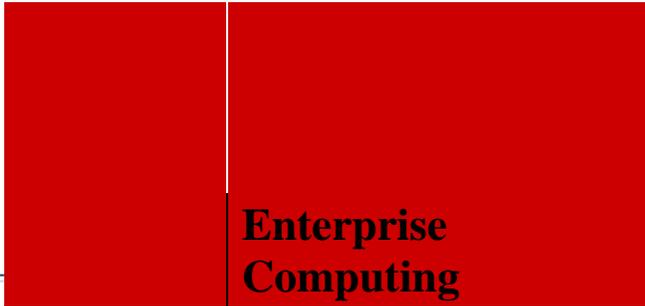


DocFinity User Guide for Managers



DOCFINITY End-User Guide Managers

Login

You will be able to access DocFinity through the my.fairfield.edu portal. You will be prompted for your Net ID credentials to access the system. Use your Net ID and password. There will be an icon (same as above right) to click on. The first time you do, you will be prompted to complete a consent form, but only one time.

Here is the link in case you want to make it a favorite and not go through the portal.

Production System URL: <https://docs.fairfield.edu/docfinity/login.jsp>

Login Window Details

- Username Your Net ID
- Password Net ID password
- Consent page Opens to DocFinity Workspaces home page.

Your Workspace

Upon login, you can customize your workspace to display panels of where your data/documents live. Go to the PANELS tab and select from your desired panels to display from the drop down menu. Here you can view: Search, Document Viewer, Batches and Search Results. The panels can also be sized by hovering over the lines between each panel and scrolling up/down or side/side.

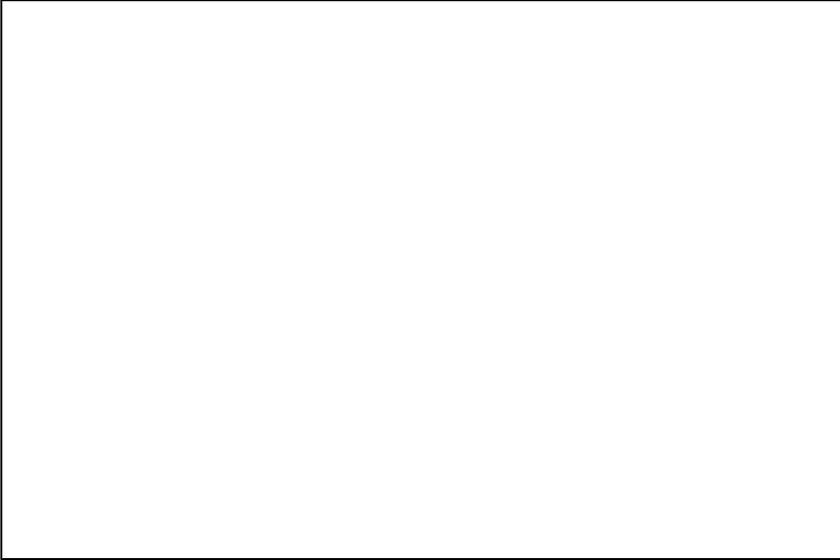
Scanning

Prepare your documents for scanning. Place in multi-function or desktop scanner. Login to DocFinity. Click on DocFinity and scroll down to select Scanning.



Your scanner should automatically default. Select the desired scan type (ADF – auto-feeder or Flatbed). Click ‘display’ under Scanner Interface. Click Next.

Select the desired Scan Profile. You do not have to select Category or Document Type, but can if you know these. Click Scan.



*Note: you will see your scanned documents in the right panel (2nd screen shot above). If you select multi-page Scan Profile, it will scan as one document with multiple pages (this would be used to index multiple pages for one student). If you select single page Scan Profile, it will treat every page as one document that needs to be indexed. This is ideal if you have multiple of the same document that need to be indexed for various students. Because you've selected 'display' under Scanner Interface, a second scanning settings page will pop up. This page is used to set/reset basic or advanced settings on your scanner. Changing any settings here will override the previous scan set up (for multi, single page, duplex, simplex, etc.) – Scan Profiles. This page will always default to the settings shown below and reset each time even if you've changed the settings.

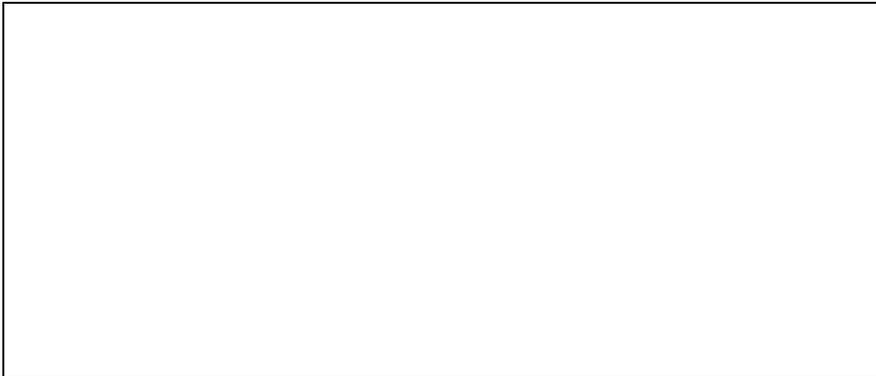


Click Scan.

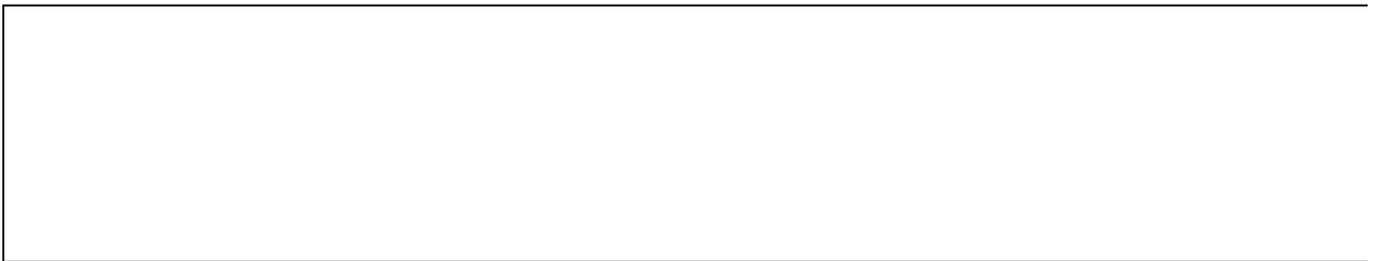
Go back to the browser where you logged into DocFinity. Click on the Workspaces tab, scroll to select Indexing. This is where you will view your batches of scanned documents, save index work and commit batches to fully index a document/page.



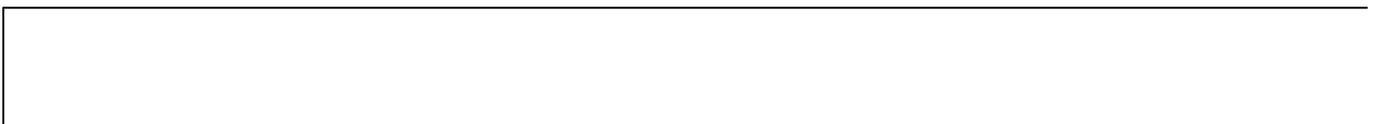
Go to Workspaces, select Indexing.



Go to your Batches panel. You will see the Progress column where your scanned documents will show as incomplete. The documents will move to a all required status after you commit the index.



Double click on a batch that you'd like to index. In the top right section of the Document Viewer panel, click the + icon. This will open your editing console.

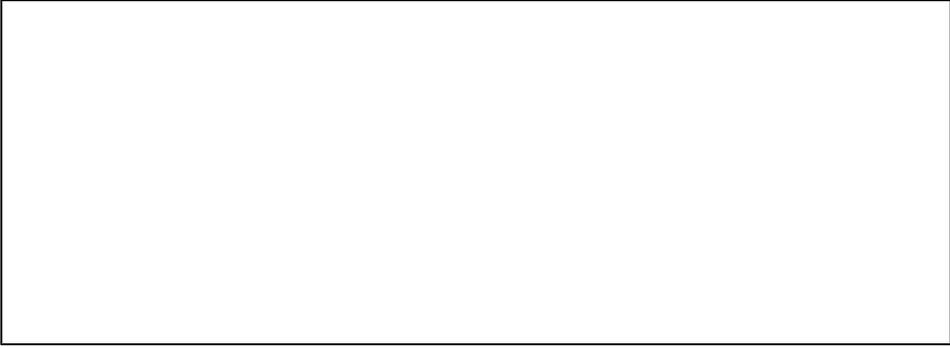


You can edit documents as necessary here. You can zoom in/out and use the scroll bar to view your document. You can also make the document a full page or open in a new browser tab. Right click on the document and select open as PDF, Native Application or duplicate.

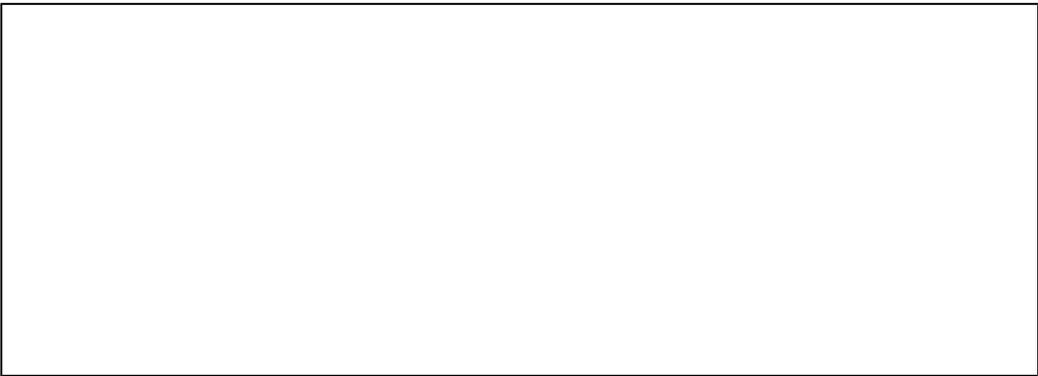


Select the desired category, document type and enter the ID of which you want to index the document. The last/first name, DOB will fill (pulling from Banner).

You can **SAVE** the document here. You will notice that the process of your Checked Out Batch has now turned to 'all required.' This means you can **COMMIT** the batch and the document will be indexed and removed from your batch list.



Commit the Batch. This will index the document and remove from your Batches panel.

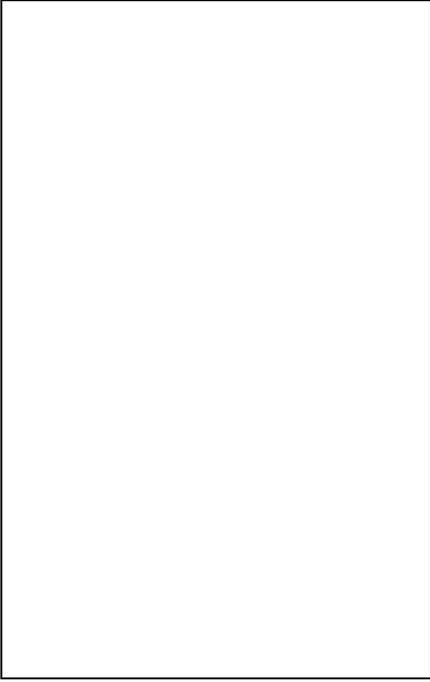


Splitting Batches

Go to Panels in the tool bar, select Batches. Double click on the batch you need to split documents. Click Edit in the Document Viewer panel

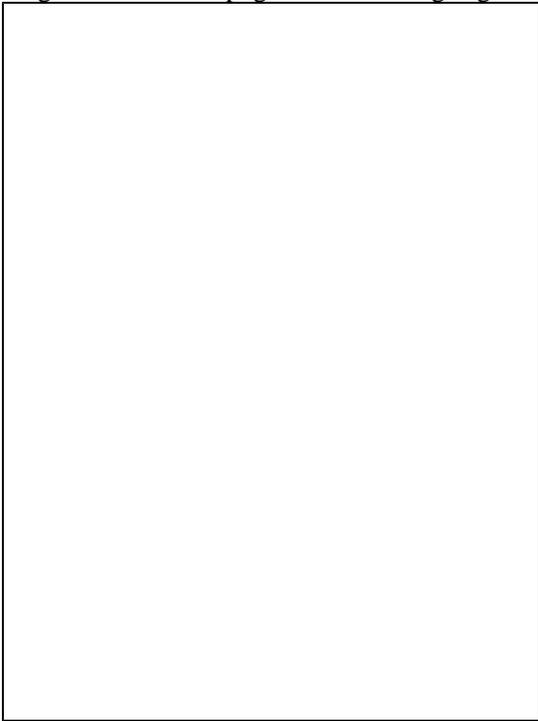


Click on the first page, scroll to the bottom of all pages, use Shift and click the last page to highlight all pages.

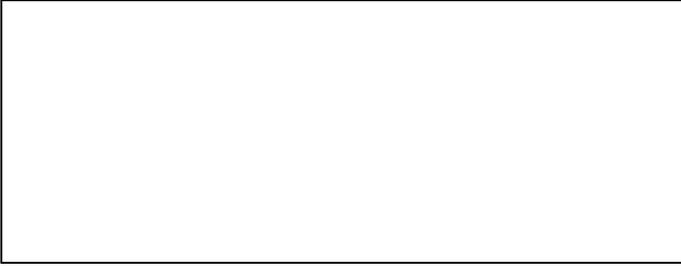


Either:

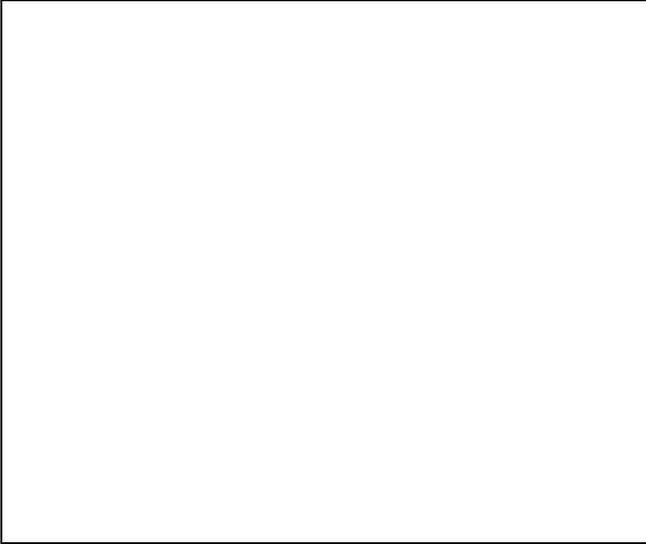
- Right click on the page list that is highlighted blue and select Split Document



- Or use the Split icon in the menu bar.

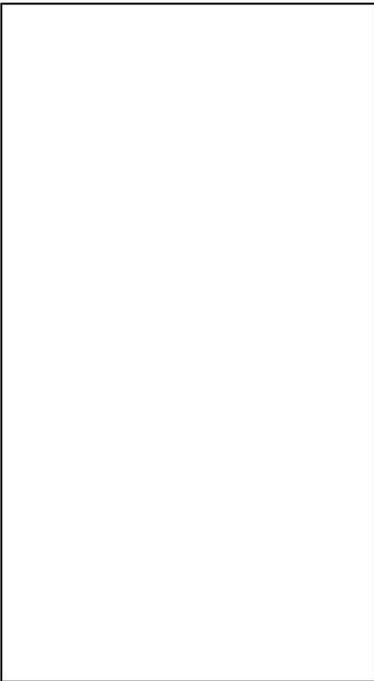


The Split Document pop up box will display. Leave all settings as is. Click Split.



This may take a few seconds depending on the number of pages.

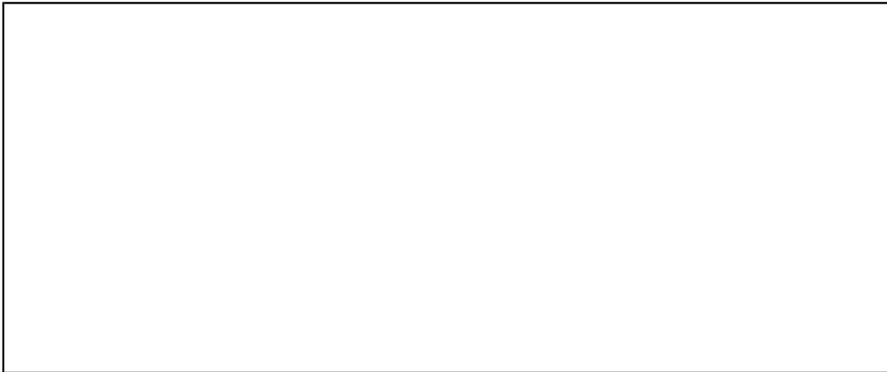
Now you can index each page (New Document 1, New Document 2, etc.).



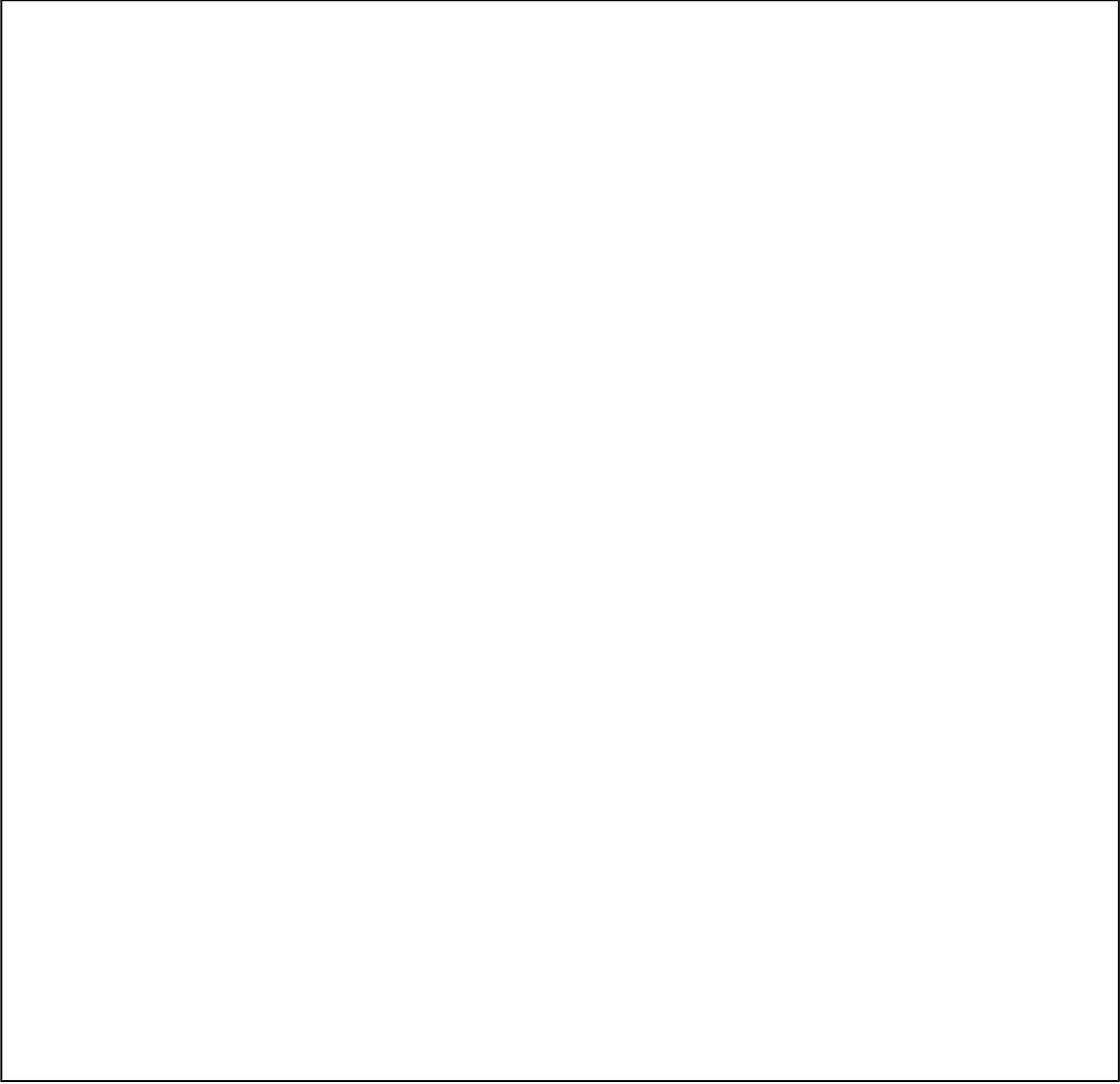
Searching

Now that the documents have been scanned and indexed, you can search for the document(s).

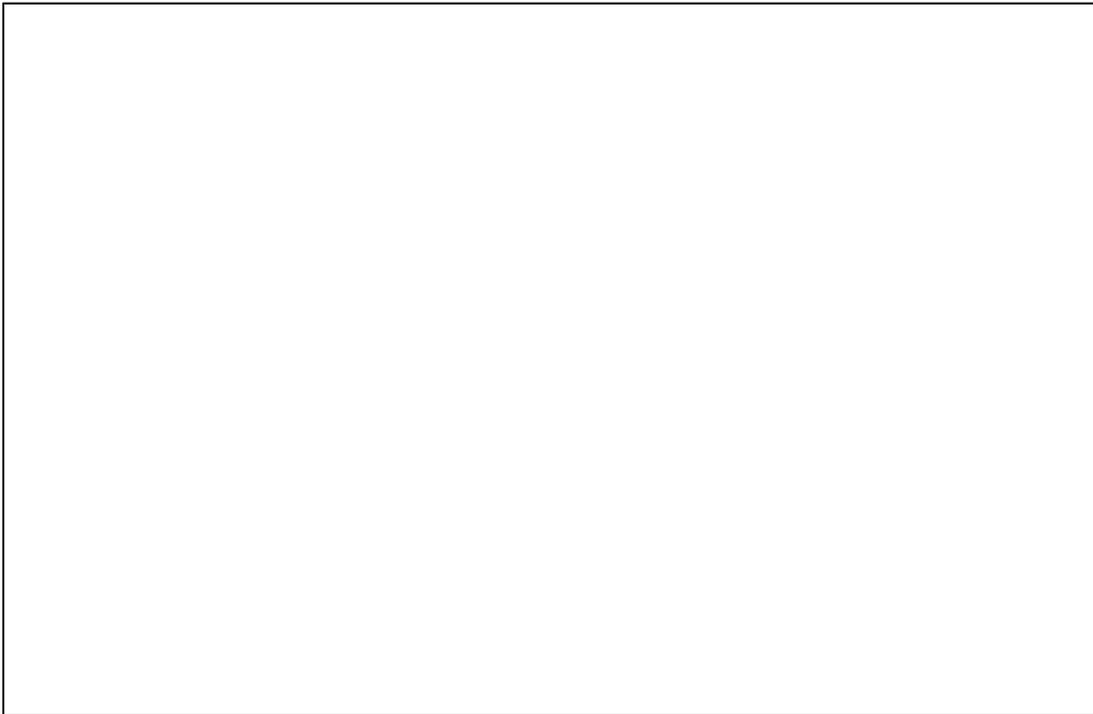
1. Click **Workspace > Searching** to open the Search panel.
2. On the *Search* panel, select a Template Search from the *Search* drop-down box. Template Searches are searches defined by an Administrator.



Enter the data you wish to search. You can search by document type and title or any fields in the search menu.



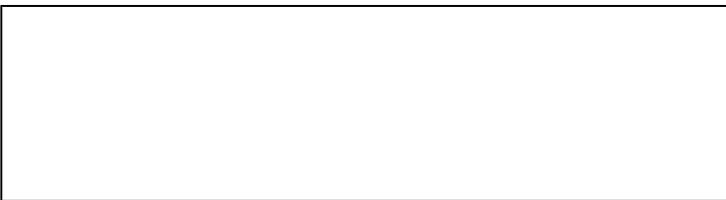
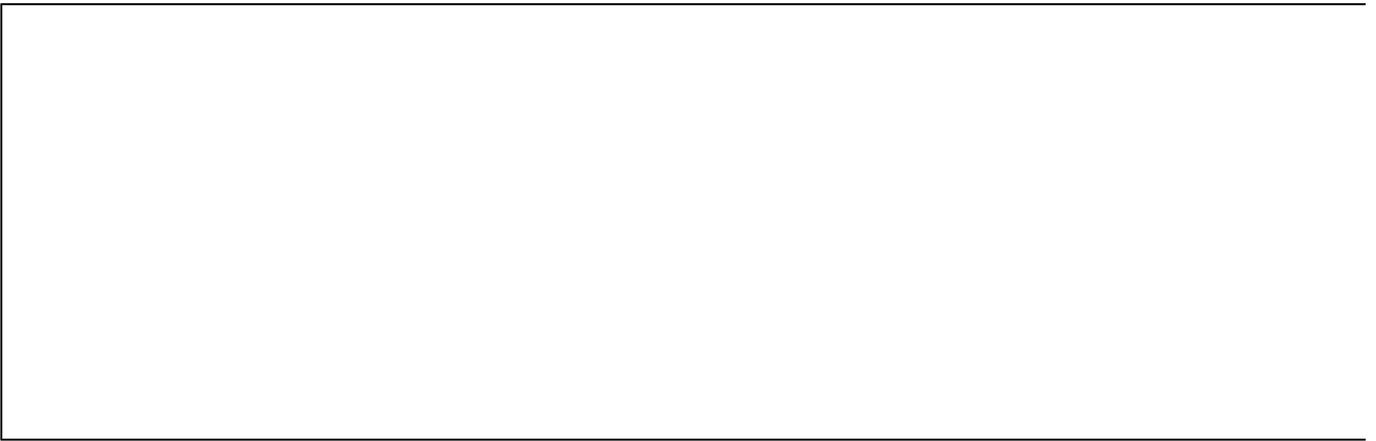
You can also search by Student Search and only enter ID #.



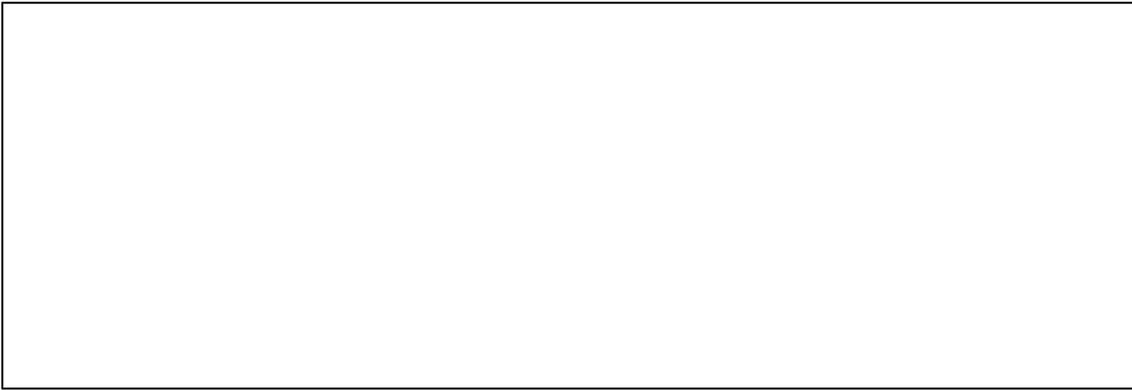
In your Search Results panel, you will see all documents that returned. You can sort and rearrange the column display.



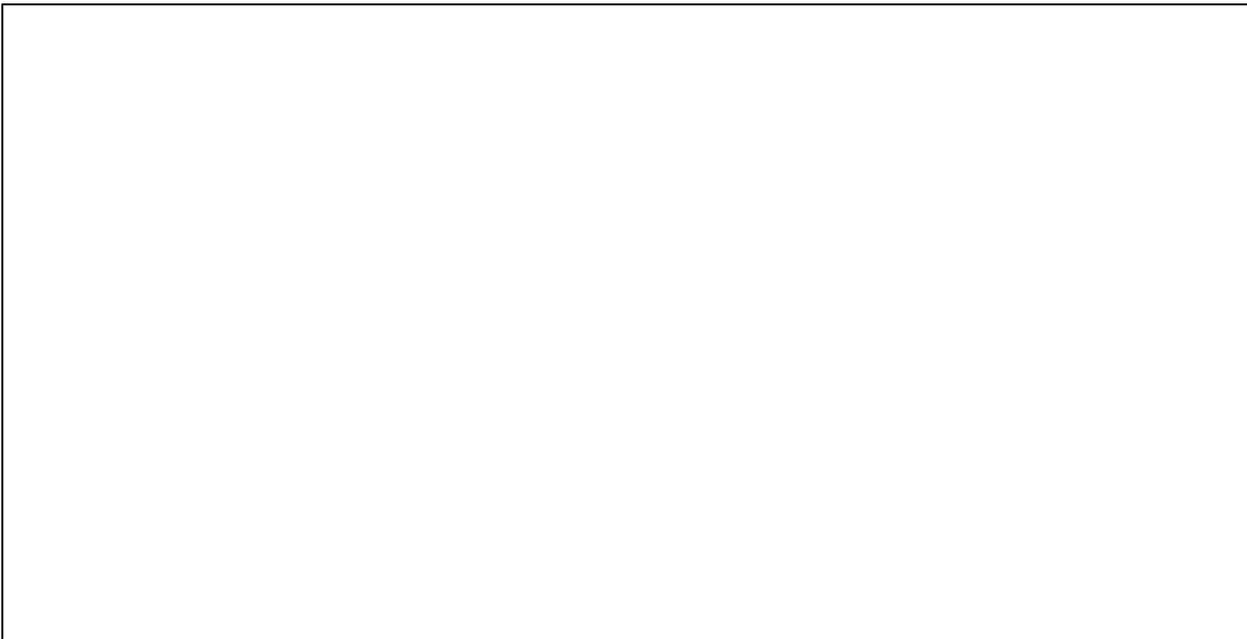
Double click on a document and you will be able to view the document in your Document Viewer panel. You will have editing functions to the document and be able to save changes. Example: you can fit to height/width, rotate, draw arrows/lines, etc.



ReIndex Document



To reindex a document, you would select the document by selecting the checkbox of the line of the search result you would like to change the metadata value(s) and then select the reindex icon indicated by the red arrow above.



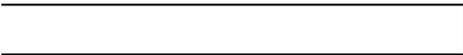
Alternatively, you can select the checkbox of the line of the search result you would like to change the metadata value(s) and then press your right mouse button while that line is selected and choose Re-index from the menu.

Deleting Documents

You can request that the document(s) be restored by the DocFinity administrator if it has not been purged from the system (permanent delete). You will need to give the administrator as much information about the document you would like to restore as possible. (Who deleted the document? When was it deleted? What Document Type was the document? What was the contract number or purchase order number of the document?)

DocFinity Interface Basics

Interfaces across DocFinity share common features and options, as described below. Note: You can change the display size of Workspaces by using your browser's Zoom controls.

	List Page Controls	Displayed when a list of items is too long to display on a single page. Click the navigation controls to display the other pages in the list.
	Help	Click to open online help for the pop-up window.
	Panel Menu	Click to open an options menu on panels.
	Close	Closes the panel or window.
	Minimize	Minimize the panel to a simple menu bar.
	Restore	Restore the panel to normal size.
	Full Screen	Maximize the panel to full screen.
	Open in New Window	Will move the Viewer to a new window.
	Checkbox	Selects / de-selects the adjacent



item. When the checkbox is in the header of a list of item, clicking the checkbox selects / de-selects all the items in the list. Use shift-click to select multiple checkboxes.



Filter

If a list column header items is preceded by this symbol, the list can be filtered by selected items in that column. Click to open the Filter options. Filtering displays any list entry that contains the entered characters.



Filter Applied

Indicates the column is filtered. Click to open the Filter options.

Resizable Panels

Click and drag to resize panels.



Collapse/ Expand Panel

Click to collapse or expand a panel.



Adjustable Column Widths

Most table columns can be resized. Hold the cursor over the header column divider until the resizing cursor appears, and then click and drag the divider to adjust it.



Collapse/ Expand

Collapse or expand the menu item to hide or show additional information / selections.

Sortable Columns

Most tables can be sorted by column. Sort the items in a list by the selected column, either in descending or ascending order.

Navigation

The Navigation Bar gives you access to the menus for all of DocFinity's functions. Note: Only menu items you have the Feature Right to access are available for selection in the Navigation Bar.

DocFinity

Access other DocFinity modules.

- **Scanning**

Open DocFinity Scanning. Scanning opens in a new browser window.

Workspace	Access preset workspaces, which are sets of panels related to a particular job function.
• Indexing	Load the Indexing workspace. By default, the workspace contains the Batches and Index panels.
• Job Assignments	Load the Business Process Job Assignments workspace. By default, the workspace contains the Jobs and Job Views panel.
• Searching	Load the Searching workspace. By default, the workspace contains the Search and Search Results panels.
• Save Workspace As	Save the current panel layout. Opens a window to select the workspace to save the layout as: Searching, Job Assignments, Indexing, or as a custom-named workspace. Opens Save Workspace As.
• Delete Custom Workspace	Delete a custom workspace. Opens Delete Custom Workspace..
• Reset to Default Workspaces	Reset the workspace to its default display. You are prompted to confirm.

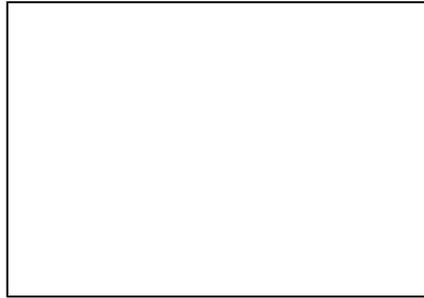
Panels	Display or hide individual panels. A checkmark indicates the panel is open.
• Batches	Display or hide the Batches panel.
• Diary	Display or hide the Diary panel.
• Document Information	Display or hide the Document Information panel.
• Document Viewer	Display or hide the Document Viewer panel.
• Forms	Display or hide the Forms panel.
• Index	Display or hide the Index panel.
• Search	Display or hide the Search panel.
• Search Results	Display or hide the Search Results panel.
• Close All Panels	Close all open panels.

Help	Access DocFinity help and information.
• Help	Open DocFinity Help documentation in a separate browser window.
• Hot Key Reference	Display the Hot Key Reference.
• About	Display the About window, which contains version and licensing information. Click the About window to close it.

Click to access the user menu, where you can set your preferences or logout of DocFinity.

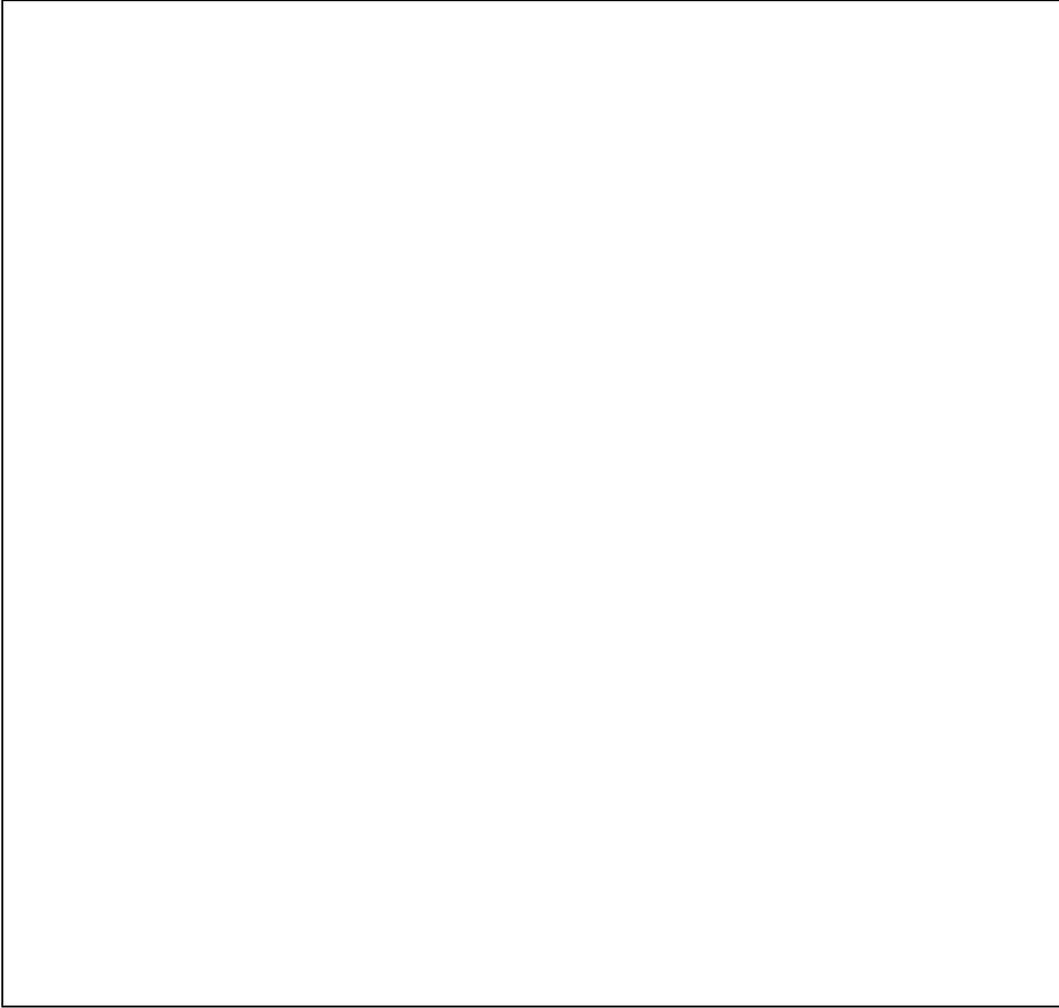


- **Preferences** Edit your application preferences. Options include General, Document View, Indexing, and Search Results.
 - **General** Set personal preferences for the level of instructional text displayed on panels and windows throughout DocFinity. Opens General Preferences.
 - **Document View** Set personal options for viewing documents throughout DocFinity. Opens Document View Preferences.
 - **Indexing** Set personal Indexing options. Opens Indexing Preferences.
 - **Search Results** Set personal Search Result options. Opens Search Results Preferences.
- **Logout** End the current session and log out the current user. Returns the browser to the DocFinity Login window. Logging out saves your current workspace. The next time you log in, the saved workspace will open automatically.



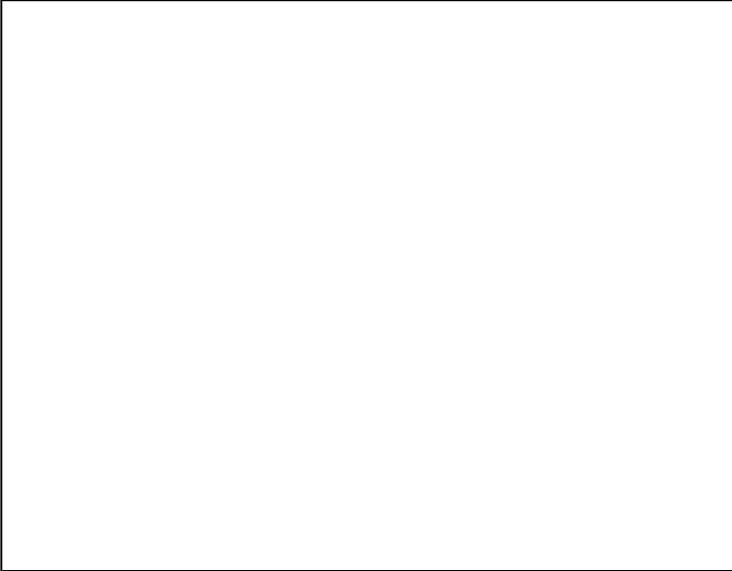
Print-To

The Print-To functionality is used when you have the document you want to add to DocFinity opened in its native application. To add the document to DocFinity, in your browser menu, select File, Print, select the Print To DocFinity as your printer and then Print.



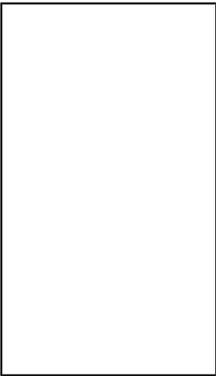
Then, the document will open to a PDF in a new browser tab. You can edit the document from here as well.

Open as PDF, Native Application and Duplicate. You can also right click on the document to open as PDF, Native Application and Duplicate:



Emails

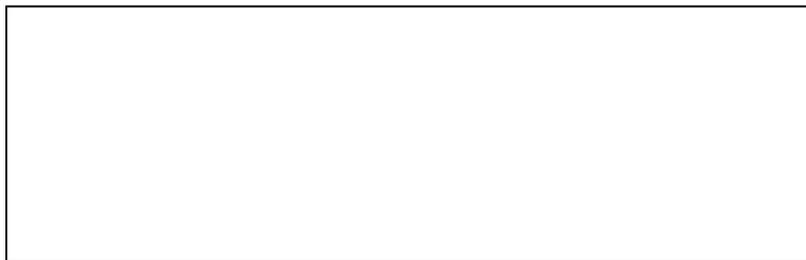
You can save an email to your desktop and click and drag it into DocFinity. From the File option in the top tool bar of the email you want to index, click Save As.



Save email to your desktop. Open DocFinity. Click on Panels, then Batches. Use the Upload icon to open a box where you will drag and drop your email file.



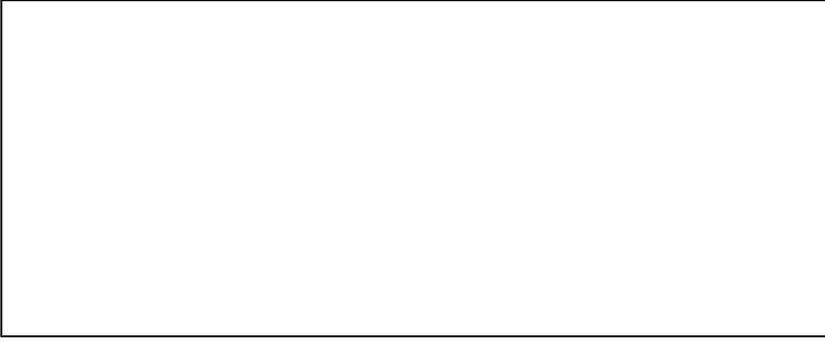
You can either use the Browse button to upload the file from your desktop or you can drag the file from your desktop (or other location) to this box. When dragging/dropping, you will need to make sure the file is dropped directly in line with the words “Drop files here to upload” or it won’t upload. If you do this correctly, the box will say



You will then see your file name below the Browse button. It will also say “files to upload: 1.” Your file will not be uploaded until you click the Upload button.



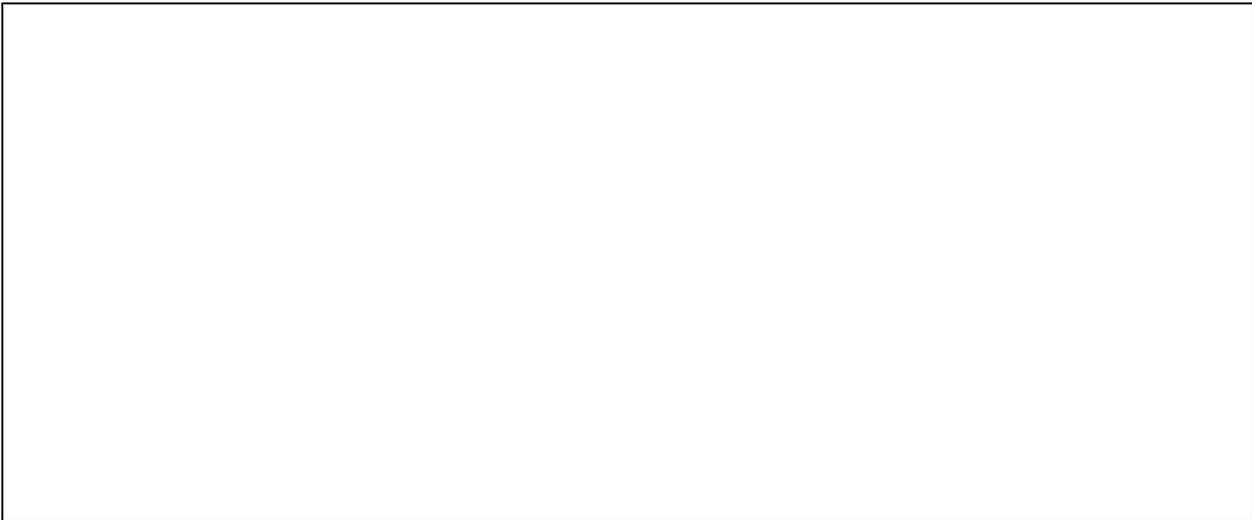
After it is successfully uploaded, the box will display like this. You will see the name of the file in green font, a green check next to the file name and “Done” in the “Drop files here to upload” box.



This file will now be in ONLY your batch of My Uploads. Only you can index this document. No one else will be able to see it in the Batches panel. Index accordingly.

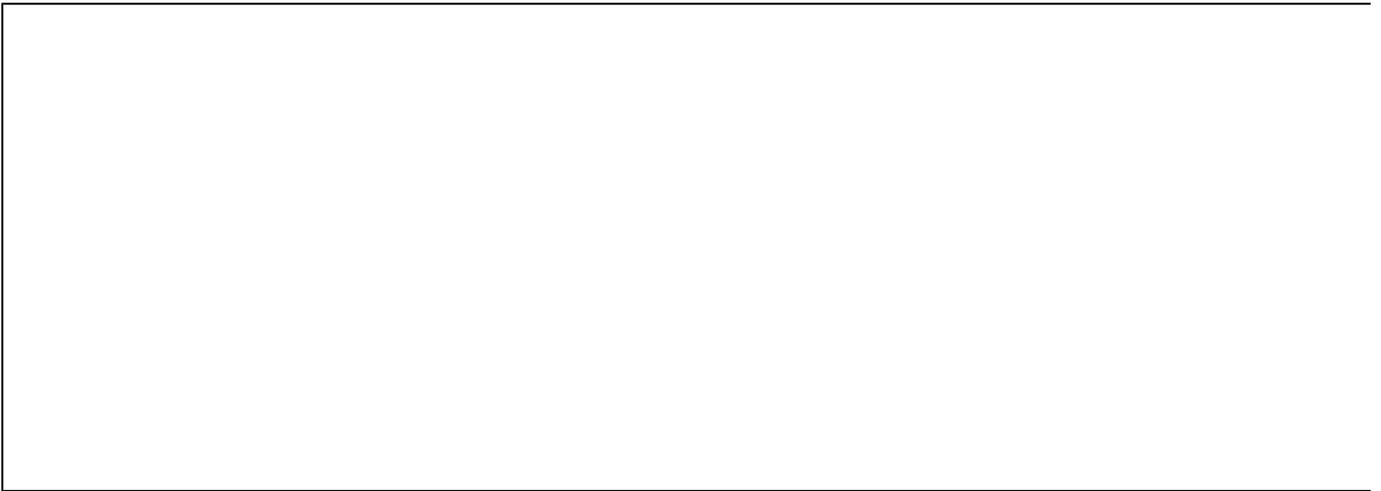
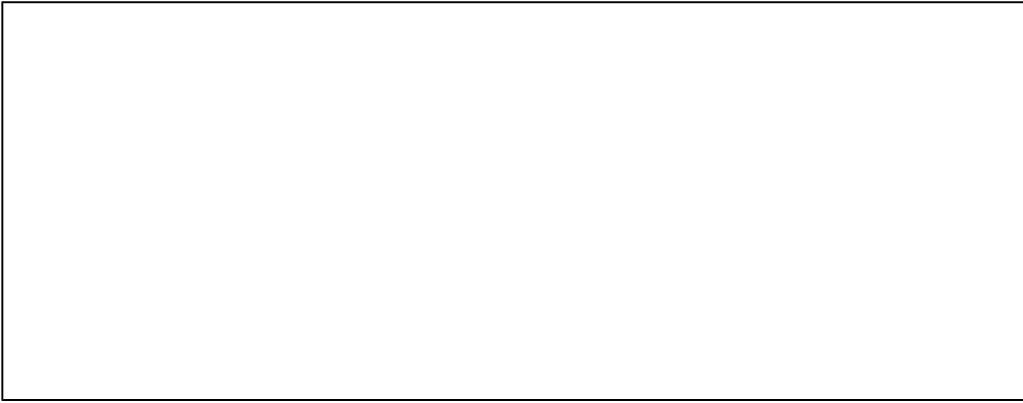
Send-To

The Send To functionality is used when you have the document you want to add to DocFinity without opening the document in its native application. To add the document to DocFinity, select document in File Explorer, click your right mouse button and then select Send To DocFinity.

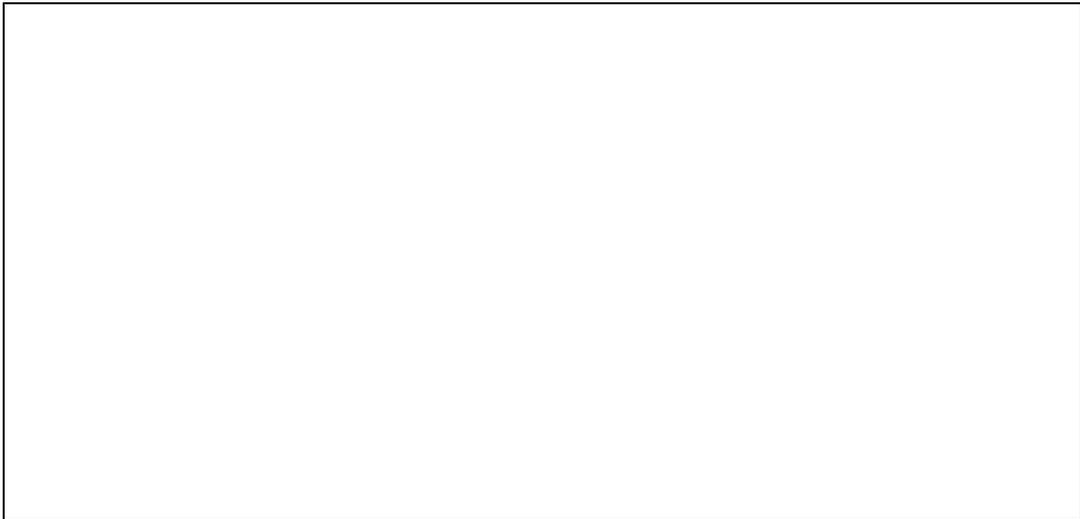


File Upload

Another alternative to adding a document to DocFinity is to upload your document in the indexing workspace.



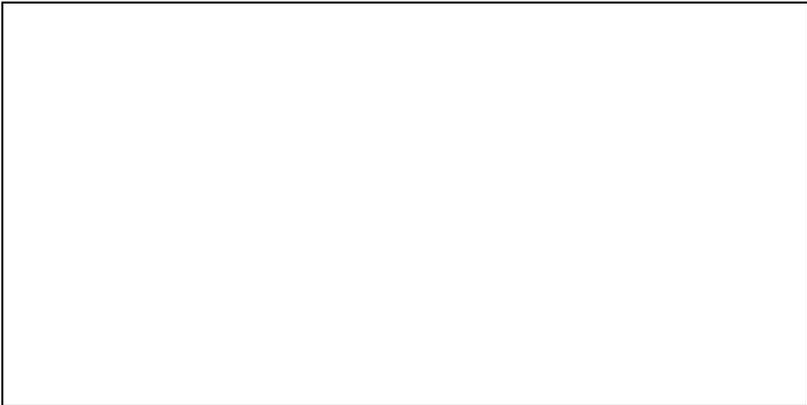
Select the file upload icon indicated by the red arrow.



Select the Browse button, browse to the file you want to upload, select the Upload button and select the Close button.

You will be prompted to Index your document by selecting a document type and entering values for the metadata objects.

Required metadata object values are indicated with an asterisk (*). Select the Commit Batch icon to commit your document indicated by the red arrow.



Select the Commit button to confirm committing.

Batches Panel view: No Batch Checked Out

The *Batches* panel displays available batches and lets you upload new documents. When no batch has been checked out, only certain options are enabled, as detailed below.



Panel Menu



Opens the Panel Menu.

***Buttons / Panel
Menu Options /
Right-Click
Context Options***

Batch options. Some options are only available when a batch is checked out. Options vary depending on context and a user's Feature Rights.

**Upload
Files**



Upload files to the user's *My Uploads* batch for indexing. Opens *Upload Files*. Uploading automatically checks out the *My Uploads* batch. Requires *File Upload* and *Index Documents* Feature Rights.

**Scan New
Batch**



Scan documents for indexing. Opens the *Scan* workspace. Requires *Allow Scanning* Feature Right.

**Check
Out Batch**



Check out the selected batch for indexing. (Batches must be checked out before they can be indexed. A checked-out batch can only be indexed by the user who checked it out.) Switches the *Batches* panel to *Checked-Out View* and opens the *Document Viewer* and *Index* panels. *Note:* While the *My Uploads* batch can contain an unlimited number of documents, if there are more than 500 documents in the batch, only the first 500 documents will be checked out at a time.

**Delete
Batch**



Delete the selected batch from the system. This also deletes all documents in the batch. You are prompted to confirm the deletion. Requires *Delete Batches* Feature Right and *Delete* document security access to the documents in the batch.

**Refresh
Now**



Refresh the *Batches* list immediately.

Pause /

Pause automatic refreshing of the *Batches* list.

Resume Refresh

Set Refresh Interval...

Change the automatic refresh interval. Opens *Set Refresh Interval*.

Indexing Preferences

Change indexing settings. Opens *Preferences > Indexing Settings*.

Help

Display the panel's online help.

Show Toolbar

Toggle the display of the button bar. Default is Show (Checked).

Batch List

Displays the user's currently available batches. *Receive Batches* feature right required for batches assigned to the user's groups to be displayed. For batches that have been partially indexed during scanning or importing, only batches containing Document Types to which the user has *View* document security access permission are displayed.

Checked Out Indicator

Indicates whether the batch is checked out () or not checked out ()

Name

The name of the batch.

Documents

Number of documents in the batch.

Date Created

The date the batch was created.

Status

The current status of the batch, checked out or checked in.

Batches Panel view: Batch Checked Out

When you have a batch checked out, the *Batches* panel displays documents in the currently checked-out batch. Note: Only the documents in the batch that you have List, View, and Update permissions for will be displayed.

Selecting a document displays it in *Document Viewer* and makes further actions available, such as indexing.

Panel Menu

Opens the Panel Menu.

Buttons / Panel Menu Options / Right-Click Context Options

Batch options. Some options are only available when a batch is checked out. Options vary depending on context and a user's Feature Rights.

Upload Files

Upload files to the user's *My Uploads* batch for indexing. Opens *Upload Files*.

	<input type="checkbox"/>	Uploading automatically checks out the <i>My Uploads</i> batch. Requires <i>File Upload</i> and <i>Index Documents</i> Feature Rights. Files over 50 MB cannot be uploaded.
Create New Batch	<input type="checkbox"/>	Only available when viewing My Uploads. Create a batch from the documents in My Uploads. Opens <i>Create Batch</i> . Requires the <i>File Upload</i> and <i>View Groups</i> feature rights.
Scan New Batch	<input type="checkbox"/>	Scan documents for indexing. Opens the <i>Scan</i> workspace. Requires the <i>Allow Scanning</i> Feature Right.
Check In Batch	<input type="checkbox"/>	Check in the current batch so others may work with it or to return to it at a later time. All metadata entered up to this point is saved, but documents are not “indexed” into the Repository until a user "commits" the batch.
Commit Batch	<input type="checkbox"/>	Index the documents in the currently checked-out batch. You are prompted to confirm the commit. Only documents that have a complete set of metadata (all required metadata) are indexed. Any remaining documents stay in the batch, which is automatically checked in, to be indexed later. If all documents in a batch are indexed, the batch is removed.
Delete Batch	<input type="checkbox"/>	Delete the selected batch from the system. This also deletes all documents in the batch. You are prompted to confirm the deletion. Requires the <i>Delete Batches</i> Feature Right and <i>Delete</i> document security access to each document in the batch.
View Document	<input type="checkbox"/>	Display the selected document in the <i>Document Viewer</i> panel. Requires <i>View</i> document security access to the document.
Print Document(s)	<input type="checkbox"/>	Print the selected document. Opens <i>Print</i> . Printing requires the <i>Print</i> Feature Right and <i>View</i> document security access to the document to be printed (<i>override_redaction</i> required to print a document without its redactions; <i>view_markup</i> to print with its markups).
Create Pointer	<input type="checkbox"/>	Create a pointer to the selected document. The pointer is added to the currently checked-out batch for indexing. Requires the <i>Create Pointer</i> and <i>Index</i> Feature Rights and <i>List</i> document security access permission to the document.

If a user has Update security permissions, the source’s metadata is copied to the pointer and the pointer will have the same Document Type as the source; with just List access, the pointer is set to the Unindexed Document Type and no metadata is copied. Not available when multiple documents are selected.

Pointers are a way to index the same document under different sets of metadata (and even a different Category and Document Type). The pointer “points” to the original document, only with its own unique set of searchable metadata. Pointers display in search results as a separate result. You can point to the same document using any number of pointers. Pointers can be checked out for editing (provided the user has EDIT security access to the Document Type) using *Download to Edit* and *Edit Document in Native Application*, and if changes are checked back in (using *Replace*, *Send to DocFinity*, or *Print to DocFinity*) the

pointer ceases to be a pointer to the original document and instead points to a new copy of the document as edited. The original document remains unchanged, and all other pointers will still point to the original document.

Edit Document	<input type="checkbox"/>	Checks the selected document out for editing and sends it to the Document Viewer, where you can split checked-out documents, create new documents, copy pages from checked-out document to another, and change the orientation of pages within a checked-out document. Requires EDIT security access to the document.
Delete Document	<input type="checkbox"/>	Delete the selected document from the batch and from the system. You are prompted to confirm the deletion. Requires <i>Delete</i> permissions per Document Type.
View Thumbnails	<input type="checkbox"/>	Displays the documents in the batch as thumbnail images. Click to select a document and make it the current document – the document the <i>Index</i> panel is set to index. Clicking a thumbnail also displays it in <i>Document Viewer</i> .
View Details	<input type="checkbox"/>	Displays the documents in the batch in a list, detailing the batch's indexing progress, name, Category, Document Type, the date it was created, and the username of the user who created it. (<i>View Details</i> is the default view mode when thumbnails are deactivated system-wide.)
Indexing Preferences		Change indexing settings. Opens <i>Preferences > Indexing Settings</i> .
Help	<input type="checkbox"/>	Display the panel's online help.
Show Toolbar		Toggle the display of the button bar. Default is to show (checked).

Indexing Panel Options - Basics

The Index panel lets you enter metadata information for documents in a batch so the batch can be indexed. The files being indexed go into the Repository, and the associated metadata goes into the DocFinity database.

Depending on the number of documents in a batch, users are provided several options within the panel. The below information describes these options in more detail.

Save Metadata	Save all metadata for all documents in the batch for future indexing.
Index Rest	Index the remaining documents in a batch with the metadata associated with the current document. Requires the Index Rest Feature Right.
Index All	Index all the documents in a batch with the metadata associated with the current document. Requires the

Index All Documents Feature Right.

Check-in Batch

Check in the current batch so others may work with it. All metadata indexed is saved, but documents are not marked as indexed until a user commits the batch.

Commit Batch

Index the documents in the currently checked-out batch. Only documents that have a complete set of metadata (all required metadata) are indexed. Any remaining documents stay in the batch, which is automatically checked in, to be indexed later. If all documents in a batch are indexed, the batch is removed.

Clear Document's Metadata

Deletes any saved metadata associated with the document and returns it to an unindexed state, as well as clears any user-entered data from indexing fields.

Requires the Unindex Documents Feature Right.

Reset to Document's Saved Metadata

Clears any user-entered data from indexing fields and returns the document's metadata to values they had when last saved.

View Document

Display the current document in Document Viewer
Requires the View document security access to the document.

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