

The Filing System (TFS) User Guide Version 1.7

Contents

Index

1. Overview of the TFS filing system
2. Hardware and software requirements
3. Microsoft's MDSE server
4. Installing the TFS application
5. Configuring TFS
6. Setting up a filing system using TFS
7. Creating and managing TFS users
8. Adding documents to TFS
9. Scanning documents to the TFS database
10. Viewing documents in TFS
11. Exporting documents in TFS
12. Editing documents in TFS
13. Deleting documents in TFS
14. Viewing document properties in TFS
15. Refreshing TFS data
16. Assigning and managing rights to documents in TFS
17. Searching for documents in TFS
18. TFS statistics
19. Archiving documents in TFS
20. Registering TFS
21. Support

1. Overview of the TFS filing system

The EFH software solution while simple to use is feature rich offering you the benefits of filing documents electronically while ensuring your documents are secure and easily searched and retrieved when required.

Simply, the EFH system replaces your office filing cabinets with an electronic equivalent that you will easily understand. Almost all the documents you would usually keep in your filing cabinet are made easily accessible with the added benefits of being able to share documents with other users in the Company electronically (no printing and delivering files) and the ability to search for documents more easily using the EFH search tool.

Just Some of EFH's features:

1. **Simplicity:** EFH offers unprecedented filing ease to users. The system is easy to setup and scalable from the home user just wanting to file personal paperwork to the larger company wanting to run a reliable electronic filing system throughout the organization.
2. **Saves Money:** Filing electronically saves money in the short, medium and long term. The cost of the EFH software is easily recovered in the first six months of use in most cases.
3. **Access and Share Documents Easily:** Documents saved to the EFH system can easily be shared with staff or emailed to users outside of your organization. Similarly, documents you want kept private are encrypted using one of the best encryption software solutions available today.
4. **Tried, Tested with a Scalable Backend:** One of EFH's unique features is the use of MS SQL server to store your documents. The home user can run EFH on Microsoft's freely distributed desktop version of MS SQL server while the larger Company can make use of Microsoft's acclaimed MS SQL server 2000. Both applications feature superb administration tools making backups / restores and other essential database management a breeze.
5. **Data Security:** EFH allows documents to be encrypted using PGP. Probably the most secure and tested encryption software available today
6. **Document Search Facility:** Finding documents in EFH is a breeze! Just type in a few key words and all documents relating to your request are immediately available.

- 7. No Proprietary File Standards:** You can file any document you like in the EFH system! Photo's, PDF files, Word documents etc. EFH handles all file types with ease!
- 8. Version Control:** Files are never deleted but rather archived in the EFH system allowing full document traceability.

2. Hardware and software requirements

TFS will run on the following hardware:

- Pentium II 300Mhz or above
- 64Mb RAM (128Mb recommended)

TFS will run on the following software:

- Windows 2000 (SP3)
- Windows XP
- Windows 98

3. Microsoft's MDSE server

The TFS system is divided into two parts:

- The backend which uses either Microsoft's free desktop server edition (MDSE) or, in a large workgroup or corporate environment, Microsoft's MS SQL server 2000. The backend software manages the documents loaded by TFS utilizing Microsoft's successful MS SQL server technology.
- The TFS front end application which is visible to the user.

Microsoft's MDSE will be installed by default. If you want to use MS SQL 2000 server, you will need to run the TFS database script Included in the TFS distribution archive.

4. Installing the TFS application

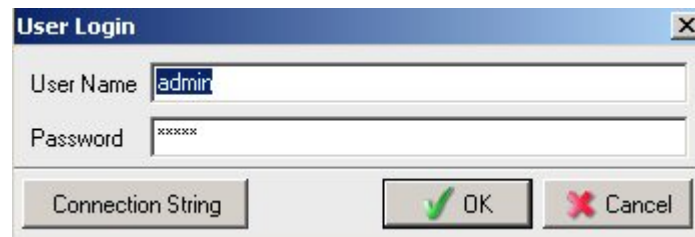
Installing the TFS system requires the following steps:

1. After downloading the TFS system from www.thefilingsystem.com website, unzip the archived file **TFSV.ZIP** to any directory on your hard drive.
2. In the directory you have unzipped the TFSV1.ZIP files, locate and double click on the **SETUP.EXE** file.
3. Follow the online instructions

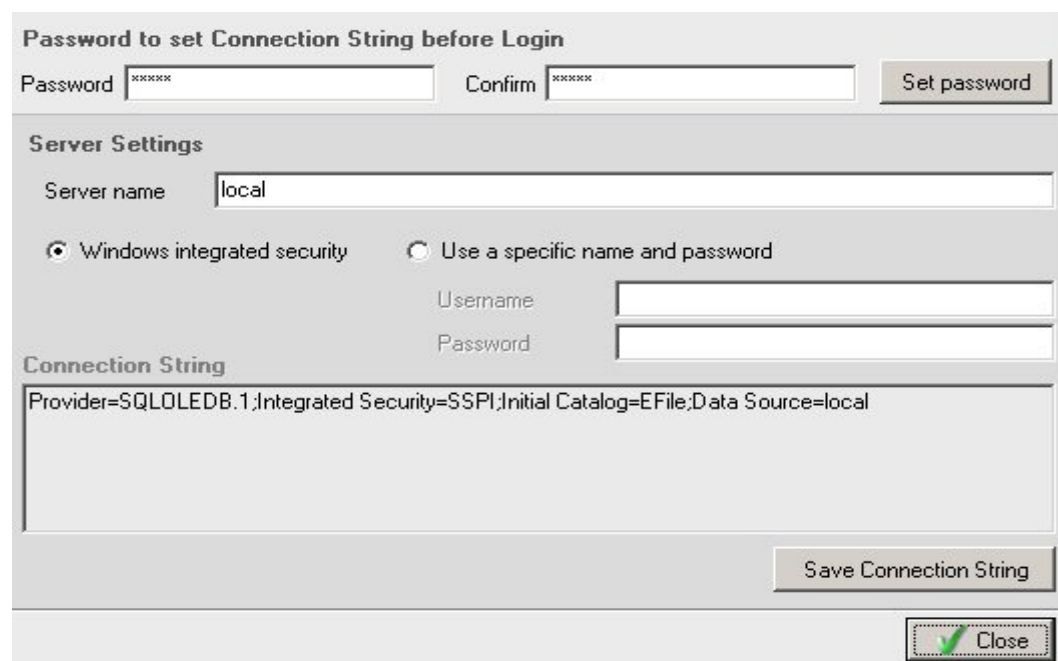
Note: TFS will by default install Microsoft's MSDE database engine. The archive all includes this user guide in PDF format and the TFS user license agreement.

5. Configuring TFS

Once TFS has been installed, double click the TFS icon and the following screen will be displayed:

A dialog box titled "User Login" with a close button (X) in the top right corner. It contains two text input fields: "User Name" with the text "admin" and "Password" with masked characters "xxxxx". At the bottom, there are three buttons: "Connection String" on the left, and "OK" (with a green checkmark icon) and "Cancel" (with a red X icon) on the right.

Click on the **Connection String** button and enter the default password which is **Admin** and the following screen will be displayed

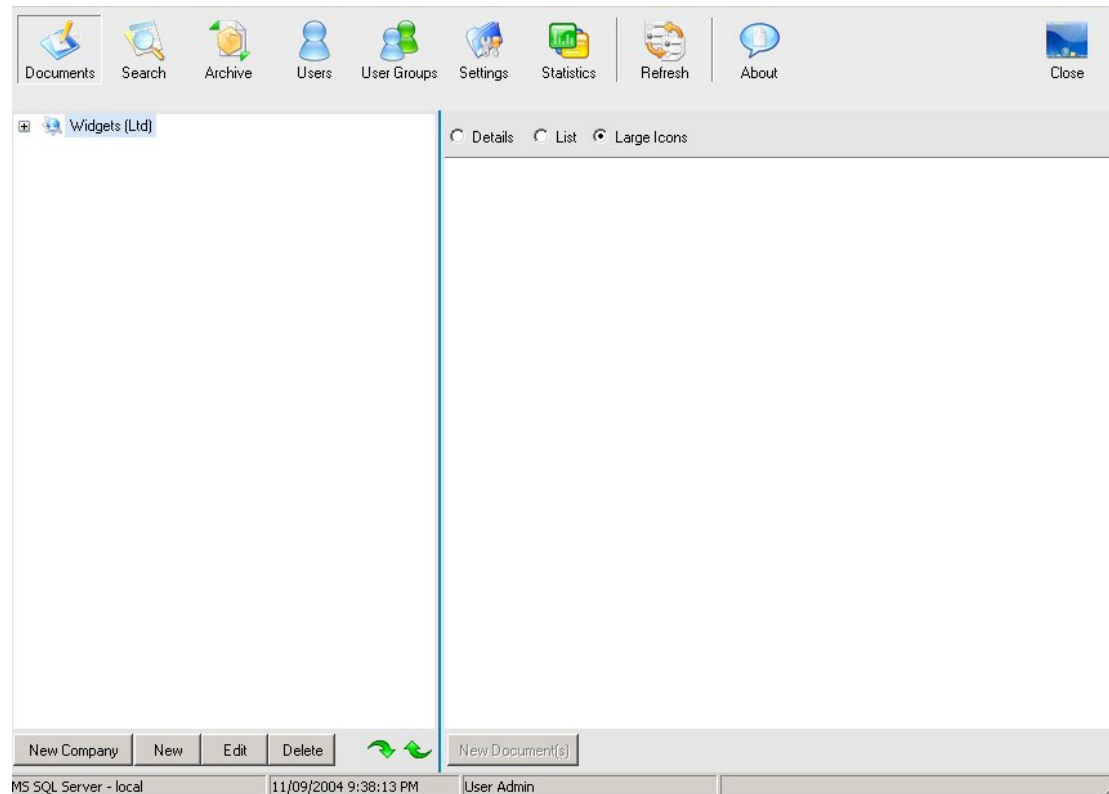
A dialog box titled "Password to set Connection String before Login". It has two text input fields for "Password" and "Confirm", both masked with "xxxxx", and a "Set password" button to the right. Below this is a section titled "Server Settings" with a "Server name" field containing "local". There are two radio buttons: "Windows integrated security" (selected) and "Use a specific name and password". The second option has "Username" and "Password" fields. Below "Server Settings" is a section titled "Connection String" with a large text area containing the text "Provider=SQLOLEDB.1;Integrated Security=SSPI;Initial Catalog=EFile;Data Source=local". At the bottom right is a "Save Connection String" button, and at the very bottom right is a "Close" button with a green checkmark icon.

This form requires you to input the settings for your MS SQL server or MSDE desktop server. If you are running TFS on a stand-alone machine, then the best option is to select **Windows integrated security**. The server name will be **local** as indicated in the image above if you are running on a stand-alone machine. If you are on a LAN / other type of network, your network administrator will need to setup TFS on the MS SQL server and give you the correct login information

After you have captured the server settings, click the **Save Connection String** button to save the settings to your computers registry. You will therefore not need to re-apply these settings each time you login to TFS.

You will now be taken back to the TFS login form. Enter the default username: **admin** and the default password: **admin** and press the OK button.

The TFS application should now open and display a similar form as shown below



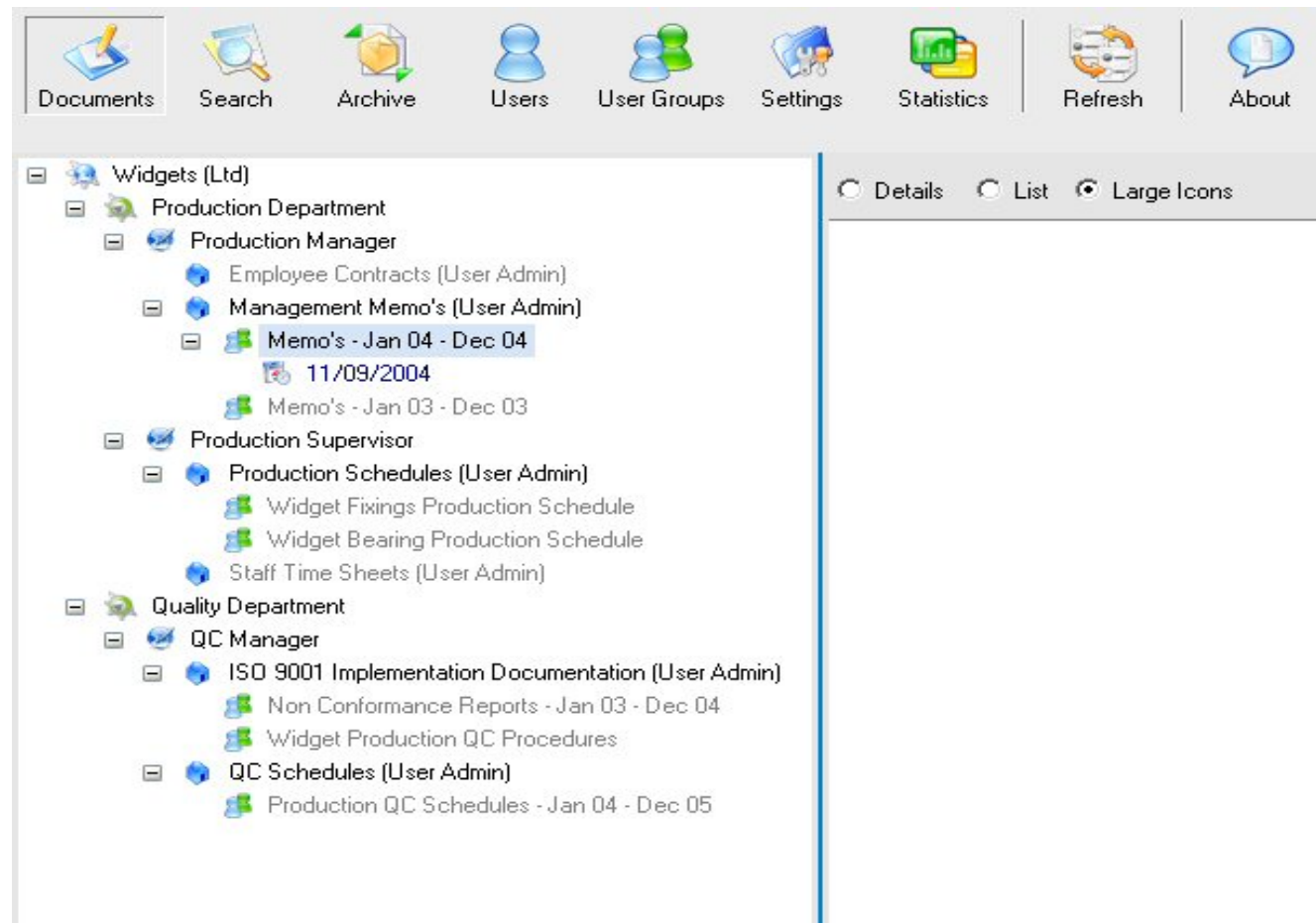
6. Setting up a filing system using TFS

Setting up a filing system in TFS couldn't be simpler!

TFS has 5 levels:

1. **Company** – This is the Company you want to set the filing system up for
2. **Department** – This is the department in the company the files will be kept in (Example: production department)
3. **Office** – This could be the office or area in the department the files will be kept (Example: The production managers office)
4. **Cabinet** – This is the filing cabinet in the office specified (Example: Memo's received from management)
5. **Folders** – These are the folders in the cabinets specified (Example: Management memo's received between January and December of a given year could all be kept in one folder)

The image below gives you an example of the structure your filing solution could have within the TFS system



As can be seen, TFS can easily be configured to replicate your current 'paper' based filing system. It is sometimes better to keep things similar so the changeover to the TFS system is easier to manage.

TFS displays the filing solution in a 'tree' type view so users can easily navigate through the various departments, cabinets and folders. To expand the tree or collapse the tree view, simply click the green arrows at the bottom of the form.



These arrows appear on all the forms where a tree view of the filing system you have created is displayed.

7. Creating and managing TFS users

Creating and managing users is done by clicking on the Users button

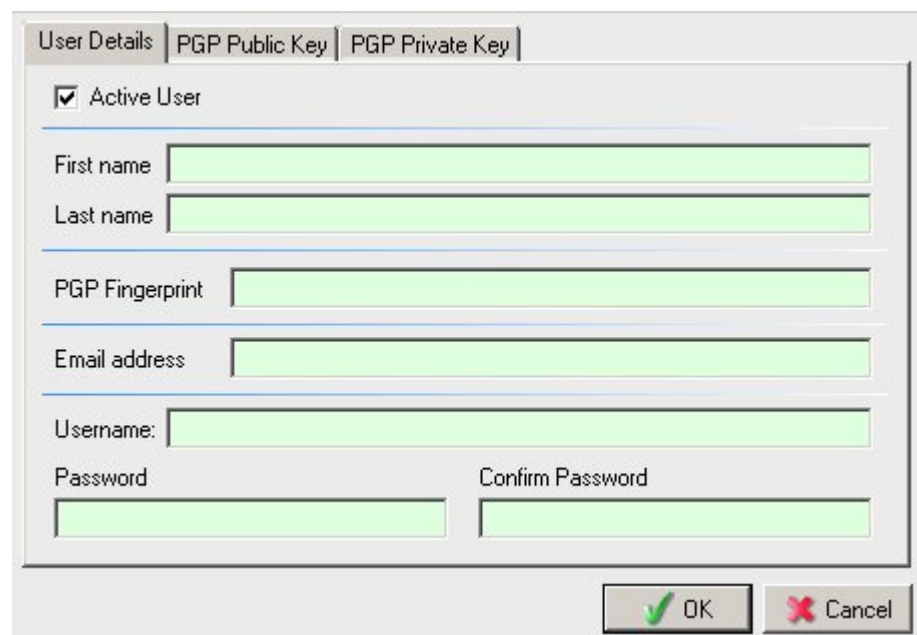


When you install TFS, the Admin user will always exist in TFS. The Admin user is the only user that can do the following:

- Create users
- Delete users
- Create a filing system down to cabinet level. All other users can create their own folders.
- Change a user's user name
- Archive documents
- Change application settings

To create a new user, do the following:

1. Click on the **Users** icon
2. Click the **New** button at the bottom of the form.
3. The following screen should be displayed

A screenshot of a 'User Details' form. The form has three tabs: 'User Details', 'PGP Public Key', and 'PGP Private Key'. The 'User Details' tab is selected. It contains a checkbox for 'Active User' which is checked. Below this are several text input fields: 'First name', 'Last name', 'PGP Fingerprint', 'Email address', 'Username:', 'Password', and 'Confirm Password'. At the bottom right of the form are 'OK' and 'Cancel' buttons.

4. Complete the relevant information

Note:

If you use PGP (www.pgp.com) to secure your email and documents, then you can save your PGP private, PGP public and PGP fingerprint information into the TFS system. In a later version TFS will be able to encrypt documents within the TFS application

5. Press the **OK** button to save the user information captured
6. The user has been successfully added
7. You can edit user data by highlighting the user in the left pane of the form and clicking the **Edit** button at the bottom of the form

8. Adding documents to TFS

Documents can be added to TFS many ways:

- Drag-and-drop files from Windows Explorer to TFS
- Drag-and-drop emails from MS Outlook or Outlook Express to TFS
- Add documents using directory selection
- Scan documents using any TWAIN compliant scanner to the TFS database.

Note:

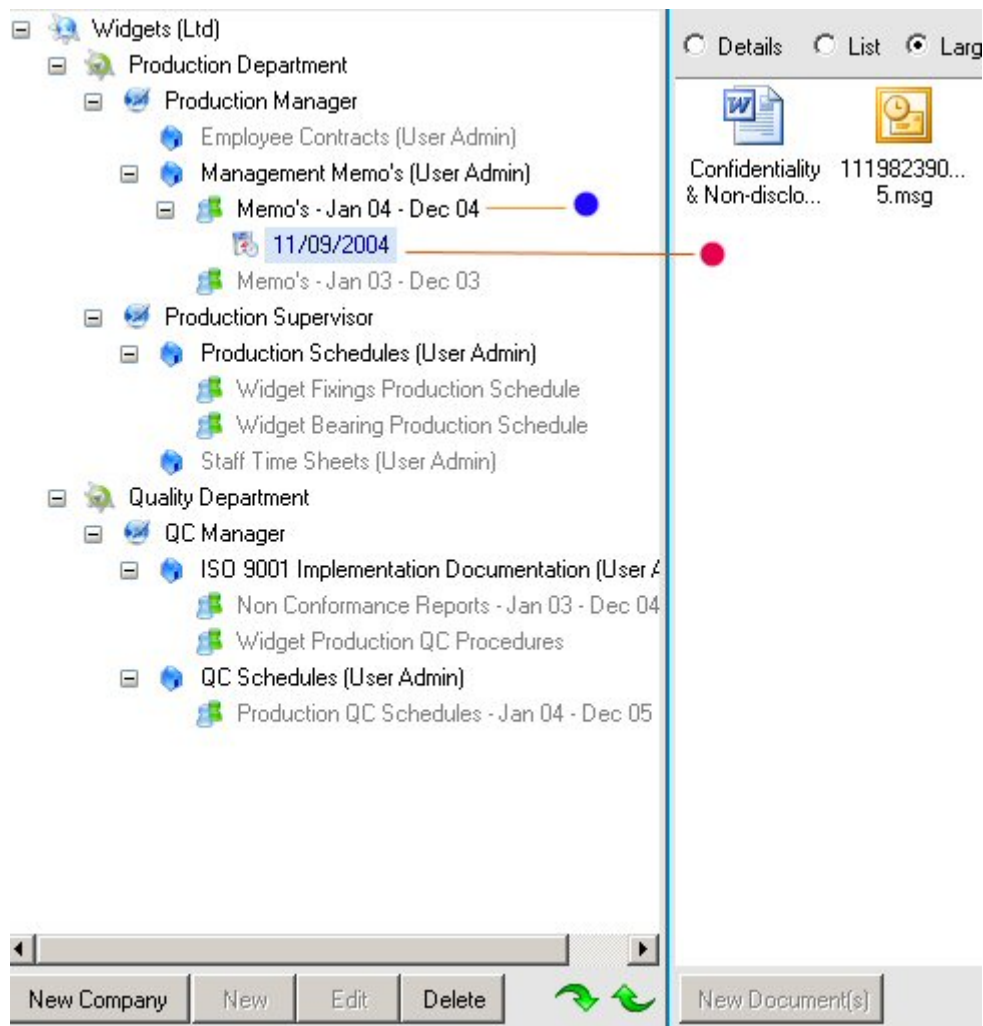
that scanned documents are saved to PDF format before being stored in the TFS database

To file a document using TFS, do the following:

1. Click the **Documents** icon

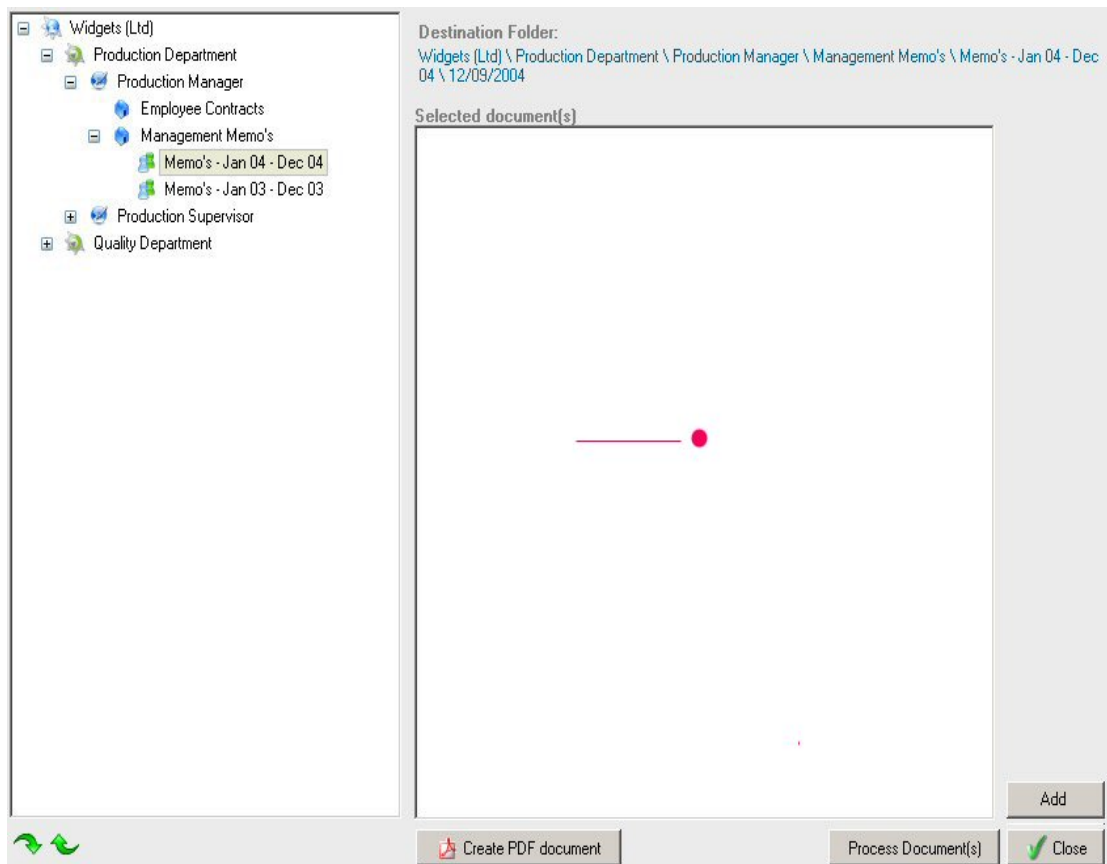


2. Select a folder to save the document to. Remember documents can only be saved to folders. See below:



The **Blue** dot indicates a folder within the tree and the **Red** dot indicates the date the files were allocated to the folder. The files in the folder can be seen in the right-hand pane on the form.

3. Once a folder has been selected, the **New Document(s)** button will become active.
4. Click the **New document(s)** button and the following screen should be displayed



5. You can now add documents to the TFS system using one of the following methods:
- Drag-and-drop one or more documents from Windows Explorer into the TFS document block indicated in the above image with a **Red** dot.
 - Drag-and-drop one or more emails (including there respective attachments into the TFS document block indicated in the above image with a **Red** dot.
 - Click the **Add** button and select the file/s you want to add to the TFS database.

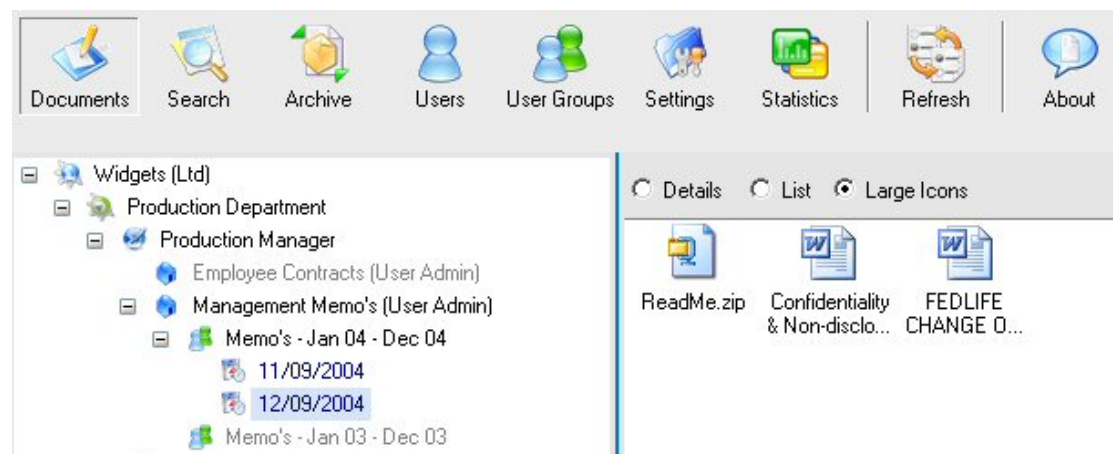
After you have added the documents to TFS, click the **Process Document(s)** button. The following screen should be displayed:

The screenshot shows the TFS file upload interface. On the left is a tree view showing the folder structure: Widgets (Ltd) > Production Department > Production Manager > Employee Contracts > Management Memo's > Memo's - Jan 04 - Dec 04. The main window shows the file name 'C:\Wayne IMS\MyStuff\Efile Project\Application\Beta 5\ReadMe.zip' with a green dot indicating the 'Keep document for' period. Below this is a 'Brief description' field with a blue dot. There are also 'Allowed Users' and 'Allowed Groups' sections. At the bottom is a 'Description' field with a red dot. The bottom right has buttons for 'Auto Process', 'Save -> Next', 'Skip -> Next', and 'Cancel'.

Processing a document requires you give TFS the following information:

- **Keep document for (Required)** - The period of time you want to keep the document active (See the **Green** dot). After this date the document is archived in the database. While the document is not deleted, it does take longer to open as it is compressed to a smaller file size and TFS will need to de-compress the file before it can be displayed to the user. By default, this setting is 2 years.
 - **Brief Description (Required)** – This is a brief description of the document/s. Example: 'Memo from CEO to all staff dated 12 Jan 05' **Blue** dot
 - **Description (Optional)** – This is a more in-depth description of the document and is an optional field Example: 'Memo discusses expansion plan for Widget (Ltd) company over the next six months'. **Red** dot.
 - **Private (Optional)** – If you want to mark this document as private. Note that this does not encrypt the document ensuring it's confidentiality.
6. You can now complete the file load process by selecting either of the following options:
- **Auto Process** – This will finalise the load of the documents/s to the TFS database.

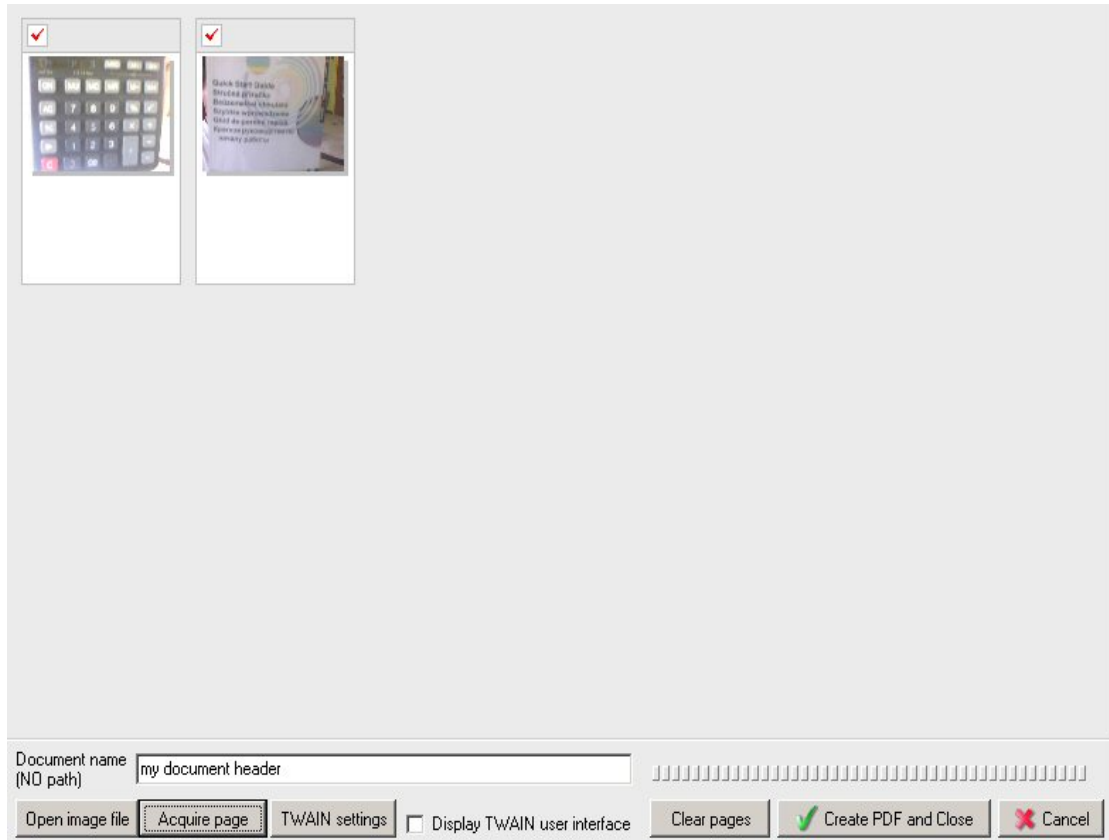
- **Save -> Next** – This will save the current document and ask for details for the next document being saved if multiple documents have been selected for loading.
 - **Skip -> Next** – If you would rather complete the details for another document being loaded rather than the first document selected for loading, use this option.
 - **Cancel** – If you would like to exit the document load process
7. Once the load process has been completed, you will be taken back to the file selection form where you can load additional documents. If you have no additional documents to load at that time, select the **Close** button to return to the document filing tree where you will be able to view the documents you have loaded.



9. Scanning documents to the TFS database

If you have paper documents you want to file electronically in the TFS system, follow steps 1 – 4 under section **Adding Documents to TFS** and then follow the following steps:

1. Select the **Create PDF document** button
2. Select TWAIN settings button
3. For documents you want to save in colour to the TFS system select either the **16 colours** or **256 colours** option. For documents you want to save in black and white format (less storage space required) select either the **black & white** or **16 greys** option
4. Press the **OK** button
5. Select **Acquire page** button
6. Scan the page or pages into TFS. They will be displayed as shown below

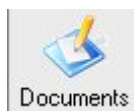


7. Enter the name or the document/s or image/s you want to save to the TFS system as shown above.
8. Click the **Create PDF and Close** button
9. Select the Process Document(s) button and follow step 5 – 7 under section **Adding Documents to TFS**

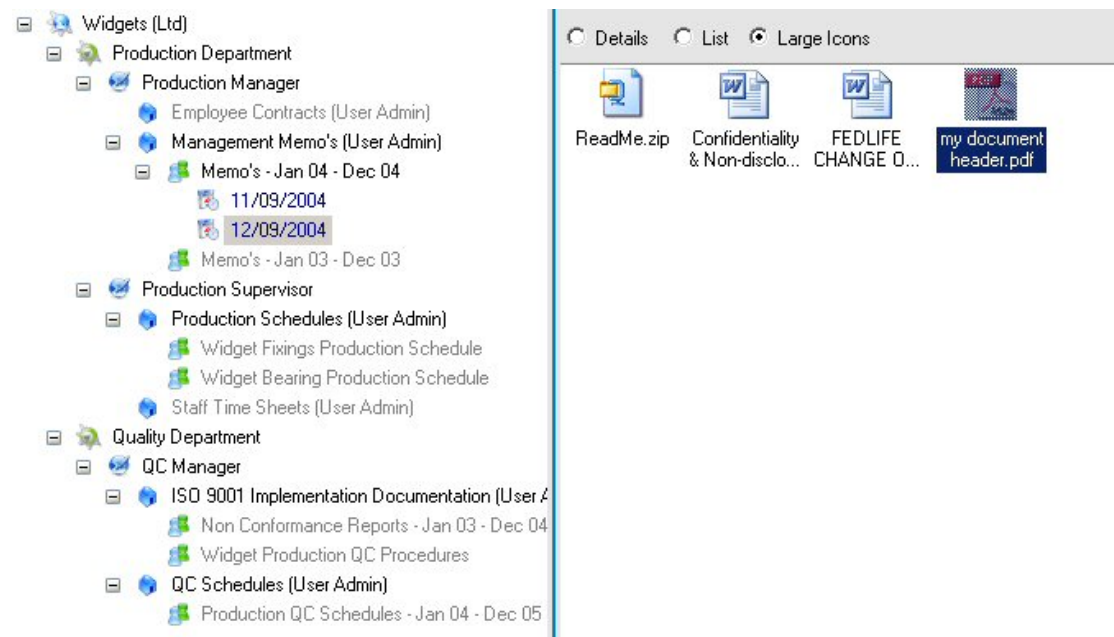
10. Viewing documents in TFS

Viewing documents in TFS is done as follows:

1. Click on the **Documents** icon



2. Select the document in the folder you want to open.



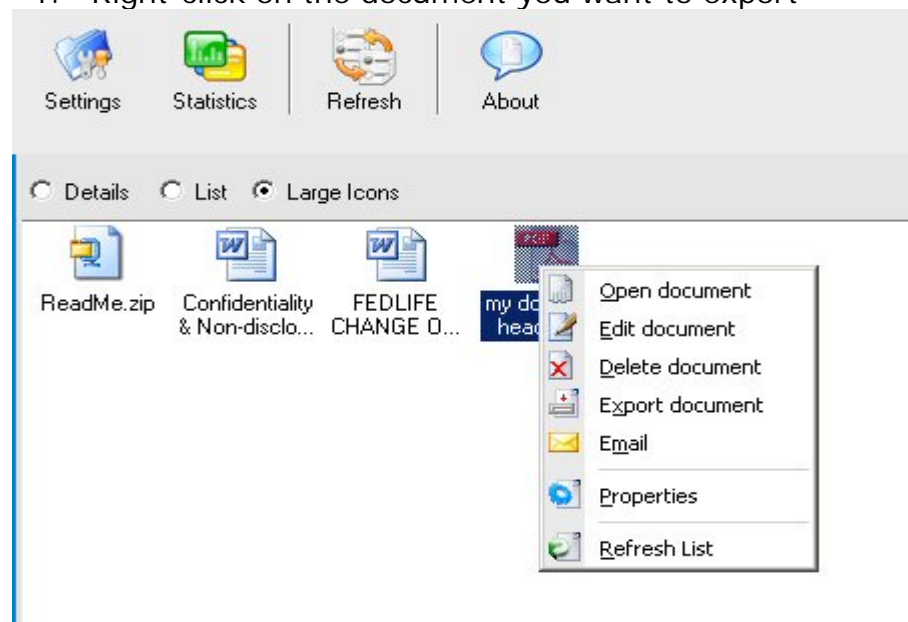
In the example above, the document is a PDF file

3. Double click on the document
4. The document will open in the associated application. In this example the Adobe Acrobat reader (www.adobe.com) will open the specified PDF file

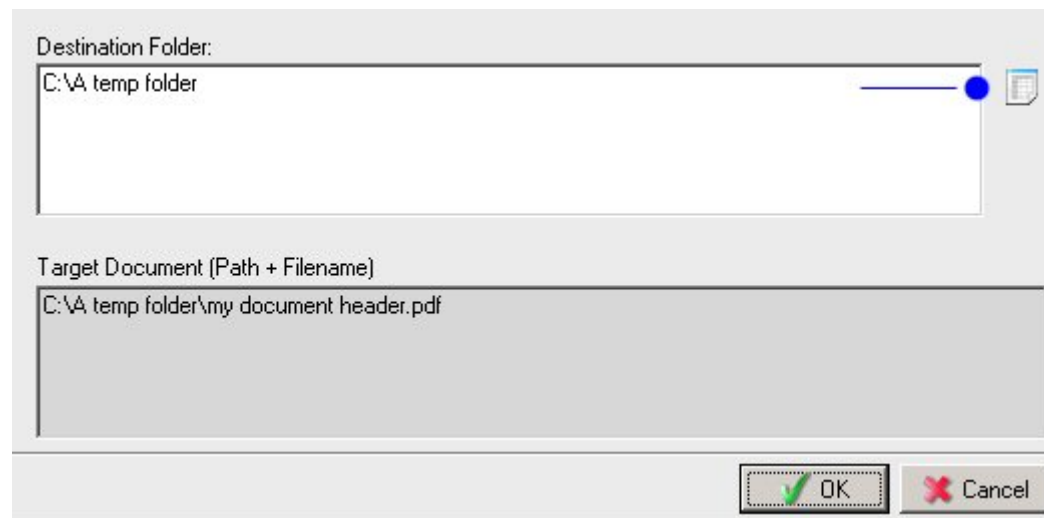
11. Exporting documents in TFS

Exporting documents in the TFS system is completed as follows:

1. Right-click on the document you want to export



2. Select **Export Document** from the drop-down list
3. Select the directory you want to export the document to by clicking on the file manager icon indicated in the image below with a **Blue** dot



Destination Folder:

C:\A temp folder

Target Document (Path + Filename)

C:\A temp folder\my document header.pdf

OK Cancel


4. Click the **OK** button which will export the file from the TFS database to the storage media of your choice.

12. Editing documents in TFS

Editing documents in the TFS system is completed as follows:

1. Right-click on the document you want to edit
2. Select **Edit Document** from the drop-down list
3. You can now edit the brief description and description of the document from this screen.
4. If you have edited the document outside of TFS, such as making changes to a Word document, you can select to reload the edited document from this form.

File name
PDF created from EFile\my document header.pdf



☐ Private



Keep document for: Keep for 2 year

Archive date: 12/09/2006

Brief description

Test

Description

Export & Open document Reload document  OK  Cancel

13. Deleting documents from TFS

deleting documents in the TFS system is completed as follows:

5. Right-click on the document you want to delete
6. Select **Delete Document** from the drop-down list
7. Press the **Yes** button to delete the document from the TFS database

Note:

Documents are never physically deleted from TFS but merely flagged as deleted in the database. You will need your network administrator or DBA to delete documents from the database.

14. Viewing document properties in TFS

To view the properties of a document saved in the TFS system, follow these steps:

1. Right-click on the document you want to view the properties of.
2. The following form will be displayed:

Document properties | Document description | Document History | Change History

PDF my document header.pdf

☐ Encrypted ☐ Private

Type of document: Adobe Acrobat Document

☐ Archived Original name:
Original size (kB):

Original document path: PDF created from EFile\

File size (kB): 33.16 Created at:

Saved at: 12/09/2004 2:07:27 PM by: User Admin

Last viewed at: 09/12/2004 2:07:47 PM by: User Admin

Programmed for archive on: 12/09/2006

Brief description

Test

- **Document Properties** – Shows basic document information
- **Document Description** – Shows the description of the document when it was loaded
- **Document History** – Shows when the document was last viewed, edited, exported and emailed including the user who performed the relevant task.
- **Change History** – All changes made to a document are recorded. TFS indicates the date and user who may have made changes to a document

15. Refreshing TFS data

In a multi-user environment with the possibility of many users adding, changing etc of documents, TFS can be refreshed to show the latest changes to a filing tree by clicking the **Refresh** button.

16. Assigning and managing rights to documents in TFS

Assigning rights to documents and folders can be done in two ways:

1. Create a group, assign users to the group and then assign rights to the group.
2. Assign rights directly to a user/s

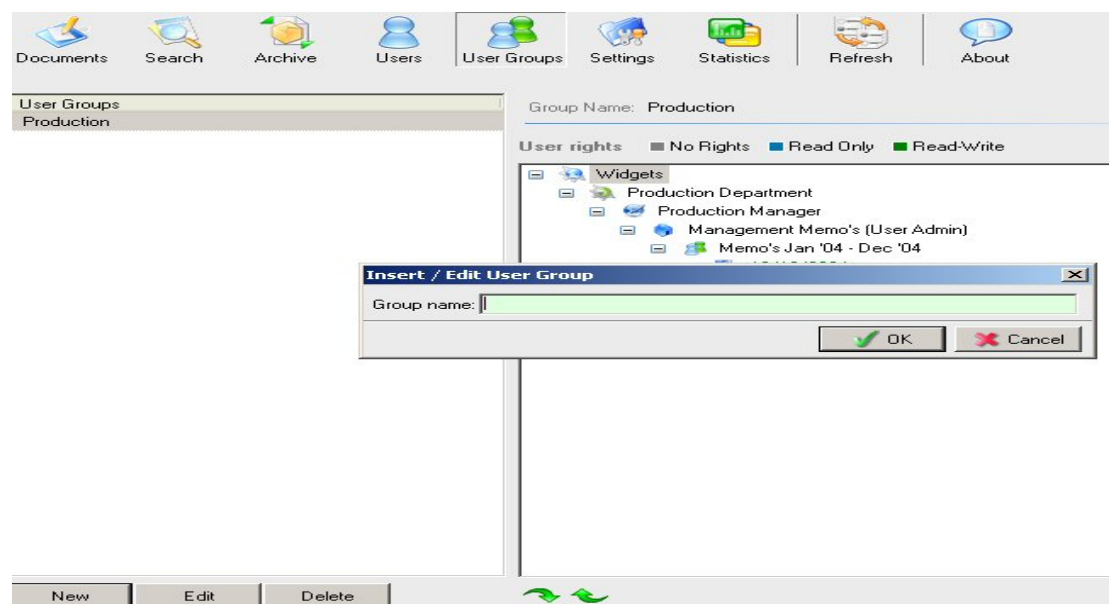
The following rights can be assigned to users:

No Rights	By default, a user that creates a cabinet & folder will be the <u>only</u> user that has access to these areas (Except the Admin user who can access all areas) There is therefore no need to deny users access as this occurs <u>automatically</u> .
Read Only	If you only want the user to be able to read the documents / files in a specific cabinet / folder. A user with read access is able to <u>export</u> the document / file but cannot re-load a <u>changed</u> document / file.
Read-Write	This allows a user to read, edit and delete a document. Essentially user/s with this right has full access and rights to documents and files you have in the specific cabinet / folder you may have given the user access to. Note however that any access of the document, or changes to the document are audited within the TFS system.

To create a group, add users to the group and assign rights to the group, do the following:

Note: Only the Admin user can create groups

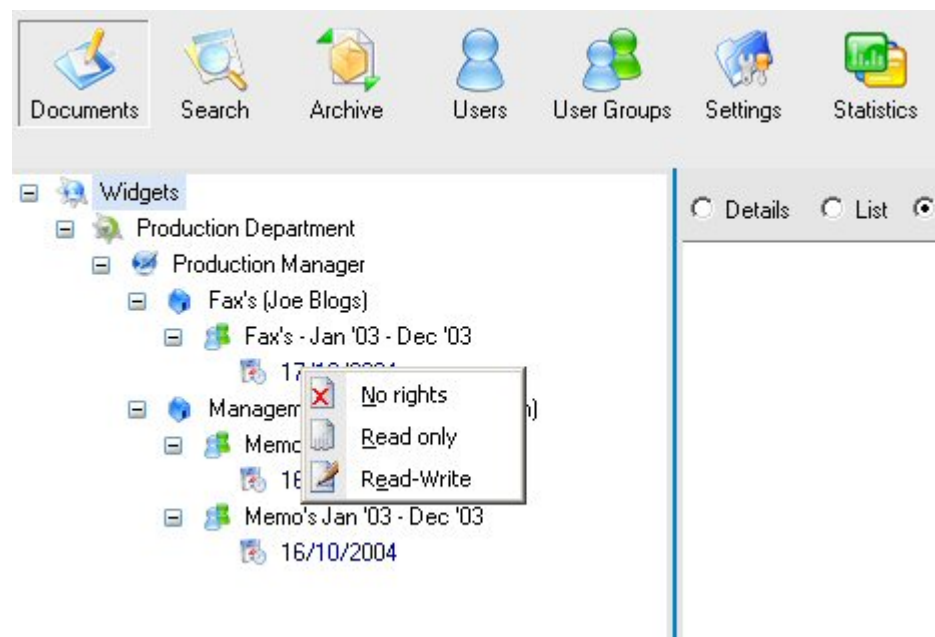
1. Click the User **Groups** icon and click on the **New** button



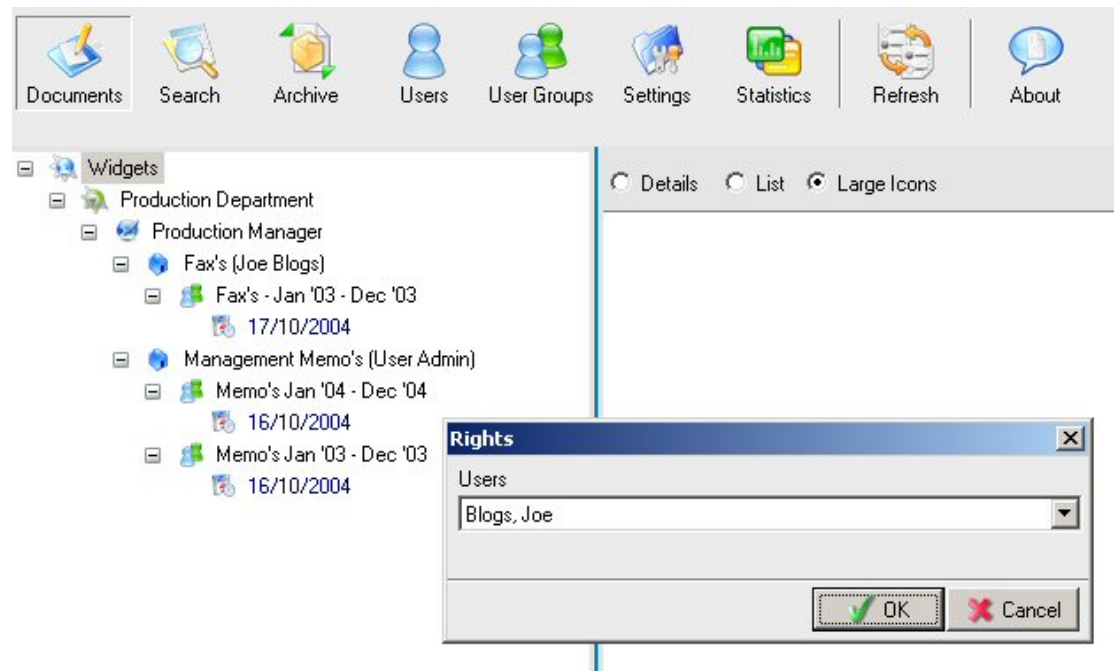
2. Enter the group you want to create. Example: Creating a group Production and adding users to this group will mean if you give the group Production access to a Cabinet or Folder, all users within that group will have access to the files / folders. Access rights will depend on what you allocate (No rights, read, read-only and read-right)
3. Press the **OK** button
4. With your mouse, highlight the group which is displayed in the left hand panel and the folder or cabinet you want to allocate rights to.
5. Right-click the cabinet or folder and select the right you want to allocate to the group
6. The group now has rights to the cabinet / folder you selected.

Giving rights to individual users is done as follows:

1. Click the **Documents** icon
2. Select the cabinet or folder you want to allocate rights to
3. Right-click on the cabinet or folder you want the rights added two



4. A box will be displayed as shown above.
5. Select the appropriate rights you would like to allocate to the user
6. Select the user from the drop-down box (shown below)

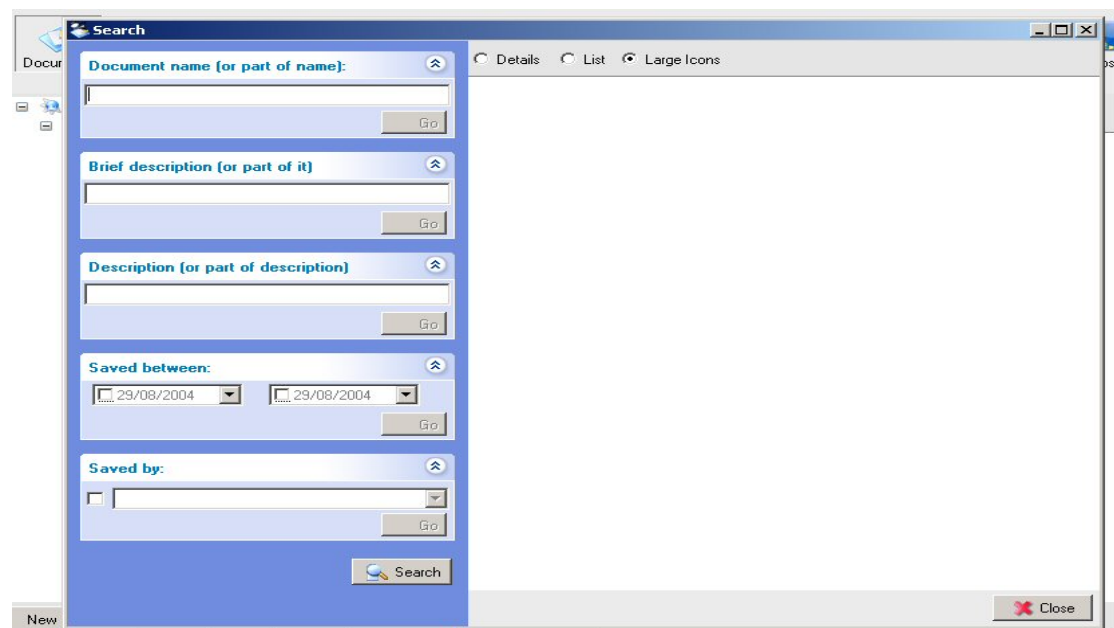


7. Press the **OK** button
8. A message will be displayed advising the rights have been applied to the user.

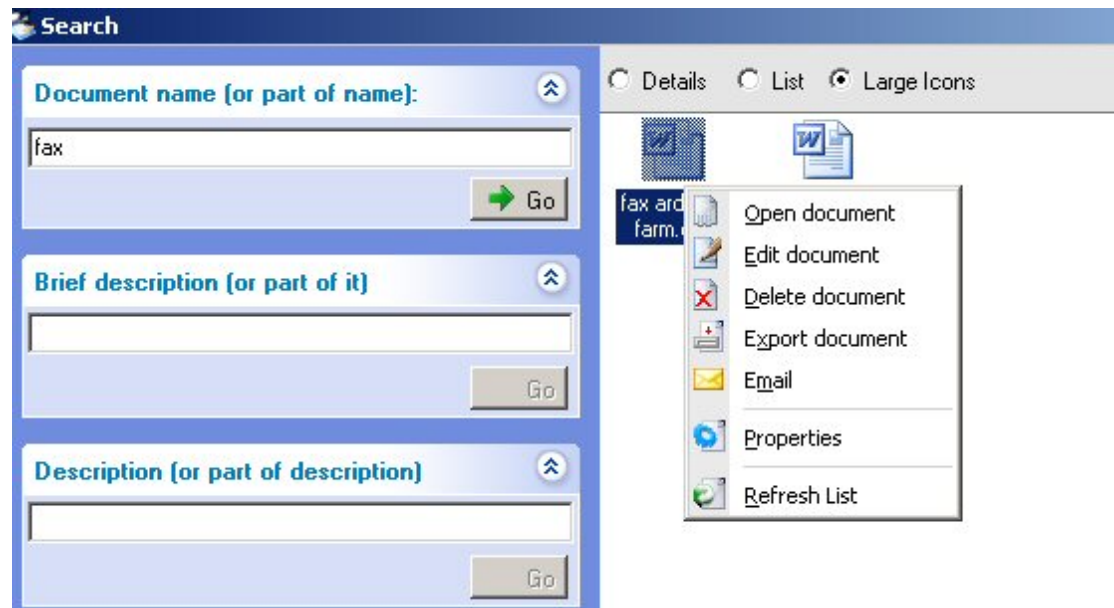
17. Searching for documents in TFS

Searching for documents in the TFS system is very similar to searching for files using Windows explorer

1. Click the **Search** icon and the following screen will be displayed:

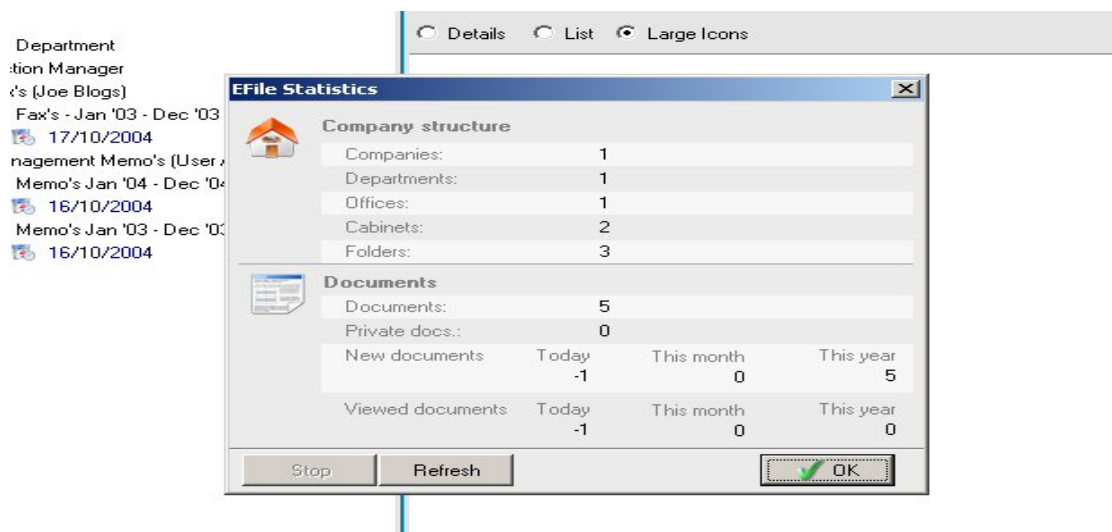


2. There are multiple search parameters available. Select the one that suits your requirements, input part or all of the file name and press the **Go** button
3. If files / documents are found, they will be displayed in the right-hand panel
4. You can now open, view, edit etc documents as you would normally do within TFS by right-clicking on the document or file as shown below



18. TFS Statistics

For basic TFS statistics, such as the number of documents added for the week, month year etc, click the **Statistics** icon and the following screen will be displayed:



19. Archiving documents in TFS

The archiving procedure is initiated when a document is loaded (See Section .8. – 'Keep document for (Required)')

The archive function can be manually run by the **Admin** user by clicking on the **Archive** icon. By doing this, all documents that are due for archiving will be archived as detailed section .8.

20. Registering TFS

The TFS system is sold as **shareware** and is not disabled in anyway during the 30 day evaluation period. For large workgroup or corporate users, we will extend the evaluation period to a maximum of 60 days. Just send an email to extradays@thefilingsystem.com requesting the extension.

If after the 30 day (or 60 day) evaluation period you decide to purchase the TFS system, either visit our website where you can purchase user licenses online or send an email to registration@thefilingsystem.com with the number of keys you require.

TFS licenses are sold on the following discount structure

No of licenses	Price
1 – 5 Users	\$27.00 per user
5 – 50 Users	\$25.00 per user
More than 50 users	\$23.00 per user

Payment can be made online using **IKobo**, our online payment partner or funds can be wired to our account. Our account details are available on request. email: registration@thefilingsystem.com

Once payment is effected, an activation key/s will be emailed to you.

21. Support

All bug reports or requests for support can be emailed to

support@thefilingsystem.com

Please supply us with the following information in order to solve your problem as quickly as possible:

- A detailed explanation of the error / bug
- The applicable error message displayed
- Your phone number including Country and area code and the best time to call you.
- Your email address

We normally respond within 24 hours.

--END--