

IRIS OPENDOCS

Getting Started Guide

IRIS OpenDocs IRIS OpenDocs

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What is IRIS OpenDocs?

IRIS OpenDocs is an Electronic Document Management System (EDMS), which manages all documents and communications arriving on your desk; paper, e-mails, web pages, faxes and electronic files. Using IRIS OpenDocs you can rapidly scan, import, file, retrieve and track all these documents via an easy-to-use and simple mode.

Whether access is required to customer files, invoices, correspondence or to solve a compliance problem, IRIS OpenDocs provides the answer to all kinds of administrative requirements. The product is based on the most up-to-date technology providing both huge scalability and future integration options.

Guide Introduction

This guide is intended to introduce the IRIS OpenDocs and help get you started.

You will learn how to:

- Switch to different Modes
- Bring Documents into IRIS OpenDocs
- File documents away
- Quickly and effortlessly retrieve documents through Search and explore
- View the contents of a selected document
- Make changes to a selected document
- Understand simple search features using CodeFree



Accessing IRIS OpenDocs


Open IRIS OpenDocs

To launch IRIS OpenDocs double click the Icon which will be located on the desktop.



You will be automatically login to IRIS OpenDocs.

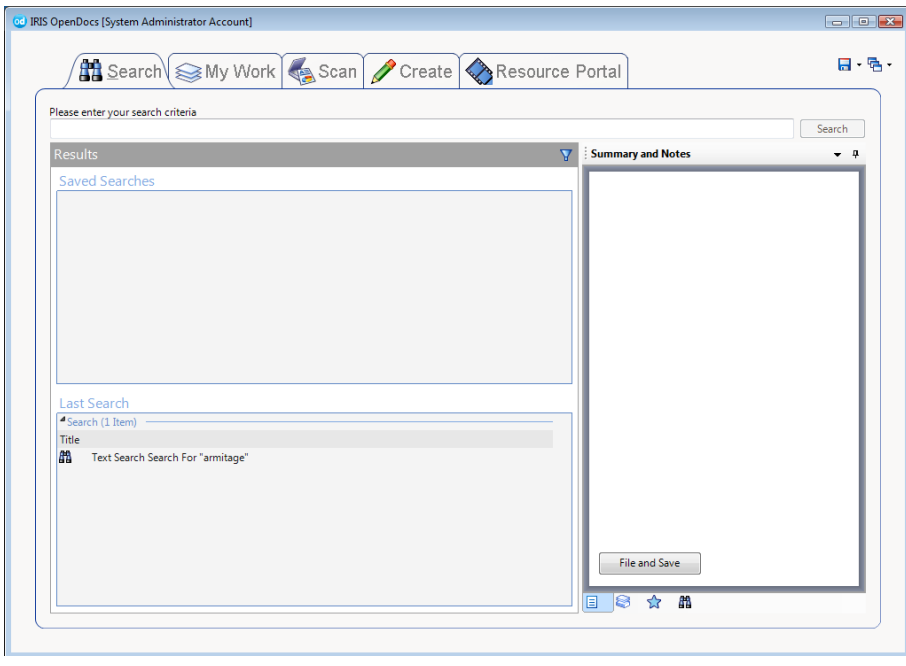
Close IRIS OpenDocs

Click the  button in the top right corner of window/toolbar (applies to all modes).

The IRIS OpenDocs Modes

When you open IRIS OpenDocs you will be presented with one of three modes. Depending on the privileges given by the System Administrator you may have them all or just one. The three modes are:

- Simple
- Standard
- Advanced

Mode Name	Screen Shot
Simple	 A screenshot of the IRIS OpenDocs application window in Simple mode. The window title is 'IRIS OpenDocs [System Administrator Account]'. The top toolbar contains icons for Search, My Work, Scan, Create, and Resource Portal. Below the toolbar is a search input field with the placeholder text 'Please enter your search criteria' and a 'Search' button. The main content area is divided into two panes: 'Results' on the left and 'Summary and Notes' on the right. The 'Results' pane shows 'Saved Searches' and 'Last Search' sections. The 'Last Search' section shows a search for 'armitage' with one result. The 'Summary and Notes' pane is empty. At the bottom right of the window, there is a 'File and Save' button.
<p>The Simple mode provides a simplified way of working with Invu. Search, My Work, Scan, Create and Resource</p>	

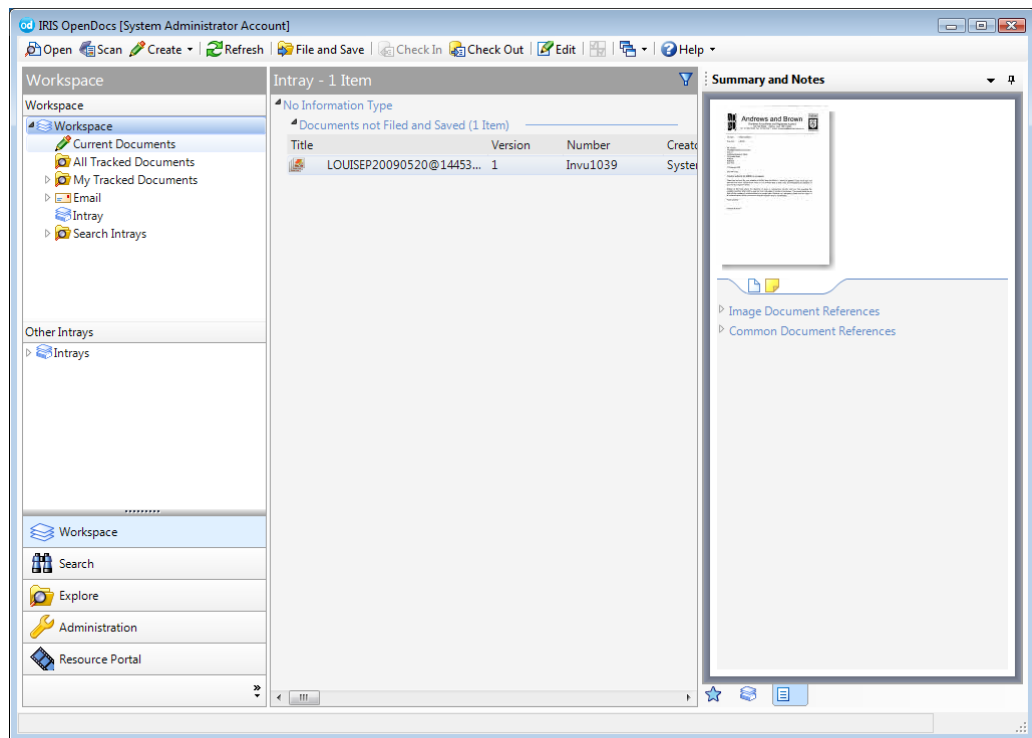
Portal are the 5 main functions which are displayed as tabs across the top of the screen and each, in turn, has been uncomplicated with minimal options to confuse. A Simple Mode user does not have the ability to Explore or configure IRIS OpenDocs through Administration in this mode.

Standard




The Standard mode has been provided with a floating toolbar. Full functionality is available in the Standard mode Workspace, Search, Explore, Administration and Resource Portal. Each Icon is presented in its own independent window.

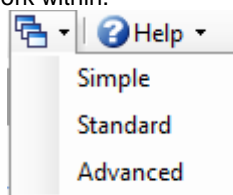
Advanced



The Advanced mode is contained within a single window. The style of the window has a similar feel to Microsoft Outlook giving you an environment that you may be familiar with. Full functionality is available in the Advanced mode Workspace, Search, Explore, Administration and Resource Portal. These Five functions are displayed as buttons on the left-hand side of the screen.

Switching Modes

To switch modes click the arrow to the right of the  icon on the main toolbar. A menu will appear where you can select the mode you wish to work within.




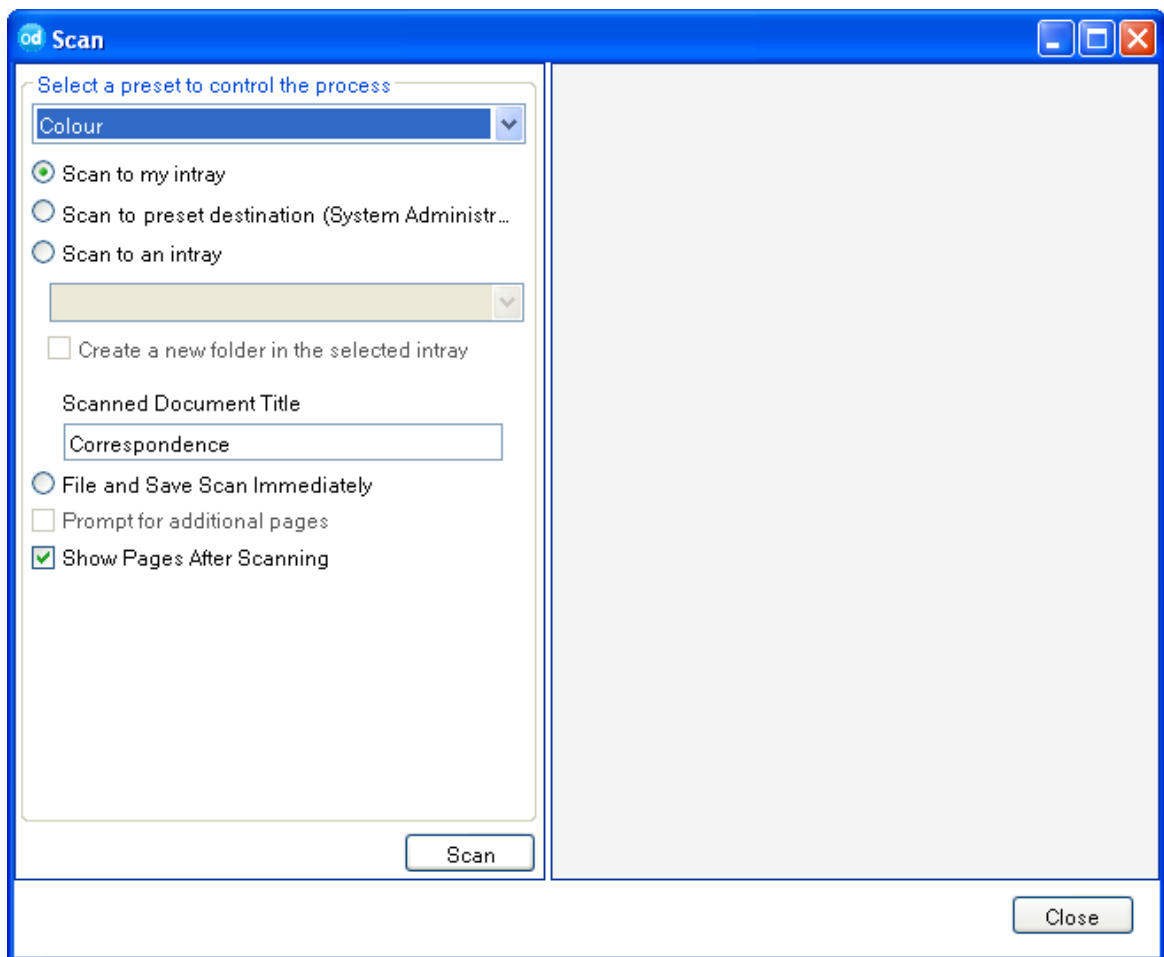
Getting Documents into the System

There are many ways a document can be brought into IRIS OpenDocs such as Drag & Drop, the Send to option, Scanning and Creating documents from IRIS OpenDocs. We will now take you through the process of bringing documents into IRIS OpenDocs.

Scan a Document into your Intray.

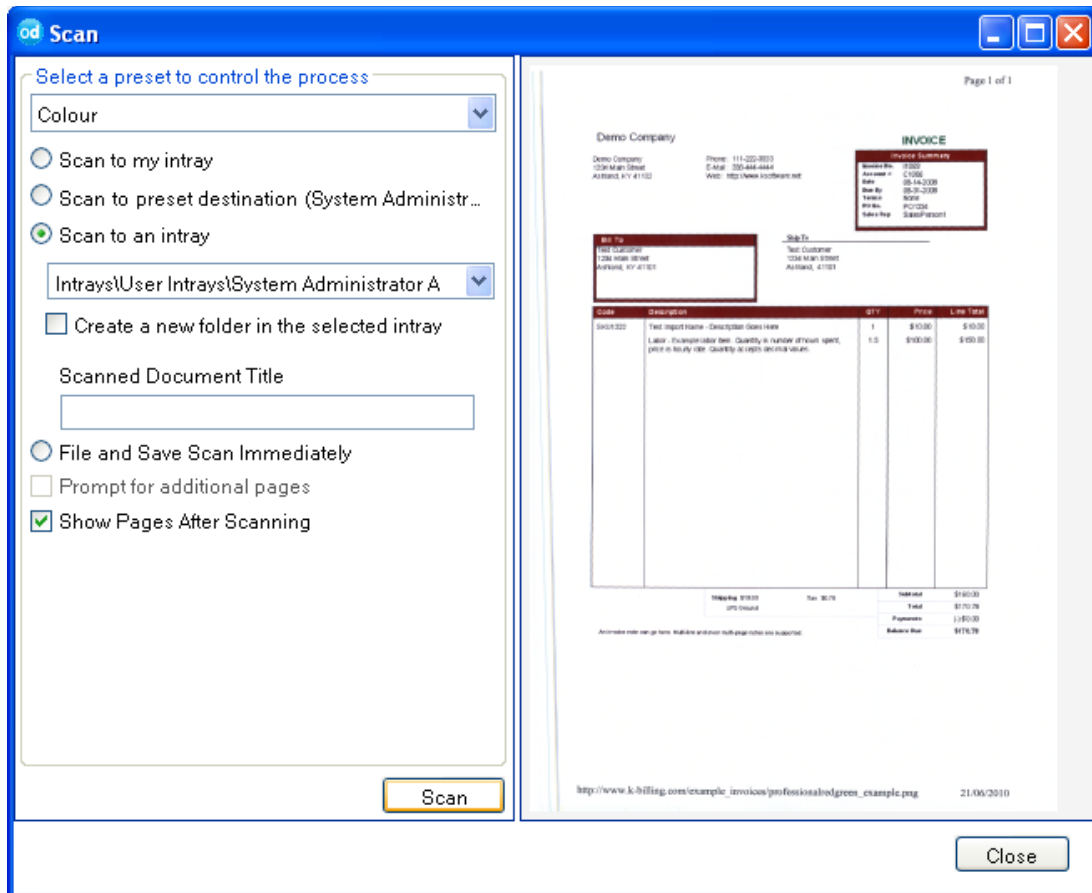
Where you have a paper document to be processed you will need to scan the document into IRIS OpenDocs:

- ⋮ Place the document into the scanner.
- ⋮ Click the  Scan button and the 'Scan' screen will be displayed.
- ⋮ Choose the relevant preset from the drop down list. The example below shows the preset **Colour** selected.



- ⋮ Select the **Scan to my Intray** option.
- ⋮ If you wish to create your own title for the documents you scan in then enter a name into Scanned Document Title. For each document scanned in it will increment 0001, 0002, 0003 etc.
- ⋮ Click the **Scan** button.

- If the document you are scanning is large you could scan it in two stages. Tick the **Prompt for additional page** check box then scan the first part of the document, when the scanner has completed a message will be displayed asking for the next part of the document.
- The document will then be scanned in and displayed in the preview to the right of the scan options as shown on the next page:



- Click the **Close** button.
- To view the scanned document, click the **Workspace** button and then click the Intray option in the left-hand pane.
- The document name will be created from the **computer name year month day @ time** (hours: minutes: seconds) e.g. **SAMARIUM20070531@1451020001.tif** if a Scanned Document Title was not entered.


Workspace - 12 items

No information type

Unindexed (12 items)


Title	Version	Number	Creator
X Ray.jpg	1	Invu1287	System
Sport Car.tif	1	Invu1286	System
SAMARIUM20070531@1451020002.tif	1	Invu1501	System
SAMARIUM20070531@1451020001.tif	1	Invu1502	System
SAMARIUM20070531@1449590001.tif	1	Invu1500	System

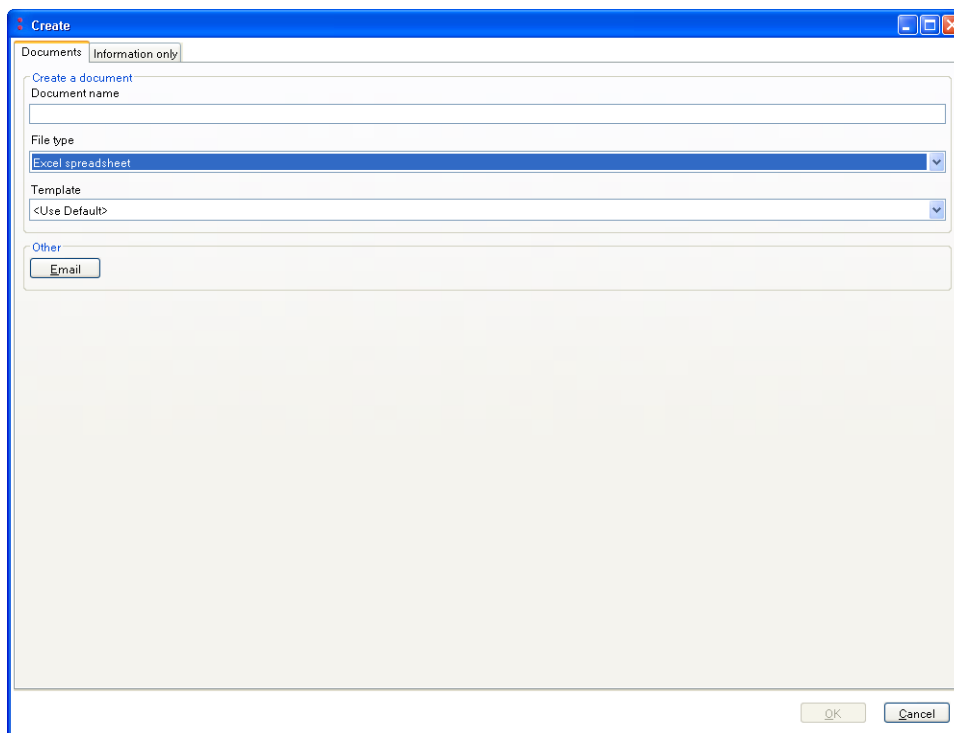
Drag a Document from the Windows Desktop

- ⋮ Click the  button and then select the **Intray** option which appears on the left pane.
- ⋮ In the top right corner of the window click the **Restore** button.
- ⋮ Your Windows Desktop should now be seen.
- ⋮ Click and drag the document into the middle pane of IRIS OpenDocs and release the mouse button.
- ⋮ The document will be available to be filed and saved. For more information on file and save, see the topic on **Filing A Document**.

Create an MS Office document within the System

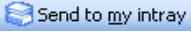
Another way to bring documents into the system is to create the document from within IRIS OpenDocs. Here we will use the example of an Excel spreadsheet.

- ⋮ To create an Excel Spreadsheet, click the arrow to the right of the  button which appears in the toolbar at the top of the screen and the following screen will be displayed:



- ⋮ Type in the **Document name**. i.e. "**2008 Company Performance Report**".
- ⋮ Choose the **File type Excel spreadsheet**.
- ⋮ Click the **OK** button. The spreadsheet will be created in Microsoft Excel.
- ⋮ Create the spreadsheet as normal then click the **Save** button and then **Close** the document.
- ⋮ The 'File and Save' document' screen will then be displayed.
- ⋮ To File and Save the document please see page 8 for more information.

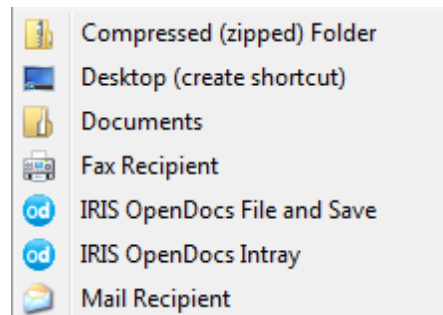
Send an Email to your Intray using the Office Addin

- ⋮ Open Microsoft Outlook in the usual way.
- ⋮ Find the email and highlight it.
- ⋮ On the toolbars at the top click the  icon.
- ⋮ The document will then be copied to your Intray within IRIS OpenDocs ready to be Filed and Saved.

NB: Other Microsoft (Word/Excel/PowerPoint) files can be placed into your Intray using this method.

Bring a Document in using Send to

- ⋮ Another way to bring an electronic document into IRIS OpenDocs is to right click a document on your desktop, Windows Explorer or My Computer.
- ⋮ From the menu select the **Send to** option and the following menu will be displayed:



- ⋮ From this menu click the **IRIS OpenDocs Inray** option to send the document directly to your Inray.

NB: If the **IRIS OpenDocs File and Save** option is selected from the above menu the document will be brought into IRIS OpenDocs and the 'File and Save document' screen will be displayed so that the document can be filed away. For more information please see page 8.



Filing Documents Away in IRIS OpenDocs

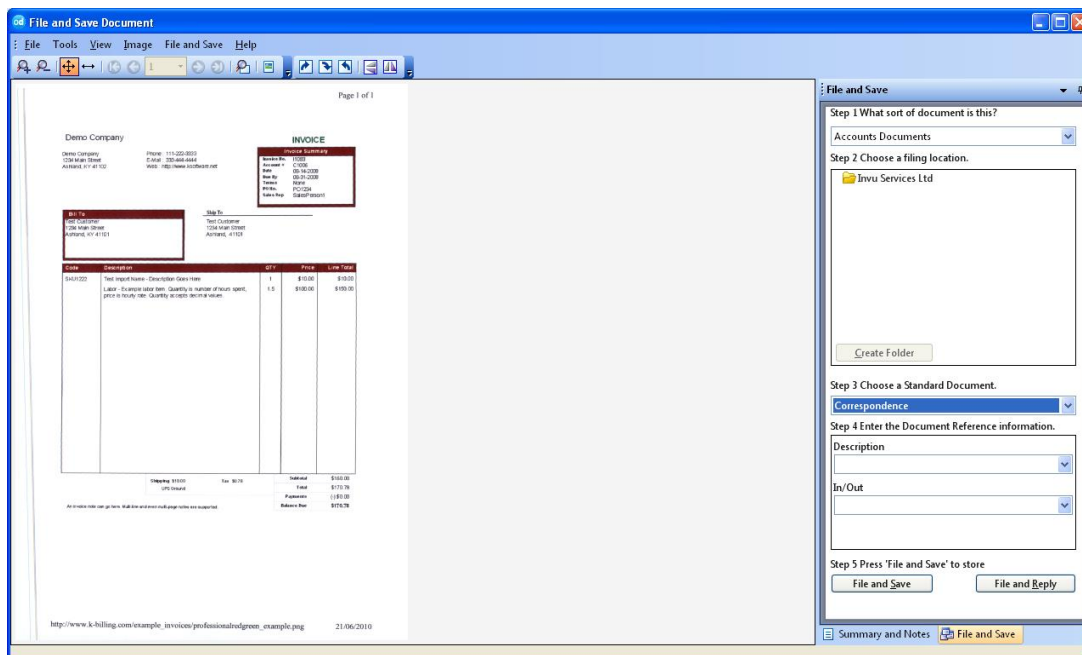
Documents need to be filed away in IRIS OpenDocs and this is called File and Save a document. There are many ways this can be done such as from your Intray or straight from Microsoft Office (Word/Excel/Outlook/PowerPoint).

We will now take you through the process of File and Save.

File and Save a Document in IRIS OpenDocs

The example below shows a document created in Word then filed and saved into the system as a marketing document.

- Click the  **Workspace** button and then select the **Intray** option located in the left-hand pane.
- Click the document in the middle pane to highlight.
- Click the  **File and Save** icon on the toolbar.
- The 'File and Save document' screen will be displayed as shown below:



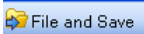
In the **File and Save** pane which is located on the right side of the screen, there are five easy steps to follow to File and Save a document:

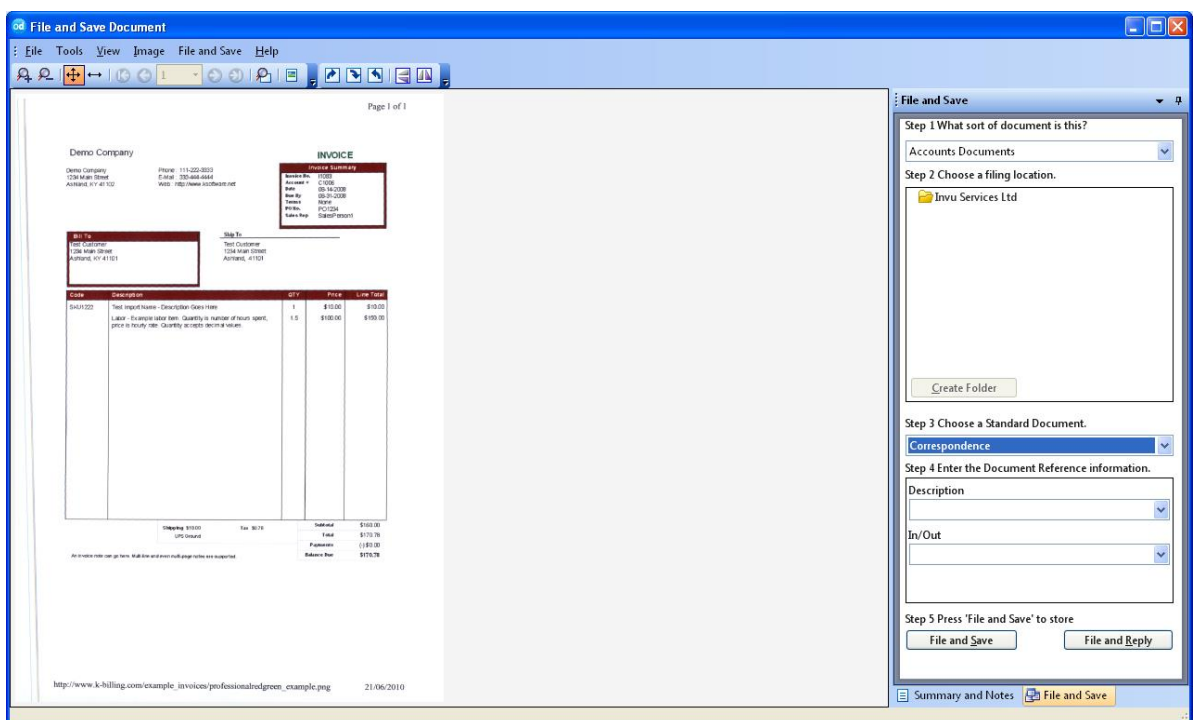
- **Step 1** - Choose what sort (Information Type - category) of document it is. Click the drop down list and choose **Marketing Materials - External**.
- **Step 2** - Choose a Filing Cabinet for the document. Click the white arrows to expand the folder list and choose **Marketing** folder.

- **Step 3** - Choose a Standard Document (sub category). Click the drop down and choose **Case Study**.
- **Step 4** - Enter the Document Reference information. This will depend on the Standard Document chosen. Type in details for **Company Name, Industry Sector**.
- **Step 5** - Once the File and Save Pane is complete click the **File and Save** button.

File and Save a Document Using the Office Addin

Documents created in Microsoft Office (Word/Excel/Outlook/PowerPoint) can be Filed and Saved from the application using the Office Addin.

- Create the document in Microsoft Word as normal and save.
- Click the  icon in which appears at the top of the screen in the toolbars of Microsoft Word.
- The 'File and Save document' screen will be displayed as shown below:



- In the **File and Save** pane, there are five easy steps to follow to File and Save a document.
- **Step 1** - Choose what sort (Information Type - category) of document it is. Click the drop down list and choose the relevant document type.
- **Step 2** - Choose a Filing Cabinet for the document. Click the white arrows to expand the folder list and choose the relevant folder.
- **Step 3** - Choose a Standard Documents (sub category). Click the drop down and choose relevant Standard Document.
- **Step 4** - Enter the Document Reference information. This will depend on the Standard Document chosen. Type in the details for each Document Reference displayed. Ensure all mandatory Document Reference are completed.
- **Step 5** - Once the File and Save Pane is complete click the **File and Save** button.

Retrieving Documents

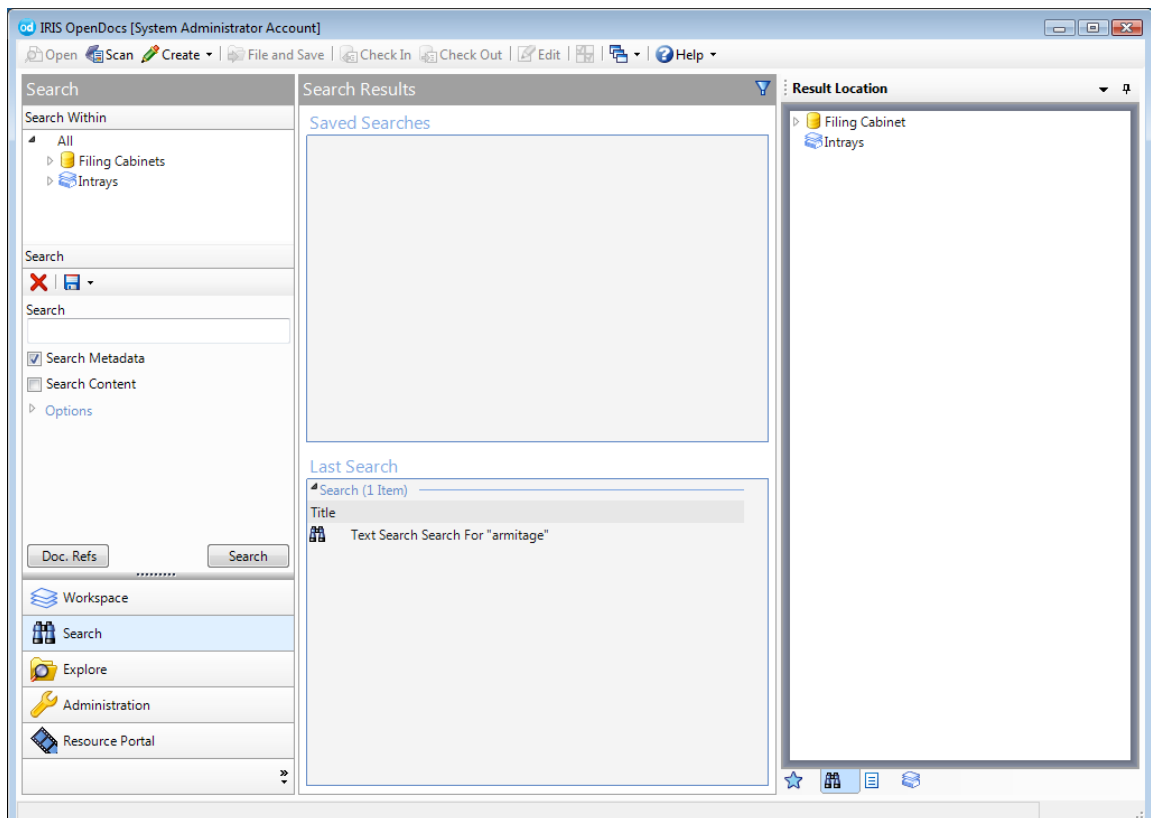
Finding documents is quick and easy. There are two ways in which documents can be retrieved

- Search for the document using a search phrase
- Browse in the same way you would use Windows Explorer

Searching for a Document

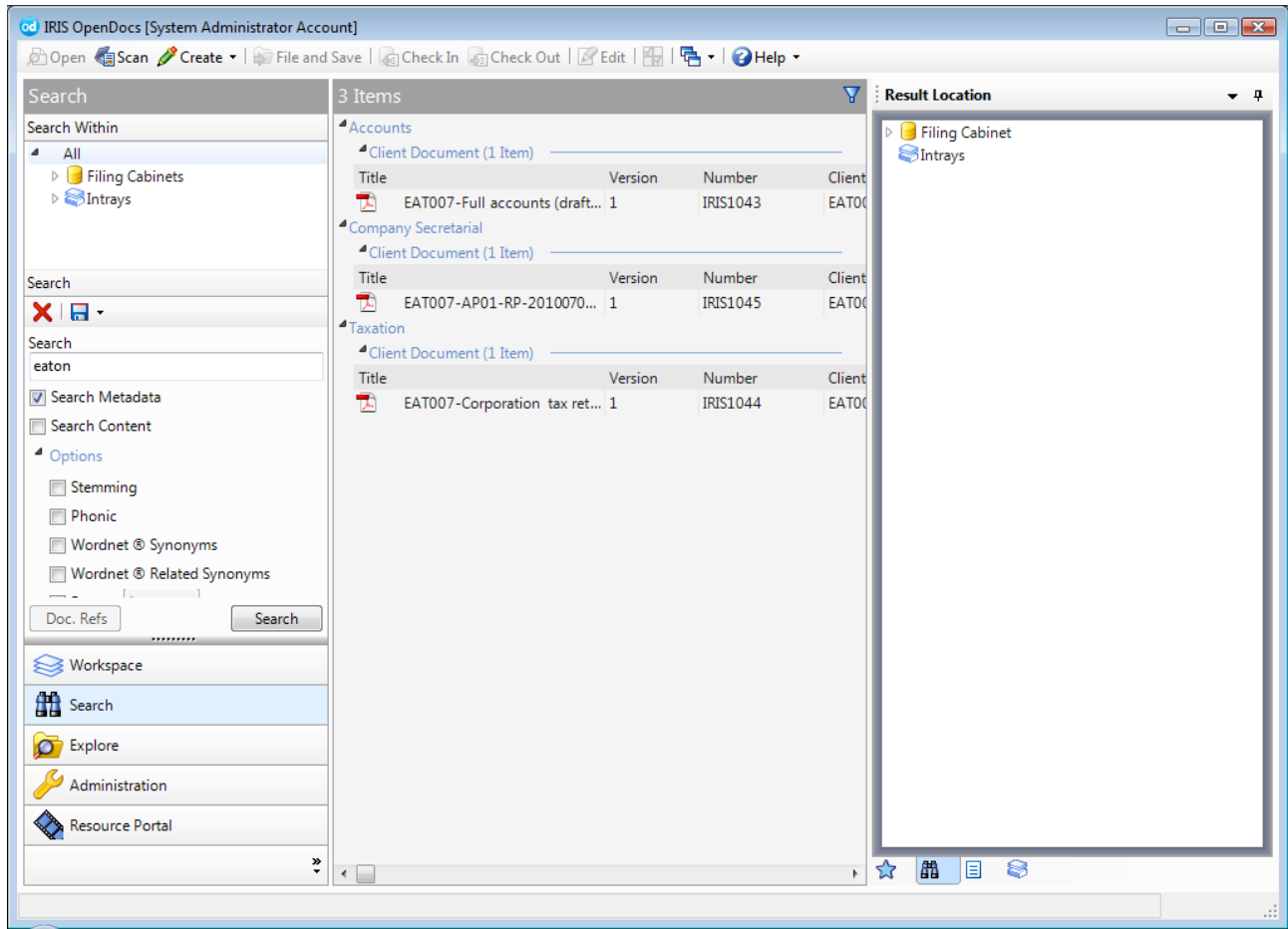
We will search for a document using the phrase **"BBS"** searching all locations, the document information (metadata) and the documents contents within IRIS OpenDocs.


- To search for a document, click the  Search button. In the left-hand pane and the following screen will be displayed:

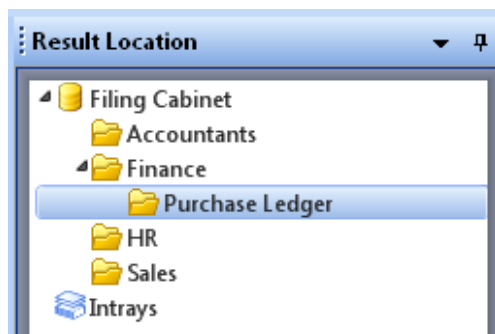


- In the 'Search Within' pane click the **All** option. This will search throughout the system.
- In the 'Search' pane type in a word or phrase the search should be based on into the **Search for** text box. i.e. **"BBS"**.
- Ensure the **Search metadata** and **Search content** check boxes are ticked. The **Search metadata** option, when ticked, will search the information held about the document and the **Search content** option, when ticked, will search the content of the document.
- Click the **Search** button to perform the search.

The results will be displayed within the Results pane along with the number of results (as shown on the next page).



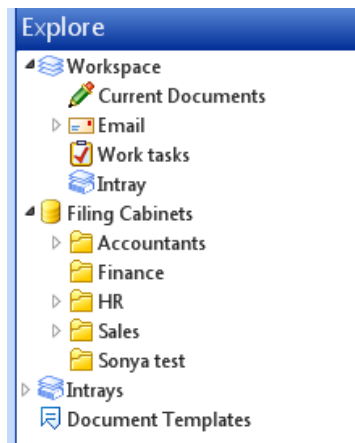
- To view the location of a document in the Results (middle) pane, click the white arrows to expand the relevant location i.e. **Purchase Ledger**
- Click the document title in the expanded section and on the right-hand pane at the bottom, click the **Result Location**  button and the location of the highlighted document will be displayed in the right-hand pane:



Browse for Documents

Browsing for a document works in a similar fashion as the Windows Explorer. For example we will browse for a document located in Sales.

- To browse for a document, click the  button in the left-hand pane.

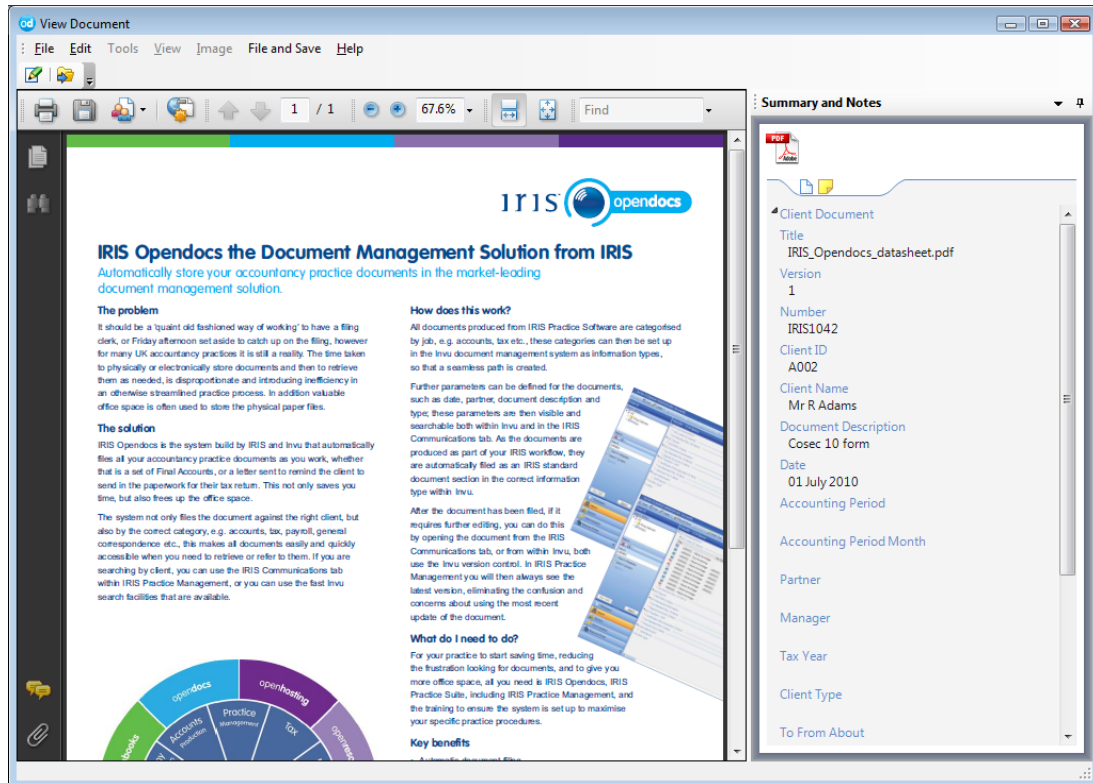



- In the Explore area, (as shown above) click the white arrow to the left of the **Filing Cabinet** to expand the selection.
- Click the white arrow beside the **Accountants** folder, and then click on the **Client Files** folder to display the documents in the middle pane.
- To expand the section and click the white arrow in the middle pane to the left of the relevant heading.

Opening a Document

Once the document has been located, it can be opened to view its contents.


- To open a document for viewing, double click the document name from the middle pane and the 'View Document' screen will be displayed. You will see the document and a summary pane to the right, which will show you the thumbnail and metadata for the selected document.



- When finished, click the  button in the top right corner of the 'View Documents' screen.

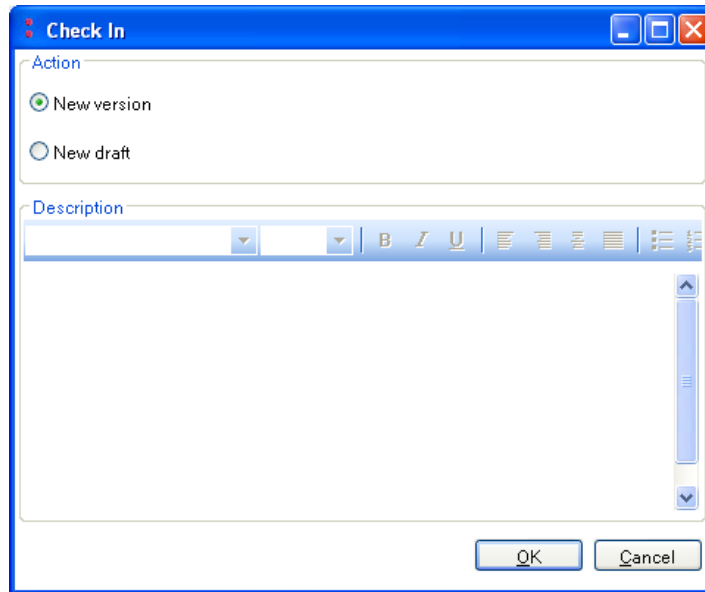
Editing a Document

If any changes need to be made to a document held within IRIS OpenDocs the document will need to be edited and then checked back in as a new version.

- To edit, first browse or search for the document.
- Click the document to highlight.
- Click the  **Edit** icon on the main toolbar.
- The document will then be opened in its native application unless it is a scanned image this will be displayed in the 'Edit Document' screen.

NB: At this point the document has been checked out. This means that other users will not be able to edit it but will still be able to view the document. Other users will know which documents are checked out as the document name will be displayed in red.

- Edit the document as normal. When finished, **Save** the document and **Close** word.
- The message 'Check in changes for document' will be displayed click the **Yes** button to continue.
- The 'Check In' screen will be displayed as shown on the next page:



- From this screen choose the **New Version** option.
- If required, type in a brief **Description** of what was changed in the document.
- Click the **OK** button to check in the document.

Sales - 114 items

Note

Note (1 item)

Sales & Demonstration Documents

Demonstration Document (23 items)


Title	Version	Number	Title
BitBob Spec Sheet.TIF	1	Inwu1428	BitBob Spec Sheet
Bridgeport Order Only.tif	1	Inwu1245	Bridgeport Order Only
Bridgeport Scan Two Pages	1	Inwu1210	Bridgeport Boating 2 Page Sc
Delivery Note BB.PDF	1	Inwu1282	Delivery Note Bridgeport Boat
Delivery Note DS.PDF	1	Inwu1279	Delivery Note Dock & Sail
Delivery Note SL.PDF	1	Inwu1280	Delivery Note Sailing Ltd
Delivery Note T.PDF	1	Inwu1281	Delivery Note Trader
green field.wmv	1	Inwu1403	Green Field
Invu Email Management.exe	1	Inwu1404	Invu Email Management Derr
INVU.wmv	1	Inwu1413	Invu Corporate Video
New Bridgeport Letter.doc	2	Inwu1232	New Bridgeport Letter
New Bridgeport Letter.doc	2.1	Inwu1232	New Bridgeport Letter
new bridgeport Order.xls	2	Inwu1233	New Bridgeport Order
NikNak Spec Sheet.TIF	2	Inwu1414	NikNak Spec Sheet

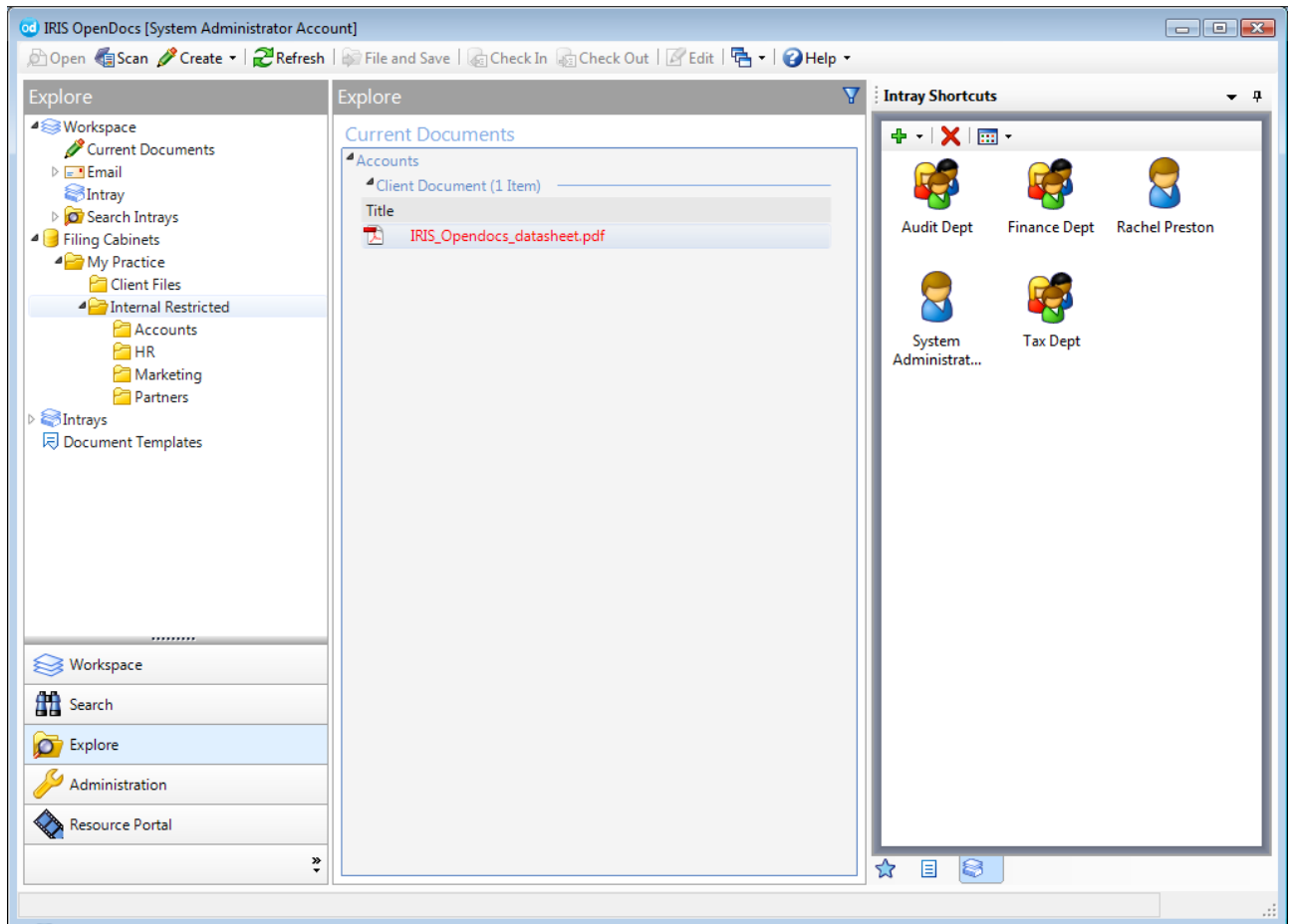
The above example shows 3 versions of the document. If only one version can be seen, right click in the Explore (middle) pane, choose the **View** option and then select the **All versions**.

If you check in a Draft then the file will be displayed in green text and increment by a point so if check in version 2 as draft will become 2.1.

To view all documents that you have checked out

When you check out a document, the title of the document will be displayed in red and the documents will also be displayed in the Current Documents area.

- To view documents that are checked out by you, click the  **Workspace** button and then select the **Current Documents** option located in the left-hand pane.
- The following will be displayed in the middle pane:

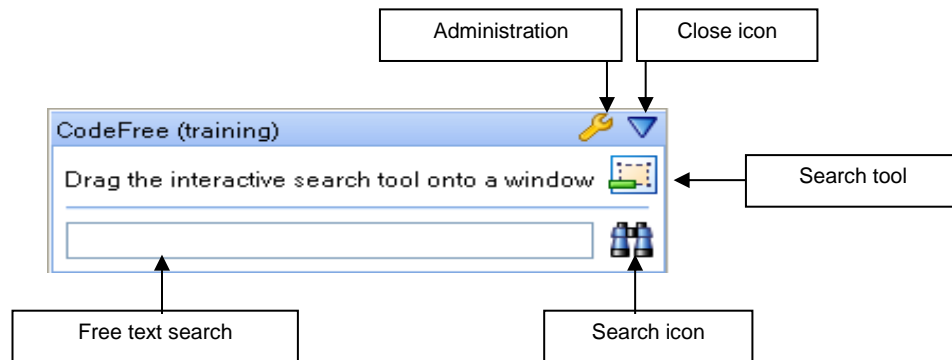


CODEFREE

CodeFree is an extension to the Standard Document Management System, which allows users to perform a search from third party applications (e.g. an accounts package). When IRIS OpenDocs is started, the CodeFree application will automatically start and can be seen running in the system tray (normally near the clock on the Windows Task Bar).



Click the Red Colon icon to display the pop-up Toolbar for CodeFree (shown below):



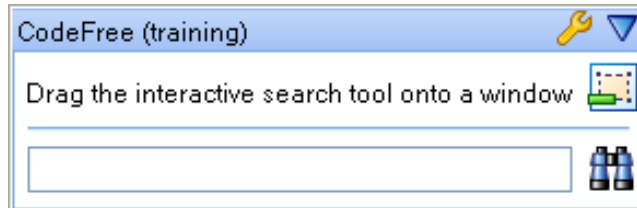
There are two main methods of searching:

- The Free Text Search
- The Interactive Search Tool

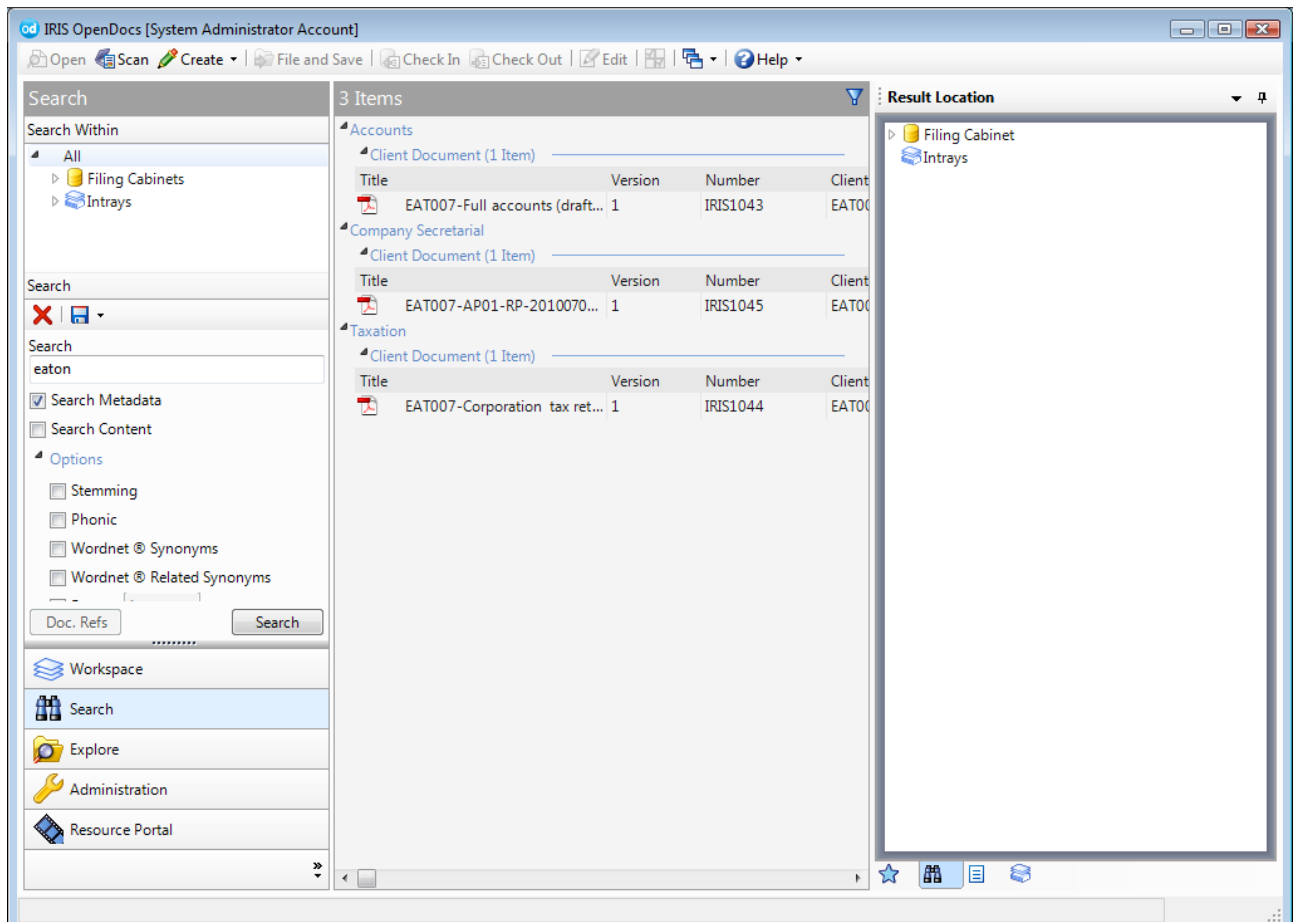
The Free Text Search is a simple search bar where the user supplies the word or phrase that they wish to search against. The Interactive Search Tool is a drag and drop icon, which can be used to search on information held in a third party application.

To Perform a Simple Text Search

- Click the CodeFree icon in the system tray to display the CodeFree Toolbar.

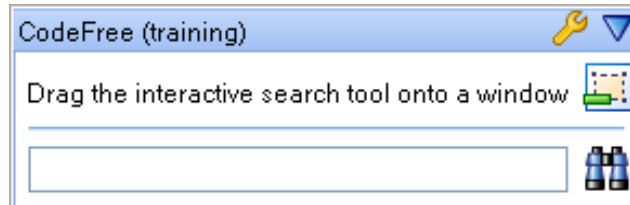


- In the Free Text search box, type the word or phrase you wish to search for.
- Click the search icon to activate the search.
- The search results window will then be displayed containing the list of documents found.



Using the Interactive Search Tool

- Click the CodeFree icon in the system tray to display the CodeFree Toolbar.



- Click and drag the Interactive Search Tool onto the field in the third party application you wish to use to search for in IRIS OpenDocs.

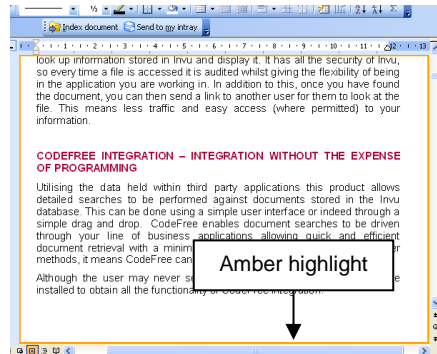
NB: As the search tool is dragged across the application the text boxes (and other controls) will be highlighted (in either green or amber). The Free Text search box will also display the value captured by the application. The window on the next page shows the value captured within the **Company Name** field.

Actions if Green

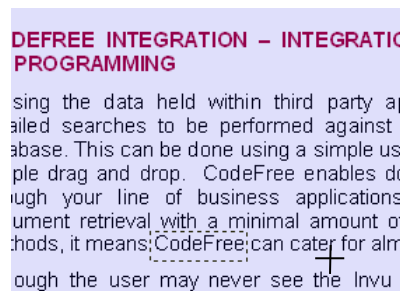
- If the area/field is highlighted in green, release the mouse button and the search will begin.
- The search results window will then be displayed containing the list of documents found.

Actions if Amber

- If the area/field is highlighted in amber more information is required to perform the search, release the mouse button and the area/field will become shaded.



- Within the shaded area drag a box (with the cross + cursor) around the word or phrase you wish to search for and release the mouse:



- The search results window will then be displayed containing the list of documents found.

