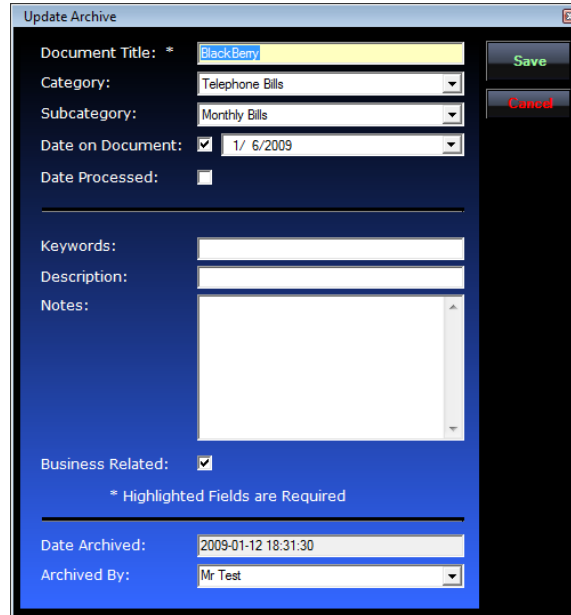
Workaround

A workaround for web based email users is to configure Outlook Express or Microsoft Mail as the default desktop email handler. This will allow you to click the email button in Digital ArcHound which will open a new email message with the PDF already attached. You can then drag that PDF to any web based email system that supports Drag and Drop or drag it to the Desktop. From the Desktop you can upload or attach the file to your web based outgoing email.

Updating an Archive

A user can edit or update every field in the Update Archive once an archive has been saved.

The only field that cannot be changed is the “Date Archived” as it will always display the date archived.



Important

A Document Title is the minimum required field for any archive to be successfully saved. If you have checked the box under Tools – Settings “Require at least one Keyword before allowing the document to be saved” then the Keyword field will be required in addition to the Document Title for any archive to be successfully saved.

You can determine if the Keyword requirement has been turned on by displaying an asterisk “*” after the word Keyword.

A Title and/or Keyword is defined as a minimum of 3 characters. You may use letters, numbers or symbols, any combination of at least 3 to save an archive.



Manage Archives Tab

The Manage Archives Tab provides a lot of information about your Digital ArcHound Vault and allows a very quick and easy way to search your archives.

- View all Digital ArcHound Statistics
 - Information about services
 - Database Size
 - Drive Space Used and what is Available
 - Application and Database Version numbers
 - Archive Statistics; number of archives based on categories
- You may click on a category name hyperlink which will automatically take you to the search tab with the latest 20 archives from that category will be listed in the results window.

The screenshot shows the 'Digital ArcHound Management Console' window. It features a top navigation bar with 'Search by Keyword', 'Manage Archives', and 'Tools'. The main area is divided into several sections:

- Digital ArcHound Management Console:** Includes a 'Refresh' button and fields for Database Status (Connected), Database Version (v1.3.50), Database Access (Read/Write), Database Size (440 KB), Total Archived Files (94), Average Size of Archive (9 KB), Total Disk Space Used (907 KB), Disk Space Available (166 GB), Archives Location (..._Desktop Edition\Vault), Disks Available (C: (232 GB)), and Active Computers (LAB64).
- Archive Statistics:** A list of categories with their counts: Bank Statements (13), Checks Received (2), Company Records (4), Credit Card Related (6), Education Documents (2), Household Bills (4), Identification Records (3), Insurance Policies (1), Insurance Statements (6), Medical Invoices (0), Medical Records (5), Misc (1), Misc Invoices (5), Mortgage Payments (7), Other Documents (2), Owners Manual (4), Payroll Items (15), Store Receipts (9), Tax Records (2), and Telephone Bills (4).
- Helpful Hints:** A section with a red dog icon and text: 'It is a good idea to periodically make a backup copy to an external disk drive and store it in a safe place or a safety deposit box. If you are expecting imminent weather, make a backup and take it with you.'

At the bottom, it shows 'Archived Files: 95' and the date '1/15/2009'.

Tools Tab

The Tools Tab has a number of options including; Settings, Launch a Scanner Controller, Process PDF Folders, Licensing and Report a Problem.

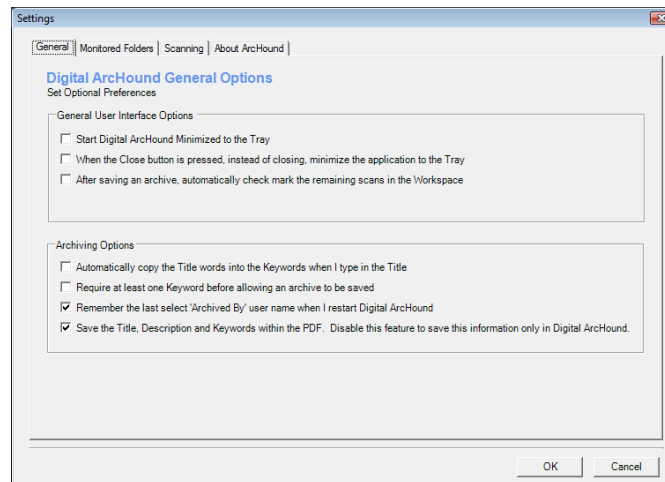
Settings

Settings will allow you to customize Digital ArcHound to conveniently function in what is best for you. Also, choose which folders to monitor and even scanner settings.

General Tab

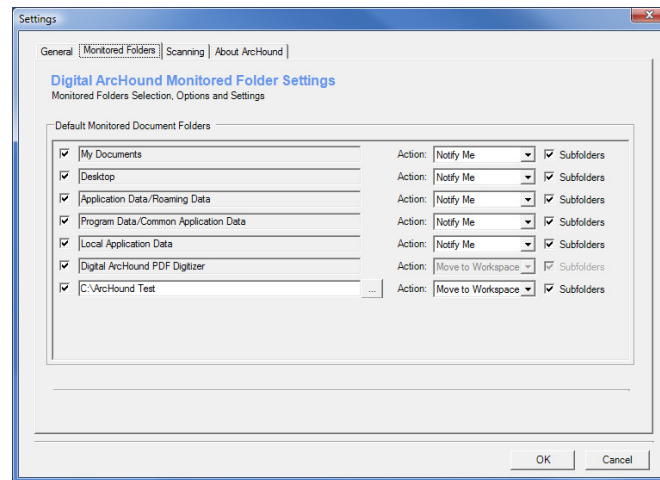
The General Settings Tab has a number of user definable functions available.

- The General User Interface Options have only to do with the user experience
- The Archiving Options have an effect on how the digital archives are saved.
- You may also change the name of the server to which you are connected.



Monitored Folders Tab

- You may specify what folders Digital ArcHound will monitor for new documents to be archived.
- You may choose not to include subfolders or to include subfolders.
- In order of precedence as listed.
- Exclude overrides everything, if it is on the list of being excluded.
- You have four choices with folder monitoring.
 1. Copy to Workspace – leaves original in tact and moves a copy to the Workspace for archiving.
 2. Move to Workspace – moves original to the Workspace for archiving.
 3. Notify Me – allows you to choose file by file.
 4. Exclude – ignores any files in the respective folder and/ or sub folders.



Important

Choose a folder on your local computer or on a mapped drive. You will need to map a drive if the folder you wish to monitor is located on another computer.

Local Drive Example: Enter the drive letter and folder "C:\folder".

Network Drive Example: If you are entering a network location enter the drive letter and folder "F:\folder" and do not enter the network mapped location "\\computer\share\files".



Move to Workspace

When sharing a network folder with more than one computer and the Action is set to Move to Workspace, you may receive an error as all the computers race to move that file into the temporary Workspace. To resolve this from being an issue, use the Notify Me for Folder Monitoring rather the Move to Workspace.



Advanced User Notes

Mouse over a folder field in Default Monitored Document Folders, Digital ArcHound will display the actual folder location as it is defined in the Registry. When you are running Vista and have mapped the custom folder location to the root of a drive, you must run Digital ArcHound 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 Digital ArchHound framework and can be very tricky if you are not careful with your setup and configuration settings.

We have found that 98% of the time, no changes at all are necessary to the Monitored Folder settings. In less than 2% of the time a folder or subfolder may need to be made inactive and it is even rarer that a custom folder is required. It is always recommended that you use the default Monitored Folder settings for a week before making any changes. Then only after careful consideration make a change with special regard to how the monitoring of the custom folder will respond. Please review the User's Guide carefully before you change the Monitored Folder 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.

Digital ArchHound is intelligent enough to monitor you entire computer for new PDFs to archive. In most cases, you may want a single Folder or a number of Folders to save a PDF that Digital ArchHound does not apply its Smart PDF Detection. This is where the "Exclude" Action for Folders or Sub Folders will be useful. Also, the ability to process 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, Digital ArchHound could process the file based on your settings. You need to be mindful 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.



Mapping to 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 PDFs place in any Desktop Subfolders will be processed, however, the Desktop itself will be excluded.

In this scenario, you may use your Desktop as a work area the Digital ArchHound will not process. Saving files as needed right to the Desktop. If you create a Folder on the Desktop and name it something like "Archive" and 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



Desktop Edition

Drop it into "Archive" as soon as you are ready to archive it.

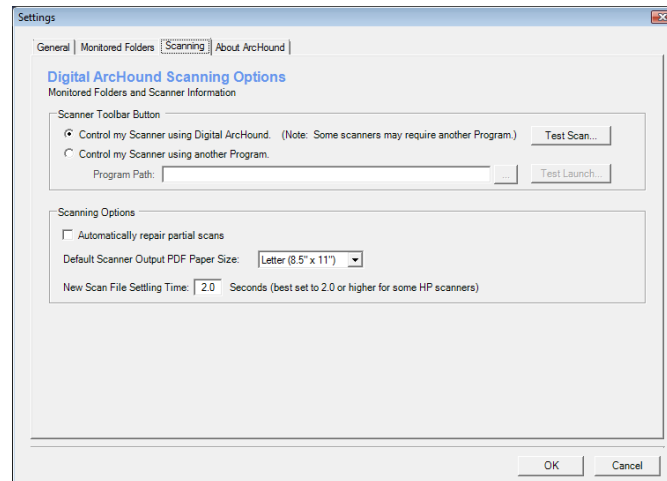


No matter which configuration you decide for Folder Monitoring, test your Folder Monitoring after you change the settings. This will insure that when you are busy and using Digital ArcHound you will not be surprised with any unexpected results.

Scanning Tab

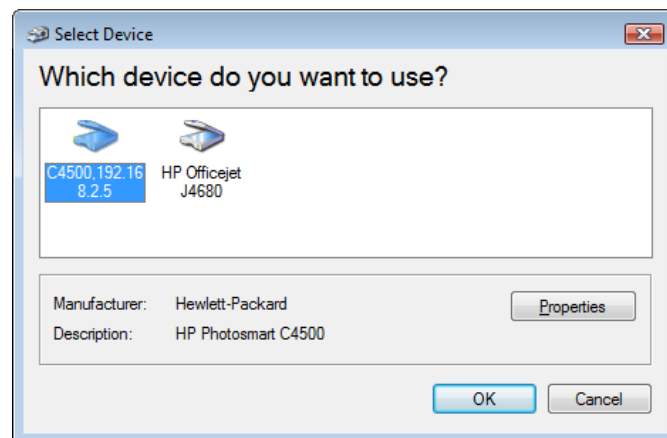
Digital ArcHound will allow you to control your WIA type scanner directly from within the Digital ArcHound application.

- You may choose your scanner application. This feature is handy if you ever want to acquire an archive directly from a scan.
- Supports WIA (Windows Image Acquisition) Scanner Control.
- Also supports both 96DPI and 120DPI for Medical, X-Rays, Maps, Genealogy and other important images and documents.
- User definable Scanner Output PDF Paper Size supports Letter, Legal and A4 sizes.



Launch a Scanner Controller

- Only if you have a WIA (Windows Image Acquisition) compliant scanner may you use this function of Digital ArcHound
- Choose an installed scanner to acquire a new scan.





Using a Scanner that doesn't support WIA

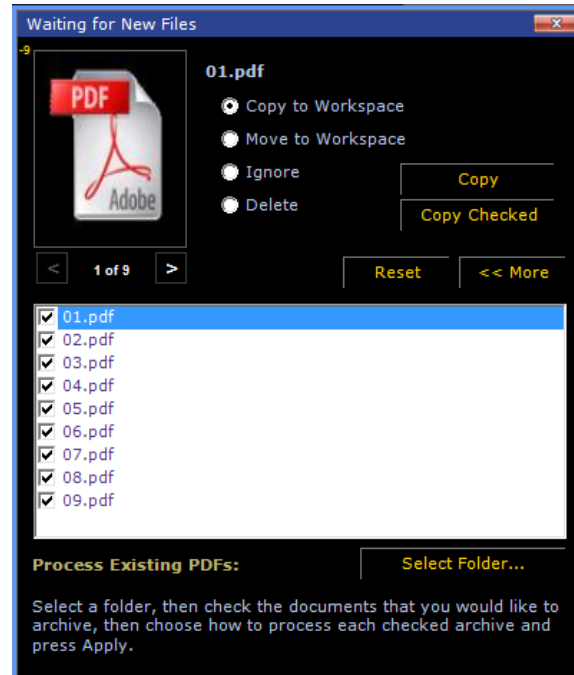
If you experience any trouble with software that wants to automatically read the PDF (causing a conflict) simply create a folder on your desktop called ArcHound, then drag your PDF to that folder.

To create a folder:

1. Click on the Settings button within Digital ArcHound
2. Click on the button to the right of the "Scanner Output" Folder [...]
3. Click on the Desktop Icon
4. Click on the "Make New Folder" button
5. Type in "ArcHound"
6. Click OK

Process PDF

- First you need to choose a folder of your choice.
- You have four choices with the Notify Me popup screen.
 1. Copy to Workspace – leaves original in tact and moves a copy to the Workspace for archiving.
 2. Move to Workspace – moves original to the Workspace for archiving.
 3. Ignore – ignores the file.
 4. Delete – moves the file to the Windows Recycle Bin.
- These choices may be made one by one or for all checked



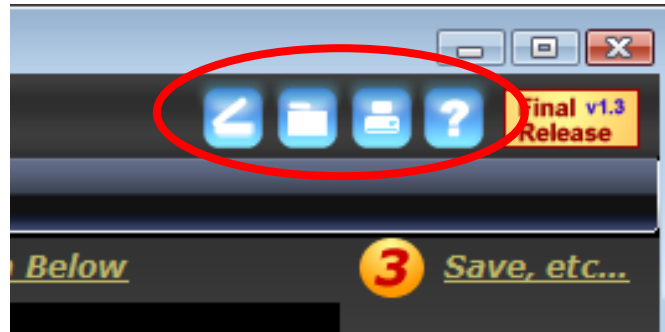
If your computer is in the Sleep mode, Hibernation, Shutdown or not running the Digital ArchHound application, Digital ArchHound is unable to auto-detect new PDFs. To process these undetected files use the Process PDF Folders feature.

Other Helpful Features

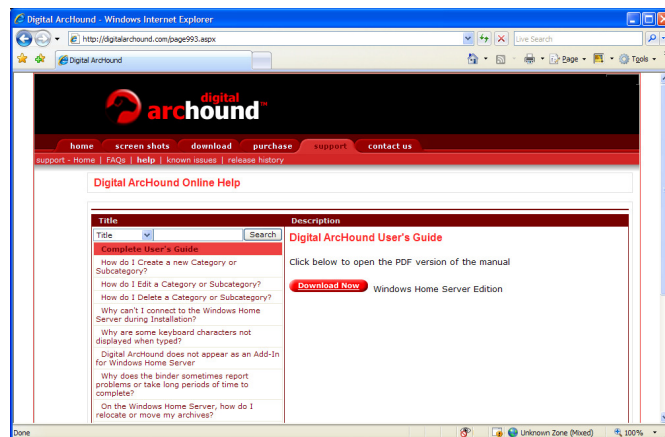


Icon Definitions

The upper right-hand corner of the Digital ArcHound Workspace has some useful icons.



- The Scanner Icon allows you to acquire archives directly from your scanner. Click on Tools, then Settings, to set this button with your scanning software.
- The Folder Icon will open the folder Digital ArcHound monitors for new scans.
- Clicking on the **GRAY** printer icon in the status bar of the application will allow you to automatically download and install the ArcHound PDF Digitizer – it makes the experience of working with Digital ArcHound much easier when archiving online documents. Best of all...it's FREE. The **GRAY** printer icon changes to **BLUE** when the printer is installed – don't forget to restart Digital ArcHound once you have completed the installation.
- The Question Mark Icon will take you to the Digital ArcHound Online Help.



Digital ArchHound on Privacy

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The Digital ArchHound Team thanks you for your purchase and wishes you the best.

Happy Archiving!



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