Aquarius DMS
User's Guide
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Overview

What is AQUARIUS DMS?

AQUARIUS DMS is a software for managing large amounts of documents. AQUARIUS allows to scan documents, index the document for fast access through a Query Wizard, move documents to massive storage disks (like Optical Disks, Zip Disks, CD’s, etc.) and view the scanned documents through the Viewer.

AQUARIUS DMS is an easy to learn software, consisting of a friendly interface that allows the users to move through all the different options using Wizard like screens.

AQUARIUS INTEGRATION

AQUARIUS DMS is an Open System that allows interoperation with other software applications through the use of the following technologies:

- **ODBC**: Standard interface that enables the application to access different database management systems through Structure Query Language (SQL). Supported engines include: Microsoft SQL Server, Oracle, IBM DB/2, Sybase, among others, and desktop databases such as: MS Access, MS FoxPro, dBase, Paradox, Excel, and comma-separated -value files.

- **DDE**: A feature that allows other programs to share data or send commands directly to AQUARIUS. In this case AQUARIUS works as a “DDE Server”.

- **OLE**: Enables you to create OLE objects within the AQUARIUS viewer. AQUARIUS integrates transparently with MS Office suite and many other OLE server software.

- **Internet Technology**: The AQUARIUS web browser integration allows the use of technologies like ActiveX, Plugins, VB-Script, Java Applets, HTML, XML and Java-Script.

- **AQUARIUS Script**: A visual-like Basic scripting language that allows customization of AQUARIUS-DMS for your particular needs. Common uses for AQUARIUS Scripts are: automation of repetitive tasks, integration with Legacy Systems, customization and addition of new features.

- **Auto Link**: Allows access to documents from a command line or from another software application.
OTHER FEATURES

AQUARIUS-DMS also integrates other features:

- **Messaging & Workflow:** Allows to send and receive messages and documents to and from local users and over the Internet. The Workflow allows predefinition of document flow, based on a process within an Organization. Messaging can be integrated with Microsoft Outlook and Exchange.

- **OCR:** Converts document images into text documents for full text search retrieval.

- **Cold / ERM:** AQUARIUS-DMS integrates with AQUARIUS-ERM (Enterprise Report Management) to allow access to digital reports extracted from Legacy Systems. Reports can be annotated and exported to Excel. The use of Form overlays are among other features included in AQUARIUS-ERM.

- **Web Based Imaging:** AQUARIUS documents can be accessed from any web browser, simplifying the distribution of the information across an organization and the Internet.
Scanning Batches

How to Create, Delete and Select Batches

Batches assist in the organization of the scanned documents, simplifying access to documents for indexing purpose. A “batch”, groups the documents according to its sequential number, date, region and Scanner ID.

In the “Document Batches” window we can create, delete or select a batch.

Although AQUARIUS-DMS allows scanning of documents directly from the Document Center, is highly recommended to perform all scanning activities through the Scanning Batches option. Among the major reasons for using scanning batches are:

- Documents scanned in the same day are shown together.
- Documents scanned in the same batch session are shown together.
- Grouping of documents under one batch facilitates the indexing of documents.
- Documents of the same batch are stored in separate directories, increasing the performance of accessing documents.
• Work can be organized by operator, day, department or any other criteria.

• Only documents of the same batch are shown, reducing the load of a document type in the Document Center.

• Some features in the Document Center are only available from the scanning batches option, like the Auto collate feature.

As the scanning batches option is used just as a way to organize documents, when all documents in a scanning batch are indexed, the batch is not longer necessary and it can be deleted safely. However, it’s common to leave available the completed scanning batches to keep track of the scanning work.

**Creating a new batch**

To create a new batch, press the “New Batch” button. The batch properties window appears.

This window shows the grouping values of batch number, department ID, date and Scanner ID. When a batch exists with the same department, date and Scanner ID, the sequential number increases.

The ID’s for department and scanner bring the previously used values by default. It is critical that each scanning station has a Scanner ID assigned.

For network environments it is recommended to specify a Local scanning path different to the system default (\Program Files\AQUARIUS\Batches) to reduce network traffic and obtain a good scanning performance. This practice will also prevent a scanning station to store images in another mapped scanning station. Suggested Scanning paths are:

\ScanDocs, \Docs, \Scanning, \Batches.

Documents can be accessed from the Document Center even if they don’t have an Index. However, in order for a document to be queried or moved (among other activities), it’s required to **Index** the document.
Deleting a Batch

To delete a batch, select the “Delete Batch” option in the Document Batches window. A confirmation window is displayed.

Selecting “Yes” will remove the selected batch. This operation is irreversible.

**NOTE:** Deleting a batch does not remove the documents. They remain in their folders and can be still accessed through the Document Center.

Selecting a batch

Selecting a batch invokes the Document Center where you can add, modify and delete documents for this batch, and closes the Document Batches window.
The only difference between the Document Batches and the Document Center window are the “Batch”, “Collate” and “Auto Collate” options, at the bottom of the screen.

- The “Batch” button shows the Scan Batch Properties.
- The “Collate” button presents the Auto Collate Properties where you can select one of three options:
  - **Fixed Document Length.** If all documents will have the same number of pages; when selecting this option, the “No. Pages per Document” will enable for you to specify the number of pages.
  - **Blank Page.** Indicates End of Document.
  - **Variable Document Length.**
Auto Collate Properties

- Fixed Document Length
- Blank Page Indicates End of Document
- Variable Document Length

Collation Options:

No. Pages per Document: 1

Buttons: OK, Cancel
Document Center

Document Center Basics

The “Document Center” is the area where the user is able to manipulate all the data contained in the current application. This module makes it easy to edit, add and delete anything from folders to document pages.
The Document Center window aligns automatically to the left when the desktop is shared with the Document Viewer, Index, etc.

**Document Type Selection**

Document Type selection can be done through the combo box at the top of the window or through the document type tree to the left. It lists the available document types. The document types can be user-defined or “virtual”. The virtual document types, such as the “Personal Folder” or the “Current Query” mostly are used to group documents and some features (like indexing) are not available while selected.

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**See also**

Document List Area.

Page List Area.

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**Document Area Menu**

These options are opened by default with a single right click in the Document List Area:

- **Index**: Invokes the Index Form.
- **View**: This option is to view a page from the selected document.
- **Find Document**: Displays the Find Document Window.
- **New**: Displays the New Document Window.
• **Open**: Opens the selected document. This option can be executed with a single click over the Document.

• **Delete**: To delete the selected document.

• **Send to**: This option presents other options to select:
  
  - **User**: To send the document to a user by mail.
  
  - **Document**: To send the open document to another document.
  
  - **Copy To Directory**: To copy the selected documents to another directory.
  
  - **Move to Directory**: To move the selected documents to another directory.
  
  - **Send to Clipboard**: Send documents to the Clipboard folder.
  
  - **Get From Clipboard**: Get documents from the Clipboard folder.
  
  - **Change Type**: Displays a window with the possible document types to send the selected document to.

  ![Move selected documents dialog box](image)

  - **Bookmark**: Sends the document to the Bookmark document type.
  
  - **Cache Back**: Caches back the document to the Cache Back path specified in the Aquarius Setup.
  
  - **Document Mover**: To send the document to the Document Mover.

• **Batch Processing**: This option prompts the toolbar shown below, where one or all of the activities presented can be selected. To begin the process press Start.

  ![Batch Processing toolbar](image)

  - **Select Documents**: When this option is selected, a sub-menu appears with the following items:
Select All: To select all the documents in the Document List area.

Select None: Deselect all the documents in the Document List area.

Invert Selection: To invert the current selection of documents.

Count Pages: To count the pages of the selected documents.

Verify Path on Folder Load: To verify that the documents are accessible when a document type is selected.

Show Volume: To select the documents corresponding to a specific volume.

Show Non-indexed: When checked all of the not indexed documents will appear on the document list area.

On Single Click: When checked, documents can be opened with a single click, otherwise documents are opened with double click.

• Edit: When this option is selected another menu appears where we can use Cut to delete a document, Copy to copy a document, Paste to locate the document that was Cut or Copied, Edit Title to edit the title of the document, Sort Documents to organize the documents by name, and the last option is the Application Manager to open the Application Setup Window.

• Refresh: To update the modifications made in the document list area.


• Properties: Presents the properties window for the selected document file.
Page List Area

The Page List Area of the Document Center shows the pages associated with a document. Multiple selection of pages is allowed.

Right-clicking inside the Page List Area brings a pop-up window to select other options in an easier way.

Pages can be reordered and moved between documents dragging and dropping the pages onto the desired document. The Page List Area can be resized dragging up and down the button below the Index button.

**PAGE AREA BUTTONS**

This button displays the following window to change the title of a page.

![Edit Title Window]

These buttons move up or down a single page or a group of selected pages.

Press this button to find a page within the opened document. As in the button to find documents, this option allows regular expressions.

Delete Pages. This option deletes the reference to the page (or pages) and optionally deletes the file itself. Observe that pages stored locally and are not completely deleted: they go to the Windows Recycle Bin.

This option brings up the properties window for the page file. This window also pops up when right-clicking a file and selecting “Properties” in the Windows Explorer.
This buttons perform the following tasks:

**Scanning:** Starts a scanning session.

- **Scan/Add:** This button shows the different ways to add pages to the page list: Scanning the page or importing the file, as a normal file or as an OLE document, URL, etc. (See Adding Pages to Documents).

- **View.** Display the page using the Document Viewer.

**Quick Launch:** This option launches the program associated to the file type of the page.

**Explorer:** This option opens the Window Explorer.

**Toggle File Window:** If this option is selected the Document Center and Viewer windows are going to re-size to fit the screen.

- **Status Bar of the Document Center:** Presents the number and name of the selected page.

See also

- Scanning Documents.
Finding Documents.

Page Area Menu

These options are opened by default with a single right click on the Page Area:

- **Add**: This option presents the Add File window.
- **View**: This option is to view a page from the selected document.
- **Open**: This option opens the Program associated to the file type of the selected page.
- **Find Page**: This option opens the Find Pages window.
- **Select Pages**: With this option we can Select All or Select None of the pages; If we have one page selected and we want the remaining of the pages except this page we use the Invert Selection.
- **Edit**: When this option is selected another menu appears where we can use Cut to delete a document, Copy to copy a folder, Paste to locate the document that was Cut or Copied, Edit Name to edit the title of the page, Renum Pages to renumber the pages, and Reorder Front/Back to reorder a group of dual-sided pages that were scanned all the front side first and then the back side.
- **Delete**: This option is to delete the document selected.
- **Send to**: With this option we can send the page via email through the Message Center when the User option is selected, we can copy a page or move a page to a directory with Copy to Directory and Move to Directory.
- **New Section**: To create a new section in the Page Area.
- **Refresh**: To update the modifications made in the Page list area.
- **Properties**: Presents the properties of the selected page file.

## Finding Documents

To find a Document press the **Find** button from the Document List Area. When this button is activated, the Find Document window appears.

![Find Document](image)

- **Search document in current list**: With this option you can find a document by its title within the selected document type.

- **Search documents in all document types**: This option locates documents in any of the existing document types. Wild card characters (*) are allowed.

- **Full Text Search in selected documents**: Queries the results of an OCR process previously performed on the documents. These results are stored in an external database. This operation may include “and” or “or” but not combination of the two. Combinations lead to substitute the “and” by “or” in the expression. If a full text search index exists, a list with found documents is generated.

The search can continue by using **F3** to find the next Document.

## Adding Pages to Documents

When the **Scan/Add** button is pressed, a window appears that shows the different ways to add pages to the page list: Scanning the page or importing the file, as a normal file or as an OLE document, URL, etc.
When the Scan Document option is selected, the scanning window will appear next.

**OPTIONS**

- Scan Document.

- **Import Scanned Images & Faxes**: This option is to add to the document Images & Faxes already scanned. When selected, an open dialog box appears.
• **Import OLE Document**: This option is to add files of any type to the document.

• **Import Network Address Location (URL)**: When this option is selected a window appears to insert the name of the URL.

![Import Network Address Location (URL)](image)

• **Add Blank Page**: To add a blank page to a document.

### Copying, Moving and Linking Pages

Between the area of the document list and the page list appears a selection box with a list of operations. These operations can be activated with the “Apply” button. It is recommended to disable the selection of documents on single click before using any of the following options.

![Operations Selection Box](image)

**Move Pages**

This option moves pages between documents. To perform this operation, select a page or group of pages. Select the target document or documents, and press “Apply”. A confirmation screen will appear, press “Yes” to continue; if you selected more than one target document, a second screen will appear asking how would you like to distribute the selected pages among the target documents. Enter the number of pages that each document will contain, and press “OK”.

**Move All Pages**

This option works in similar way as the previous, with the exception that you can only select one target document. Select the group of pages you wish to move or the document that contains such
pages, then select the target document; press “Apply”. This operation can be also accomplished by dragging and dropping the pages to another document.

**Copy Pages/Copy All Pages**

This option copies pages to another document. The pages are physically duplicated with a generated file name. To perform this operation, select a page or pages. Click the target document and press “Apply”.

**Link Pages/Link All Pages**

This option copies the references of the pages to another document. It is similar to “Copy Pages”, but does not duplicate page files, only the references. To perform this operation, select a page or pages. Click the target document and press “Apply”.

**Send To Clipboard/Get from Clipboard**

These options allow moving documents with all their pages between document types using a virtual document type called the “Clipboard”. To use it, select the documents and press “Apply”. Later select the new document type and choose “Get from Clipboard” followed by “Apply”.

**Document Properties**

This window presents three tabs where the document properties can be modified.

**Status Tab**

The “Status” tab presents four types of possible status for a Document: Approved, Secured, Confidential and Encrypted Document.

In this tab you can specify the level of security of a document, being 0 the lowest and 9 the highest, then select the option to allow changing of status.
**Document Rights Tab**

The “Document Rights” tab presents all of the rights given to a document, allowing the user to create queries, send attachments, edit, delete and view additional information of a document. Also, all of the Index and Document Notes Rights (in this case) are granted.

**Page Rights Tab**

In this tab we can establish the rights for pages within a document. In this case all of the general and printing rights are selected, that allows a user to add, copy, annotate, save, view, move, delete and edit the page; also we can print a complete and partial page and disable the headers.
The “Information” tab shows the general information of a document. Presents who and when the document was created and indexed. The scan and moved date, the document path, page and note count, and the volume set.
Scanning Documents

AQUARIUS allows scanning of documents through several methods that increase the productivity of the process. Thus, it is important to define the scanning preferences before a scanning session, otherwise the last settings will be used. To access the Scanning preferences, press the Scan/Add button and select Scan Document or just right-clicking over the Scanner button in the Document Center. In this window, press the scanner button for the Setup Scanning Preferences. The different available settings are explained below.

![Scanning (Idle) window]

In this window, the button OK starts the process of scanning and adds the scanned pages to the current document.

Three buttons appear in this window to control the process:

- According with the state of this button the scanned page is inserted above the currently selected page (pushed state) or at the end of the page list.
- Asks for the scanner setup window before the scanning starts. This setup window depends on the driver for the scanner. Typically the scanner setup allows to specify the image Quality, DPI, source, etc.
- This button shows the scanner preferences window.

The scanner preferences window is made up of two tabs:

- **General Settings** – This tab includes, among several useful options, the scanner paper source to choose between Flat Bed Scanning or using the Auto Document Feeder (ADF). It is also possible to decide on what criteria the scanning session will end a document and start a new one: via a fixed page count, when running out of paper or when a blank page appears. Documents can be previewed during the scanning process. The scanning date can also be specified. Refer to Setting the Scanning Preferences.
Special Features – This tab includes the options to configure some special features related to the scanning process. Options like index while scanning, scan in reverse order and set the rotation while scanning, can be configured here.
Document Collate Window

Every time a page is scanned, a window prompts the user for the next step:

![Image of scanning window]

This window appears always when the “Flatbed option(Page Method Only)” in “Setup Scanning Preferences” is selected. When the “Feeder (ADF)” option is selected, it appears depending on the “Number of Pages is Always n”, “End When Out of Paper” or “Blank Page Indicates Last Page” options.

This window also allows changing the default name of a document while in the process.

The button “Continue” lets the scanner to continue. The “End Document” button will terminate the addition of scanned pages to the current document and creates a new document to continue adding the scanned pages. Finally, the “End Scanning Session” terminates the process and returns control to the Document Center.

The button that resembles an arrow pointing down extends the functionality of this window.

![Advanced scanning window]

With this advanced form of the window it is possible to pre-set the properties of the document, such as “Approved”, “Secure”, etc. and provides direct access to other standard options such as “Add Notes”.
Setting the Scanning Preferences

Scanning Standard

– **TWAIN**

  This is the default used by AQUARIUS. TWAIN is an industry standard protocol to communicate with scanners. It supports a wide variety of scanners including those with color capabilities.

– **KOFAX Accelerator Board**

  Use this option when using the KOFAX accelerator board.

Paper Source

– **Flat bed scanning**

  Recommended only for low volume scanning or for delicate documents that may get damaged when passed through the ADF.

– **Automatic Document Feeder (ADF):**

  Used mostly for high volume scanning.

– **Duplex Scanning:**

  Check mark this option if you configured your scanner for duplex scanning (to scan both sides of a page simultaneously).

Scanning Method

– **By Page:**

  Use this option for Flat bed Scanning or when confirmation of every page is required (View and Confirm). If View Only is selected in Document Preview, this methods works exactly as the By Batch method.

– **By Batch:**

  Recommended for most cases. This option allows document collation (explained below)

– **Bulk scanning:**

  Use this method whenever you want to disable document collation. All pages are stored in a single document (usually the “Scanned Pages” document) and used to separate into new documents later through the Auto-Collate feature.
**Document Collation**

- **By Fixed Number of Pages**

  This is useful when most or all documents have the same number of pages (usually a small amount). If the number of pages specified is reached, a collation window will continue to appear until you select the end of a document.

- **Feeder is Out of Pages**

  This is useful for documents with high volume of pages or when documents have a variable number of pages. The collation window will appear when finding the feeder tray empty.

- **Blank Pages Indicates Last Page**

  This is useful when the documents have a variable number of pages and pages have a considerable amount of text or graphics. You can specify if you want to confirm every time a blank page is found, or if you want to auto delete the blank page.

  A threshold of at least 3KB can be used for black and white scanning at 200DPI, using the CCITT Group 4 2d Fax compression. However, it’s is recommended that you scan a blank page before the scanning process to determine the size of the blackness threshold.

**Batch Processing**

To run a batch process to a group of documents, follow these steps:

- Select the documents you wish to process from the document list.


![Batch Processing Toolbar](image)

- The available processes are:

  **Rotate.** The selection box beneath will enable, for you to select the rotation degrees for the pages.

  **Deskew.** To straighten the images automatically.

  **Crop.** To cut off one or more of the edges, eliminating unwanted parts of the original page.

  **Invert.** To invert the image colors.

  **Despeckle.** Remove spots from an image.
**OCR.** To perform OCR of the selected documents. For each page that the OCR reads, an .rtf file is created and added as a page to the document.

**Index/Zones.** To start the OCR by Zone or Auto Index process. This process will OCR the predefined text regions in the image, and will take the results and save them in the related field of the document index.

- The available process options are:
  - **Reorder.** To reorder dual-sided pages scanned on a simplex scanner. This option is also available with a single right click on the Page Area of the Document Center, in the Edit options.
  - **Spell Check.** To perform a spell check on the OCR results.
  - **Index Words.** To store all the words resulting from the OCR process in a database, for future consulting, through the full text search feature.
  - **Front Page Only.** To perform the selected process on the first page of each selected document.
Document Index

Document Index Basics

- Index documents manually through the Standard Index Form.
- Index documents manually through a custom form created through AQUARIUS Script.
- Index documents semi automatically, entering key values and auto-filling fields from an existing table. Assisted by the AQUARIUS Script.
- Auto index documents through the OCR by Zone feature.
- Index while scanning (every time a document is scanned, the index form appears).
- Index automatically through AQUARIUS Script using the document name specified during scanning process or any other data entered manually.
- Index from external applications with access to ODBC database engine.
- Index documents creating a full text index from OCR.
- Any combination of the options listed.

With the following window we can perform indexing by means of data entry. The appearance of this window depends on the defined index fields. Index fields can be defined through the Application Setup option of AQUARIUS. You can reach this window through Index the Document Center button.
Green squares can be turned red when clicked, to enable and disable fields. This is useful to temporarily disable data entry to any given field: pressing the tab key on the keyboard makes the cursor jump to the next editable field. To enable the field, click it again and it turns green.

The “Save & Next” button saves the indexing information for the current document and advances to the next document in the document center.

**Indexing Options**

The toolbar of the Document Index window presents the following buttons:

- **“Save”**: This button saves the indexing information.
- **“Print Document”**: This button prints the document.
- **“Delete”**: This button deletes the index information for the document.
- **“Clear Fields”**: This button clears the index fields presented in the indexing window.
“Previous and Next Document”: This button allows moving to the previous or next document of the current folder.

“Seek index using Form Values”: This button is used to find documents based on index field values presented on the Index form. When this option is pressed, a new window with the results of the query is presented.

“Always on Top”: This button sets the window to remain always on top.
The Document Viewer, is where pages are displayed. In addition this window acts as an Internet Browser, a Cold/ERM viewer and a thumbnail viewer. Through the toolbar, many of the system functions can also be accomplished.
Viewer Options

The options available through the toolbar include:

- **Add File**: Displays a dialog box where we can select the source of the document file. See Adding Pages to Documents.

- **Scan Documents**: Starts a scanning session.

- **Save**: This button saves all information added or modified. The Menu button presents other options for saving information. The options are:
  
  - **Save Image**: Store image annotations permanently.
  
  - **Saves As**: Saves image in a different format and with a different Name.

  - **Split Multipage Image**: Splits multipage TIFF files into multiple single images.

  - **Join Images**: Creates multipage TIFF’s.

  - **Cache Back to Disk**: Saves moved documents in hard disk for modification.

- **New Document Window**: With this option another Viewer window is opened.

- **Print Document**: Displays the “Print Document” window. See Printing Document.

- **Query Wizard**: Starts the Query Wizard. The Menu button contains the following options:

  - **Find Document**: Starts the Query Wizard.
• **Full Text Search**: Queries the results of an OCR process previously performed on the documents. These results are stored in an external database. This operation may include “and” or “or” but not combination of the two. Combinations lead to substitute the “and” by “or” in the expression. If a full text search index exists, a list with found documents is generated.

• **Find Next**: Finds the next document with the previously specified name or title.

“**Move to the Previous or Next Page**”: This two buttons move to the previous or the next page.

“**Go to Page**”: Through this option we can go to, a specific page number. When the button is pressed, a window appears to select the page number.

When the menu button is pressed other options appear:

• **Go to Page**: Opens the “Go to Page” window.

• **Go to First Page**: Goes to the first page of the document.

• **Go to Last Page**: Goes to the last page of the document.

“**Thumbnail View of Pages**”: This option shows all or the selected pages as thumbnails.
“Fit to Window”: Fits the image to the window. When the Menu button is pressed the following options appear:

- **Fit to Window**: Makes the document fit the window size of the viewer.
- **Fit to Width**: Fits the document according to the window’s width.
- **Fit to Height**: Fits the document according to the window’s height.
• **Magnifier zoom**: Presents a zoom glass to view parts of the document in zoom mode.

• The rest of the options zoom the page to the specified value.

  • **Zoom In or Zoom Out** images: This can also be performed selecting a rectangle in the page image or using the gray Plus or Minus Keys. Use space bar or asterisk to best fit.

  • **Rotate image Right 90°**, **Rotate Image Left 90°** and **Flip Image**: These buttons rotate the image in any direction.

  • **Scale to Gray**: This button clarifies the image.

  • **Document Center**: When pressed opens the Document Center if hidden. The menu option shows the Document Properties option that opens the Document Properties window.

  • **Index Document**: This option pops the Index Document window, which is mostly used to Index documents through data entry.

  • **Additional Information**: This option opens a window (shown below), to add, modify, delete or to find additional information for a document.

  • **Tile Windows**: This button re-arranges all windows in the screen.

  • **Calculator**: opens the Windows Calculator.
“Always on Top”: This button sets the window to remain always on top.

**Annotating Pages**

“Annotation Tools”: When this button is pressed, a toolbar appears with the following options:

- **Selection Arrow**: With this option we can select a section of the document and immediately zoom it.
- **Highlighter**: Makes a section of the page stand out; the Highlighter works like a marker.
- **Filled Rectangle**: This option is used to “Post” a filled rectangle to a page.
- **Sticky Note**: This option is for the introduction of remarks or information in the page in form of a sticky note.
- **Text**: This option is for inserting text boxes in the document.
- **Hyper Link**: Use this option to add a link to an Internet address. To make the link press the Link button, take the cursor to the area on the document that you want to link, make a click and the following window appears:
Use this Window to specify the File or URL to link. If you want to link to a different page in a document, you can do so specifying the page number.

- **Draw Line**: To add lines to the Document.
- **Freehand Annotation**: For adding personal or by hand annotations.
- **Rubber Stamp**: When selected, two other options appear:

  ![Stamp Image](stamp_image.png)

  **Stamp Image**: Used to Stamp Text or Images selected in the “Select Rubber Stamp” section.

  **Select Rubber Stamp**: When this option is selected, the following window appears:
Through this window, you can create text or Image stamps, you can also edit or delete existing stamps.

All annotations can be only viewed by the owner and the System Administrator.

- **View Annotations**: Used to toggle between viewing of annotations or not.

**Batch Processing Tools**

- **Tools**: This button provides access to the Batch Processing tools.

  - **Undo**: This option is used to undo an action that was done to a document.
  - **Redo**: When we want to repeat an action several times.
  - **Cut**: To delete in a selected area, it can be text, images, etc.
  - **Copy**: To copy Text or Images to another part of the page, or to a new page.
  - **Paste**: To introduce the copied objects.
• **Auto Deskew**: To straighten the page or images automatically.

• **Manual Deskew**: To manually straighten a page or image. This operation is performed.

• **Invert Image**: This option is used to invert the presentation of an image, it is mainly used to invert microfilms, in this case the presented image possesses a black background with white letters, the “Invert Image” option converts this image to a normal document (black letters and white bottom) and vice-versa.

• **Despeckle**: Some scan documents present spots when scanned, to remove some of the spots we use the “Despeckle” option.

• **Auto Crop**: Cropping a page is like cropping a photograph: you cut off one or more of the edges, eliminating unwanted parts of the original Page.

### **OCR Document**

**“Show OCR”:** This button applies the OCR process to a page; also controls the selection, removal and assignment of OCR zones. When the menu button is selected the following options are presented:

- **OCR Document.** Runs the OCR process on all pages of the selected document. For each page the OCR processes, an .rtf file is created and added to the document as a page.

- **OCR Selected Pages.** Runs the OCR process on the selected pages of a document. For each page the OCR processes, an .rtf file is created and added to the document as a page.

- **OCR from Clipboard.** Runs the OCR process on the images currently located in the clipboard.

- **Draw OCR Text.** To draw a zone that the OCR will process. This zone can be related to a field in the database, so that every time the OCR processes the zone it will index the document with the read value. To assign a field to the text zone, right click on the zone and select “Edit”. A screen with a selection box will appear for you to select the desired field.
• **Draw Picture Region.** If the pages contain pictures, select this option to exclude the picture area from the OCR process.

• **View OCR Regions.** Check this option if you wish to see the defined text and picture Regions on the page.

• **Remove All OCR Zones.** To permanently delete all text and picture regions from the page. You can redefine the zones selecting the Draw OCR Text and Draw Picture Region options.

• **List Index Zones.** Displays a screen showing all the fields related to a defined OCR Text Zone.

• **OCR to Clipboard.** Copies the results of the OCR process to the clipboard.

• **Setup.** Displays the OCR Setup screen.
**Notes**: Add, modify or delete notes for a document.

**Messaging**

- **Send Document**: The send document button displays the Messenger Window.
- **Check Inbox**: This button opens the Messaging Center to view all received messages.

**Printing Documents**

To print a document we have to select the **Print** button in the Viewer.

**The Page Range**: In this option we can decide to print the Entire Document, the current page or a range of pages.
**The Document Type:** To specify the type of document that we are going to print (Images, Text Files, OLE, URL).

**Include Annotation:** If we want to print the document with all its annotations.

**Include Document Notes:** To print the Notes added to the documents.

**Copies:** To specify the number of copies wanted.

**The Print Setup button:** When this button is pressed the print setup window is presented.
Here we can specify the name of the printer to be used, we see the status, type, and location of the printer. Other specifications can be made like the paper and orientation of the printed page.
Query Wizard

Query Wizard Basics

The Query Wizard is the interface that allows searching of documents based on specified criteria. It uses two different interfaces: simple and advanced.

![Query Wizard Interface]

**Buttons**

- The **Cancel** button closes the Query Wizard window and returns to the previous screen.

- The **<< Back** and **Next >>** buttons navigate through the options in the Query Wizard. These actions may be different depending on the style of the query.

- The **Clear All** button deselects all the folders.
• The **Open Query** button opens a previously saved query. This interface will be explained in detail later.

• The **Folder** tab shows the document types for which the query is about to be performed. It is possible to select multiple document types to query.

• The **Use Advanced Query** option. When this option is selected the button **“Next”** introduces us to the Advanced Query interface.

• The **Finish** button initiates the process of querying. The query is generated and brings up the Query Answer window, closing the Query Wizard window. If this button is not enabled, it means that there are query requirements pending to be specified.

**Simple Query Interface**

When the “Use Advanced Query” option is not selected, the “Next” button takes us to two different tabs: “Search Criteria” and “Fields”. The Simple Query consists of these tabs.

![Simple Query Interface](image)

At this point, we can go back to the “Folders” tab or press either “Next” or “Finish”. If we select “Finish”, the query is generated without criteria, meaning that the system will search for all available documents.
The “Search Criteria” Tab

This tab shows a grid of three sections. In the “Search Column” section, all the fields defined in the document type or document types appear. The “Relation” section shows the “relations” that, combined with the “Search for Value” section, will form the criteria. Clicking on it causes a box with the available relations to appear:

- =, <>, >, <, >=, <= for comparison. Examples:
  
  Name = CHARLES

  Salary > 10000

- Begins with and end with to match respectively to the beginning of the value or the end of the value. Examples:

  Name begins with CH

  Name ends with RLES

- Contains to match contained text. Examples:

  Name contains ARL

  Name contains OH

- Like to use pattern matching. Example:

  Name like CH%R%S

  Name like J%N

It should be noticed that clicking inside the “Search for Value” that corresponds to a field brings a box with all the values recorded for that field to that moment.

The “Match All Criteria” and “Match Any Criteria” options: These options, mutually exclusive, let us combine logically the criteria between the fields. “Match All” means combine using AND (q.e. AccountNumber > 24 AND Name = JOHN).

“Match Any” means combine using OR (q.e. AccountNumber > 24 OR Name = JOHN).

In the Simple Query interface, the fields left blank will not be considered for the criteria.

The “Fields” tab

This tab, also shown in the Advanced Query interface, presents the folders selected for the query with their fields. Only the fields chosen will appear in the Query Answer.

This tab consists in the selection of folders, the selection of fields and the Optional Columns. When a folder is selected, the field selection box changes accordingly. The optional columns are values contained in the document, such as number of pages, number of notes, file name, document type, etc.
Notice the check “Selected Fields Only” option. It let us see only the fields selected, in the “Folder Field” form, to ease the selection between folders, as there may be many fields and folders.

**Query Answer**

The purpose of the Query Answer window is to show the results of the query previously designed in the Query Wizard.
The Query Answer consists of three sections: the toolbar, the grid of results (the body of the window) and the status bar (at the bottom of the window).

**Toolbar**

The toolbar contains for the following buttons to perform different actions:

- ![Print Document](image)
  - Print Document.

- ![Save Query](image)
  - Save Query.

- ![Delete Document](image)
  - Delete Document

- ![Returns to the Query Wizard that generated this answer](image)
  - Returns to the Query Wizard that generated this answer

- ![Set status of the document](image)
  - Set status of the document (“Approval”, “Confidential”, “Encryption”)

- ![Set security level for the document](image)
  - Set security level for the document
Notice that the option to save queries appears in this toolbar. Opening and saving queries will be discussed later.

**The Body of the Query Answer**

The body of the answer presents the documents that matched the query and the field columns or additional columns selected in the Query Wizard.
Double - Clicking any document brings the Document Viewer with the first page of the document. The query generator groups the matching documents into a virtual document type called “Current Query” which is shown among the document types listed in the Document Center.

The Document Center and the Query Answer work integrated: When the selected document changes in the Query Answer, the Document Center reflects the change.

**Status Bar**

The “Status Bar” of the Query Answer shows information related to the selected document, such as folder, document name and description, and pages.
Right Click Options

The following options are available with a single right click on the “Query Answer” window.

- Save.
- Save As. Saves the query results in a .csv file.
- Query Wizard. Returns to the “Aquarius Query” screen.
- Print. Prints the results of the query.
- Refresh. Refreshes the “Query Answer” screen.
- Set Font. Changes the font of the query results.

How to Query a Sub-Document Type

When querying an application organized by document and sub-document types, you might want to:

1. Having the results of a query for one document type, you want to see the documents contained in a different sub-document type for the same index value. For example, when querying the Promotions for an employee, you might want to see the training files for the same employee; in an Aquarius application, usually these two types of documents would be in different sub-document types. To view the all documents related, follow these steps:
   - Once you are in the Document Center, double click on the document; make sure that the “On Single Click” option is selected (right click on the document, select the “Select Documents”, and check the “On Single Click” option).
   - The Index Form and the “Show Sub-Document” window will appear.
In the “Show Sub-Document” window, select the sub-document type you wish to retrieve.

The document will appear in the document list area of the Document Center. Not all the documents corresponding to the query could be presented; this kind of query will only show the first index document in this sub-document type, read the next item in this section.

To move to another sub-document type, repeat the same steps.

2. If you want to retrieve all the documents of a sub-document type that corresponding to an specific index value. For example, if you want to see all the Vacations files of each employee, follow this step:

In the Query Wizard, makes a regular query (simple or advanced), selecting the sub-document type that you want to query.
Whenever it is desired to save the definition of a query, for example to perform it at another time, this option is useful. To save a query you must select the **Save Query** button which appears in the toolbar of the Query Answer.

Pressing the button displays a window asking for the name of the saved query and the type (Personal or Shared). If the saved query already exists, a confirmation to overwrite it pops up in the screen.

After saving the query, it can be retrieved using the Query Wizard. At the Query Wizard, press the **Open Query** button.
The window to open queries appears in the screen. The saved queries appear separated into two tabs, “Personal” for personal queries, and “Shared” for shared queries. The personal queries belong to the user; the shared queries are available to all users.

The saved queries retain the document types, the interface (advanced or simple) the fields to query, etc. and reproduce it in the Query Wizard when loaded.

The Open Query window also allows deleting saved queries.
Messaging

Messaging Basics

The Messaging Center is the area to prepare new messages, check the inbox, forward or reply messages, etc. Its interface is standard and similar to that found in most popular Internet Browsers.

Upon entering the Messaging Center, the system checks for new messages. When no new messages are available, a window appears to notify it.

The Messaging Center window presents the following sections:
**Folder Area**

The Folder area shows four pre-defined folders: The Inbox, Outbox, Deleted and Misc (Miscellaneous).

**The Message List Area**

This area shows a list of the messages for the selected folder.

The list shows the user who sent the message, the subject, the date and time of the message, the last viewed date, etc. The horizontal scroll bar that appears below the area allows viewing of more information of the message.

**The Body Area**

This area shows the body of the message.

**The Status Bar**

The status bar of the Messaging Center shows the message count, read messages, the current application and a unique ID associated to the message.

**THE MESSENGER**

The Messenger is the window that allows to create messages.
Immediately after the Messenger is displayed, a small window pops up (“Send Message To”). Within this window we choose the destination of the new message, which might be:

- **System Users**: any user defined through the “Setup Users” option.
- **Email Address**: an address in the form `username@host`.
- **Message Groups**: a group of users defined with the standard option “Setup Message Groups”.
- **Composed Message Groups**: a group of users defined with the standard option “Setup Composed Message Groups”.
- With the “Clear Destination List” option any previous destination we selected for this message is cleared.

**Sending messages with the messenger**

The “Send Message To” window closes automatically when a destination is selected. The Messenger window shows the user that is creating the message, with the current date and time.

The “Cc:” button displays a window with the title “Copy Message To”. This window is identical to the “Send Message To” and allows adding to the list of users that will receive copies of the message. By default, the current user appears in the destination list.

The area of the subject of the message must be filled in order to send a message. When not, an error message appears.

The “Priority Level” option defines a priority for the message. A priority can be defined to be “High”, “Normal” or “Low”.

The “Return Receipt” option provides acknowledgment that a message has been read.

The “Attached Documents” box is the area to place attachments to a message.
Document Trash Bin

Document Trash Bin Basics

When documents from user-defined folders are deleted in the Document Center, they are not physically deleted as we stated before; instead, they are placed in a temporary area called “Document Trash Bin”.

The “Document Trash Bin” window presents the following areas:

- **Document Type List.** This area shows the existing document types. Once we select a document type, the deleted documents appear on the Deleted Document List.

- **Deleted Documents List.** This area shows the deleted documents for the currently selected document type.

- The “Empty Trash Bin” button. This button allows deleting of all the documents in the document list. Although the operation is irreversible, the documents are placed in the Windows Recycle Bin where they could still be accessible.

- The “Undelete” button. This button returns the deleted documents to its previous normal state.
The “Delete” button. This button deletes permanently the selected documents. A message to confirm the operation is always displayed.

As the confirming message indicates, permanently deleting a document also deletes:

- All the document references in AQUARIUS.
- All the files associated with the document.
- All the page files contained in the document. If a page is linked from different documents, and one of the documents is deleted, the page will not be accessible from all other documents. Pages in Read-Only media are not physically deleted.
- The “View” button. Using this button AQUARIUS shows the first page of the deleted document.
- The “View log” button. This button displays a window with a log of deleted documents.

Each time a document is deleted or undeleted, the Trash Bin records a log of these operations. The log contains the date/time, the user that performed the operation, the operation itself, the document name and the document id. Within this window we can print the log or clear it.
Merlin Wizard

What is the Merlin Wizard?

The Aquarius DMS Merlin Wizard is a help tool that uses an animated character (in this case Merlin) to guide the user through Aquarius DMS. Merlin creates an intuitive and informative interface for administrative users with a comprehensive reporting capability and a clear communication between the user and Merlin.

![Merlin Wizard interface](image)

Hello, System Administrator! Welcome to Aquarius.

Working with the Merlin Wizard

The Merlin Wizard guides the user through the steps of performing the tasks in the correct order, and provides visual cues for the information required. To work with Merlin is necessary:

1. To select a document in .rtf format.
2. To open the document and select the section that you wish Merlin to read.

3. Right click on your selection and select the “Read” option.

4. Merlin will appear, reading the selected text.

**NOTE:** The Merlin Wizard will only read English documents, in .rtf format.
Aquarius DMS Web Server

Today’s demand for business-critical information implies fast access to valuable information, from any location around the world.

Using the power of Intranet and Internet technologies and building upon user’s comfort with Web Browsers, Aquarius-Web Server is a highly innovative tool that provides immediate access to electronic documents at any time, through a LAN, WAN, or the World Wide Web.

Aquarius-Web Server drives Internet Explorer and Netscape users into a simple and intuitive user interface that provides access to all types of documents, images and reports. It is an ideal tool for 24-hour on-line access to the world.
Working with Aquarius DMS Web

The Query Document Type

After the document type selection, the Query Document Type page is presented. Here is where the query values are specified.

This view of the screen will vary depending of the fields defined for you document type. In this case, the “Query Document Type” is made of:
The fields are filled out depending of the type of query. Not all of the fields have to be filled out for the query to take place, just one field is enough to proceed.

Next to the name of the field, select the type of the relation between the field and the search value. The types of relations are:

\[
\begin{align*}
\text{Equal (}=\text{):} & \quad \text{Finds the document(s) which index information matches exactly the typed value.} \\
\text{Greater (>)/Smaller (<):} & \quad \text{Finds the document(s) which index information is greater than or smaller than the search value.} \\
\text{Greater or Equal (}>=\text{):} & \quad \text{Finds the document(s) which index information is higher or the same as the search value. In the example below, the query will return all of the documents where the Employee SS is higher or the same as 079.}
\end{align*}
\]
**Begins With:** Finds the document(s) which index information starts with the search value. In the example below, the result will be all of the documents where the Employee First Name begins with John.

![Employee First Name begins with](example)

**Ends With:** Finds the document(s) which index information ends with the search value. In the example below, the result will be all of the documents where the Employee Last Name ends with Miller.

![Employee Last Name ends with](example)

**Not =:** Finds the document(s) which index information is not the same as the value in the search box.

![Promotion Type not =](example)

**Like:** Finds the document(s) which index information is LIKE or has a resemblance to the value in the search box.

![Employee First Name like](example)

**Note:** Perform a character search within string; the wildcard character is %. For example %Laura%Marie%.

After all of the values of the Query are established, press the “Search” button to initiate the search. If you want to clean the search boxes and start all over, press the “Clear” button.

The “Match any value” option is selected when multiple values are entered, and you wish to retrieve the documents which index information matches any of the specified values.

![Match Any Value](example)

After pressing the “Search” button, the results are presented on the next page.

**Application:** Human Resources

**Answer for:** Promotions

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Pages</th>
<th>Employee Number</th>
<th>Employee SS</th>
<th>Employee First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>3658</td>
<td>1</td>
<td>3658</td>
<td>089-52174-7</td>
<td>John</td>
</tr>
</tbody>
</table>

When you select a document from the list, another page opens where the characteristics to that document and pages are shown.
The index information for the selected document can be modified and saved by pressing the “Save” button shown at the end of the page.

To view a pages, just click on the page and it will be presented on the right side of the browser.
Additional Options

Other options may become available as you browse through different pages, and depending on your DMS Web configuration.

- **Query Answer:** Return to the “Query” section.
- **Document Types:** Return to the “Select Document Types” section.
- **Applications:** Return to the “Select Application” section.
- **Home:** Return to the “System Login Page” section.
- **Send Document:** Send document by email. When this option is activated a page is presented where we can specify the email address, then we press the “Next” button and another page is shown where we can add a note of the document. To send, just click the “Send” button or if you decide to correct something press the “Back” button.
- **Update Document:** Updates the document after having made annotations to it.
For example, attach a note on the document, then press the “Update Document” button. After saving the modified image file in your computer or anywhere on the network, follow these instruction:

1. Select modified image file you just saved.
2. On the next text box, type a name for the page. This name will be the one displayed on Aquarius DMS and DMS Web.
3. Choose one of this options:
   - Append the page at the end of document.
   - Insert page as.
   - Replace the page.
   - Delete the page.
4. Click on the “Update” button, then a message will inform you that the page was uploaded into the Page Viewer.
The Imaging Options

“Zoom Out or Zoom In”: This option can also be performed selecting a rectangle in the page image or using the gray plus or minus keys.

“Fit to window”: Fits the image to the window size of the viewer.

“Fit to width”: Fits the document or page according to the window’s width.

“OCR Convert”: Applies OCR process to a page from OCR to text or URL.

“OCR Draw”: Applies OCR process to a page, especially for the insertion of OCR text or picture region.

“Rotate”: Rotates the page in any direction.

“Annotation Tools”: When this button is pressed a toolbar appears with the following options:

“Select Annotation and Zones”: Selects a section of the document and immediately zoom it.

“Freehand Annotation”: For adding personal or by hand annotations.

“Highlighter”: Makes a section of the page stand out, the highlighter works like a marker.

“Draw Line”: Adds lines to the document.

“Rectangle”: Inserts a rectangle into the document.

“Filled Rectangle”: Posts a filled rectangle to a page.
“Text”: Inserts text boxes in the document.

“Hyperlink”: Adds a link to an Internet address from anywhere in the document.

“Attach a Notes”: This option attaches a is for the introduction of remarks or information in the page in form of a sticky note.

“Stamp”: Stamps text or images selected to the document.
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