

DbAuthorise user and administrator guide

Document Management & Imaging



This document describes the DbAuthorise software. Part of the Version One document management suite – award-winning paperless office solutions.

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In this document...

Introduction	1
Version One document management suite	2
Document creation and distribution	2
Document scanning and archiving	3
Document data capture	4
Document authorisation	4
The document management suite applications and client tools	5
See also:	6
Using the document management suite	7
Before you log in	7
The login window	7
Programs menu option	7
Recently used menu option	8
Desktop shortcut option	8
Customising windows	8
Toolbars	8
Using the windows	9
Sizing columns	9
Sorting columns	9
Moving columns	9
Filtering columns with search	9
Clearing your search criteria	10
Date picker	10
Complex searches	10
Clearing multiple search criteria	10
Choosing fields	10
Using help	12
Links and how they work	12
Screen shots	12
The icons	12
Finding a help topic	13
Glossary	14
Accessing the applications – logging in	15
DbLogin admin console	16
Securing your data	17
Server	17

Scan station	17
About us	18
Getting in touch	18
Problems and queries	18
Copyright and small print	18
Help about	19
Standard toolbar options	19
DbAuthorise	22
About DbAuthorise	23
Document authorisation.....	23
Authorisation routes.....	23
DbAuthorise emails	24
DbAuthorise screens	24
Users.....	24
Using the client – regular users	26
File menu.....	26
View menu	27
Entry menu	29
View / edit data	30
Using the client – administrative users	33
File menu	33
DbAuthorise administrators – view menu	34
DbAuthorise administrators – entry menu	36
DbAuthorise administrators – help menu	37
DbAuthorise management console	39
About the management console	39
The authorisation grid.....	40
Routemap menu	42

Configuring DbAuthorise	43
Configuring and maintaining DbAuthorise	43
Using DbAuthorise history	44
DbAuthorise configuration window	45
Routemaps	46
Managing routes	46
Route details	46
Adding a new route	48
Adding a new state	48
Editing conditions	48
Adding a new condition	49
Reordering actions	49
Adding more states	49
Saving changes	49
Updating a route	51
Changing a person	51
Updating actions	51
Adding a new state	51
Removing a state	51
Saving any updates	51
Removing a route	52
Copying user data fields to a route	53
Copying user data field names to a route	53
Renaming data fields	54
Replacing a username	55
Glossary	56
Index	59

Introduction

Version One document management suite

Overview: the document management suite provides scanning and document management facilities for electronic handling of paper documents. It can be used to automate and simplify your:

- sales document cycle (order to cash)
- purchasing cycle (purchase to pay)
- other archiving requirements (HR documents, technical documents, etc).

These solutions save significant amounts of time, money and storage space. Typical documents:

- sales order invoices
- purchase orders
- statements.



Software installation is normally handled by Version One, or another specialist, and is not covered in this help.

The Version One document management suite is a comprehensive collection of software tools to automate document processes within their core application environments. Using the software you can replace paper-based processes with electronic procedures, eliminating printing, posting and manual filing.

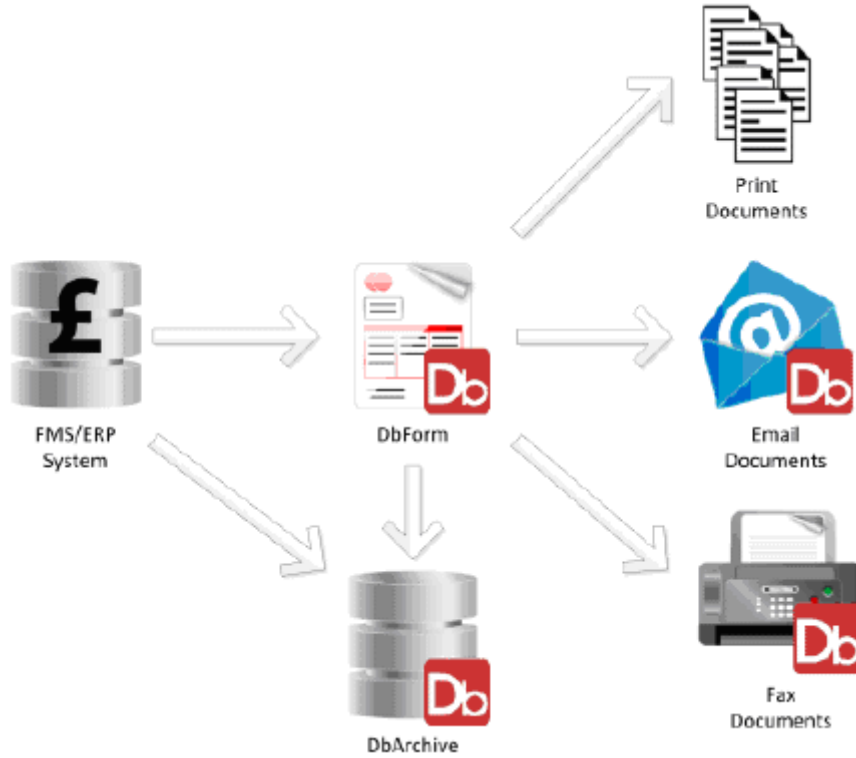


There are many different ways of configuring and using the software, using different combinations of the core product set. You may not have the complete applications suite installed.

The document management suite is made up of a number of integrated application modules that work together to give the desired functionality. These applications are broken down into the following areas:

Document creation and distribution

Documents based on data from core systems may be formatted as professional output documents which can then be printed, faxed, emailed and archived based on defined business rules.



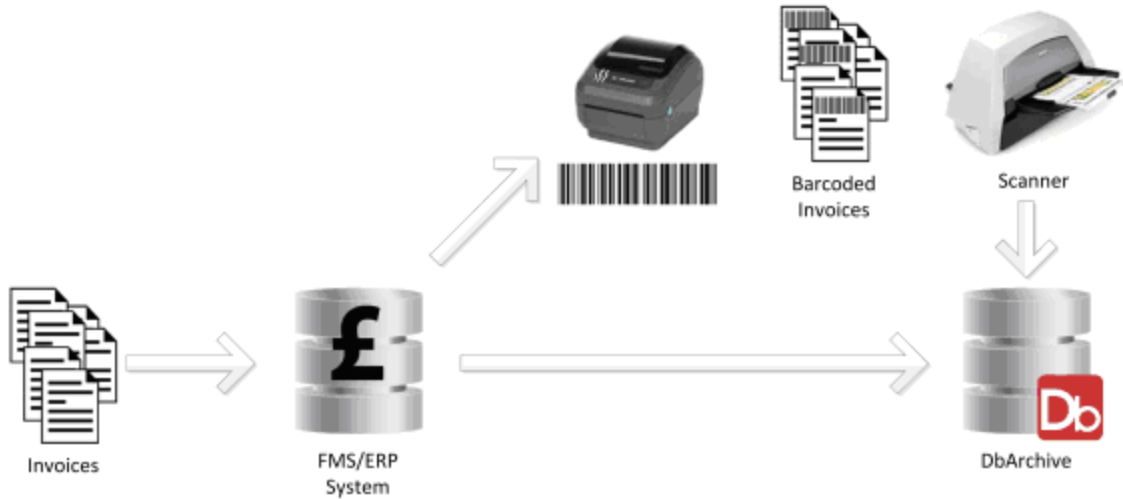
Several applications support these processes:

Application	Description
-------------	-------------

DbForm	Document formatting and business rules management.
DbFax	Sending documents by fax.
DbMail	Sending documents by email.
DbArchive	Archiving outbound documents.

Document scanning and archiving

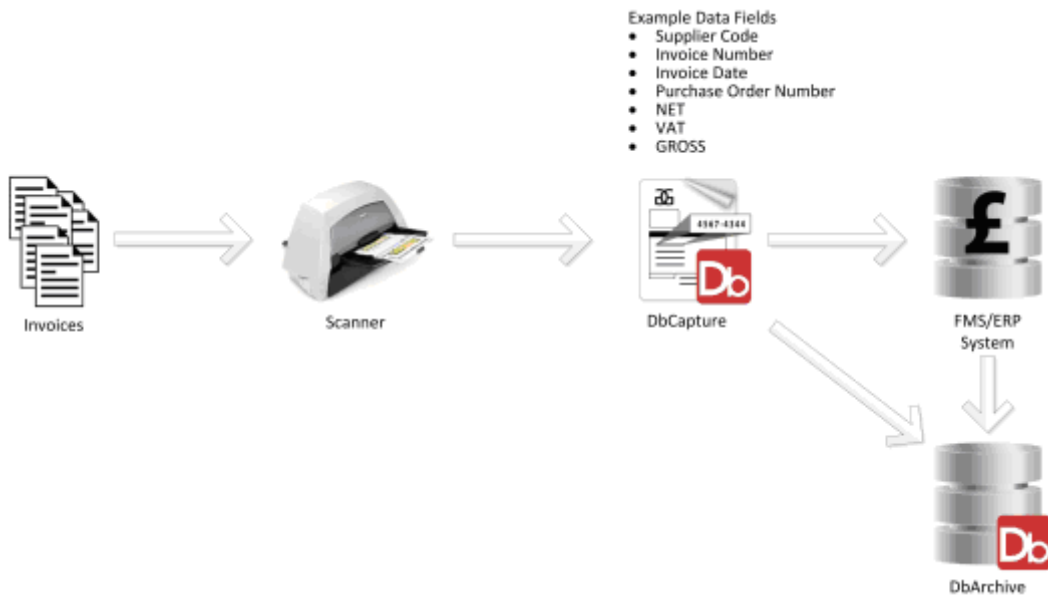
Incoming paper documents such as invoices and orders may be scanned and stored for easy access and for statutory purposes (eg to comply with UK HMRC legislation). The basic process makes use of barcoding techniques for document separation and recognition.



The application supporting document scanning and retrieval is DbArchive.

Document data capture

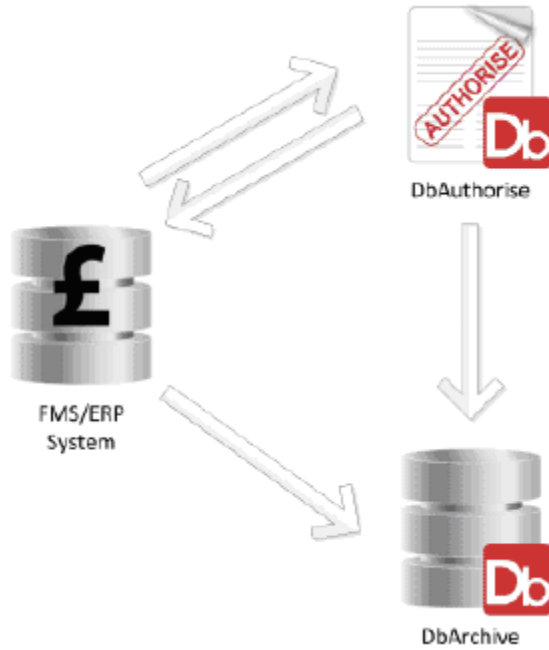
This process typically involves scanned documents such as purchase invoices. The document data can be intelligently captured using OCR technology and validated, so transactions can be automatically posted to the core finance system.



The application supporting intelligent data capture and transaction posting is DbCapture.

Document authorisation

This process typically involves documents such as purchase invoices captured using DbCapture and now requiring coding and approval for payment.



The application supporting document routing and authorisation is [DbAuthorise](#).

The document management suite applications and client tools

The following applications and associated client tools are available as part of the Version One Document Management suite:

Application	Client tool	Description
DbLogin	DbLogin admin console	The master utility for managing the Version One Document Management suite and who has access to it.
	Green meter console	Shows the environmental benefits from using the suite.
DbForm	DbForm GUI designer	Design the format of the outgoing documents.
DbFax	DbFax client	Manage the DbFax system. Create and send faxes from a client PC.
DbMail	DbMail admin client	Manage the DbMail system.
DbArchive	DbConsole	Configure the Tables and Access Levels available within the DbArchive system. Manage the DbArchive system.
	BLOB type manager	Configure new document formats on DbArchive systems using the Native Documents Option.
	Failed deposits manager	Deal with documents that have failed to deposit correctly into DbArchive.
	DbQuery	Document search and viewing facilities based on the user's designated access rights.

	DbWebQuery	The web based alternative to DbQuery for document search and retrieval.
	DbWebRetrieve	Additional functionality to DbWebQuery, providing better searching and enhanced usability.
	Index manager	Amend the search data values for stored documents and copy or move documents between DbArchive tables.
	DbDeposit	Store ad-hoc documents, which exist already directly into the archive.
	DbScanner	Scan documents for storage in DbArchive and optional intelligent data capture within DbCapture.
DbArchive export	Export documents from DbScanner into DbArchive	
DbCapture	DbCapture export	Export documents from DbScanner into DbCapture.
	DbCapture admin	Manage the queue of documents being processed within DbCapture.
	DbCapture interactive client	Process individual documents within DbCapture and to create templates for new document formats.
	DbAuthorise DbAuthorise client	Coding and approval of documents within DbAuthorise. Manage the Routing Rules and other management tasks.



Customisation: Some applications may not be installed on your system, depending on your license, any packages you are interfacing with (eg Accounts) and choices made during installation. You may have modules embedded in a parent application, so you would not necessarily see them branded as Version One.

See also:

[Using the Version One document management suite](#) more on using the applications

[Using help](#) more about using this help

[Using the windows](#) general conventions for working with data in the software.

Using the document management suite

Overview: the Version One document management suite has a number of common features. This topic outlines some of the common functions used across the product family.

Before you log in

To log in to the Version One document management suite you need the following:

- the software must be installed on your PC or laptop
- user name — your system administrator should have created this for you. This is your identity on the Version One document management suite
- password — your system administrator should have created this. If you are not using Windows authentication you can change this once you log in to the Version One document management suite.



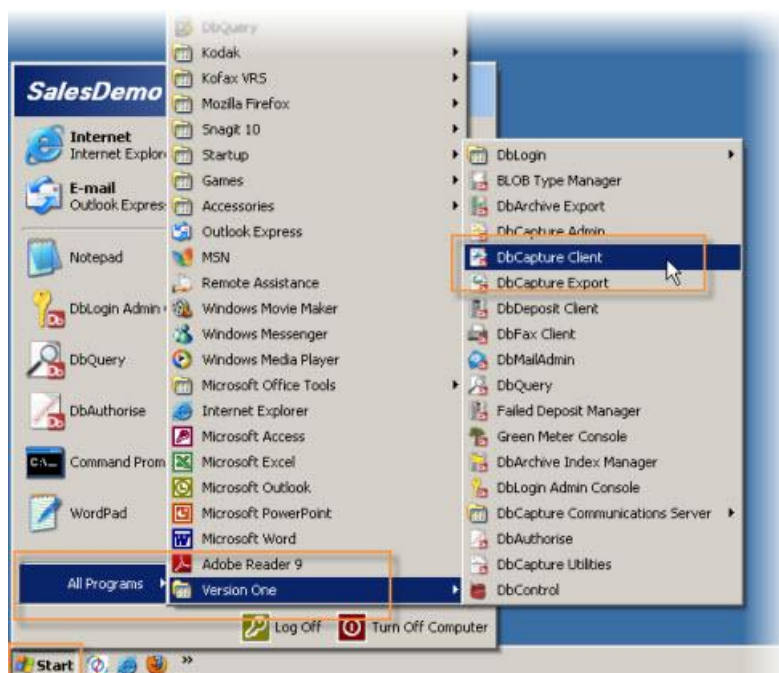
Customisation: Your system may be using Windows authentication to log in to the document management suite automatically. If so, the [DbLogin window](#) is not displayed. Using Windows authentication allows you to use your regular PC logon to access the software without an additional logon.

The login window

Once the Version One document management suite has been installed, there are several ways for you to display the [DbLogin window](#).

Programs menu option

Version One is displayed in the list of programs on your computer. Click **Start > All Programs > Version One > [Program Name]**. For example:



Recently used menu option

Once you have used the Version One document management suite it may be displayed in your Recently Used menu above the Start button. You can also use this to start the program.



Desktop shortcut option

You can drag and drop the link to your Version One document management suite program from one of the menu options onto your desktop. Click the mouse, hold the button down, drag to the desktop and release the mouse button.



You can then click this desktop shortcut to start the program.

Customising windows

Many of the windows in the document management suite can be configured to suit your preferences, eg:

- Dragging and dropping columns to change the order they are displayed
- Hiding some columns
- Sorting columns by various filters.



Customisation: Once a screen has been changed, the system uses the new layout until you reset it to the original layout. Example screenshots shown in this help therefore might not exactly match what you see on your system.

Toolbars

There are a number of common icons used throughout the system. As you become familiar with the toolbar icons and their use in different contexts, their use should become intuitive. The common Help menu functions like change user, environment, language and password are described in [Help About](#).



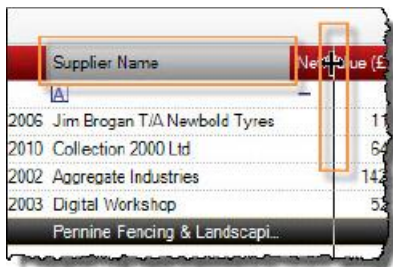
The options available depend on your particular document management suite configuration.

Using the windows

In many places within the software you can customise the display to change the way document results are shown. For example sizing, sorting and moving columns. You can also filter columns with search, run complex searches across columns, use the date picker and choose the fields you want to display.

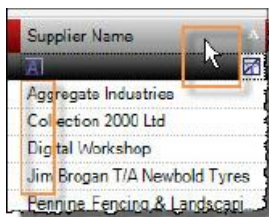
Sizing columns

You can change the size of columns by clicking and dragging. Here we are making Supplier Name wider to show the full name.



Sorting columns

You can sort the data by clicking on a column heading. Here clicking the Supplier Name column shows documents sorted alphabetically by supplier.



Click the column header again to sort the column in reverse order.

Moving columns

You can customise the column layout by clicking and dragging the column header to a new location. Here we are dragging Supplier Name to the left.



Filtering columns with search

Many columns in the software have a search filter used to narrow the results shown. Here we are filtering Supplier Name to show suppliers beginning with 'agg'.



Clearing your search criteria

Clear the search criteria by clicking the small cross alongside the search term:



Date picker

Use the date picker to search for documents for a particular date:



Complex searches

More complex search queries are available for some fields. Click the drop-down arrow to choose a search type and add your criteria:



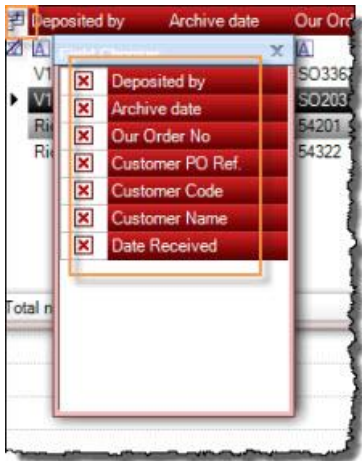
Clearing multiple search criteria


Some windows allow you to clear all your search criteria at once by clicking a button:



Choosing fields

Some windows allow you to choose which fields to display. Click the icon to show the available fields and mark the ones you want with a cross:




 Try out the layout options to get the display how you want it. You are only changing the way information is shown, not changing the data. Some windows can't be customised.

Using help

When you first open help the introduction page is shown, along with navigation tabs (Contents, Index and Search) to find more topics.

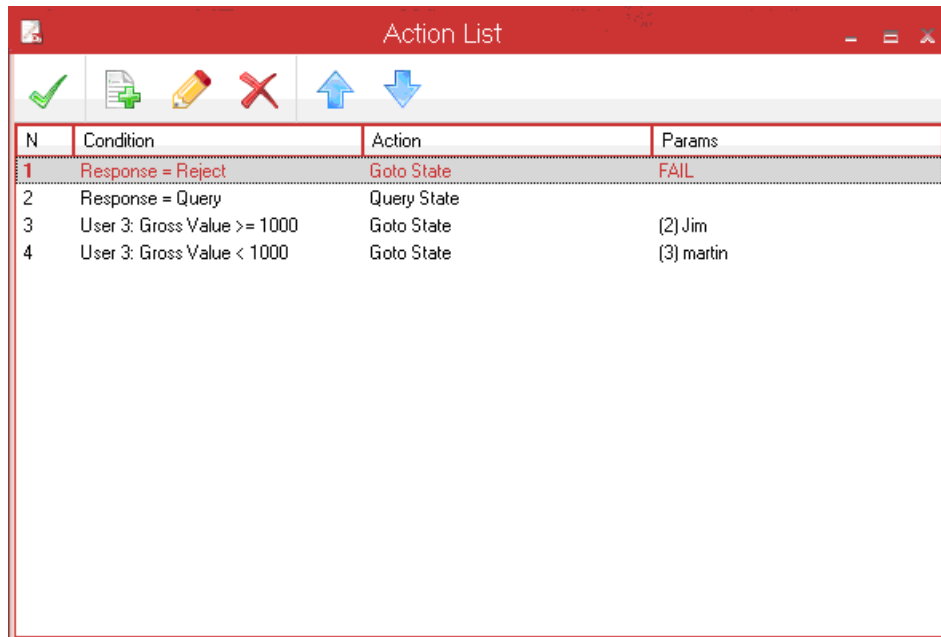
Links and how they work

Throughout help, you will see links such as [Links and how they work](#). Holding the mouse over a link changes the cursor to a pointer . Click for one of the following:


- more text
- new window opens (click anywhere to close)
- another help topic (use the Back button to return to the original topic).

Screen shots

Sample screen shots are shown where they help clarify the topic. To save space and keep the help briefer, they are often shown in drop-down links like this: [Show/hide screen](#). Click the link to **show the graphic**. Click again to **hide the graphic**.



N	Condition	Action	Params
1	Response = Reject	Goto State	FAIL
2	Response = Query	Query State	
3	User 3: Gross Value >= 1000	Goto State	(2) Jim
4	User 3: Gross Value < 1000	Goto State	(3) martin

 Some screenshots are mock-ups of real data, made anonymous by blurring key information. Any resemblance to real companies does not imply an endorsement of the software or an active trading relationship between companies.

The icons

These icons help you use the help more effectively.

Icon	Description
------	-------------



Hide the navigation and glossary panel.



Show

Show the navigation and glossary panel.



Back

Go back through the topics you have looked at.



Forward

Go forward through the topics you have looked at.



Print

Print the current topic.



Finding a help topic

You can find the help you need several ways:

- contents
- index
- searching the text.

Search the contents

Searches the **Contents** and **Topics** (like chapters and sections in a book):

1. Click Contents.
2. Click one of the Books 
3. Click a Topic  to show the content on the right.

Search the index

Searches the predefined entries in the **Index** (like the index of a book):

1. Click **Index**.
2. Type your search term.
3. Click an index word to show the topic.



Help does a best match against your term. For example: if the index contains both 'Hidden' and 'Hiding' and you search for 'Hid', 'Hidden' is highlighted as the first word containing that string. If you type 'Hidi', 'Hiding' is highlighted ('Hidden' no longer matches the string). Try synonyms for what you are looking for, eg 'house', 'dwelling', 'residence'.

Search the text

This method searches all the text in the help (like searching the text of a book):

1. Click **Search**.

2. Type the word you are searching for.
3. Click **Go**.
4. All topics containing the search word are listed.
5. Click the topic you want.

Glossary

Some of the terms used in the help are defined in brief glossary entries. These are self-contained descriptions and don't link anywhere else.

Accessing the applications — logging in

Overview: a login window is displayed when you click a Document Management suite icon. The same style of login window is used for all applications. This is where you enter your login username and password.

Field	Description								
Username	Enter your user name. This may be your Version One user name or your Windows user name, depending on the option you select in the Log on using field.								
Password	Enter the Version One or Windows password for the user name you entered.								
Log on using	Select how you want to log on to the Version One Document Management suite:								
	<table border="1"> <thead> <tr> <th>Option</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Windows</td> <td>Windows Authentication attempts an Active Directory (AD) User Password login — specify your Windows password to validate against Active Directory.</td> </tr> <tr> <td>Internal DbLogin</td> <td>Version One document management suite Login ID and password — attempts an internal login for the user name and password entered.</td> </tr> <tr> <td>Current Windows user</td> <td>Uses the Windows User currently logged in to this computer. Attempts an AD Login, replicating the default behaviour on loading</td> </tr> </tbody> </table>	Option	Description	Windows	Windows Authentication attempts an Active Directory (AD) User Password login — specify your Windows password to validate against Active Directory.	Internal DbLogin	Version One document management suite Login ID and password — attempts an internal login for the user name and password entered.	Current Windows user	Uses the Windows User currently logged in to this computer. Attempts an AD Login, replicating the default behaviour on loading
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Windows	Windows Authentication attempts an Active Directory (AD) User Password login — specify your Windows password to validate against Active Directory.								
Internal DbLogin	Version One document management suite Login ID and password — attempts an internal login for the user name and password entered.								
Current Windows user	Uses the Windows User currently logged in to this computer. Attempts an AD Login, replicating the default behaviour on loading								

a client application. Doesn't require a password.

Validation of Windows login with Active Directory (AD) uses a secure socket (ssl) connection from the DbLogin server to Active Directory. If this fails, Windows login is not possible (other than the basic AD login as the current Windows user). AD user verification from the server is only supported from the Windows DbLogin server, not the Unix versions.



The application version number is shown for information — you'll need this information if you contact your support team with a query.

Button Description

OK Log in using the details entered.

Cancel Exit without logging in.

After validating the login any DbLogin password rules are applied, eg prompting you to update your password. After a successful login, DbLogin applies the default environment (normally 'Live', unless configured otherwise) and checks:

- the user has access to their default environment
- the application being loaded is present in the default environment
- valid CAL access can be granted.



Any failure prevents access to the client application.

DbLogin admin console

Login administration is covered in a separate topic for **system administrators only**.

Securing your data

Overview: you need to make sure that your data is securely backed up in case of problems. A secure backup policy is crucial to any IT system. The details of your backup policy is beyond the scope of this help, and not covered by the document management suite or Version One project management. These notes are for general guidance only.



This topic is for **system administrators only**.

The document management suite is a client-server application with components running on both a central server and client PCs.

Server

Back up the entire folder:

```
d:\versionone\
```

Scan station

If you have the ability to clone a machine, make an image of the scan station. Otherwise you should backup:

```
c:\versionone\
```

```
c:\Program Files\Version One
```



These folder names assume your software has been installed in the default locations. Backup up your own installation folders if different from those above.

About us

Getting in touch

This software is from Version One Ltd. If you have any comments on this help or suggestions for improvements, please get in touch. You can email info@versionone.co.uk. We're happy to hear from you.

Problems and queries

If you have a query on using the software you should get in touch with your support contact. In many cases your software comes from a third-party, who is normally your first point of contact for queries.



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Help about

Overview: each of the applications has a Help About window displaying information about the version of the application you are using. Click Help > About [application name], eg Help > About DbQuery to display the About DbQuery window.



You will need the version number if you contact your support team with a query.

Click OK to close the window.

Standard toolbar options

Many of the applications have standard toolbar buttons with frequently-used functions. The same functions are also on the Help menu:

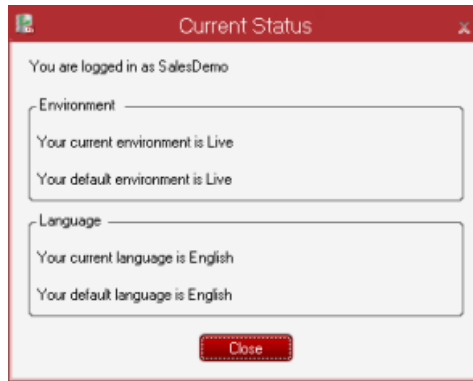


Shows the Help About window.



Use the drop-down to change your system configuration.

Option	Notes
Current status	Use this to check the current status of the environment and language settings.



Change environment

You can have multiple environments, eg Live and Test. Choose the environment from the drop-down box. You can also choose to make this environment the default using the checkbox.



Change user

Change the current user to a different login. Add the username and password for the new user in the Change User window.



Change password Change the login password for a user.



Change language Choose from the languages installed on your system or use the Windows system default.



DbAuthorise

About DbAuthorise

Overview: manages the authorisation of documents, such as supplier invoices needing payment. Each document can pass through a series of authorisations before final approval.

DbAuthorise is used alongside DbArchive to scan and enter additional information. Documents are stored as images and registered with your accounts or ERP package (if relevant). If the document requires authorisation, it completes a DbAuthorise process. See using DbAuthorise.



DbAuthorise is a client-server application, and can be customised to meet your business requirements using integration scripts.

Document authorisation

Authorisation of each document follows a pre-defined route. Different documents can have different approval routes. Routes are linear and made up of a number of states where a particular person must carry out an authorisation action, eg:

- accept the document (with or without modifications)
- reject the document
- query the document.

The authorisation route followed by a particular document depends on the details entered when it was scanned into DbArchive. The final route is typically determined by the department to which the document relates. For example, you might have a different invoice approval process for high value invoices.

Each route involves a sequence of people who can approve the document, before it is passed to the next person in the sequence. The last person in the route may need to carry out any modifications required to the document details. Once the document has been accepted by everyone in the authorisation route and any changes made, the document is fully authorised and can be actioned. For example, invoice can be paid.

People in an authorisation route are notified of a document needing their approval in one of two ways:

- via email — typically used when their approval is not required very often
- using a DbAuthorise window (either web-based or client-server) — someone who needs to approve many documents every day will find this more convenient.

Authorisation routes

Each document can proceed through a number of approval states to be fully authorised. The authorisation route taken by a particular document follows pre-defined rules. Rules can use fields from the document, such as total value.

Typically the person entering information about a document into DbArchive assigns it to a particular department within your company. For example, to assign a nominal code to the document. A further authorisation route can then be automatically assigned on the basis of the nominal code.

There may be multiple authorisation routes, depending on a value in the document. For example, an authorisation route for an invoice for payment of a large value may include the department head or director.

The last person in an authorisation route is often a clerk or administrator who makes any modifications to the document information before final approval and passing to accounts for payment (in the case of an invoice).

 If the wrong nominal code was assigned to a document, the authorisation route will need changing. **A DbAuthorise administrator typically does this.**

DbAuthorise emails

You can notify people in the authorisation route by email that a document requires their approval. The email is generated and sent by DbAuthorise, the email contains details of the document to be authorised and a link to the image.

When the recipient of the email chooses to approve, reject, query or accept it with modifications, the email is forwarded to one of four possible DbAuthorise email addresses, reflecting their choice.

On receipt of the person's response, DbAuthorise checks which entry it relates to and updates the authorisation status. Another email is generated to the next person in the authorisation route and so on, until the document is fully authorised or rejected.


DbAuthorise windows

When you need to authorise a greater number of documents you may prefer able to access them on demand, rather than as they are delivered to your email inbox. To do this you use the DbAuthorise windows, using either a client window or web browser (such as Internet Explorer).

Users

The DbAuthorise windows supports a number of different user types, including:

- Typical users, with access to documents they must approve, only when they are responsible for authorising them. This is a level 0 user.
- Departmental manager, with access to documents that require authorisation by all members of their department.
- DbAuthorise administrator, who can set up and edit authorisation routes, users and so on.

 The exact user types and the functions available to them can vary between different installations of DbAuthorise.

You must enter a user name and password to access DbAuthorise. When you log in one of the following is displayed:

- The list of the documents (DbAuthorise entries) requiring authorisation, displayed in the DbAuthorise management console window.

- Details of a specific document needing approval, displayed in the View/Edit Data window.

Using the client — regular users

File menu

Overview: the DbAuthorisation client is used to accept, reject or query a document to progress it through its authorisation route. The file menu has the following options:

Option	Description
Refresh	Refresh the list of entries displayed.
Search history	Search the history. Check through your DbAuthorisation history. Specify the start and end date for your search, either by overtyping the dates or using the date picker window.
Export history	Export the history.
Export to csv	Export to a csv file. Useful for further analysis of your query results.
Configure	Configure the DbAuthorise
Exit	Exit DbAuthorise.



Other menus:

[View menu](#)

[Entry menu](#)

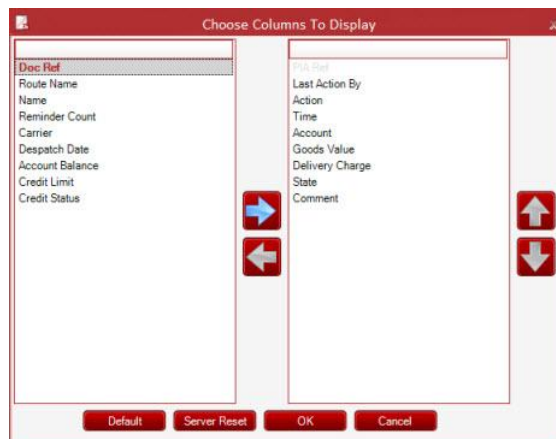
View menu

Overview: the DbAuthorisation client is used to accept, reject or query a document to progress it through its authorisation route. The View menu has the following options to filter your results and customise the display:

Option	Description
All entries	Display all entries. Use the scroll bar to browse through the results.
In progress entries	Display in progress entries only.
Authorised entries	Display authorised entries only.
Cancelled entries	Display cancelled entries only.
Queried entries	Display queried entries only.
History entries	Display history entries only.
Striped grid	Display the striped grid to help identify entries more easily. Alternate lines are shown with background shading.

PIA Ref	Last Action By	Action	Time	Account
PIINV-001275		New entry	30/03/2011 16:46:49	Progress Office Sy
PIINV-001275	Richard	Accepted	30/03/2011 16:51:14	Progress Office Sy
PIINV-001275	Richard	Accepted	30/03/2011 16:51:14	Progress Office Sy
PIINV-001275		New entry	30/03/2011 16:46:49	Progress Office Sy
PIINV-001276	PIINV-001275	Richard	Accepted	30/03/2011 16:51:14
PIINV-001276	PIINV-001275	Richard	Accepted	30/03/2011 16:51:14
PIINV-001276	PIINV-001275	martin	Accepted	30/03/2011 16:52:41
PIINV-001276	PIINV-001275	martin	Accepted	30/03/2011 16:52:41
PIINV-001277	PIINV-001276	New entry	30/03/2011 16:46:55	Ridgeons
PIINV-001276	Richard	Accepted	30/03/2011 16:51:18	Ridgeons
PIINV-001276	Richard	Accepted	30/03/2011 16:51:18	Ridgeons
PIINV-001276	martin	Accepted	30/03/2011 16:52:39	Ridgeons
PIINV-001276	martin	Accepted	30/03/2011 16:52:39	Ridgeons
PIINV-001277		New entry	30/03/2011 16:48:02	A M Labels Ltd

Column chooser Display the column chooser window. Used to select which columns you want to display.



Save display
preference

Save the current display as your preferred format. This layout is used subsequently until changed.

Other menus:

[File menu](#)

[Entry menu](#)

Entry menu

Overview: the DbAuthorisation client is used to accept, reject or query a document to progress it through its authorisation route. The Entry menu has the following options:

Option	Description
Edit user data	Edit the user data. Show the View/Edit window to look at the document details.
View history	View the history.
Display image	Display the document image.
Accept entry	Accept the entry.
Accept with change	Accept the entry with changes made.
Reject entry	Reject the entry.
Query entry	Query the entry.
Send reminder	Send a reminder to the person currently responsible for the document authorisation.

Other menus:


[File menu](#)

[View menu](#)


View / edit data

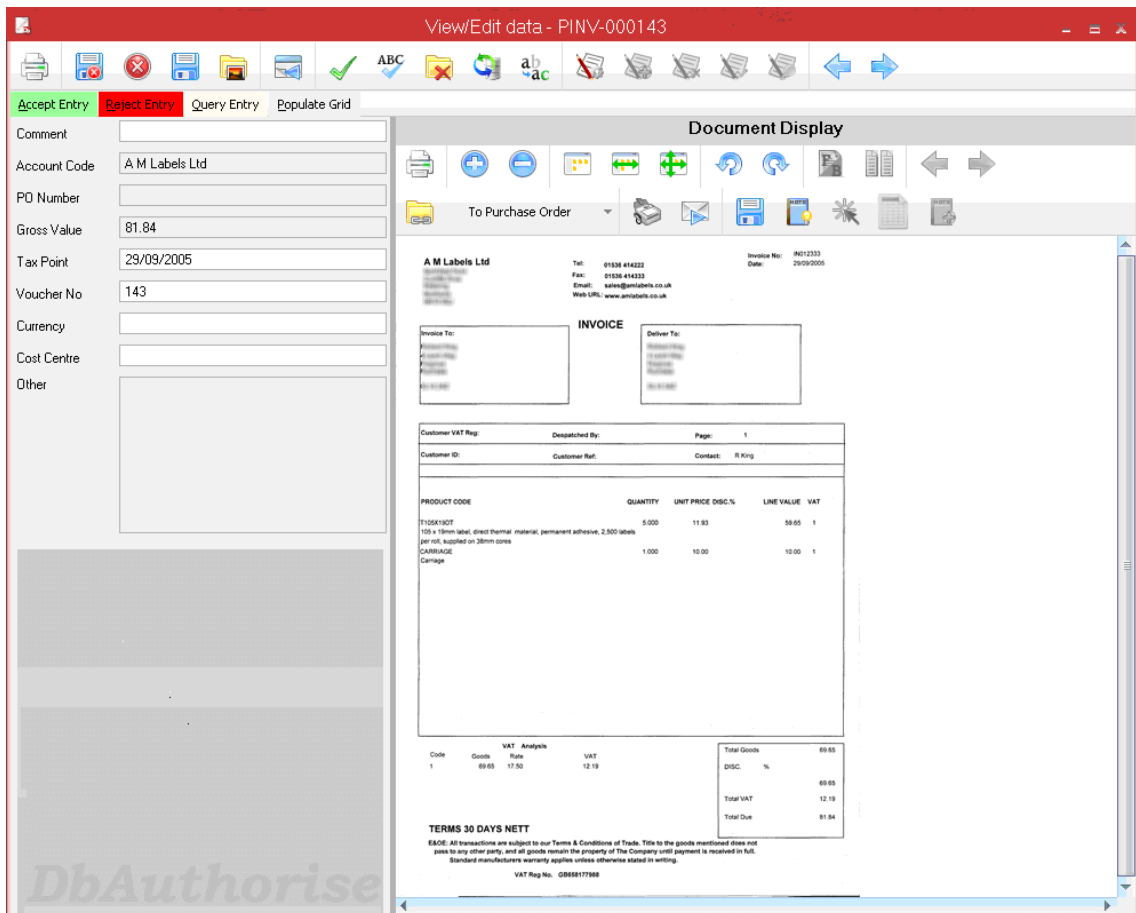
Overview: when you view an individual document entry requiring authorisation, the details (and possibly a document image) are displayed in the View / Edit data window containing:

- toolbar with buttons with different actions
- information fields including comment, user defined and other fields
- image of the document (optional).

 User defined fields shown depend on your configuration. Field labels can be changed for all entries in a particular route.

The Comment field is used to enter and display information about changes required before authorisation. The User fields and the Other field are used to store information such as dates and invoice totals, as the document progresses through the authorisation route. These can be re-labelled for all entries in a particular route. Depending on how your DbAuthorise is set up you may be able to populate these fields with information from DbArchive and/or access this information through DbArchive.

 DbAuthorise may be configured to run a validation process on the user data before saving.



View/Edit data - PINV-000143

Accept Entry **Reject Entry** Query Entry Populate Grid

Comment

Account Code A M Labels Ltd

PO Number

Gross Value 81.84

Tax Point 29/09/2005

Voucher No 143

Currency

Cost Centre

Other

Document Display

To Purchase Order

A M Labels Ltd
 Tel: 01536 414232
 Fax: 01536 414233
 Email: sales@amlabls.co.uk
 Web URL: www.amlabls.co.uk

Invoice No: R012333
 Date: 26/09/2005

INVOICE

Invoice To: Deliver To:

Customer VAT Reg: Despatched By: Page: 1

Customer ID: Customer Ref: Contact: R King

PRODUCT CODE	QUANTITY	UNIT PRICE DISC.%	LINE VALUE	VAT
T105X190T 105 x 19mm label, direct thermal material, permanent adhesive, 2,500 labels per roll, supplied on 36mm cores	5,000	11.93	59.65	1
CARRIAGE Carriage	1,000	10.00	10.00	1

Code	Goods	VAT	Analysis	VAT
1	69.65	12.19		


















Total Goods 69.65
 DISC. %
 Total VAT 12.19
 Total Due 81.84

TERMS 30 DAYS NETT

ES&E: All transactions are subject to our Terms & Conditions of Trade. Title to the goods mentioned does not pass to any other party, and all goods remain the property of the Company until payment is received in full. Standard manufacturer's warranty applies unless otherwise stated in writing.

VAT Reg No. GB66177968

Icon Description

	Print the screen.
	Save changes to the user data and continue.
	Cancel the changes to the user data and close the View / Edit window.
	Save changes to the user data.
	Display the image associated with the selected entry.
	Display the history of the selected entry.
	Confirm approval of the selected entry, eg the invoice for payment. The document is normally passed to the next person in the authorisation route.
	Confirm that you approve the selected entry with certain modifications made to the User fields or noted in the Comment field. The document is normally passed to the next person in the authorisation route.
	Reject the selected entry. This normally identifies the document as failing to get approval in the current state and passes it to another state in the route.
	Hold the selected entry at the current state whilst it is investigated.
	Specify a new authorisation route for the selected entry. Only available if you have the appropriate user privileges.
	Create a new grid.
	Add a new line to the analysis.
	Remove a line from the analysis.
	Adjust the column widths.
	Run the lookup definition file.
	Display the previous entry.



Display the next entry.




The buttons available in this window are configurable. Not all buttons may be available on your system.

Field	Description
Comment	Shows information about changes required before authorisation.
<User defined fields>	<p>The user defined fields and the Other field are used to store specific information, such as dates and invoice totals, as the document progresses through the authorisation route.</p> <p>User defined fields shown depend on your configuration. Field labels can be changed for all entries in a particular route. Depending how DbAuthorise is set up you may be able to populate these fields with information from DbArchive and / or access this information through DbArchive.</p>
Other	The user defined fields and the Other field are used to store specific information, such as dates and invoice totals, as the document progresses through the authorisation route. Depending how DbAuthorise is set up you may be able to populate these fields with information from DbArchive and / or access this information through DbArchive.

Using the client – administrative users

File menu

Overview: administrators have a slightly different menu to regular users within the client application, with some extra functions. This is in addition to the administrator functions of the [DbAuthorise management console](#). **This topic is for system administrators only.**

Option	Description
Refresh	Refresh the list of entries displayed (or press F5).
Search history	Search the history. Check through your DbAuthorisation history. Specify the start and end date for your search, either by overtyping the dates or using the date picker window.
	
Export history	Export the history.
Export to csv	Export to a csv file. Useful for further analysis of your query results.
Clear completed	Clear the completed entries.
Configure	Configure the DbAuthorise
Exit	Exit DbAuthorise.

Other menus:

[View menu](#)

[Entry menu](#)

Help menu

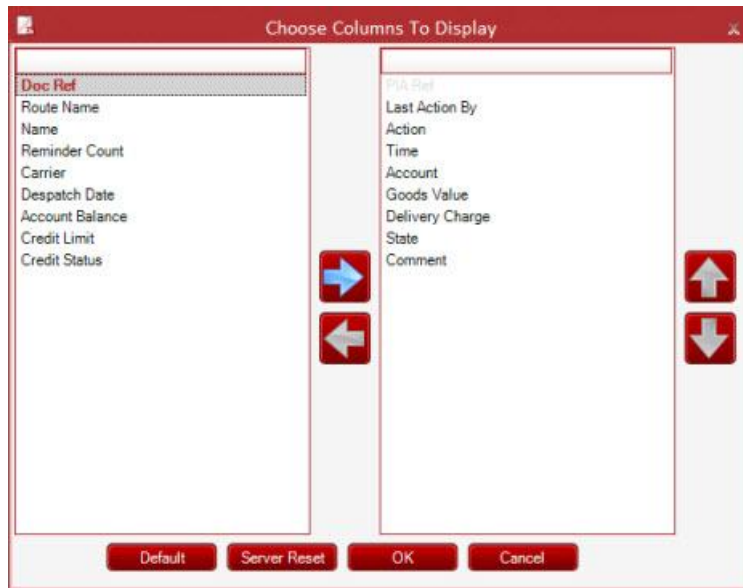
DbAuthorise administrators – view menu

Overview: administrators have a slightly different menu to regular users within the client application, with some extra functions. This is in addition to the administrator functions of the [DbAuthorise management console](#). **This topic is for system administrators only.**

Option	Description
All entries	Display all entries. Use the scroll bar to browse through the results.
In progress entries	Display in progress entries only.
Authorised entries	Display authorised entries only.
Cancelled entries	Display cancelled entries only.
Queried entries	Display queried entries only.
History entries	Display history entries only.
Striped grid	Display the striped grid to help identify entries more easily. Alternate lines are shown with background shading.

PIA Ref	Last Action By	Action	Time	Account	
PIINV-001275		New entry	30/03/2011 16:46:49	Progress Office Sy	
PIINV-001275	Richard	Accepted	30/03/2011 16:51:14	Progress Office Sy	
PIINV-001275	Richard	Accepted	30/03/2011 16:51:14	Progress Office Sy	
PIINV-001275	PIA Ref	Last Action By	Action	Time	Account
PIINV-001275					
PIINV-001275	PIINV-001275	Richard	New entry	30/03/2011 16:46:49	Progress Office Sy
PIINV-001275	PIINV-001275	Richard	Accepted	30/03/2011 16:51:14	Progress Office Sy
PIINV-001276	PIINV-001275	Richard	Accepted	30/03/2011 16:51:14	Progress Office Sy
PIINV-001276	PIINV-001275	martin	Accepted	30/03/2011 16:52:41	Progress Office Sy
PIINV-001276	PIINV-001275	martin	Accepted	30/03/2011 16:52:41	Progress Office Sy
PIINV-001277	PIINV-001276		New entry	30/03/2011 16:46:55	Ridgeons
PIINV-001276	Richard	Accepted	30/03/2011 16:51:18	Ridgeons	
PIINV-001276	Richard	Accepted	30/03/2011 16:51:18	Ridgeons	
PIINV-001276	martin	Accepted	30/03/2011 16:52:39	Ridgeons	
PIINV-001276	martin	Accepted	30/03/2011 16:52:39	Ridgeons	
PIINV-001277		New entry	30/03/2011 16:48:02	A M Labels Ltd	

Column chooser Display the column chooser window. Used to select which columns you want to display.



Save display preference Save the current display as your preferred format. This layout is used subsequently until changed.

Process counts Process counts. Shows administrators the documents processed by each user. Users are shown down the side, with counts in the body of the display.

User	Today	1	2	3	4	5	6	7	8
administrator	0	0	0	0	0	0	0	0	1
credit	0	0	0	0	0	0	0	0	0
Demo	0	0	0	0	0	0	0	0	0
Jim	0	0	0	0	0	0	0	0	0
Lisa	0	0	0	0	0	0	0	0	0
Manager	0	0	0	0	0	0	0	0	0
martin	0	0	0	0	0	0	0	3	0
Richard	0	0	0	0	0	0	0	3	2
Sales	0	0	0	0	0	0	0	0	3
versionone	0	0	0	0	0	0	0	0	0

Other menus:

- [File menu](#)
- [Entry menu](#)
- Help menu

DbAuthorise administrators – entry menu

Overview: administrators have a slightly different menu to regular users within the client application, with some extra functions. This is in addition to the administrator functions of the [DbAuthorise management console](#). **This topic is for system administrators only.**

Option	Description
Edit user data	Edit the user data. Show the View/edit window to look at the document details.
View history	View the history.
Display image	Display the document image.
Accept entry	Accept the entry.
Accept with change	Accept the entry with changes made.
Reject entry	Reject the entry.
Query entry	Query the entry.
Cancel entry	Cancel the entry.
Delete entry	Delete the entry.
Send reminder	Send a reminder to the person currently responsible for the document authorisation.
Change route	Change the route. Use an alternative document authorisation route.

Other menus:

[File menu](#)

[View menu](#)

Help menu

DbAuthorise administrators — help menu

Overview: the DbAuthorisation client is used to accept, reject or query a document to progress it through its authorisation route. The help menu has the following options:

Option	Description
About	Display the About DbAuthorise window with version number information and information about other components installed. You will need this if you contact your support team with a query.
Change environment	Change the environment — you can have multiple environments, eg Live and Test. Choose the environment from the drop-down box. You can also choose to make this environment the default using the checkbox.



Change user Change the user. Add the username and password for the new user in the Change User window.



Change password Change the password for a user.



Change Change the language — choose from the languages installed on your system

language or use the Windows system default.



Other menus:

[File menu](#)

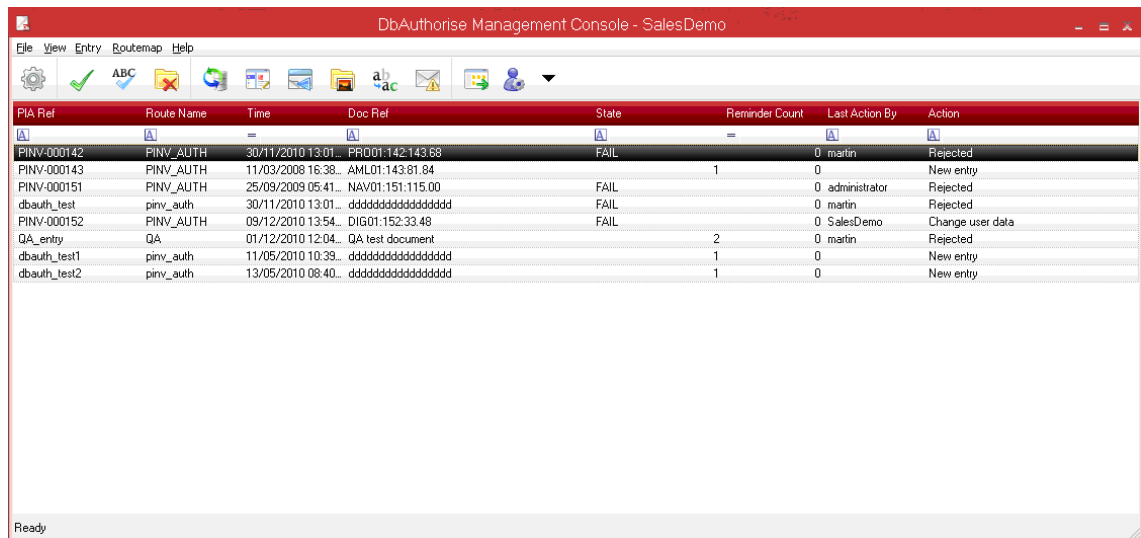
[View menu](#)

[Entry menu](#)

DbAuthorise management console

About the management console

Overview: shows a list of documents in each authorisation route that include the current logged in user. You can accept, reject or query a document to progress it through one state of its authorisation route.



The exact contents of the DbAuthorise Management Console window depend on the configuration in your organisation and the type of user logged in. This section is only **for system administrators**, covering management setup of DbAuthorise.

The management console has these menus:

Menu	Description
File	Configure DbAuthorise, search or export an entry history and refresh the displayed list of entries.
View	Determine the types of entry displayed in the entry list.
Entry	View and process actions on one or more selected entries.
Routemap	Add and edit routes.
Help	Display the log file or add a message to it, to manage system files and send an email to your DbAuthorise administrator.

The following options are available:

Icon Description



[Configure DbAuthorise](#). Set the server and port details for DbAuthorise.



Confirm approval of the selected entry, for example, the invoice for payment. The document is normally passed to the next person in the authorisation route (routes are linear).



Confirm approval of the selected entry with certain modifications to the User fields or notes in the Comment field. The document is normally passed to the next person in the authorisation route.



Reject the selected entry. This normally identifies the document as failing approval in the current state and passes it to another state in the route.



Hold the selected entry at the current state whilst it is investigated. It stays in the queue for the current user.



Edit some user data for the entry.



Display the history of the selected entry.



Display the image associated with the selected entry.



Specify a new authorisation route for the selected entry. Only available if you have the appropriate user privileges.



Send a reminder about the entry.



Export the entry to csv file. This is useful for further analysis.

The authorisation grid

The following columns are displayed in the main authorisation grid:

Column	Description
PIA ref	The unique identifier for the Purchase Invoice Authorisation (PIA) entry.
State	The state the document has reached in the authorisation route and its current status. As well as the number indicating the state reached, there is an indicator of its current status:

Option	Description
OK	The final state where the document has been fully authorised.
FAIL	The final state where the document has been rejected. Although this is a final state you can still change the route for this document, as it may have been assigned to the wrong route.
**	Accepted with changes at some point on this entry.
Q	Queried.
Doc ref	A document reference. This is often the same as the PIA Ref, but may not necessarily be unique.
Route name	The name of the route for the document being authorised.
Name	The name of the person currently responsible for authorising the document.
Time	The date and time of the last action carried out on the document.
Reminder count	The numbers of reminders sent for a particular document, to the person responsible for authorising it. This is reset when the entry changes state.
User	The name of the person who carried out the last action on the document. If you can only see your own entries in the DbAuthorise Management Console window then this field is left blank.
Action	The action last carried out on the document.

Routemap menu

The following options are available:

Option	Description
Edit	Edit the routemap. Alter the document approval path.
Clear cache files	Clear the cache files.

Configuring DbAuthorise

Configuring and maintaining DbAuthorise

There are a number of administration tasks involving the DbAuthorise server:

- Configuring the DbAuthorise front end for the server and displaying images of documents
- Viewing and writing the DbAuthorise log file
- Retrieving various DbAuthorise files from the server or uploading them to the server.

Changing the DbAuthorise configuration

1. Click File in the main menu of DbAuthorise Management Console and choose Configure.
2. Update the configuration information. You can update:

Field	Description
Authserver	The name or IP address of the server for the DbAuthorise server application.
Authport	The server port if you are not using the default of 31420.
DbQuery	The path to dbquery if you are using DbQuery to display images of documents.
WebQuery	The path to dbwebq if you are using DbWebQuery to display images of documents or the internal viewers.
Use internal web view on user data form	Indicates whether or not the View/Edit data window displays the document image along with the entry details in a single browser window by default.

The View/Edit data window showing entry details and the document is shown. The 'Automatically go into user data form on startup' field indicates whether the View/Edit data window (showing user data for the next document requiring approval) is automatically displayed by default (in place of the DbAuthorise Management Console window).

3. Click OK.

Using DbAuthorise history

You can check the authorisation decisions made in a particular time period using the DbAuthorise history. The history can either be displayed on screen or exported to a text file. To search for documents accepted, rejected or queried in a specific time period:

1. Click File in the main menu of DbAuthorise Management Console and choose Export History.
2. Enter the date range you are interested in (you can use a calendar to select dates).
3. Click OK.

The DbAuthorise Management Console displays a list of authorisation actions for the specified time period.



This may take some time when there are a large number of transactions.

Exporting the history


Once you have generated a history you can save it to file:

1. Click File in the main menu of DbAuthorise Management Console and choose Export History.
2. Specify the file in which you want to save history using the Save As window.

The history can be viewed using a text editor or used in another application for further analysis.

DbAuthorise configuration window

Overview: use this window to configure the DbAuthorise servers and use.

 **For system administrators.** You would normally configure the server at the start of your implementation and only need to return this window rarely.

Choose Configuration from the [file menu](#) or click the Configuration button from the DbAuthorise window.

Field	Description
Auth server	The authorisation server name.
Auth port	The authorisation server port number.
Archive server	The archive server name.
Archive port	The archive server port number.
Prohibit the user processing an entry from the main screen	Select to prohibit the user processing an entry from the main window. Instead they must open the View / edit data window to process the item.
Automatically go into user data form on startup	Select to automatically display the user data form on startup.

Button Description

OK	Save the updated configuration details.
Cancel	Exit without saving.

Routemaps

Managing routes

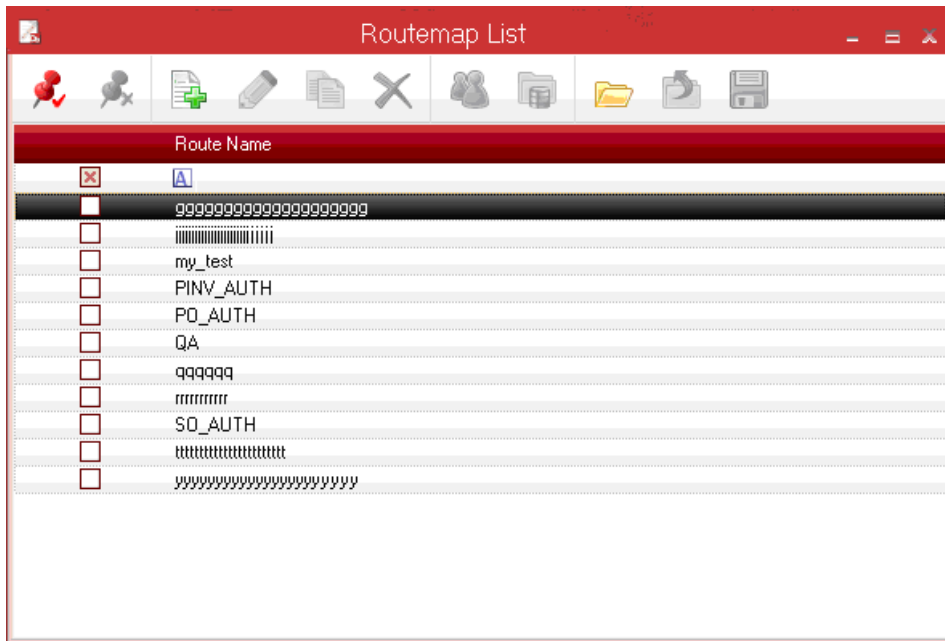
Authorisation routes, comprising a number of states, are fundamental to the way DbAuthorise works. Before using DbAuthorise you need to set up the authorisation routes used in your company. These are a sequence of states, where an individual is responsible for approving or rejecting a document assigned to their stage of the route.

At each state the document can be accepted, accepted with modifications, rejected or queried. Each state has a set of conditions and actions that determine what happens to the entry. For example you may need to complete a particular data field.

Route details

Display details of the existing routes on your system:

1. Click the Routemap option in the main menu of the DbAuthorise Management Console and choose Edit to show the Routemap List. [Show me the screen](#)



Icon	Description
	Select all routes.
	Deselect all routes.
	Add a route.
	Edit the selected route.



Select all routes.










Deselect all routes.



Add a route.



Edit the selected route.

-
-  Copy the selected route.
 -  Delete the selected route.
 -  Change the user.
 -  Copy the user data names.
 -  Show the routes available.
 -  Load routes from server.
 -  Save the routes to a server.
-

2. Click Show Routes. The window shows details of the routes on the system.

Other tasks:

[Adding a route](#)

[Updating a route](#)

[Removing a route](#)

[Copying user data fields to a route](#)

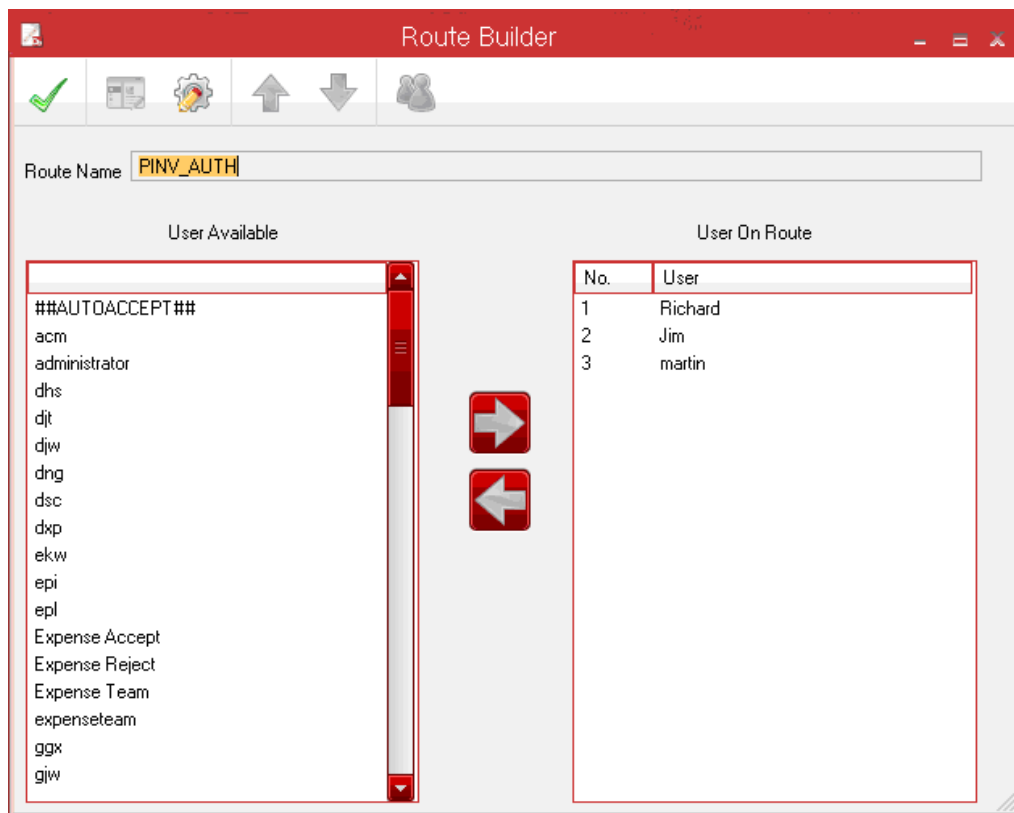
[Renaming data fields](#)

[Replacing a username](#)

Adding a new route

To add a new route to your DbAuthorise system:

1. Click the Routemap option in the main menu of DbAuthorise Management Console and choose Edit. The Routemap List is displayed, as shown below.
2. Click Add Route. If the new route is similar to an existing route you can copy the existing route and modify it rather than create a new route. To do this, select the route and click Copy Route.
3. Enter the name of your new route in the Enter route name field of DbWebAuth. An empty Route builder window is displayed in which you can specify the states of your authorisation route.



Adding a new state

Add a new state that you want to include in your route. To do this:

1. Choose the user who approves the document in the new state. The special user `##AUTOACCEPT##` is used if DbAuthorise automatically approves the document. It might be used if the invoice value is very low or if someone who normally authorises documents at the start of the authorisation route is ill.
2. Insert the new state in the route.
3. Display the actions to be taken if the user accepts, rejects or queries the document by clicking on with the state selected. The Action List dialog is displayed showing an ordered list of conditions and the actions that should be taken in each case.

Editing conditions

You can edit, add and remove the conditions (and their associated actions) in the actions list:

1. Select the condition in the action list.
2. Click Edit Action.

N	Condition	Action	Params
1	Response = Reject	Goto State	FAIL
2	Response = Query	Query State	
3	User 3: Gross Value >= 1000	Goto State	(2) Jim
4	User 3: Gross Value < 1000	Goto State	(3) martin

3. Select the Action and any Parameters required using the drop-down lists of options.
4. Click OK in the Current Action section.

Adding a new condition

To add a new condition:

1. Click Add Action.
2. Click Edit Condition in the Current Action section, if required. The Condition Builder is displayed.
3. Use the buttons and drop-down lists to specify your new condition.
4. Click OK.

Reordering actions

1. Reorder the actions list if required. To do this, use Action Up and Action Down.
2. Click OK.

Adding more states

Repeat the steps above if you want to add a further state to your route.

Saving changes

1. Click OK to save your new route.
2. Click Save to Server in the Routemap List dialog.

Other tasks:

[Managing routes](#)

[Updating a route](#)

[Removing a route](#)

[Copying user data fields to a route](#)

[Renaming data fields](#)

[Replacing a username](#)

Updating a route

To edit the details of an existing authorisation route:

1. Click the Routemap option in the main menu of DbAuthorise Management Console and choose Edit to show the Routemap List.
2. Select the route you want to update in the left-hand pane.
3. Click Edit Route. The Route Builder window shows details of the stages in the route.

Changing a person

Change the person whose approval is sought for any states that require it:

1. Select the name of the state you want to update.
2. Select the new user in the drop-down User list at the bottom of the Route builder window.
3. Click OK. The user name is changed in the list.

Updating actions

Update the actions for any states that require it:

1. Select the name of the state you want to update the user for.
2. Follow the steps in [adding a route](#).

Adding a new state

Add one or more new states, if required. To do this, follow the steps in [adding a route](#)

Removing a state

Remove any states no longer required in the route. To do this:

1. Select the state you want to remove in the Route builder list.
2. Click Delete.

Saving any updates

1. Click OK to save your updated route.
2. Click Save to Server in the Routemap List dialog.



All the above changes need saving before they are active.

Other tasks:

[Managing routes](#)

[Adding a route](#)

[Removing a route](#)

[Copying user data fields to a route](#)

[Renaming data fields](#)

[Replacing a username](#)

Removing a route

To remove a route:

1. Click Routemap in the main menu of DbAuthorise Management Console and choose Edit.
2. Select the route you want to remove in the left-hand pane.
3. Click Delete Route. Take care when removing a route. Any entry currently using a deleted route will not allow a subsequent accept or reject command (as the next stage cannot be determined). A user with level 2 or level 3 privileges must issue a Change route command on the entry.
4. Click Save to Server in the Routemap List.

Other tasks:

[Managing routes](#)

[Adding a route](#)

[Updating a route](#)

[Copying user data fields to a route](#)

[Renaming data fields](#)

[Replacing a username](#)

Copying user data fields to a route

Copying user data field names to a route

Once you have set up the user data field names for one route you may want to copy these to a similar route. To do this:

1. Click Routemap in the main menu of the DbAuthorise Management Console and choose Edit. The Routemap List is displayed, as shown below.
2. Select the route you want to copy the user field names from.
3. Click on Copy UD Names. The Select Routes to copy user data names to window is displayed.
4. Check the boxes that correspond to each route you want to replace the names of the user data fields for, in the left-hand pane, or click on either Select All or Select None.
5. Click OK.
6. Click Save to Server in the Routemap List dialog.

Other tasks:

[Managing routes](#)

[Adding a route](#)

[Updating a route](#)

[Removing a route](#)

[Renaming data fields](#)

[Replacing a username](#)

Renaming data fields

To update the names of the User fields for a particular route:

1. Click the Routemap option in the main menu of DbAuthorise Management Console and choose Edit. The Routemap List is shown. If the new user data fields are the same as a different route, you can copy them from this route, rather than enter them again. See later.
2. Select the route whose user data fields you want to rename from the list in the left pane.
3. Click Edit Route. The Route builder window is displayed showing the authorisation states in the route and the person whose approval is required.
4. Click OK. The Edit User Data Names window shows fields User 1 to User 8.
5. Enter or update the names of the User data fields in the selected route.
6. Click OK to save your updates on your local machine.
7. Click Save to Server in the Routemap List dialog.

Other tasks:

[Managing routes](#)

[Adding a route](#)

[Updating a route](#)

[Removing a route](#)

[Copying user data fields to a route](#)

[Replacing a username](#)

Replacing a username

Occasionally you may need to change the user whose approval is needed in all routes from one person to another, for example when someone changes jobs or is replaced. To replace one username with another in all routes:

1. Click Routemap in the main menu of DbAuthorise Management Console window and choose Edit, to show the Routemap List.
2. Click Change User to show the Change User window.
3. Select the username you want to replace using the Old User drop-down.
4. Select the new username using the New User drop-down.
5. Click OK.
6. Click Save to Server in the Routemap List.



Don't use this to temporarily pass responsibility from one user to another, as it may be difficult to restore the original responsibilities. For example, assigning all John's work to Sarah, then reversing this at a later date would lead to John having all of Sarah's work, not just his own.

Other tasks:

[Managing routes](#)

[Adding a route](#)

[Updating a route](#)

[Removing a route](#)

[Copying user data fields to a route](#)

[Renaming data fields](#)

Glossary

A

accounts package: Version One packages can interface with third-party standard accounts and ERP packages.

annotation: A note added to a document in DbArchive. Like adding a sticky not to a paper document, the original document is not changed.

authorisation route: Documents can proceed through a number of approval states to be fully authorised. The authorisation route taken by a particular document follows predefined rules. Rules can use fields from the document, such as total value.

B

barcode: An optical machine-readable representation of data.

D

DbArchive: An enterprise-wide document imaging and management system, used to archive outgoing and incoming documents, and retrieve them quickly and easily.

DbAuthorise: Manages the authorisation of documents, such as supplier invoices requiring payment. Each document can pass through a series of authorisations before final approval.

DbCapture: Used to give a summary view of captures and lets you work with your documents. Captured information is shown and any problems with documents can be corrected.

DbConsole: Provides facilities for configuring and controlling the way DbScanner, DbQuery and DbWebQuery operate.

DbDeposit: Used to add extra document into the archive. Most documents are deposited automatically by printing invoices or scanning. DbDeposit allows you to add a file, such as a Word document or a PDF file, into the archive.

DbFax: Provides facilities for sending electronic documents by fax. Administrators can use DbFax to view fax requests on the server, edit or view system files, and take appropriate actions.

DbForm: Used to process source files (typically a print spool file), reformat them and pass the new layout to an output program. Output programs can convert the file to a different format, eg tiff, pdf, xml, csv, and pass it to other programs, such as DbFax, DbArchive and DbMail.

DbLogin: The common module used to access each of the document management suite applications.

DbMail: Module handling email integration, used to generate and send emails from your business applications. For example, send remittance advices directly to your suppliers via email, instead of printing, faxing or posting.

DbMailAdmin: The administration component of DbMail used to enter the information and select options to run DbMail how you want.

DbQuery: Provides facilities for finding and retrieving your archived and stored information.

DbScanner: Provides facilities for scanning paper documents and processing the images.

DbTrans: Before you can edit or delete a table you must unload the document data stored in it, and export it to another file.

DbWebquery: Provides facilities for retrieving the stored information through a standard web browser interface. Similar to DbQuery in use.

DbWebRetrieve: Uses a web browser to find and work with documents in your archive (DbArchive). You can search by a number of methods.

document profile: Document profiles control a set of scanning properties. It controls aspects to the scanning process such as whether barcodes are used, the OCR environment (if OCR is being used), how look-ups work for the document tags and so on. Each document profile is connected to a document type.

document type: A document type is created for each sort of document that is scanned. For example purchase orders, purchase invoices, goods received notes, etc.

duplex: Double-sided document printing.

E

EDI: Electronic Data Interchange — electronic exchange of transaction documents with your trading partners.

ERP: Enterprise Resource Planning — software applications that integrate internal and external management information across an organisation, embracing finance/accounting, manufacturing, sales and service, CRM, etc.

event log: A record of all the activity on your system — may be used by the support team to help diagnose any problems.

G

green meter: A package used to quantify the environmental savings from using the software in terms of CO2 emissions and tree equivalents.

GUI designer: Graphical tool available to produce the .def file. Input spool files can be mapped and output form definitions can be generated from scanned input files, data can then be placed on the output form.

I

import batch: Used if documents arrive through Electronic Data Interchange (EDI) or are scanned using another software package.

J

JPG: Graphic file format, uses 'lossy' compression, to give smaller file sizes.

K

Kofax: Kofax software is the image-processing engine used with DbScanner.

M

mail: Applications can use your email client to send a document from one user to another.

manual recognition: Sometimes a document cannot be OCR'd properly, either because it was poor quality or hand-written. You are shown a warning for these fields and you can edit the values manually.

O

OCR: Optical Character Recognition — the electronic translation of images of text (usually captured by a scanner) into editable text. OCR is not an exact science and requires human validation to make sure the results are acceptable. Think in terms of around 90% accuracy, depending on fonts, size, quality of original, etc.

S

scanner: A device that optically scans images, printed text or handwriting and converts it to a digital image.

T

TIFF: Graphic file format, uses 'lossless' compression, giving larger file sizes.

V

Version One: Award winning document management company. Authors of the document management suite of applications, saving time, improving efficiencies and improving green credentials.

Index

A

about DbAuthorise23
about DbAuthorise management console
39
about help19
accept entry.....29
accept with change29
add new condition48
add new route.....48
adding a desktop shortcut 7
adding a state51
adding new states48
address18
all entries27
application suite 2
approval routes23
authorisation..... 2
authorisation data30
authorisation name.....39
authorisation reminders.....39
authorisation route48
authorisation route name39
authorisation routes..... 23, 51
authorise history44
authorised entries.....27
authorising scans.....23

B

backups17
best match12
business security17

C

cache files42
cancel entry.....29
cancelled entries27
capturing data..... 2
change environment19
change language19
change password.....19
change route.....29

change routemap user55
change user.....19
changing route user.....51
choose fields..... 9
clear completed.....26
clear search term 9
clearing cache files42
column chooser.....27
common features 7
configuring DbAuthorise45
configuring DbAuthorise entries.....26
contact us18
contents tab12
copyright.....18
creating a shortcut 7
creating routes.....48
csv export26
customising columns..... 9
customising fields..... 9
customising the suite 7

D

data capture 2
data field renaming54
data find 9
data security.....17
DbAuthorise.....23
DbAuthorise configuration45
DbAuthorise entry menu29
DbAuthorise file menu.....26
DbAuthorise help menu.....37
DbAuthorise management console.....39
DbAuthorise management console
routemap42
DbAuthorise version number.....37
DbAuthorise view menu27
DbLogin15
delete entry.....29
delete routemap.....52
desktop shortcut 7
disaster recovery.....17

display image.....29
document approval.....23
document authorisation..... 2, 23
document data capture 2
document find..... 9
document management suite2, 7
document reference.....39

E

edit route states.....48
edit user data29
editing authorisation data30
email authorisation23
email contact18
entry menu.....29
entry menu - DbAuthorise29
environment19
example screens12
export DbAuthorise entries26
export history26
exporting history44
exporting to csv26

F

feedback18
field chooser 9
file backups17
file menu.....26
file menu - DbAuthorise.....26
filtering documents..... 9
find date..... 9
finding documents 9
finding help.....12
finding us18

G

getting in touch.....18
glossary12

H

help about.....19
help contents12

help index 12
help menu - DbAuthorise.....37
help version..... 18
history entries.....27
history export 44

I

in progress entries.....27
index tab.....12
info address.....18
installation 2
invoice approval23
issue with help..... 18

L

language19
last authorisation action39
layout options..... 9
live environment19
login15
looking for a help topic.....12

M

management console - DbAuthorise.....39
management console entry menu.....29
management console file menu26
management console help menu37
management console routemap menu...42
management console view menu.....27
menu options..... 7
modules..... 2
moving columns..... 9

N

new route.....48

O

old routemap52
order approval23

P

password.....19
personalising 9
phone number18

pop-up screen12
problems with help18
process counts27
product family..... 7

Q

queried entries.....27
queries.....18
query entry.....29

R

recently used menu list 7
refreshing DbAuthorise entries26
reject entry.....29
release number18
remind authorisation.....39
remove routemap.....52
remove search term..... 9
removing a state 51
renaming data fields54
reorder route actions48
replace username55
route changes48
route name.....39
routemap menu - DbAuthorise management console42
routemap removal52
routemap user change55
routemap username.....55

S

save display preferences27
save route changes.....48
save state updates51
screen display 9
screen shots12
search date..... 9
search DbAuthorise entries26
search fields 9
search history26
search operators 9
search tab12

searching help 12
securing data.....17
select fields 9
select language.....19
send reminder.....29
Show/hide screen.....12
showing authorisation information 30
signing in15
software version.....18
starting the software..... 7
state update changes.....51
striped grid.....27
system security.....17

T

technical terms 12
test environment.....19
tools 2

U

update password..... 19
updating routes.....51
user change.....19
user defined fields30
user login15
user password.....15
username.....15
using help12
using the software..... 7
using the windows..... 9

V

version number..... 19, 37
version one18
view - DbAuthorise27
view / edit data.....30
view history.....29
view menu.....27

W	
<i>which tool to use</i>	2
<i>wilmslow</i>	18
<i>window customisation</i>	9