Opera 3 Document Management Desktop

Training Courseware

Pegasus Software Ltd
Accreditation Training Courseware

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Introduction

About Opera 3

Opera 3 is the most versatile and user-friendly accounting, supply chain management, payroll & HR, manufacturing and reporting solution from Pegasus Software. A modular solution, Opera 3 enables you to select the components that match your current business model, whilst making it possible to add further functionality as requirements change. This means that the capability or capacity of a system can be seamlessly expanded whilst safeguarding the investment.

For more information about Opera 3, select the Solutions link on the Pegasus web site.

About this Guide

This Accreditation Training Courseware for Document Management Desktop offers an accompanying guide to the Document Management accreditation training course.

If you are new to Opera 3, read the Getting Started section of the Opera 3 Help that covers the application in more detail. You can access this from the Windows Start menu, or by using the F1 Key or Help menu when you have logged in to the product.

Opera 3 is available for both Visual FoxPro and SQL Server database platforms. This Accreditation Training Courseware applies to both database platforms, however, there are certain elements that are only included in one or the other database, and as such, the relevant sections or paragraphs are clearly identified with the following labels:

[SQL] – only relevant if you are running the application on an SQL Server database.

[VFP] – only relevant if you are running the application on a Visual FoxPro database.

Sections that are not identified with these labels are relevant to both database types.

For more information, see the section Functional Differences between Opera 3 Enterprise & Opera 3 Enterprise SQL section in the release guide.

Introducing the application

Document Management is a fully integrated Opera 3 module that provides highly efficient and secure document capture and retrieval functionality both in the Document Management module and throughout the Opera 3 product. Paper documents and previously saved electronic documents and emails can be captured and securely archived.

Documents can be captured and retrieved at header and transactional level via direct modular integration, or captured in batch through the Document Management module. When capturing or retrieving in another Opera 3 module, like the Sales Ledger, all document type selection and indexing is managed such that there is the minimum of additional clicks or data entry. Indexing can also be done using bar codes.

Barcode scanning is an additional function of PDM and does not prevent the continued use of manual scanning.

Document Management Desktop works directly from your Microsoft Windows desktop. It is both an easy retrieval system of paper documents and electronic files that have been captured to the Document Management databases and an ad-hoc capture system to quickly capture electronic files to the Document Management databases. Document Management Desktop needs access to both the Opera Server installation and the Document Management databases. However, the Opera Client software does not need to be installed on the computer to use Document Management Desktop.

Feedback

Pegasus is interested to hear your views on the documents we provide. To give your feedback, send an email to training@pegasus.co.uk. Please type "O3Training_Accreditation_REP38DocumentManagerDesktopR1.0.docx Accreditation Training Courseware" in the subject box.

Please note that product support is not offered through the above email address.

Key

Icon	Meaning
Example – Examples	Useful Hint, Tip or Note. General Comments / Notes
	Useful Report obtained from clicking on the print icon while sitting on the form
	During the literature, some basic Question and Answer / Troubleshooting points are discussed. May include a few did you knows…
	Website link
	Exercises / Example solution
	Report to XLS
	Potential Report Enhanced from Opera II (more than simple field adjustments)
Question *Answer* FAQ	FAQs - Only

Training Literature Releases

Release	Added Information
R1.0	Originating document – O3 v1.20

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Introduction

Document Management Desktop works directly from your Microsoft Windows desktop. It is both an easy retrieval system of paper documents and electronic files that have been captured to the Document Management databases and an ad-hoc capture system to quickly capture electronic files to the Document Management databases. Document Management Desktop needs access to both the Opera Server installation and the Document Management databases. However, the Opera Client software does not need to be installed on the computer to use Document Management Desktop.

Document Management Desktop is a secure application – you have to log on using a user ID that is created in Opera. Even if you are someone who does not use Opera, your system administrator still needs to create an Opera login ID for you to use Document Management Desktop. An Opera installation includes a certain number of users. For example, an Opera five-user system means that five people can use Opera at the same time. However, more user IDs can be set up if necessary to use in Document Management Desktop. Each installation of Document Management includes one Document Management Desktop user. If you require more people to use Document Management Desktop, there is an additional cost for each user. Please contact your Pegasus partner for details.

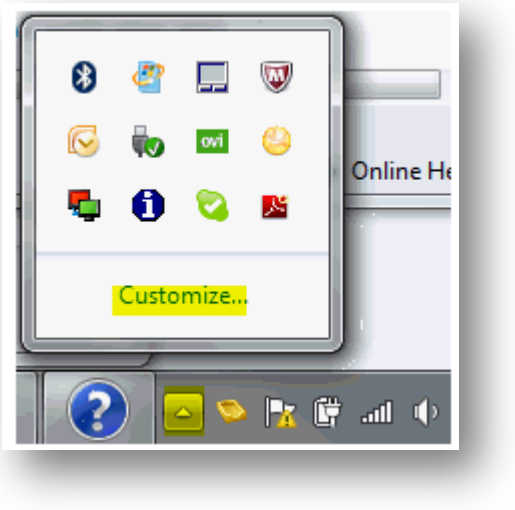
The user ID can be set up to allow access only to the information types that you need to see. For example, if your user ID allows you to view only supplier related documents like purchase orders and invoices but not customer related documents, you will be able retrieve only documents that have been indexed as purchase orders and invoices. Also, if you capture electronic documents, you will be able only to index them as purchase orders or purchase invoices.

Document Management Desktop is installed automatically when the Document Management Server and Client software is installed. After the installation, a new desktop icon is displayed on your Microsoft Windows desktop and a new menu is available in the Windows Notification Area.

This icon is displayed on your Microsoft Windows desktop.

This icon is displayed in the Microsoft Windows Notification area (normally at the bottom of your screen) after Document Management Desktop has been opened. The notification area is located at the far right of the task bar by default, and it contains program icons that provide status and notifications about things like incoming email, updates, and network connectivity.

You can set up your computer so that programs update the notification area differently. In Microsoft Windows 7, you click the arrow to display this form and then click Customise to change how the icons appear. The up arrow is displayed only if there are hidden icons.



The following items are displayed on the Windows Notification menu for Document Management Desktop:

Item	Description
Retrieve document	This opens the log in form. After you have logged in the document retrieval form is displayed. See the How to retrieve a document Help topic for details of how to capture a document.
Capture documents	This opens the document capture form if one or more documents have been captured but they have not been indexed. This menu item is disabled if a capture session has not been started. See the How to capture an electronic document Help topic for details of how to capture a document.
Help	This opens the Help file for Document Management Desktop.
Log off	This logs you off Document Management Desktop. It is only displayed if you have already logged in to Document Management Desktop.
Exit	This exits Document Management Desktop. This closes the menu in the Microsoft Windows Notification area.

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Document Management - The Application

Document Management is a fully integrated Opera 3 module that provides highly efficient and secure document capture and retrieval functionality; both in the Document Management module and throughout Opera 3. Paper documents, previously saved electronic documents and emails can be captured and securely archived.

Documents can be captured and retrieved at header and transactional level via direct modular integration; or captured in batch through the Document Management module. When capturing or retrieving in another Opera 3 module, such as the Sales Ledger, all document type selection and indexing is managed so that there is a minimum of additional clicks or data entry. Indexing can also be done using bar codes.

You can easily see which records have documents attached, because an icon is displayed in the status bar, making it apparent that something is available to retrieve and view.

Barcode scanning is an additional function of PDM and does not prevent the continued use of manual scanning.

Document Management Desktop works directly from your Microsoft Windows desktop. It is both an easy retrieval system of paper documents and electronic files that have been captured to the Document Management databases and an ad-hoc capture system to quickly capture electronic files to the Document Management databases. Document Management Desktop needs access to both the Opera Server installation and the Document Management databases. However, the Opera Client software does not need to be installed on the computer to use Document Management Desktop.

Advanced Document Management

Document Management includes two other features at additional cost - Content Indexing and Deferred Indexing.

Content Indexing captures machine typed text from scanned TIFF (Tagged Image File Format) images, text files (.txt) and documents (.doc) electronic files, then uses the text to index the document. This is an additional, automated method of indexing documents above the manual indexing and barcode indexing methods.

Deferred Indexing is an alternative to Manual Indexing and Barcode Indexing. It allows documents to be scanned, and then indexed later.

Document Management is designed to work with other modules in Opera 3 Enterprise and Opera 3 Enterprise SQL (6.00) or later.

About this Training Guide

Notes

This training guide provides you with background information required in using Document Management Desktop.

This document is designed to aid in the understanding and setting up of bar code scanning in Pegasus Document Management (PDM). It discusses the various components involved and advices on configuration. It does not provide indepth detail about all options but provides an effective summary.

Opera 3 Readme File

The Opera 3 Readme file contains Late Breaking News and any other release specific important information, including information about Pegasus Document Management. You are advised to check this file. It is installed in the Opera 3 Client installation's main folder and can be accessed from the Start menu or Desktop folder after installation.

Notes

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1 Getting Started

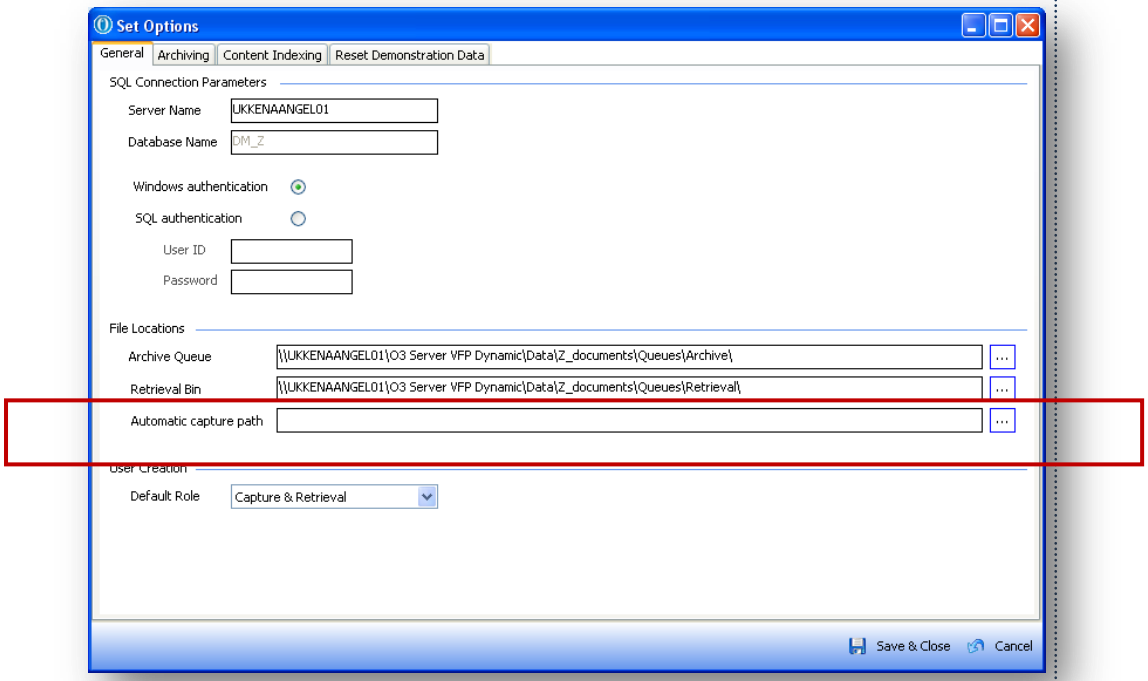
1.1 System Requirements

Document Management must be installed and activated on the system with Opera 3. SQL Server or SQL Express. If you follow the pre-requisites required for Document Management, the desktop edition should work correctly.

NB: Document Management Desktop is installed as part of the client installation of Document Management version 3.x onwards. DM Server Upgrade, DM Client must be uninstalled (v2.x) and v3 Client installed as new.

1.2 Set-Up Set Options

Use the Set Options command to specify options and controls that affect the operation of the Document Management module. The settings include Microsoft SQL Server Connection parameters, file locations for scanned documents, default roles for users, archiving settings, and context indexing settings.



General Tab

General settings dictate primary options used by Document Management to access the associated SQL databases, to archive captured documents, and to set the default parameters for new user creation.

Box	Description
SQL Connection Parameters	These will be automatically created by the system and should not be adjusted without appropriate Microsoft SQL Server knowledge.

Getting Started

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File Locations	The Archive Queue and Retrieval Bin are temporary locations where files are written to and read from when documents are captured or retrieved. They act as a cache for the document archive and therefore all users must have full access to the paths entered here. These paths will default to an appropriate location based on the location of the company's data. If necessary they can be changed by typing a location or by selecting a location using the ellipses […] button to the right of the field. **Note:** Any documents that are captured but are not indexed until later using the Deferred Indexing feature, remain in the Archive folder until they are indexed. They are then moved to the Storage folder defined on the Archiving tab in the Disk Settings folder.
	The Automatic capture path is where you can define a folder that is used by Document Management Desktop. When a document is either copied into this folder or a new document is created in the folder, the login form for Document Management Desktop is displayed so you can capture the document. What's Document Management Desktop?
User Creation	This is the default role associated with new users that are created in the User Profiles command in the System module. **Tip**: To avoid the risk of giving full rights to all users in Document Management, set this to a role that has minimal rights.

Archiving Tab

Archiving options define when and where documents should be archived after they have been captured.

Box	Description
Schedule Settings	Archiving of captured documents can be done continuously or between certain times. Select 'Continuously' if the capture, and therefore archiving, volume is small. For example if you capture less than 100 documents per day and each document is just a few pages. Select 'Between' if the archiving load is heavy and set the time range to when the load on the database is minimal, for example outside normal working hours. This will avoid any undue performance issues on shared servers.
Disk Settings	Disk settings define where documents are archived and the preferred prefix used when the documents are archived. The default configuration uses the company letter as the prefix and a folder called ?_documents\Storage (where ? is the company identifier) below the data path as the location. The document archive is created automatically by the system. The system creates a number of folders to keep the images. In each top level folder it creates 250 subfolders, numbered 1 to 250. Within each sub-folder it will archive 100 files. This structure provides an efficient and manageable file structure without limitation in size. **Important:** Do not change the location unless the data is to be kept separately from the main company data. If you do change the location, you must remember to include it in your backup procedures.

Content Indexing tab (Advanced Document Management)

Content Indexing is available if your activation includes the Advanced Document Management feature. Content Indexing captures machine typed text from scanned TIFF (Tagged Image File Format) images, text files (.txt) and document (.doc) electronic files, then uses the text to index the document. Inclusion and exclusion dictionaries let you manage the words that are used to update the indexes. For more information, see the How to use Content Indexing Help topic.

Content Indexing of captured documents can be done continuously or between certain times.

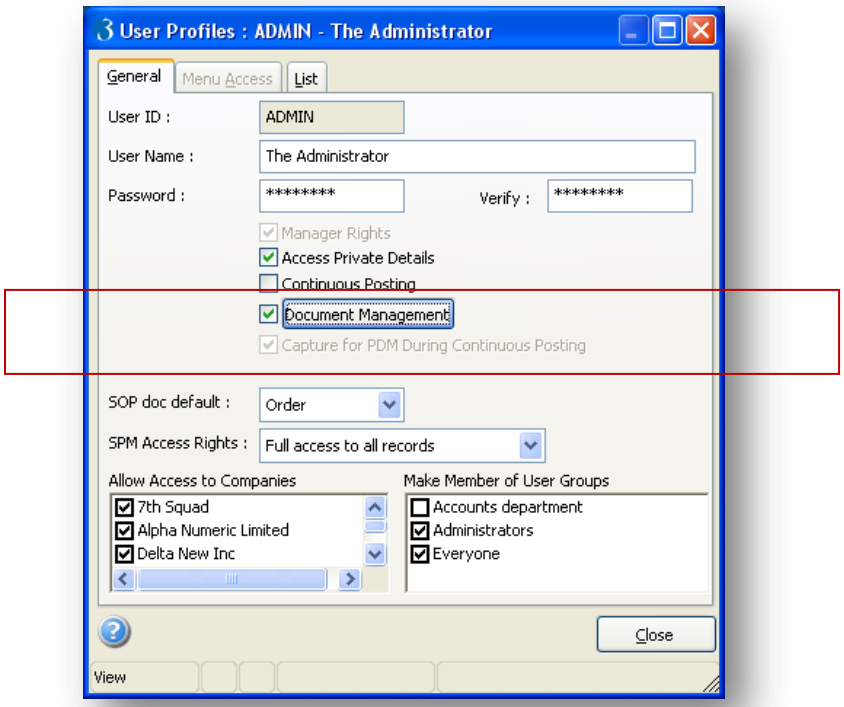
Notes

Box	Description
Schedule Settings	Select 'Continuously' if the capture, and therefore indexing, volume is small. For example if you capture less than 100 documents per day and each document is just a few pages. Select 'Between' if the indexing load is heavy and set the time range to when the load on the database is minimal,for example outside normal working hours. This will avoid any undue performance issues on shared servers. **Important:** Indexing .txt and .doc electronic files relies on Microsoft Word being installed. Indexing the content of scanned images relies on Microsoft Office Document Imaging (MODI), which is part of the Microsoft Office Tools suite. It is normally installed when Microsoft Office is installed. MODI must be installed on each client computer that uses Content Indexing. For more information, see the Document Management Installation Guide.

1.3 User Profiles

Before users can log on, they must be identified in the User Profiles form. Each user is identified by a unique user ID and you can optionally assign a password. These details are entered in the User I.D. and Password boxes on the Logon form to identify to the system that user's level of authority. By using the User Profile form, you can limit the access a user can gain to companies and commands. User records are controlled by system 'managers'. A manager in this context is someone who is given certain rights that include the means to define and control other user records. As a manager, you can control user passwords, and which companies, menus and commands to which a user can gain access. Two default user records MANAGER and ADMIN (both without passwords) are provided when the software is installed.

Important: For security reasons, we recommend that the system administrator or another person responsible for the system who will have manager rights, sets up a password for this default user record, otherwise anyone can log on with that ID and have access to all commands in the system.



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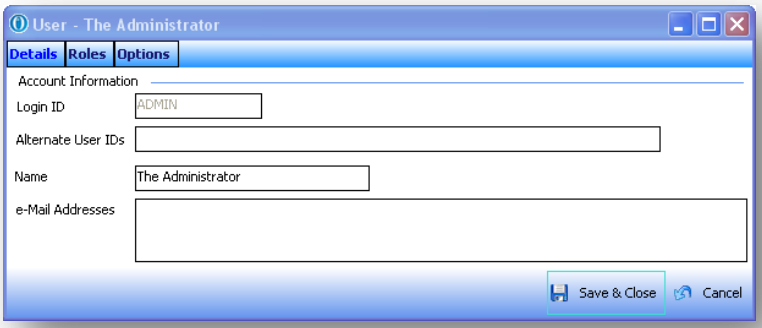
1.3.1 Menu Access

You can control the access to menus and commands that your users have. The ADMIN and MANAGER users have access to all menu items in the application.

Example:
*In your organization there are users whose job is to deal with sales ledger credit control enquiries. Using the **Menu Access** tab on the **User Profiles** form, you can limit access only to those commands that allow them to locate and view customer records and print sales reports. No other commands will be available to such users after logging on.*

1.3.2 Document Management



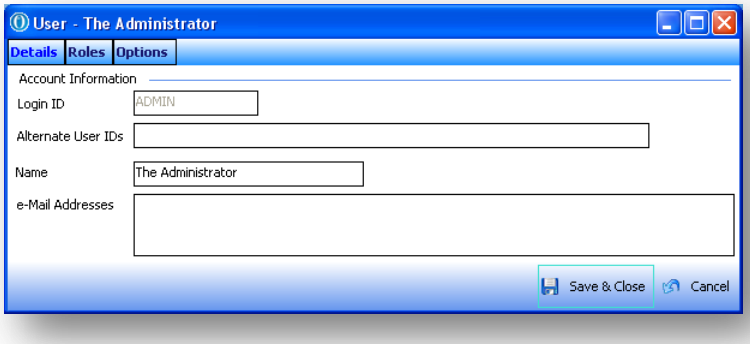
Giving Users access to Document Management

A user must be defined as being a Document Management user before they can capture or retrieve documents. If the user is already logged onto Opera 3, they must log on again to inherit the changes to the user profile.

The User Profiles command is launched from the System > Maintenance > User Profiles menu item.

To Give Users access to Document Management

1. On the User Profiles form, select the user from the List grid then click the General tab.
2. Tick the *Document Management* option and then click the Save button on the Opera 3 toolbar. The Users Wizard form is displayed. If the option is already ticked because the user already has Document Management attributes set, you can click the Document Management button to load the Users Wizard form.
3. On the Details tab the Login ID, Name and e-Mail addresses for the user are displayed. You can change the name of the user that is displayed in Document Management. The email addresses are for future use in Document Management so do not have to be completed.



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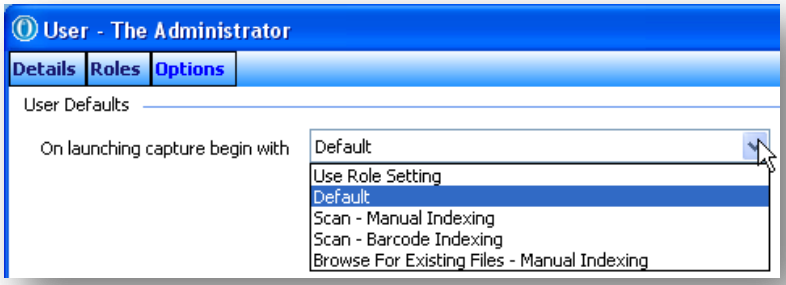
4. Click the Roles tab to add roles to the user that were previously defined in Document Management > Maintenance > Roles. A Role is defined as a set of options and attributes that are applied to a group of users.
5. Click Add Role to add an existing role to the user.
6. Click Delete Role to remove an existing role from the user.
7. If you allocate more than one role to the user, highlight the role for the user that you want to define as the primary role, then right-click and select Set Primary Role. The primary role is used when roles allocated to a user clash on a particular role attribute, for example if two roles have been defined for retrieving documents – the primary role allowing the user to re-index the document once it has been retrieved but the second role does not allow this, the primary role is used and re-indexing is allowed. Primary roles are displayed in bold. For more information about roles in Document Management, see the Roles section.

8. Click the Options tab if the user is able to capture documents in Document Management > Processing. This setting defines which form is displayed:



Default	The user will be presented with the standard screens to choose what they wish to do
Use Role Setting	This setting will be overridden by the equivalent Role setting defined in Document Management > Maintenance > Roles.
Scan Manual Indexing	The user will be automatically placed in Scan, Manual Indexing
Scan Barcode Indexing	The user will be automatically placed in Scan, Barcode Indexing
Browse for Existing Files Manual Indexing	The user will automatically be placed in Browse for Existing Files, Manual Indexing

9. Click **Save & Close**, or **Cancel** to lose any changes.

Notes

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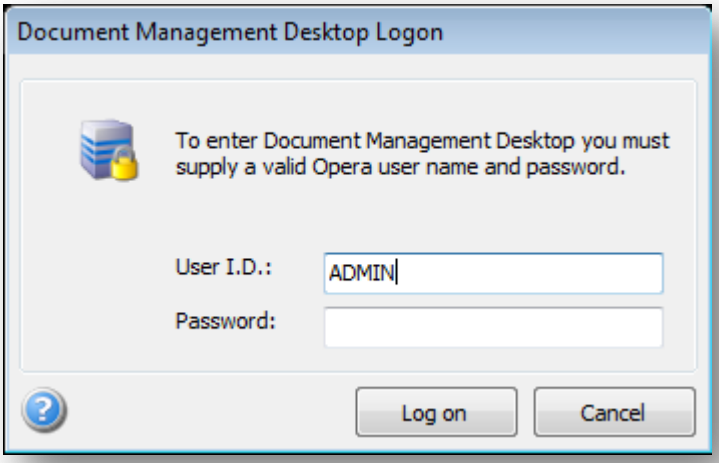
2 Using Document Management Desktop

2.1 Document Management Desktop Logon

You are prompted for your user name and password when you log on to Document Management Desktop. If your software licence permits, you may also use additional systems, each comprising up to thirty six companies. If this is the case, you will be able to choose which system you want to use as part of the logging on procedure.



A message is displayed if you try to log on to Document Management Desktop when the maximum number of users are already logged on. For example, you may have a licence for three people to use Document Management Desktop at the same time, and a fourth person tries to log in. You are also prevented from logging in to Document Management Desktop if you are logged in on another computer.

Box	Description
User I.D	Every user has a unique Opera user code that must be used to access Document Management Desktop. Users are created in the System Manager - Maintenance - User Profiles command in Opera.
Password	Your password used for authorization when you log on to Document Management Desktop. **Note:** You may be forced to change your Opera 3 password every so often if the number of days in the Password Expiry Days box on the System Manager - Utilities - System Preferences form is more than zero. You are warned for up to ten days before your password will expire. You must then change your password before it expires using the Preferences command in the System module.
System	*If you use additional systems, you must choose a system to log in to. Each additional system is independent of other systems in the application. These systems are created in the System Manager - Maintenance - Additional Systems command.*

Using Document Management Desktop

Notes

2.1.1 To Log In to Document Management Desktop

Document Management Desktop is a secure application – you have to log on using a user ID that is created in Opera. Even if you are someone who does not use Opera, your system administrator still needs to create an Opera login ID for you to use Document Management Desktop. An Opera installation includes a certain number of users. For example, an Opera five-user system means that five people can use Opera at the same time. However, more user IDs can be set up if necessary to use in Document Management Desktop.

Each installation of Document Management includes one free Document Management Desktop user. If you require more people to use Document Management Desktop, there is additional cost for each user.

1. Double-click the Document Management Desktop icon on your Microsoft Windows desktop.
2. The Logon form is displayed. Enter your Opera User ID and password.
3. If you use additional systems, you must choose a system to log in to. Each additional system is independent of other systems in the application. These systems are created in the System Manager - Maintenance - Additional Systems command.
4. Click Log on.

Note: To log off, click the Log off menu item on the Document Management Desktop menu in the Windows Notification area. After logging off you will need to log on again before you can access Document Management Desktop

2.2 Capture Documents (Document Management Desktop)

The Document Management Desktop capture form is a simple form that allows you to capture electronic files like Microsoft Word documents or Microsoft Excel spreadsheets. As long as your user profile permits you to capture documents, the form allows you to choose the Opera company you want to update along with the information type you want to use to index the document. Your preferred company is displayed by default. The index or capture date default to the date on the computer but can be changed.

All the documents that you have captured are indexed together using the same indexing information. If you have electronic documents to capture that need to be indexed differently, for example a supplier purchase order and details about an employee, you should capture these in different capture sessions.

After the file/s have been committed a message is displayed asking you whether the original files should be removed from the original location in Microsoft Windows. You can therefore decide to keep just the archived copy of the file in Document Management (to possibly avoid confusion about which copy is the most recent), or to keep a copy in Microsoft Windows as well as the archived copy.

Note: There are three methods to capture documents in Document Management Desktop. You can drag and drop a file into the Document Management Desktop icon on your Microsoft Windows desktop, use the **Send To** option on the mouse 'right-click' menu, or move a file to a folder - entered in the **Automatic capture path** box on the Document Management - Utilities - Set Options form.

Notes

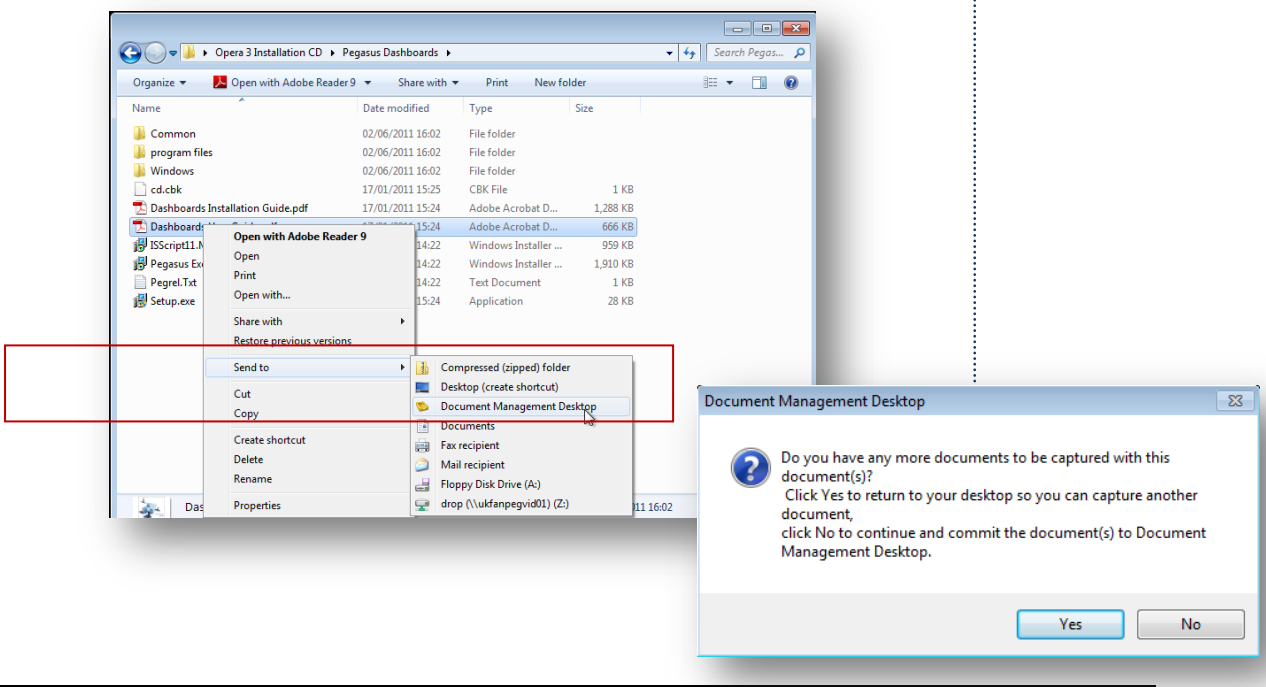
Box	Description
Company	A list of the companies that you have access to in Opera. Your preferred company is displayed by default.
Information Type	The information types that you have access to, according to the User Role linked to your User ID. Information Types define the types of documents that are captured in Document Management. They are a representation of the different types of document that you may need to scan. The view of Information Types is structured like the the application's menu structure in the various groups, like 'Financials' and 'Payroll & HR'. Beneath the groups, the modules are displayed, like 'Sales' and 'Personnel'. Index details are also defined for each information or document type. For example, a sales invoice can be indexed by the account code, company name and the document reference (or invoice number).
Index Captions	Once the information type is selected, the relevant boxes are displayed for you to update. For example, if the *Purchase - Processing - Invoice* information type is selected, boxes for the Account Code, Company Name, Reference 1 and Reference 2 are displayed. The **Index Date** is set to the date set on the computer but can be changed after the other index boxes have been updated.

2.2.1 To Capture an Electronic Document in Document Management Desktop

The Document Management Desktop capture form is a simple form that allows you to capture electronic files like Microsoft Word documents or Microsoft Excel spreadsheets. As long as your user profile permits you to capture documents, the form allows you to choose the Opera company you want to update along with the information type you want to use to index the document. Your preferred company is displayed by default. The index or capture date default to the date on the computer but can be changed.

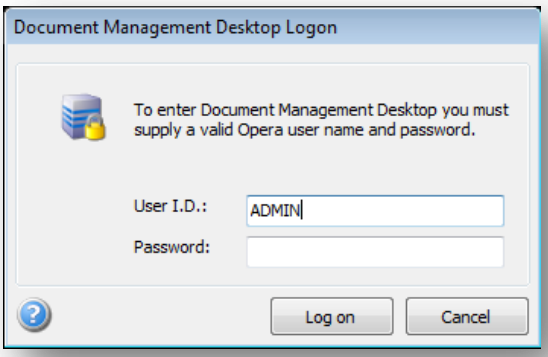
Important: All files that are captured together in Document Management Desktop will be indexed using the same information type and indexing information. For example, if you capture two files, they will be indexed to the same customer or supplier.

1. Using Windows Explorer, locate the file you want to archive and highlight it by clicking on it.
2. Using your mouse, do either of the following:
   - Right-click, choose Send to from the menu and then select Document Management Desktop

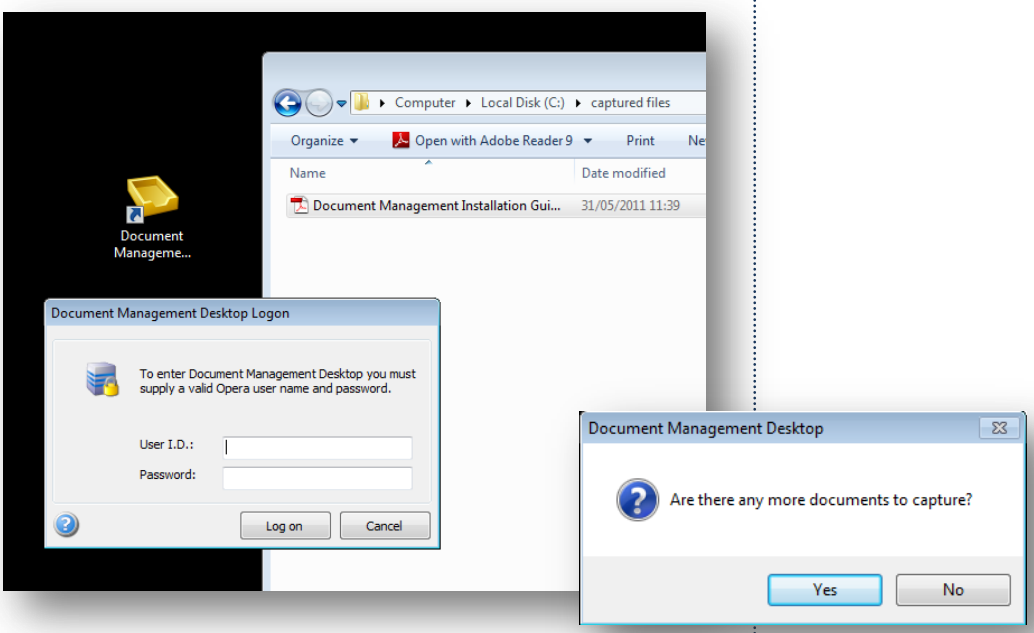


Notes

- Drag the file onto the Document Management Desktop icon on your Windows desktop

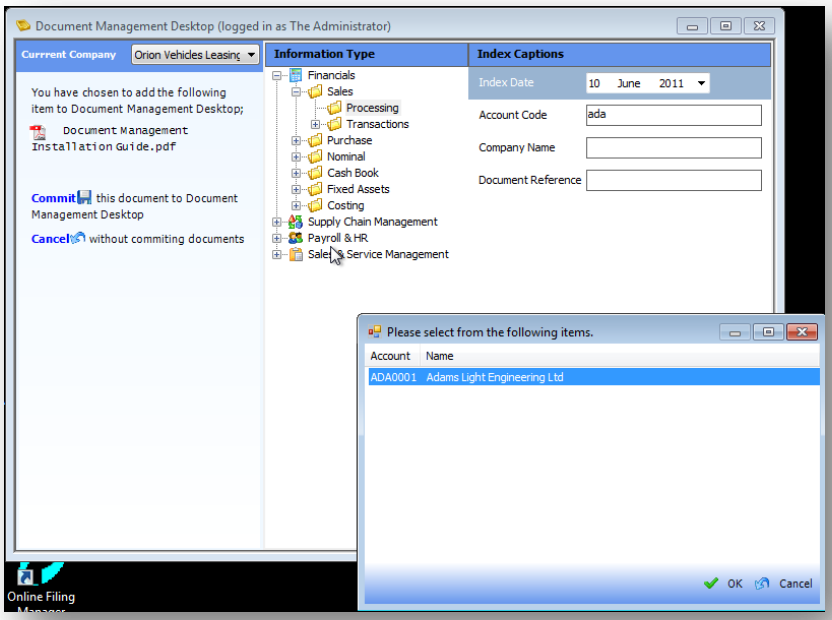


- Drag the file into the folder defined in the Automatic capture path box on the Document Management - Utilities - Set Options form.

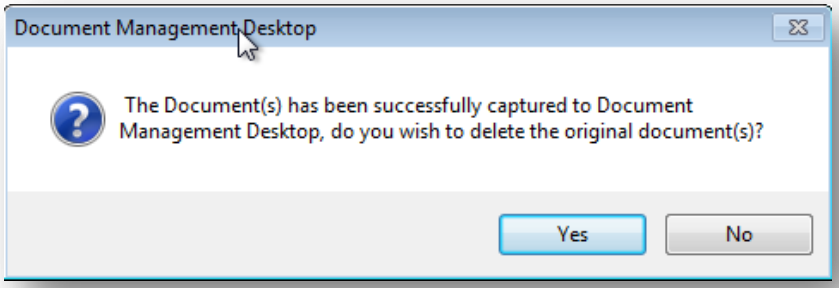


3. If you are not already logged in, enter your Opera login details. A message is displayed that asks whether other you are going to archive another file. Click Yes to return to Microsoft Windows. You can then either locate another file to archive or continue working as normal. The file will remain in Document Management Desktop until you index it..
4. Click No to open the capture form in Document Management Desktop so you can enter the index details and then commit the file/s to the database. The file/s that you have captured are displayed on the left of the form. Choose the information type you want to use and then update the index information under Index Captions.

Notes



5. Click Commit on the left of the screen to commit the file/s to the databases. After the file/s have been committed a message is displayed asking you whether the original files should be removed from the original location in Microsoft Windows. You can therefore decide to keep just the archived copy of the file in Document Management (to possibly avoid confusion about which copy is the most recent), or to keep a copy in Microsoft Windows as well as the archived copy.



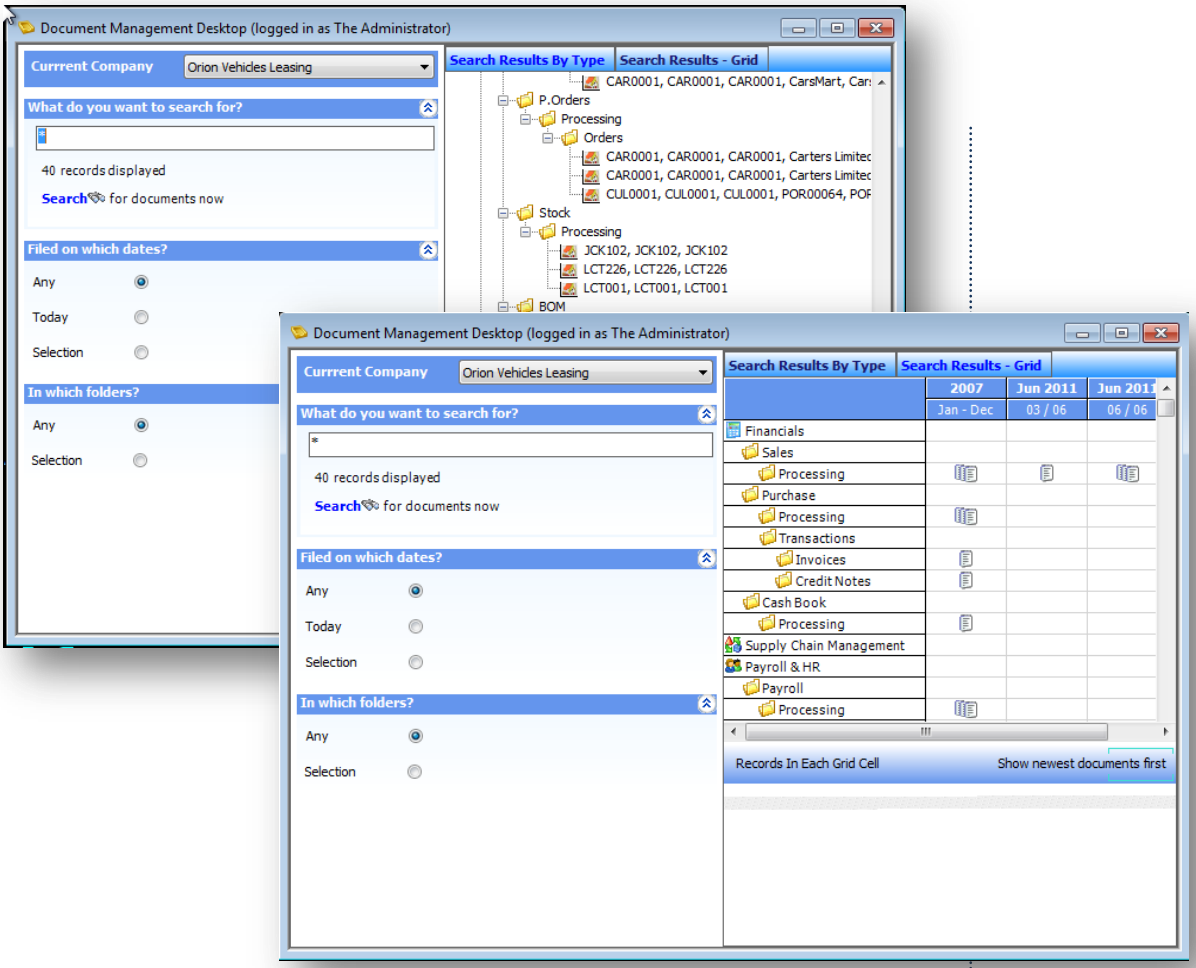
2.3 Retrieve Documents (Document Management Desktop)

The Document Management Desktop retrieve form is a simple form that allows you to retrieve any files that have been archived in Document Management, including electronic files and paper documents. The form allows you to choose the Opera company you want to retrieve the files from, the date the file was archived and the information type used.

You can only retrieve documents that have been indexed using information types you are allowed to view according to your role.

Your permissions are set on your user login ID which are maintained on the System Manager - Maintenance - User Profiles form.

Notes



Box	Description
Company	A list of the companies that you have access to in Opera. Your preferred company is displayed by default.
What do you want to search for?	You can search for documents using the following methods: · Single word/number - a single entry that will select all documents with indexes that include the word or number · Space separated multiple word/numbers - a selection of words or numbers with spaces interpreted as 'AND'. For example, John Smith meaning John AND Smith in any order within the indexes finding any document with both indexes · 'OR' separated multiple words/numbers - a selection of words or numbers separated by 'OR'. For example John OR Smith meaning John or Smith in any order within the indexes finding any document with either index · Phrase - a selection of words or numbers within speech marks interpreted as a single string. For example 'John Smith' meaning John Smith as two consecutive words.
Filed on which dates?	You can choose to search for documents that were filed on any day, those documents filed today (the computer's date) or documents filed between a date range, for example between the first and last days in a month.
In which folders?	When files are captured they are allocated an information type, which are displayed as folders. You can choose to search in all information types in the Document Management database, or select the information types you are interested in.

Notes

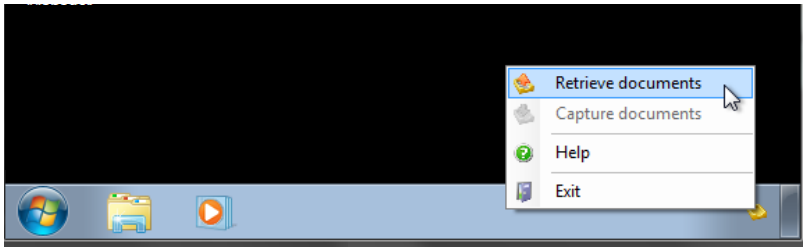
2.3.1 To Retrieve an Archived Document in Document Management Desktop

The Document Management Desktop retrieve form is a simple form that allows you to retrieve any files that have been archived in Document Management, including electronic files and paper documents. The form allows you to choose the Opera company you want to retrieve the files from, the date the file was archived and the information type used.

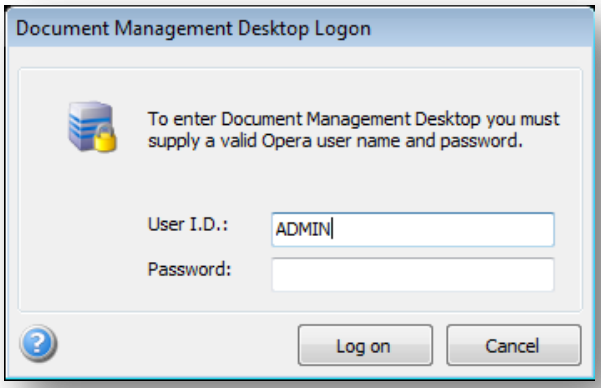
You can only retrieve documents that have been indexed using information types you are allowed to view according to your role. Your permissions are set on your user login ID which are maintained on the System Manager - Maintenance - User Profiles form.

1. Do either of the following:
   - Double-click the Document Management Desktop icon on your Microsoft Windows desktop

   - Right-click on the Microsoft Windows Notification area (normally at the bottom of your screen) and select Retrieve Documents.



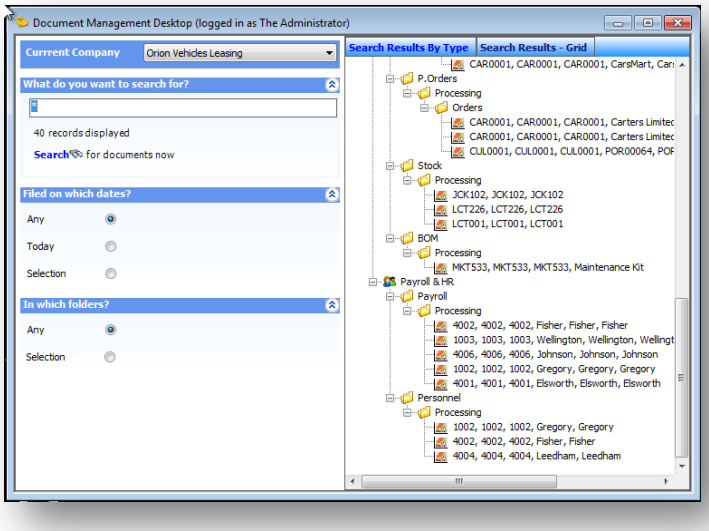
2. If you are not already logged in, enter your Opera login details.



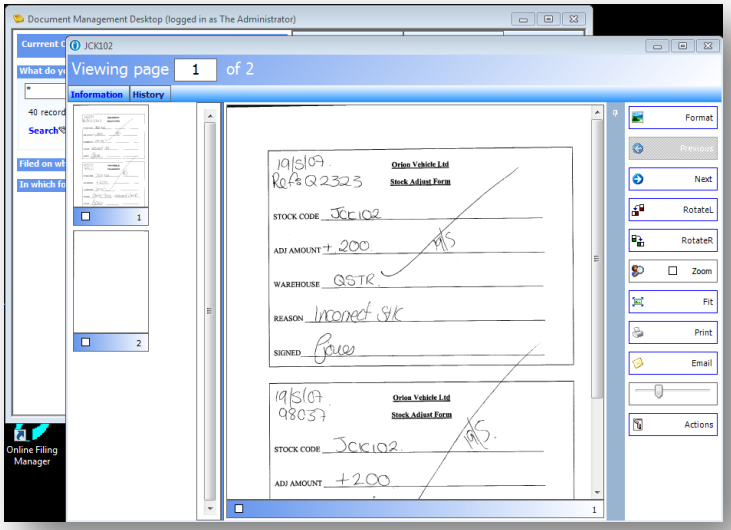
3. Under Filed on which dates, select Any if you do not know when the file was archived, Today if the file was archived today (the computer's date) or Selection for documents filed between a date range, for example between the first and last days in a month.
4. Under In which folders, select Any to search in all information types in the Document Management database, or Selection to choose the information types you are interested in.
5. In the What do you want to search for? box enter the details you are looking for using one of the following methods:
   - Single word/number - a single entry that will select all documents with indexes that include the word or number

Notes

- Space separated multiple word/numbers - a selection of words or numbers with spaces interpreted as 'AND'. For example, John Smith meaning John AND Smith in any order within the indexes finding any document with both indexes
- 'OR' separated multiple words/numbers - a selection of words or numbers separated by 'OR'. For example John OR Smith meaning John or Smith in any order within the indexes finding any document with either index
- Phrase - a selection of words or numbers within speech marks interpreted as a single string. For example 'John Smith' meaning John Smith as two consecutive words.



6. Click Search for documents now.



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Appendix

Appendix A Components & Useful Utilities Notes

.Net Framework

.Net Framework (v2)

This MS component is provided on the DVD ROM but alternatively may be downloaded from the MS Download centre Website. Recommend to search or try the following link as a guide - http://www.microsoft.com/downloads/details.aspx?FamilyID=0856eacb-4362-4b0d-8edd-aab15c5e04f5&DisplayLang=en

.Net Framework (v3.5 sp1)

This MS component is provided on the DVD ROM but alternatively may be downloaded from the MS Download centre Website. 3.5 is required for Dashboard version 2.6+. Recommend to search or try the following link as a guide - http://www.microsoft.com/net/Download.aspx

Loopback Adapter

On standalone systems which run Windows XP or lower, a MS Loopback Adapter may be required. This allows UNC paths to be resolved (pretend it is on a Network). The current Loopback Adapter provided by MS runs at 10Mbs. Windows Vista has this pre-installed but be aware this can be turned off.

There are several articles on the MS website to install the Loopback Adapter – suggest a Google search is done to find the appropriate steps (www.google.co.uk).

As an example the XP steps are found here - http://support.microsoft.com/kb/839013

1. Click Start, and then click Control Panel.
2. If you are in Classic view, click Switch to Category View under Control Panel in the left pane.
3. Double-click Printers and Other Hardware, and then click Next.
4. Under See Also in the left pane, click Add Hardware, and then click Next.
5. Click Yes, I have already connected the hardware, and then click Next.
6. At the bottom of the list, click Add a new hardware device, and then click Next.
7. Click Install the hardware that I manually select from a list, and then click Next.
8. Click Network adapters, and then click Next.
9. In the Manufacturer box, click Microsoft.
10. In the Network Adapter box, click Microsoft Loopback Adapter, and then click Next.
11. Click Finish.

SYSINTERNALS Utility Suite

The Sysinternals Troubleshooting Utilities have been rolled up into a single Suite of tools. This file contains the individual troubleshooting tools and help files. It does not contain non-troubleshooting tools like the BSOD Screen Saver or NotMyFault.

It contains FileMon and RegMon with respective help files on how to use them. These two utilities are invaluable when checking permissions and access rights to files, folders and registry keys.

http://technet.microsoft.com/en-us/sysinternals/0e18b180-9b7a-4c49-8120-c47c5a693683.aspx is the latest link and was updated in March 2009. This is the complete Sysinternals suite that has several useful utilities. To ensure you have the most up-to-date suite, please ensure you search the Microsoft Technet site thoroughly, however we endeavour to keep the most updated link in the courseware.

Code 128 Font

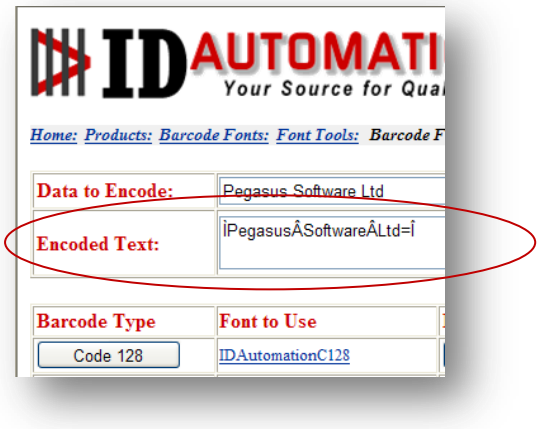
Font 128 understand special characters such as a space, however Ascii codes are required for this. For example;

If you wanted to put the text “Pegasus Software Ltd” in Code 128 you would do:

“Pegasus”+Ç+”Software”+Ç+”Ltd” (Example from developers)

http://www.bcgen.com/fontencoder/default.aspx is an online encoder page. Place the text in the box and click the font you wish to encode it too.

Example from Website;



Copy and paste the encoded text to notepad, print and scan.

Font 128 also require certain open and close characters. Further information can be found on the web, for example; http://www.idautomation.com/fonts/code128/ and how the font 128 encoding automatically could work including license details (this would be external to Pegasus)
http://www.idautomation.com/foxpro/#module

NB: Although Code 128 can interpret spaces far simpler than code 3 of 9 (if at all), it is unlikely that indexes required as barcodes will contain spaces. Code 3 of 9 would be the preferred solution.

Accreditation Training Courseware

Other Guides and Help

The following user documents are also provided with the respective software. Guides are available from various sources including Answerlink, the Opera 3 CD and from the Opera 3 Client installation's main folder, normally *C:\Program Files\Pegasus\O3 Client XXX\User documents (where XXX is either VFP or SQL)*. Some guides are also available from the Opera 3 Help menu or respective software Help menu.

Readme File

The Readme file is an HTML document. It contains late breaking news and any other release specific important information.

Note: This file can also be accessed from the Opera 3 CD Installation Menu with regards to Opera 3.

Release Guide

When new versions are released such as Opera 3, they are normally accompanied by a Release Guide that contains information such as What's New in this Release, Release History, and Functional Differences between versions.

Note: This guide can also be accessed from the Opera 3 CD Installation Menu with regards to Opera 3.

Installation Guide

The Installation Guide is provided to help you install the application in your chosen Windows environment. It contains technical information and advice to ensure the installation process is successful.

Demonstration Data Guide

This guide is provided to assist the use of the demonstration data and contains pertinent information that is not contained elsewhere in the product documentation. It is recommended that the Help be used at the same time.

Implementation Guide

The Implementation Guide provides a high-level view of an application such as Opera 3 and how to approach an implementation. It details how the modules are integrated, and recommends the order in which elements should be set up.

System Requirements Guide

The System Requirements Guide details the minimum and recommended computer hardware and software requirements that are required to install and use software such as Opera 3 Enterprise and Opera 3 Enterprise SQL.

It also includes guidance on using Opera 3 Enterprise and Opera 3 Enterprise SQL in a Terminal Services environment run in Windows Server 2003 and Windows Server 2008 (32-bit & 64-bit).

Help

F1 Help provides details of all the functions available in the application.

Document Management & Executive Dashboards Guides

Installation Guides are available for both Document Management and Executive Dashboards. A user guide is also available for Executive Dashboards. Help for Document Management is in the Opera 3 Help.

Note: The guides are in the respective folders on the Opera 3 CD and can be accessed from the Opera 3 CD Installation Menu.