

DbLogin Admin and Green Meter Consoles: user and administrator guide

Document Management & Imaging



This document describes the DbLogin Admin and Green Meter Console 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
DbLogin console	22
About DbLogin admin console	22
Application modules	22
Environments	22
CALs	23
DbLogin configuration	23
User logins	23
Screen	24
DbLogin and DbLogin administration	27
Windows authentication	27
Configuring DbLogin	27
DbLogin file menu	28
DbLogin users menu	29
DbLogin environment menu	30
DbLogin application menu	31
Configuration	32
Manage access tokens	33
Client tokens window	34
User settings	36
User management	38
Password settings window	39
Reset password window	40
New user window	40
Edit user information window	41

- Import from external directory window 42
- Refresh users window 43

- Environment management _____ 45**
 - Environments 45
 - Applications..... 45
 - Environment management window..... 45
 - Add environment window 46
 - Copy environment window 47

- Application management _____ 48**
 - Import application schema window..... 49
 - Add application window..... 50
 - Update application window 50

- Green meter console _____ 53**

- About green meter console _____ 53**
 - Environmental benefits 53
 - Counting documents 53
 - Screen..... 54

- Green meter graphic viewer _____ 56**

- Environmental benefit calculations _____ 58**
 - Overview..... 58
 - How many sheets of paper make up a tree? 58
 - How much CO2 is saved using electronic storage and distribution? 58

- Glossary _____ 61**

- Index _____ 64**

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.

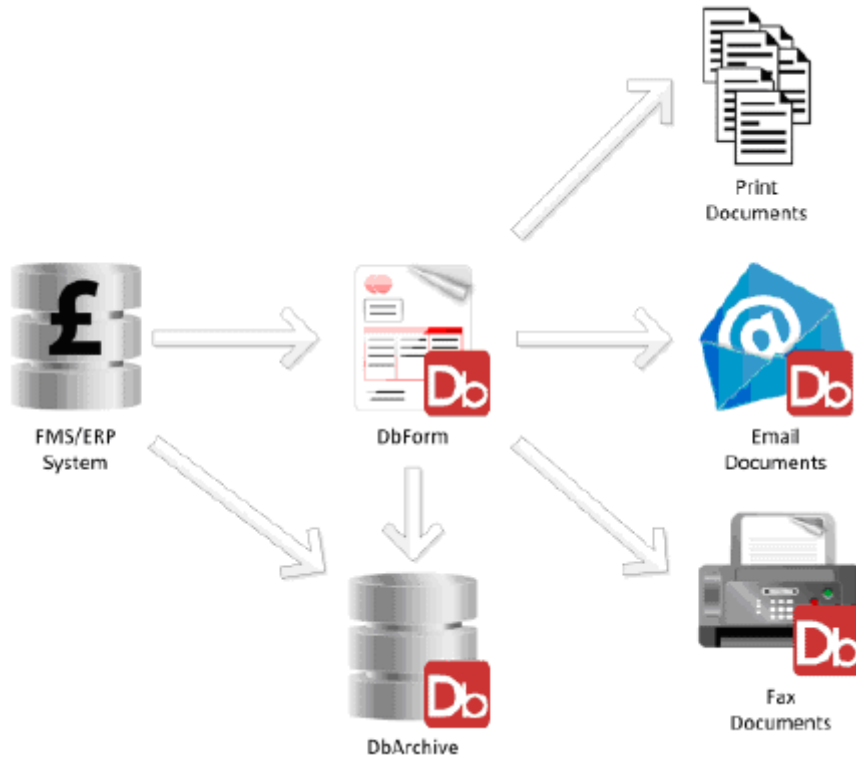


There are many different ways of configuring and using the software, using different combinations of the core product set. You may not have the complete applications suite installed.

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.



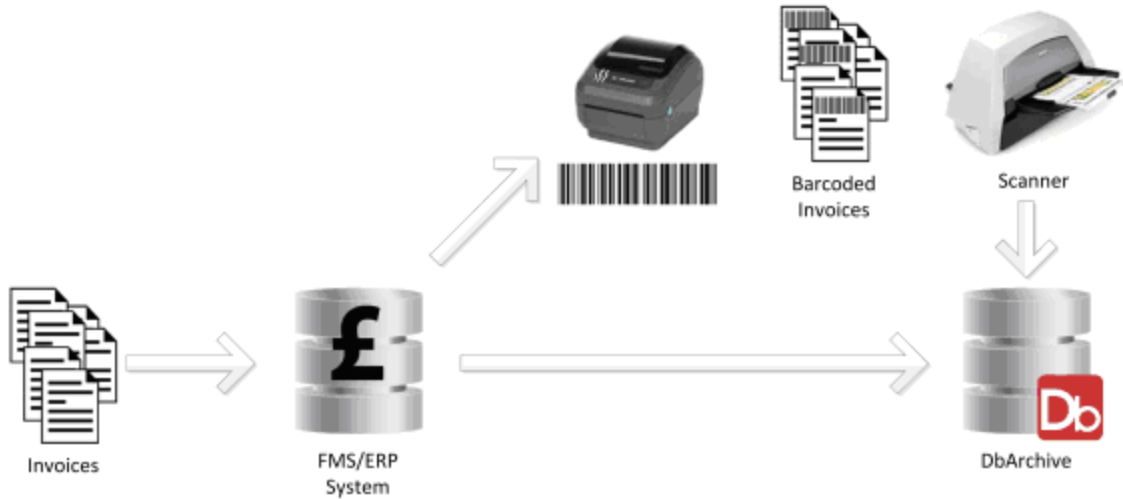
Several applications support these processes:

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

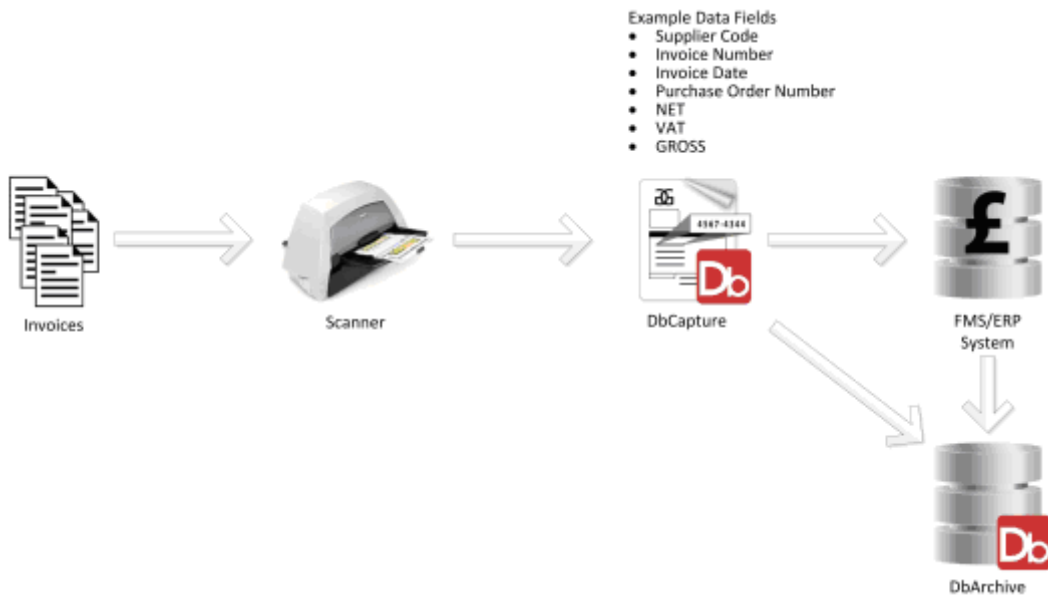
Incoming paper documents such as invoices and orders may be scanned and stored for easy access and for statutory purposes (eg to comply with UK HMRC legislation). The basic process makes use of barcoding techniques for document separation and recognition.



The application supporting document scanning and retrieval is DbArchive.

Document data capture

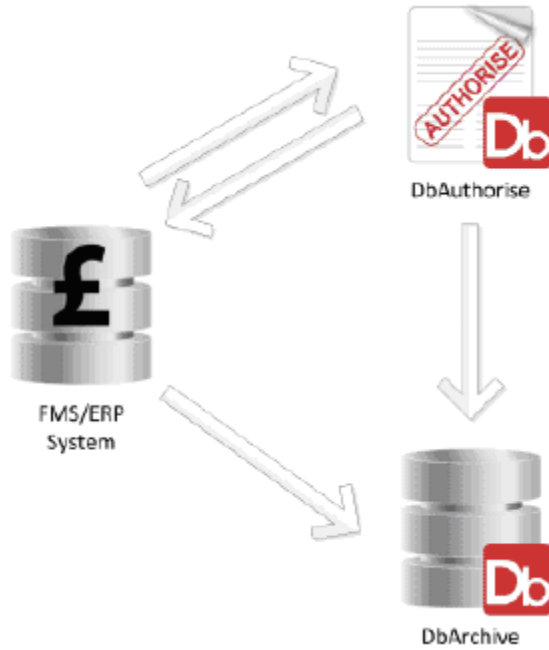
This process typically involves scanned documents such as purchase invoices. The document data can be intelligently captured using OCR technology and validated, so transactions can be automatically posted to the core finance system.



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.



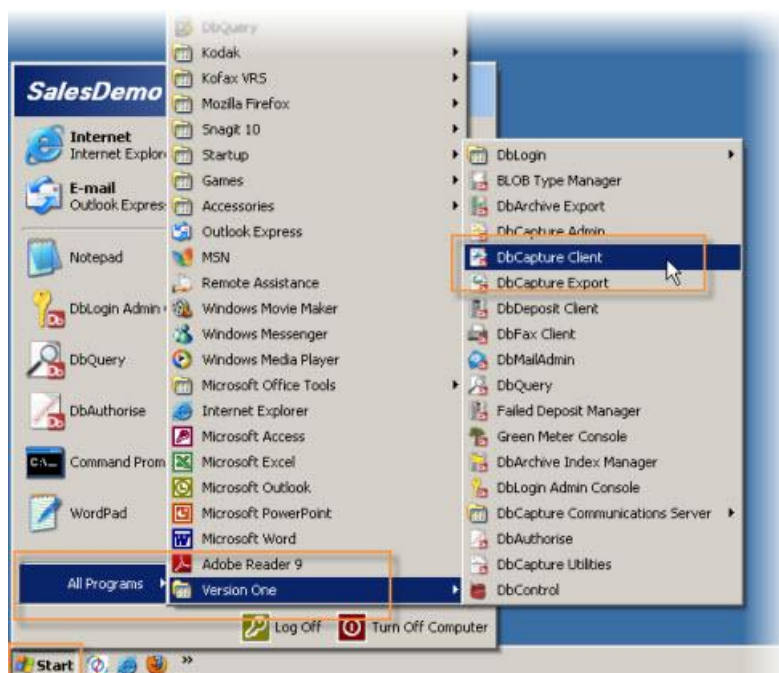
Customisation: your system may be using Windows authentication to log in to the document management suite automatically. If so, the [DbLogin window](#) is not displayed. Using Windows authentication allows you to use your regular PC logon to access the software without an additional logon.

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](#).



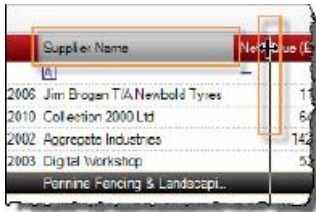
The options available depend on your particular document management suite configuration.

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.

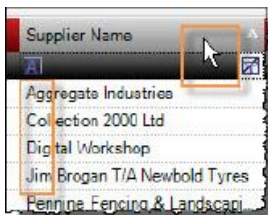
Sizing columns

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:



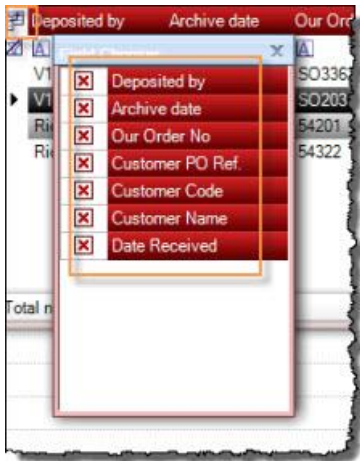
Clearing multiple search criteria


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.

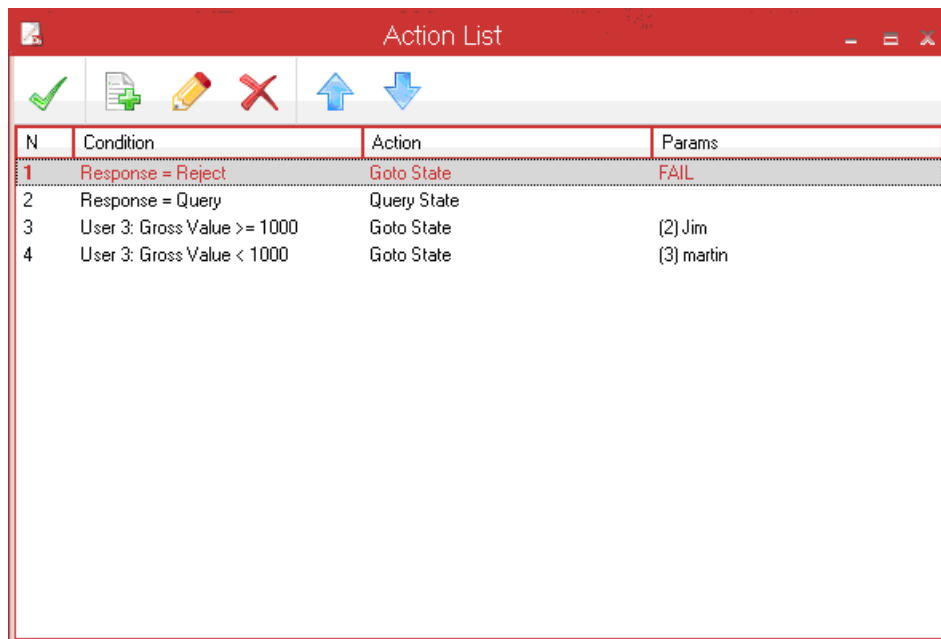
Links and how they work

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 the navigation and glossary panel.

Show



Go back through the topics you have looked at.

Back



Go forward through the topics you have looked at.

Forward



Print the current topic.

Print



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:

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 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.

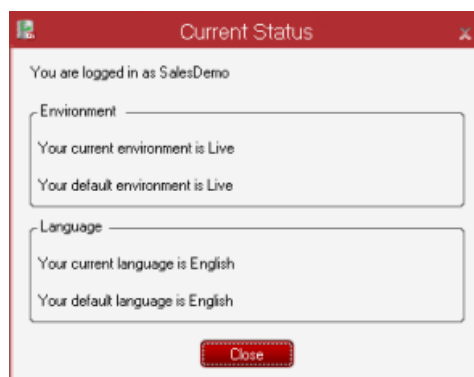


Use the drop-down to change your system configuration.

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.



DbLogin admin console

About DbLogin admin console

Overview: helps system administrators manage configuration of the document management suite more efficiently, covering:

- applications
- environments
- users
- user settings.



This topic is for **system administrators**, most users can skip this section.

Application modules

The document management suite includes a number of applications, eg DbArchive, DbFax. Within each application there may be features and options granted only to specific individuals. An application has a version number updated with each application release. The data elements are represented by schema files, with one schema file for each unique version number of each application.

All users accessing the applications must be identified to DbLogin. When a user logs in they are granted access to applications and options within those applications, based upon the configuration assigned to them by the system administrator.

Environments

For flexibility when configuring and using the system, applications are grouped into one or more environments. A single 'Live' environment is always available (and may be the only environment configured). If multiple environments are configured, each environment can contain different combinations of applications and users can be granted different access rights to applications in the different environments. Alternative environments are used for testing new applications or release versions, or to distinguish between different business functions.

Before using the system do the following:

Step Action

- 1 Install DbLogin and initialise the system. This is done by the system installer.
- 2 Configure environments and applications:
 - a. Create the necessary environments – the Live environment is created automatically
 - b. Import the schema files for the required applications
 - c. Add the applications to the required environments.
- 3 Configure users:
 - a. Decide on a password policy for Internal users and configure this before adding the users to DbLogin

- b. Add users to DbLogin either directly (Internal users) or by importing from Active Directory
- c. Assign the environments and applications to the users to whom you will grant access.

4 Set the application options for the users in their respective environments.

CALs

To apply license management each application client is allocated a number of client access licenses (CALs). These are defined in a CAL file for each client application. CALs are managed on the DbLogin server and are installed along with the core DbLogin system. CALs may be assigned to individual named users or to a user pool, depending on the client application. To run a client application, a CAL must be available to the user.

DbLogin configuration

This section explains briefly how DbLogin functions and how to best configure it.

User logins



The terms Windows and AD (Active Directory) users are used interchangeably in this section.

Start by configuring the five global settings:

Setting	Description
Enable internal login	Allow users created and managed solely by DbLogin to use the system. Only users configured within an application are able to login to it. Internal logins always require a password, if set for that user.
Enable AD user login	Allow users flagged as Windows users to login without entering their Windows password. This is the default behaviour when a client application is loaded.
Enable AD user password login	Allow Windows users to login by specifying their user name and password. This is used primarily in Change User dialogs. The password entered by the user is validated against the Active Directory. Windows passwords are not held in DbLogin
Enable AD token login	This is used internally and will be implemented further when we integrate with Single Sign On environments, such as OpenSSO.
Enable guest login	Allow users unknown to DbLogin to login with a default set of permissions, specified for the guest user in DbLogin.




Apart from Enable Guest Login, these are set to yes on system initialisation. All users who need to run applications must be stored in DbLogin as either an Internal or Windows user. Option validity is checked by the server rather than the client PC, so your screen can potentially offer an option that is not valid.

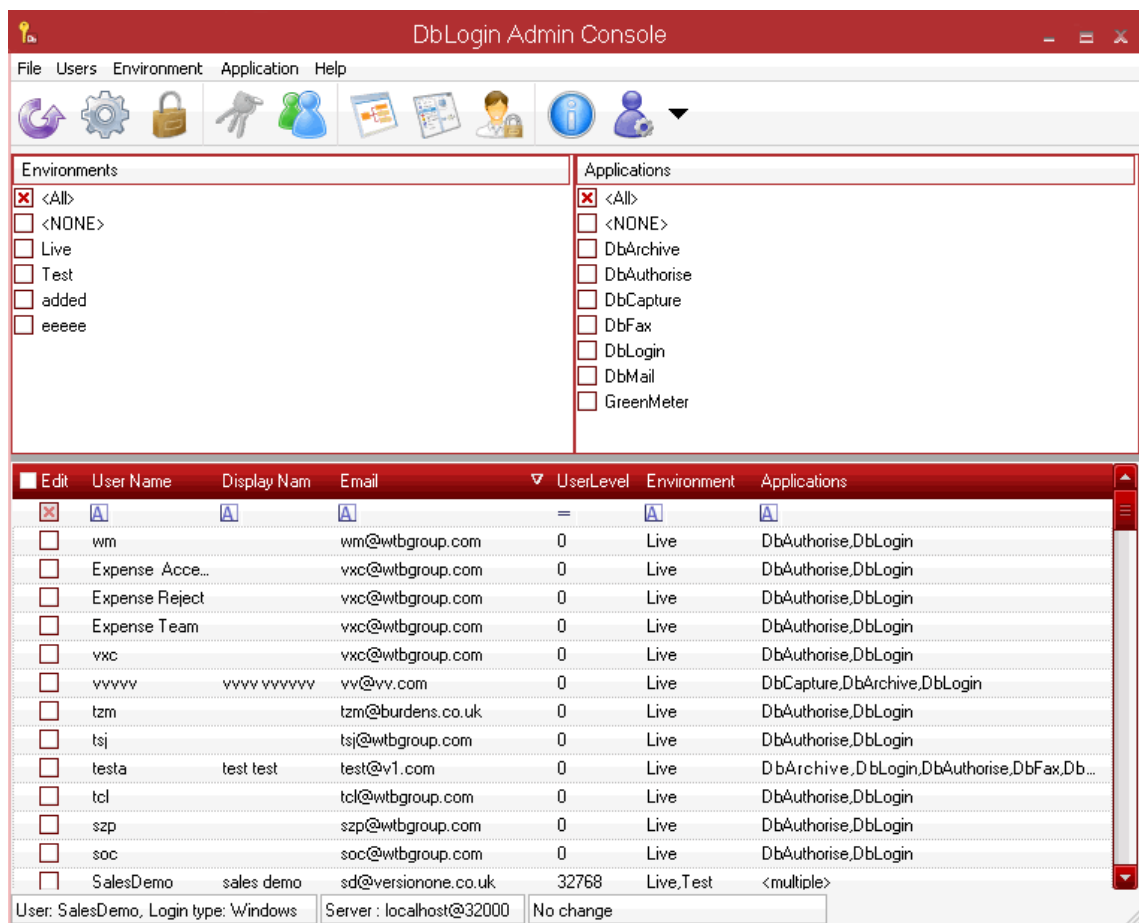
Use the DbLogin Admin Console to add and edit Internal users, or import AD users. Each is flagged as the appropriate user type.

When a client application is loaded, it initially attempts an AD User login, using the current Windows user name. If the option is valid and the user is configured in DbLogin, the login is accepted and DbLogin checks the environment and application settings for the user. If the login is not valid, you are shown the login dialog again.

If the Windows user is in DbLogin but flagged as an Internal user, the initial login fails and the user must login manually. If guest logins are enabled, the initial attempt is successful but with guest permissions.

 **Debugging:** if login gives unexpected results, run DbLogin server in debug mode. This shows the types of login being attempted and any major failures. Examining user configurations can then explain the results.

Screen



The initial screen has several menus and icons at the top of screen to choose whether to manage users, the environment or an application. The main section shows details of what is being maintained (users by default, the most frequently required).









User Selection shows all environments and applications configured in the system and allows you to filter the list of users by selected environments and applications.



The Live environment always exists as soon as the DbLogin application is installed.

This list contains ALL applications currently configured within DbLogin. It always has DbLogin application configured under Live environment as soon as DbLogin application is installed.

Menu	Description
File	Configure, re-display or exit the window
Users	Manage your user settings, user details and access tokens
Environment	Manage your system environment
Application	Manage your applications
Help	Display the help. You will need this if you contact your support team with a query.

Icon	Description
	Refresh the screen display
	Configure your system
	Manage your system access tokens
	Manage your system user settings . Only enabled when you select a user from the list.
	Manage your system user details
	Manage your system environments
	Manage your Version One Applications
	Display information about this installation.

Field	Description										
Environments	Select the environments to which the user has access:										
	<table border="1"> <thead> <tr> <th style="text-align: left;">Option</th> <th style="text-align: left;">Description</th> </tr> </thead> <tbody> <tr> <td>All</td> <td>Select all environments on the list.</td> </tr> <tr> <td>NONE</td> <td>Clears the list of selected environments.</td> </tr> <tr> <td>Live</td> <td>The Live environment exists when the DbLogin application is installed.</td> </tr> <tr> <td>[Other]</td> <td>All other environments currently configured within the DbLogin system.</td> </tr> </tbody> </table>	Option	Description	All	Select all environments on the list.	NONE	Clears the list of selected environments.	Live	The Live environment exists when the DbLogin application is installed.	[Other]	All other environments currently configured within the DbLogin system.
Option	Description										
All	Select all environments on the list.										
NONE	Clears the list of selected environments.										
Live	The Live environment exists when the DbLogin application is installed.										
[Other]	All other environments currently configured within the DbLogin system.										
Applications	Select the applications to which the user has access:										
	<table border="1"> <thead> <tr> <th style="text-align: left;">Option</th> <th style="text-align: left;">Description</th> </tr> </thead> <tbody> <tr> <td>All</td> <td>Select all applications currently configured within DbLogin.</td> </tr> <tr> <td>NONE</td> <td>Clears the list of selected applications.</td> </tr> <tr> <td>DbLogin</td> <td>The DbLogin application is always configured under the Live environment once the DbLogin application is installed.</td> </tr> <tr> <td>[Other]</td> <td>Other applications currently configured within the selected environments.</td> </tr> </tbody> </table>	Option	Description	All	Select all applications currently configured within DbLogin.	NONE	Clears the list of selected applications.	DbLogin	The DbLogin application is always configured under the Live environment once the DbLogin application is installed.	[Other]	Other applications currently configured within the selected environments.
Option	Description										
All	Select all applications currently configured within DbLogin.										
NONE	Clears the list of selected applications.										
DbLogin	The DbLogin application is always configured under the Live environment once the DbLogin application is installed.										
[Other]	Other applications currently configured within the selected environments.										
Users											
Edit	Select the users to be edited. Ticking the selection box at the top of the column, selects or deselects all users.										
User name	Displays the user name used by the system.										
Display name	Displays the user's display name. This shows the Forename and Surname entered in the user details .										
Email	Displays the user's email address.										
Environments	Displays the environments to which the user has access that match the filter criteria.										
Applications	Displays a list of the applications configured for this user that match the filter criteria. If multiple environments are selected and not all selected applications exist in all selected environments, the list shows <various>.										

DbLogin and DbLogin administration

Overview: the document management applications use [DbLogin](#) to control how users access the document management suite. The DbLogin admin console is used to maintain users and their environments.



Most users will not need the DbLogin Admin section. It is used when your software is first installed and later by system administrators to handle staff changes and environment updates.

Windows authentication

If your system uses Windows Authentication you do not directly access the DbLogin application for each application. Simply click a document management suite icon to access that application. Many users only use the DbLogin application when they click a document management suite icon to display the [DbLogin window](#) to log in to another application. System administrators use the [DbLogin admin console](#) to manage configuration of the product suite.

Configuring DbLogin

See the [DbLogin configuration](#) and [configuration](#).

DbLogin file menu

Option	Description
Configure	Configure the DbLogin admin console
Refresh	Re-display the DbLogin admin console display
Exit	Exit DbLogin Admin Console.

DbLogin users menu

Option	Description
Manage user settings	Manage the user settings
Manage user details	Display the user management window to manage user details
Manage access tokens	Manage access tokens .

DbLogin environment menu

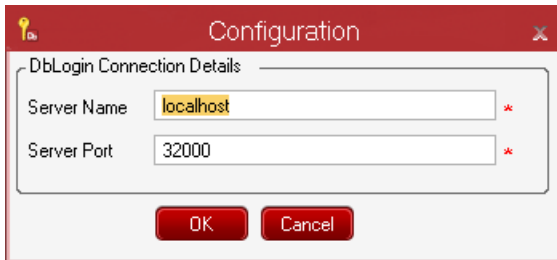
Option	Description
Manage environment	Configure the Version One environment using the environment management window.

DbLogin application menu

Option	Description
Manage application	Configure the applications using the application management window.

Configuration

Overview: you can configure the basic settings of your Version One server.



Field	Description
DbLogin connection details	
Server name	Enter the name of the server
Server port	Enter the port to use on the selected server.

Button	Description
OK	Save the server settings
Cancel	Exit without saving.

Manage access tokens

Overview: used to manage the tokens available for client access to your Document Management suite. There are two types of token for client access:

1. Allocated — allocated to specific users for specific applications
2. Pool — available to any users.

The screenshot shows a window titled "Manage Client Access Tokens" with a table of "Client Access Token list". The table has the following columns: Client, Total Tokens, Max for Allocation, Allocated, Max in Pool, Current Pool Usage, and Current Total Usage. The data is as follows:

Client	Total Tokens	Max for Allocation	Allocated	Max in Pool	Current Pool Usage	Current Total Usage
DbArchiveDbConsole	99999	99999	0	99999	0	0
DbArchiveExport	99999	99999	0	99999	0	0
DbCaptureAdmin	99999	99999	0	99999	0	2
DbCaptureClient	99999	99999	0	99999	0	0
DbCaptureExport	99999	99999	0	99999	0	0
dbdeposit	99999	99999	0	99999	5	5
dbfax	99999	99999	0	99999	0	0
dbloggingreen	99999	99999	0	99999	0	0
DbLoginManager	99999	99999	0	99999	1	1
DbMailAdmin	99999	99999	0	99999	0	0
dbquery	99999	99999	0	99999	4	4
DbWebAuth	99999	99999	0	99999	0	0
dbwebquery	99999	99999	0	99999	0	0
femanager	99999	99999	0	99999	0	0
indexmanager	99999	99999	0	99999	0	0
blobtypemanager	99999	99999	1	99999	0	0
dbscanner	99999	99999	3	99999	0	0

At the bottom of the window are three buttons: Edit, Refresh, and Cancel.

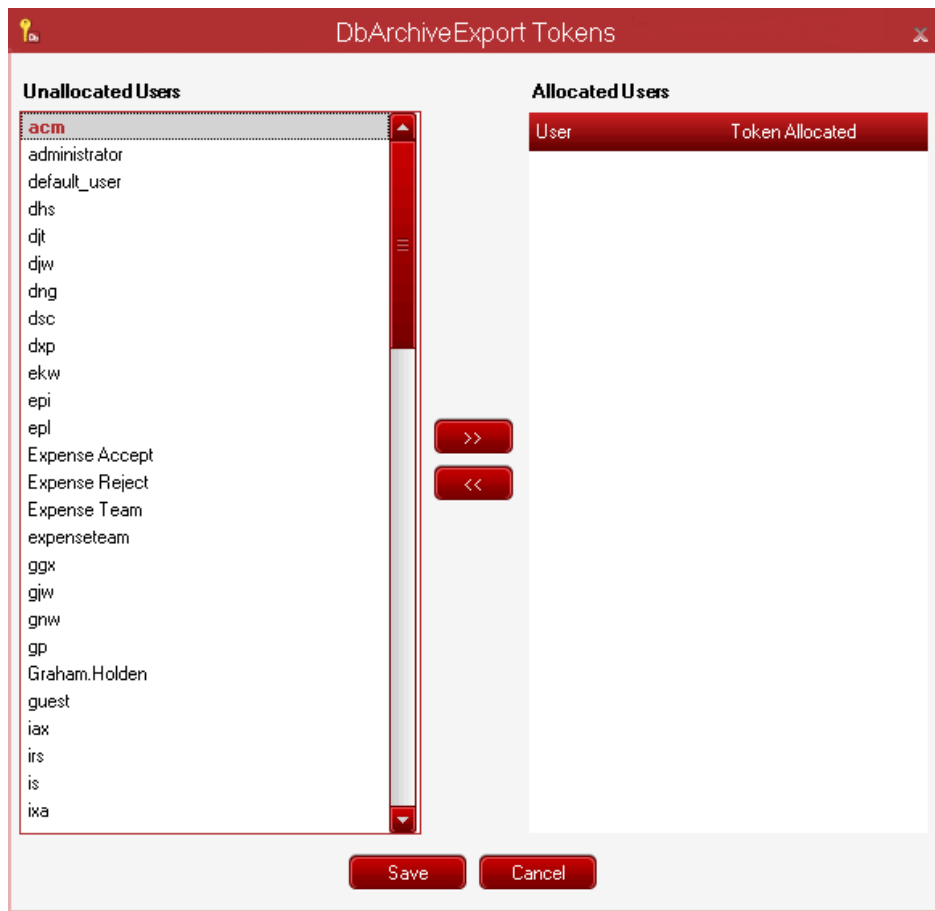
Field	Description
-------	-------------

Client access token list

Client	The client name is displayed.
Total tokens	The total number of tokens for each client is displayed, including both allocated and pool tokens.
Max for allocation	The maximum available for allocation for each client is displayed.
Allocated	The number allocated for each client is displayed.
Max in pool	The maximum available in the pool for each client is displayed.
Current pool usage	The current pool usage for each client is displayed.
Current total usage	The current total usage for each client is displayed.

Button	Description
Edit	Edit the Client Access Tokens for the selected client using the client tokens window is displayed.
Refresh	Re-display the Client Access Token List
Cancel	Exit this option.

Client tokens window



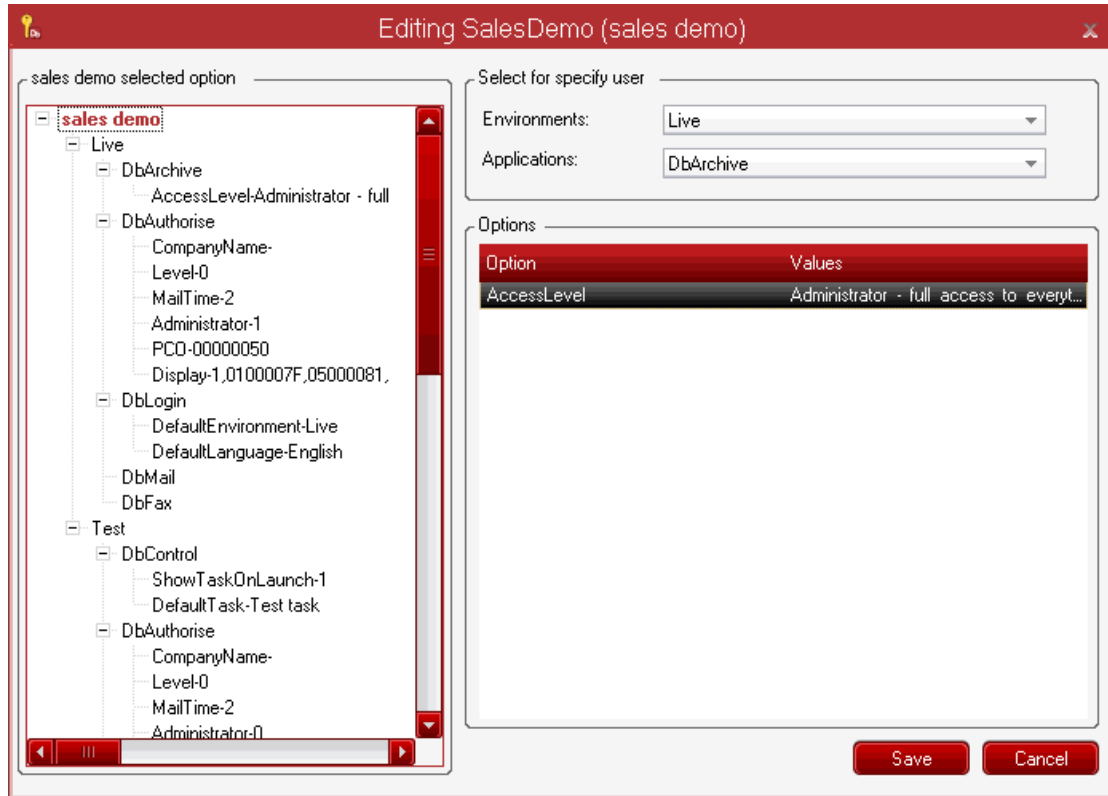
Field	Description
Unallocated users	The list of users who haven't yet been allocated a client access token.
Allocated users	The list of users with a client access token, and the numbers allocated to them.
User	The user to whom a token has been allocated.
Token allocated	The number of the token allocated to that user.

Button Description

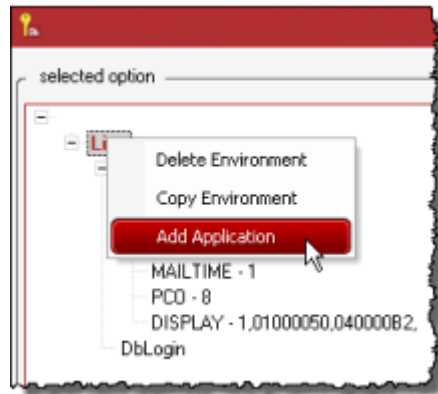
>>	Add the selected unallocated user to the list of allocated users. Enter the number of the Token Allocated.
<<	Add the selected allocated user to the list of unallocated users. The token is now unallocated.
Save	Save the updated list of allocated users and tokens.
Cancel	Exit without saving.

User settings

Overview: used to edit the settings for a user for their combination of environment and application. The name of the user is shown in the window title bar. If multiple users are selected, 'Editing Multiple Users' is shown.



Field	Description
<user name> selected option	Use the folder structure to select the user you want to edit, or you can select multiple users.
Select for specific user	Select the environment and application combination to edit for the selected users.
Environments	Select the environment to which the user has access.
Applications	Select the application the user has access to. Right click the environment and choose Add Application to add a new application to the environment.



Options

Option A list of the options available in the selected environment and application combination is displayed.

Values Click the current value. If multiple values are allowed for that option you can enter a comma-separated list. Some options show a drop-down list of previous values from which you can choose the one you want. You also see a drop-down list if multiple users are selected.

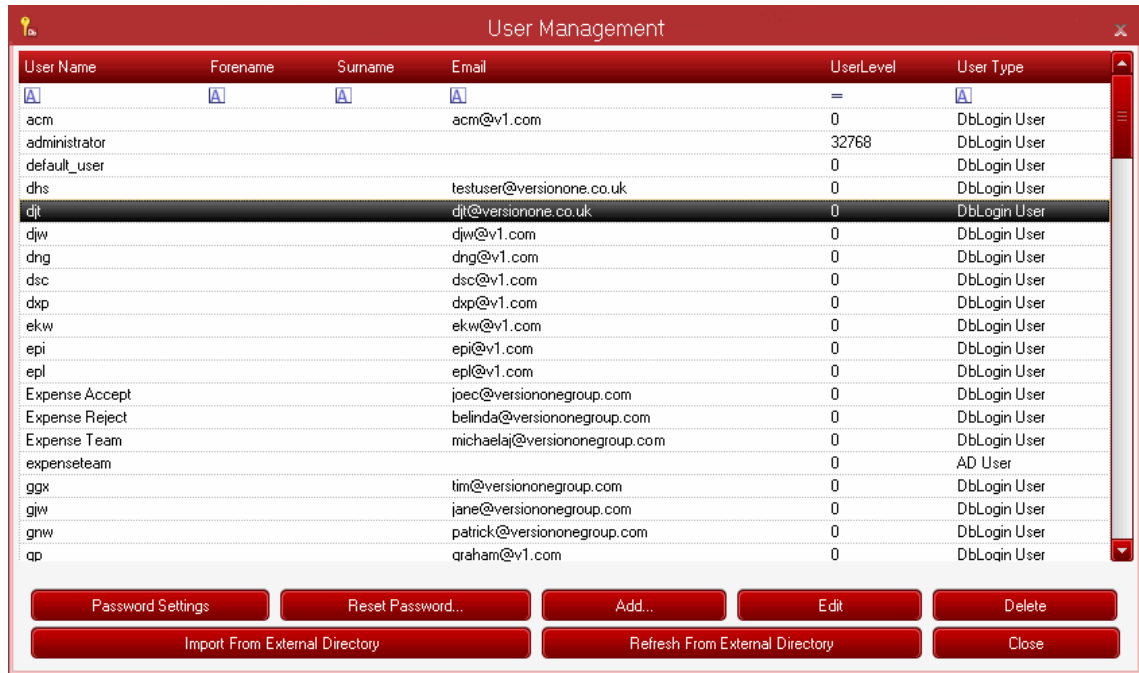
Button Description

Save Save the selected options and values.

Cancel Exit without saving.

User management

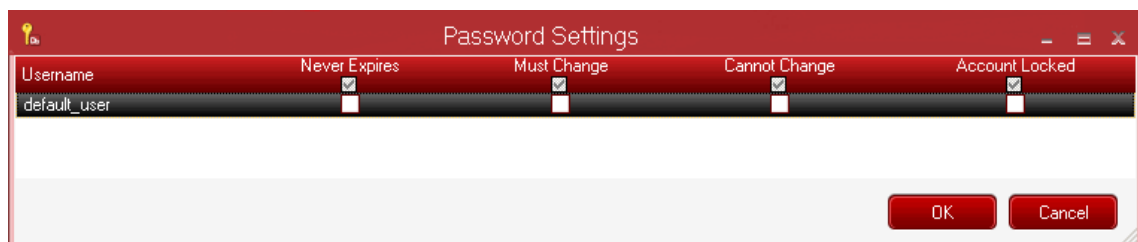
Overview: used to edit the basic personal details of the selected user.



Field	Description						
User name	The user's Version One user name is shown.						
Forename	The user's forename is shown.						
Surname	The user's surname is shown.						
Email	The user's email address is shown.						
User level	The user level is displayed for the user: <table border="1"> <thead> <tr> <th>Value</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>0 (or lower than 32768)</td> <td>Ordinary user</td> </tr> <tr> <td>32768 (or higher)</td> <td>System administrator</td> </tr> </tbody> </table>	Value	Description	0 (or lower than 32768)	Ordinary user	32768 (or higher)	System administrator
Value	Description						
0 (or lower than 32768)	Ordinary user						
32768 (or higher)	System administrator						
User type	The User Type is displayed to show whether the user was created within DbLogin or imported from another system: <table border="1"> <thead> <tr> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>DbLogin User</td> <td>Created in DbLogin</td> </tr> <tr> <td>LDAP User</td> <td>Imported from another system.</td> </tr> </tbody> </table>	Type	Description	DbLogin User	Created in DbLogin	LDAP User	Imported from another system.
Type	Description						
DbLogin User	Created in DbLogin						
LDAP User	Imported from another system.						

Button	Description
Password settings	Edit the password settings for the selected users using the password settings window . Internal DbLogin users only , not Windows AD users.
Reset password	Reset the selected users passwords using the reset password window . Internal DbLogin users only , not Windows AD users.
Add	Add a new user using the new user window is displayed.
Edit	Edit the selected user using the edit user information window .
Delete	Delete the selected user. Confirmation is required.
Import from external directory	Import users from an external directory using the import from external directory window
Refresh from external directory	Refresh the list of users from an external directory using the refresh users window .
Close	Close this window.

Password settings window



Field	Description
Username	The selected user names are displayed.
Never expires	Choose if the password is to never expire while this flag is set.
Must change	Choose if the password must be changed.
Cannot change	Choose if the password cannot be changed.
Account locked	Choose if the user account is to be locked, preventing access.

Button Description

OK	Save the updated password settings
Cancel	Exit without saving.

Reset password window

Field	Description
User name	The user name is displayed.
New password	Enter the new password.
Confirm new password	Re-enter the new password for confirmation, the two entries must match exactly.

Button Description

OK	Save the new password
Cancel	Exit without saving.

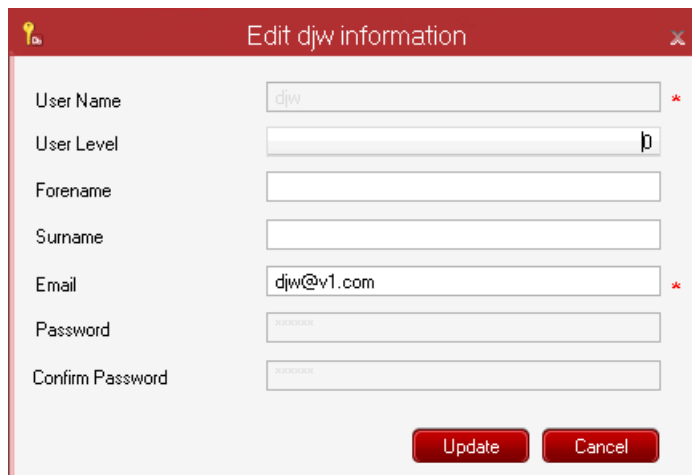
New user window

Field	Description
User name	Enter the user name.
User level	Enter the user level value:


	Value	Description
	0 (or lower than 32768)	Ordinary user
	32768 (or higher)	System administrator
Forename	Enter the user's forename.	
Surname	Enter the user's surname.	
Email	Enter the user's email address.	
Password	Enter the user password.	
Confirm password	Re-enter the user password for confirmation.	
Must change	Choose this checkbox to prompt the new user to change their password when they next log in.	

Button	Description
Add	Create the new user.
Cancel	Exit without creating the user.

Edit user information window



The User ID of the user selected for editing is displayed in the window's title. The fields are the same as in the [new user window](#), without the Must Change field.

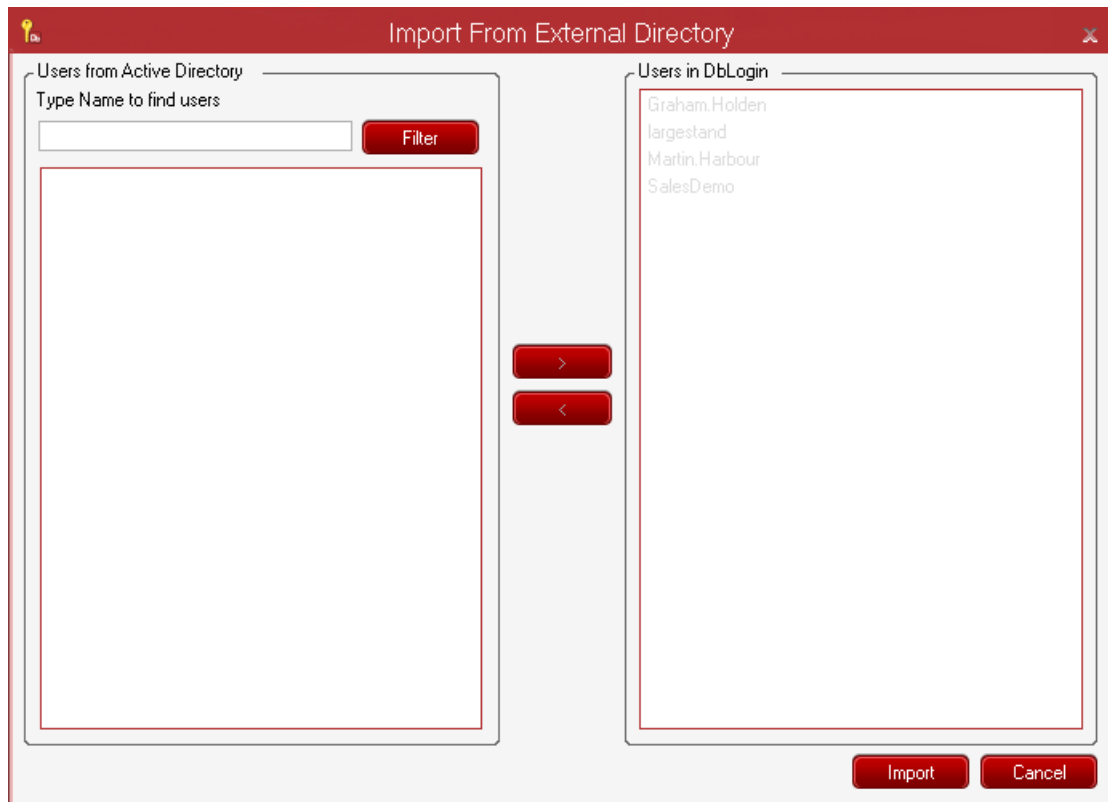
 Some fields can't be edited.

Button Description

Update Save the updated user information.

Cancel Exit without updating.

Import from external directory window



Field	Description
Users from active directory	A list of users matching the name used to filter the list and available for import from the Active Directory to DbLogin.
Type name to find users	Enter a name or part of a name to be used to find users whose name matches or contains the name entered.
Users in DbLogin	A list of available users to be imported from the Active Directory to DbLogin.

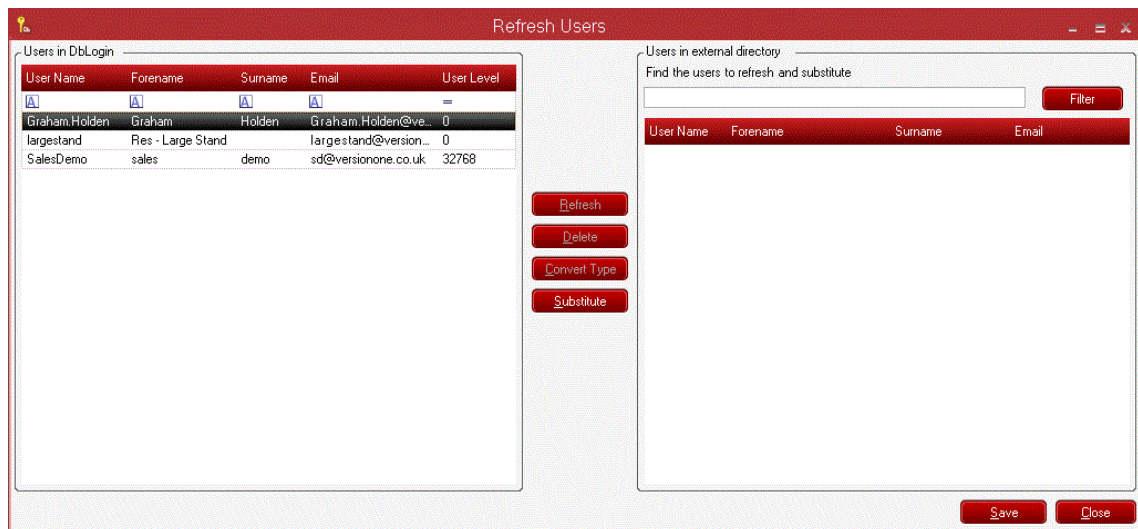
Button	Description
Filter	Filter the available users to be imported from the Active Directory and display a list of matching users.
>	Add users to be imported from the Active Directory to DbLogin.

<	Remove users to be imported from the Active Directory to DbLogin.
Import	Import the list of users displayed in the Users in DbLogin.
Cancel	Exit without importing.

Refresh users window

Some users previously imported to DbLogin may have had their information changed in external directory from where they were imported. Use the Refresh Users Window to:

- Update the user information
- Delete users if they no longer exist in the external system
- Convert the User Type to 'DbLogin User' if the user no longer exists in the external system
- Transfer a user in DbLogin to another user in the external system, if the original user no longer exists in the external system.



Field	Description
Users in DbLogin	All users currently in DbLogin.
Users in external directory	All users available in the Active Directory.
Find the users to refresh and substitute	Enter a name and click the Filter button to find matching users to refresh and substitute.

Button	Description
--------	-------------


Filter	Search the list of all users available in the Active Directory to find matching users to refresh and substitute.
Refresh	Refresh both lists of users.
Delete	Delete the selected users. This is useful if they no longer exist in the external system.
Convert type	Convert the selected users from AD User to DbLogin User. This is useful if the user no longer exists in the external system.
Substitute	Substitute the selected user in DbLogin to the selected user in the external system. This is useful if the original user no longer exists in the external system.
Save	Save the user updates.
Close	Close this option.

Environment management

Overview: used to create and maintain the environments in the document management suite.


Environments

Each environment has a set of rules applying to all content in that environment. You can have several environments on your system. For example, a Live environment for processing your business documents and transactions and a Test environment to test things before applying them to the Live environment.

 You must have at least one Live environment.

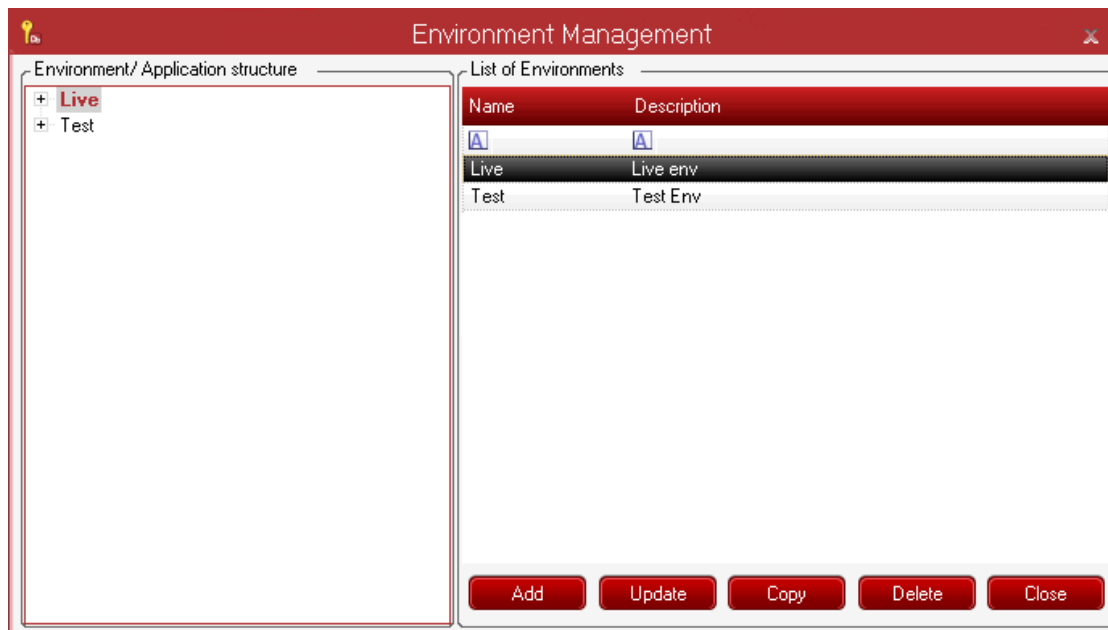
Applications

You can have several different applications within your different environments. For example, DbLogin & DbArchive in your Live environment, and DbLogin, DbAuthorise, DbArchive, DbCapture & DbQuery in your Test environment.

 DbLogin is automatically added to any new environment created.

Applications have versions and you may have different versions of an application in separate environments. The applications schema files define the applications and the configuration of applications.

Environment management window



Field

Description

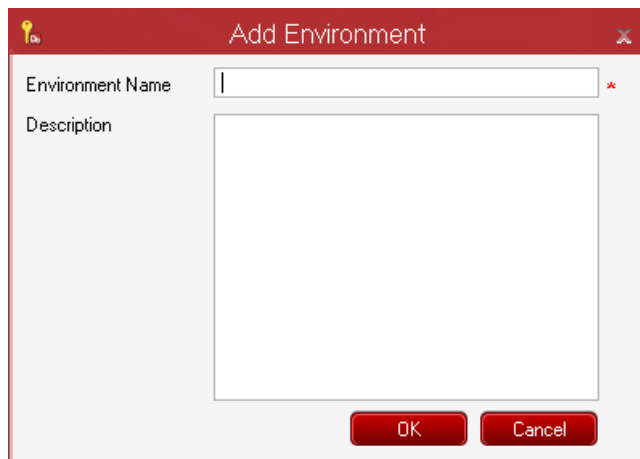
Environment / application structure The environment and application structure.

List of environments List of available environments.

Button	Description
Add	Add an environment using the add environment window .
Update	Update the selected environment using the add environment window for the selected environment details.
Copy	Create a new environment based on the selected environment using the copy environment window , with the selected environment details displayed.
Delete	Delete the selected environment (confirmation is required).
Close	Close the window.

Add environment window

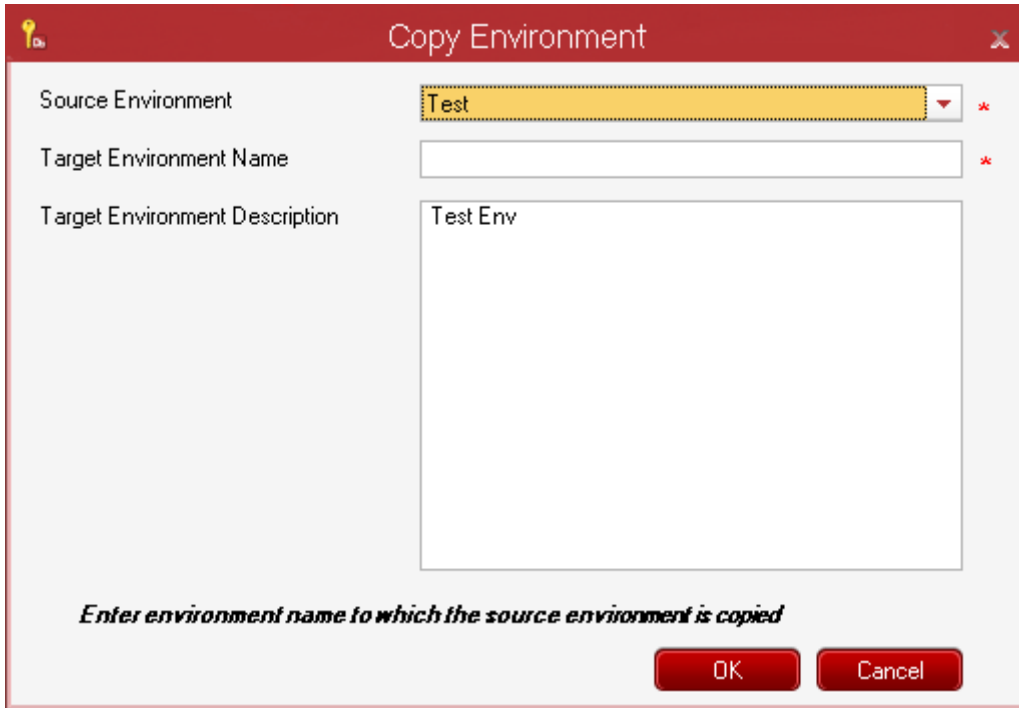
This window is displayed when you add an environment or update an existing environment.



Field	Description
Environment name	Enter the new or updated environment name
Description	Enter a meaningful description for the new or updated environment.

Button	Description
OK	Save the new or updated environment details
Cancel	Exit without creating or saving.

Copy environment window

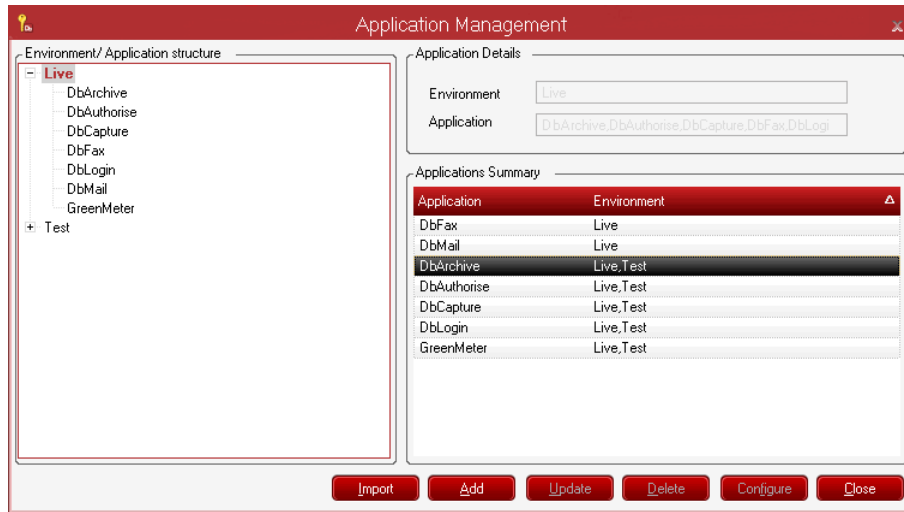


Field	Description
Source environment	Select the source environment.
Target environment name	Enter the new environment name to which the source environment will be copied.
Target environment description	Enter a meaningful description for the environment.

Button	Description
OK	Create the new environment
Cancel	Exit without creating the environment.

Application management

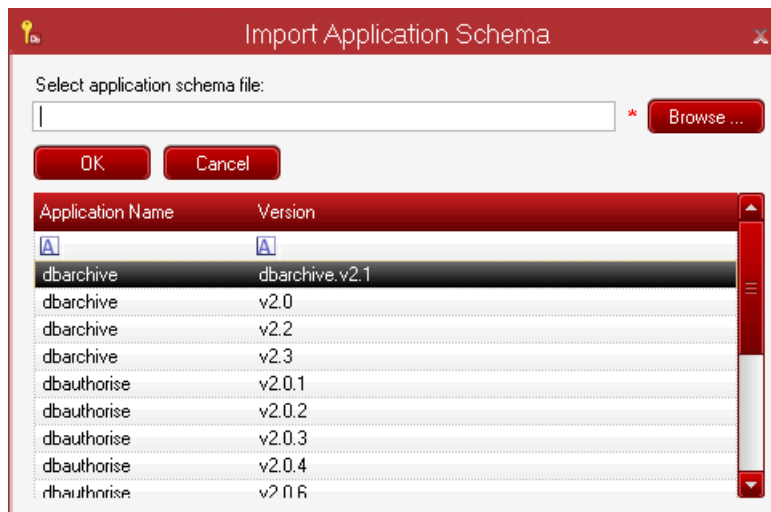
Overview: used to manage the applications available on your system.



Field	Description								
Environment / application structure	The existing structure of environments and the applications they contain. Right-click to display a dynamic menu with options to amend this structure:								
	<table border="1"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Add</td> <td>Add an application to the selected environments using the add application window.</td> </tr> <tr> <td>Delete</td> <td>Delete the selected application. Confirmation is required.</td> </tr> <tr> <td>Update</td> <td>Update the selected application using the update application window.</td> </tr> </tbody> </table>	Field	Description	Add	Add an application to the selected environments using the add application window .	Delete	Delete the selected application. Confirmation is required.	Update	Update the selected application using the update application window .
Field	Description								
Add	Add an application to the selected environments using the add application window .								
Delete	Delete the selected application. Confirmation is required.								
Update	Update the selected application using the update application window .								
Application details	Details of the currently selected application								
Environment	The currently selected environment								
Application	The currently selected application								
Applications summary	A summary of the configured applications and the environments within which they are available.								

Button	Description
Import	Import an application schema using the import application schema window .
Add	Add an application using the add application window .
Update	Update the selected application using the update application window is displayed.
Delete	Delete the selected application. Confirmation is required.
Configure	Configure the selected application.
Close	Close the application management window.

Import application schema window



Field	Description
[Applications]	The available applications and their versions are displayed

Button	Description
Browse	Browse to the file location of the application schema to be selected
OK	Import the selected application schema
Cancel	Exit without importing.

Add application window



Field	Description
-------	-------------

Environment	Select the environment in which to add the application
-------------	--

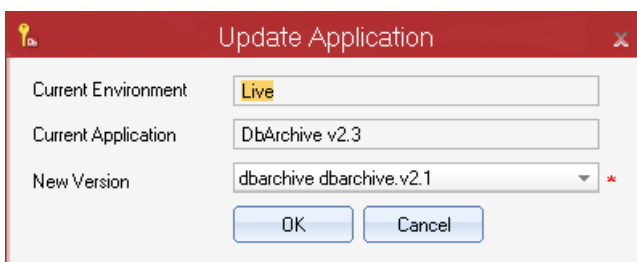
[Applications]	Select the version of the application to be added to the selected environment.
----------------	--

Button	Description
--------	-------------

OK	Add the selected version of the application to the selected environment
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Cancel	Exit without adding.
--------	----------------------

Update application window



Field	Description
-------	-------------

Current environment	The current environment is displayed
---------------------	--------------------------------------

Current application	The current application is displayed
---------------------	--------------------------------------

New version	Select the new version up to which the application is to be updated.
-------------	--

Button Description

OK Save the updated application

Cancel Exit without saving.

Green meter console

About green meter console

Overview: used to manage the Green Meter, showing how electronic storage and distribution of documents makes a positive contribution to the environment. The console gives a visual measure of these benefits in terms of trees and CO2 emissions.

The console uses counts of documents and pages processed to assess the environmental benefits of system usage. Counts are updated automatically as documents are processed. Counts are stored over four time periods:

Time period	Count
All time	Documents and pages processed since the Version One software was commissioned.
Yearly	Documents and pages processed in the current year.
Monthly	Documents and pages processed in the current month.
Ad hoc	Documents and pages processed since the ad hoc counter was last manually reset. You can use this to check the system usage over a shorter period, like you might use a car's trip meter.

Environmental benefits

We believe that the following actions within the product suite represent an [environmental benefit](#):

Action	Benefit
Distribution of documents by email	Avoids printing, postage and delivery
Distribution of documents by fax	Avoids printing, postage and delivery
Archiving of outgoing documents	Avoids printing and physical storage
Electronic authorisation	Avoids photocopying, postage and delivery.

Counting documents

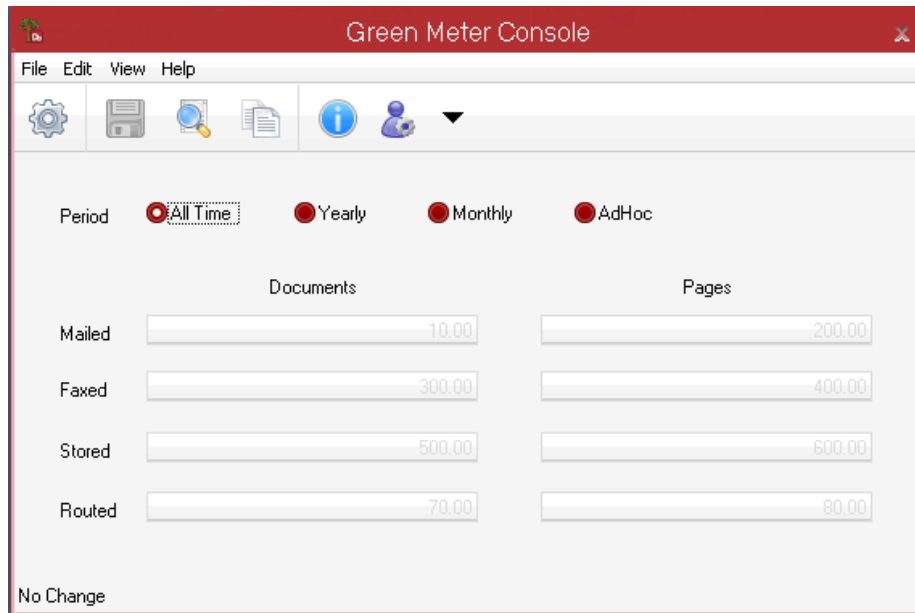
The number of documents & pages processed provide the raw material for our calculations:

Module	Count increment
DbMail	Emails sent and pages sent. Emails count as a single page. Attachments count the number of pages in the attachment (the default is 1 page per attachment).
DbFax	Faxes sent and pages sent

DbAuthorise Changes of state and pages in the document (the default is 1)

DbArchive Documents sent and pages sent.

Screen



Menu	Option	Description
File	Save	Save the Green Meter Console settings
	Settings	Edit the Green Meter Console settings. These are the server name and port number. Click OK to save any changes.
	Exit	Exit the Green Meter Console.
Edit	Zeroise values	Reset the Green Meter Console values to zero. Time values cannot be reset to zero
	Enable update	Enable the Green Meter Console value update, to allow document totals to be manually edited.
	Copy	Copy the displayed Green Meter Console values to the clipboard.
View	Graphic	Display the green meter graphic viewer
Help	About	Display the About Green Meter Console version and copyright information.

Icon Description



Edit the console settings



Save the console settings



Display the [green meter graphic viewer](#)



Copy the displayed console values



Display the version and copyright information.

Field	Option	Description
Period	All time	Documents and pages processed since Version One was installed (the default).
	Yearly	Documents and pages processed in the last year.
	Monthly	Documents and pages processed in the last month.
	Ad hoc	Documents and pages processed since the ad hoc counter was last manually reset. You can use this to check the system usage in a similar fashion to how you might use a car's mileometer trip meter.
Mailed	Number of documents and pages mailed	
Faxed	Number of documents and pages faxed	
Stored	Number of documents and pages stored	
Routed	Number of documents and pages routed.	

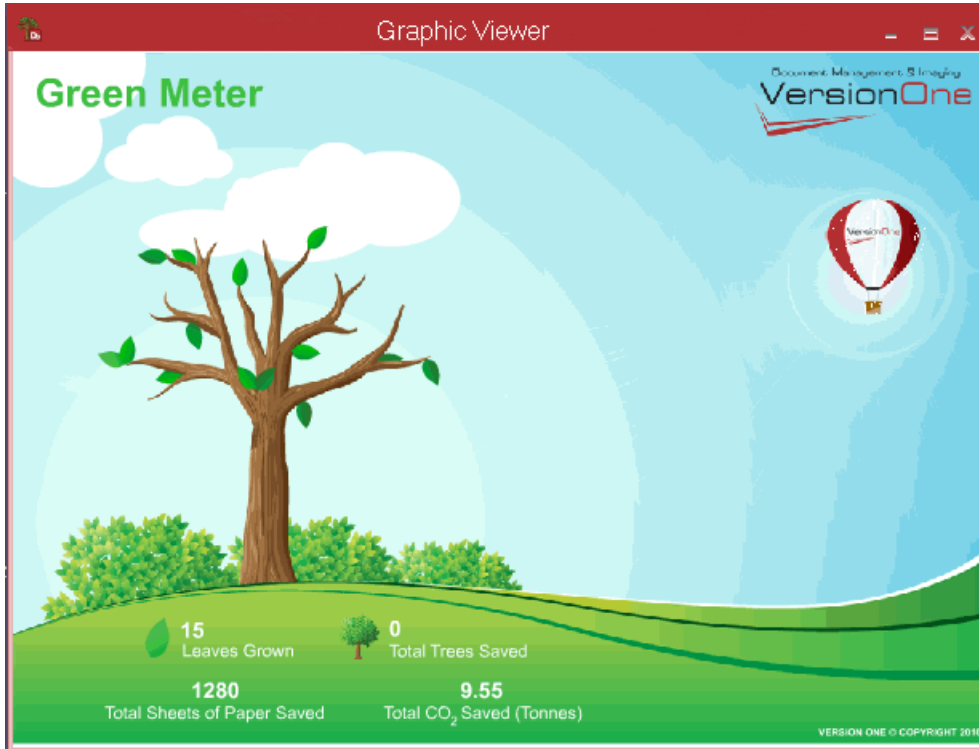
Button Description

Save Save your settings

Cancel Exit without saving.

Green meter graphic viewer

Overview: displays a graphic representation of the positive [environmental benefit](#) of using the software.



The display shows a graphic representation of a tree with up to 100 leaves. The tree first displays without any leaves, one leaf is added for each % of a tree equivalent of either CO₂ emissions or sheets of paper saved. As a tree is completed it increments a counter and is shown by a smaller, complete tree alongside the 'growing' tree. Numerical values are also shown. We also show the CO₂ values and biomass conserved on clouds moving past the growing tree.

Field	Description
Leaves grown	The estimated number of leaves theoretically grown
Total trees saved	The estimated number of trees saved
Total sheets of paper saved	The estimated number of sheets of paper saved
Total CO ₂ saved	The estimated amount of CO ₂ saved.



There is nothing to configure in this window — it shows the results of the calculations made, based on the number of documents processed.

Button Description

X	Close the window.
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Environmental benefit calculations



These calculations are based on many assumptions and are our best estimate of the CO2 and biomass saved by using our software.

Overview

By counting the number of documents and pages processed we can calculate the environmental benefits. To establish a measure with general acceptance we have used several guidelines to make these calculations.

We have been provided with a number of calculations based standards referenced below. We used these to convert the counters into measures of environmental benefit. The environmental benefit calculations use data from several sources:

- Carbon Trust — www.carbontrust.co.uk
- www.coloradotrees.org
- Conservatree — www.conservatree.org
- DEFRA 2008 carbon conversion factor for electricity
- Photocopier manufacturer specification sheets
- www.roadtransport.com
- Royal Mail.

How many sheets of paper make up a tree?

One tree can produce 16.67 reams (8333.3 sheets) of paper. There is no simple answer to this question, but the guidance suggests this is a reasonable figure.

How much CO2 is saved using electronic storage and distribution?

There are two key elements to energy savings:

1. Printing and photocopying
2. Distribution.

Printing and photocopying

The formula for CO2 emissions generated from printing and photocopying is:

Device Power Consumption (kW/h) x 0.53702 = kg CO2 per hour of use.

Typical photocopier device power consumption:

Mode	Typical consumption
In use	1.25-1.50kW/h
On standby	0.04kW/h

To build a calculation base we need to make assumptions about the frequency of copying and printing. For example, a batch of customer statements is probably printed in a single process, whilst purchase orders are probably printed one by one.

To keep this simple we assume each page takes 1 second to print or copy and that each document is printed individually and has a warm-up time of 20 seconds. We have ignored standby time for these calculations. For example:

- A 2-page purchase order takes 22 seconds
- A 20-page statement takes 40 seconds.

Distribution

This calculation is based on estimating the amount of fuel used to make the delivery and then using that as the basis for the CO2 emissions figure. Each Royal Mail van travels on average 47 miles each day. A Royal Mail Ford Transit van uses approximately 23 miles per gallon (0.2 litres per mile). These figures can give as a carbon figure for transporting each paper document that would otherwise be sent.

Tree equivalent

A mature tree can absorb CO2 at a rate of 48lbs (21.77 kg) per year.

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 OCRed 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 DbLogin admin23
about green meter.....54
about help.....19
access tokens.....34
accessing applications23
account lock.....39
active directory user39
AD user login23
add application.....49
adding a desktop shortcut 7
adding environments46
address18
allocated tokens34
application management49
application menu - DbLogin32
application schema49
application suite 2
applications23
authorisation..... 2
automatic login28

B

backups17
best match12
business security.....17

C

cannot change password39
capturing data..... 2
carbon capture.....54
carbon offset.....54
carbon trust..... 54, 59
change environment19
change language19
change password..... 19, 39
change user.....19
choosing fields 9
clear search term 9
client access tokens34
CO2.....54

common features 7
configuration DbLogin33
configure applications32
configure environment31
configure server33
configuring applications.....49
confirm password39
conservatree.....59
contact us18
contents tab12
converting user type.....39
copying environment46
copyright.....18
creating a shortcut 7
creating environment.....46
customising columns..... 9
customising fields..... 9
customising the suite 7

D

data capture 2
data find 9
data security.....17
DbLogin 15, 28
DbLogin and administration28
DbLogin application menu32
DbLogin configuration33
DbLogin environment.....31
DbLogin file menu29
DbLogin user details39
DbLogin users.....30
DEFRA59
delete application49
desktop shortcut 7
disaster recovery.....17
document authorisation..... 2
document data capture 2
document find..... 9
document management suite.....2, 7
documents emailed.....54
documents faxed.....54

documents mailed54
documents stored.....54

E

email contact18
email users.....39
energy consumption59
enter password39
environment 19, 49
environment manager.....46
environment menu31
environment structure.....49
environmental benefit59
environmental benefits.....54
environments.....23
example screens12
expire password39

F

feedback18
field chooser 9
file backups17
file menu - DbLogin29
filtering documents..... 9
find date..... 9
finding documents 9
finding help.....12
finding us18
first name.....39
forename.....39
fuel savings59

G

getting in touch.....18
glossary12
green meter console54

H

help about.....19
help contents.....12
help index12
help version.....18

I

import from directory.....39
importing AD users.....23
importing application schema.....49
importing schema.....49
index tab.....12
info address.....18
installation 2
internal users.....23
issue with help.....18

L

language19
layout options..... 9
list environments.....46
live environment 19, 23
lock user39
login15, 23, 28
login administration28
looking for a help topic.....12

M

maintain users39
manage application49
managing access tokens.....34
managing applications23
managing DbLogin.....33
managing users39
managing users - DbLogin.....30
measuring CO254
menu options..... 7
modules..... 2
moving columns..... 9
must change.....39

N

never expire39
new environment46
new password.....39

O

offset carbon59

P

page count54
password..... 19, 39
password expiry39
personalising..... 9
phone number.....18
photocopy savings59
pool tokens.....34
pop-up screen.....12
postal costs54
printer standby59
problems with help18
product family..... 7

Q

queries.....18

R

recently used menu list 7
refreshing users39
release number18
remove search term..... 9
Royal Mail.....59

S

save password39
schema49
screen display 9
screen shots12
search date..... 9
search fields 9
search operators 9
search tab12
searching help.....12
securing data17
select fields..... 9
select language19
server configuration.....33
setting up DbLogin.....33
settings - user.....37
Show/hide screen12
signing in15

single login.....28
software version.....18
source environment.....46
starting the software..... 7
surname.....39
system security.....17

T

target environment.....46
technical terms12
test environment.....19
tokens34
tools 2
transport costs.....59
tree planting.....54

U

unallocated tokens34
update application49
update password.....19
user access tokens34
user change.....19
user details.....39
user level39
user login15
user management39
user name.....39
user password.....15
user settings DbLogin37
user type.....39
username.....15
users 23, 30
using help12
using the software..... 7
using the windows..... 9

V

version number.....19
version one18
version one user name.....39

W

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which tool to use 2
wilmslow18

window customisation 9
windows authentication.....28