FILE STREAM DOCUMENT MANAGEMENT FAQs

No.	Question	Answer
Licensing		
L1	**How to find License Information**	To find information on your licence click on the "Help Tab" and then on the Licensing icon. This will show you when your licence expires, what features you are licensed for and if you click on "Get Licence" it will tell you where your licence is held.
L2	**How to find Licence Version?**	1. It could be visible on the bottom LHS of your screen. Also... 2.Clicking on the "Help Tab" followed by clicking on the "About" icon displays the version of File Stream you have installed.
L3	**How to License a new PC?**	Click on the" Help Tab" and then on the "Licensing" icon. Click on "Get License" and browse to the location where the license file is held. Click on the license and then OK.
L4	**How does File Stream Licensing work?**	File Stream Version 4 onwards has a single licence file that is usually held in the File Stream Technical Folder on the server in the case of a network system. This .LIC file is used to "switch on" additional features that have been bought as well as the number of users that can log on at any one time. It also contains a list of all the PCs by name that are licensed to use the software. This means that as PCs are removed and added this list needs to be edited accordingly using Licence Manager.
Database		
D1	**How to find the required database when installing a replacement or additional PC?**	If you have version 4.0.6.30 or higher then these details are shown in the log-in panel. If you place the mouse over the selected database drop down in the login panel on the fully installed pc the details will be revealed. If you have an earlier version, the details can be found in an xml file on another pc that already has access to the database: Go to the folder "C:\Documents and Settings\<<<username>>>\Local Settings\Application Data\FILEstream Ltd\FILEstream 4.x" and view the file called "settings.xml"
D2	**Database Range - how does this affect my searches?**	On the "Standard" tab there is an icon called "Database Range". This is used to control the time period used for document searches. For example, if it's set to "Current Calendar Year" it only searches through records created since the 1st January of the current year. The longer the time span the longer searches take. Equally a shorter time span speeds up the search, but ensure that it is wide enough to find the documents you are looking for. Note that Last Calendar Years option will suddenly remove access to 12 months of data on 1st January unless range is changed.
D3	**What maintenance needs to be done to the database?**	Re-building of SQL Indexes and truncation of log files will improve performance especially speed of searching. Filestream Ltd can provide a document which provides guidance on what needs to be done.
D4	**How can I move my SQL database to another server?**	□ Shut the SQL server down and detach all the database files and move them to the new server. □ Copy the entire File Stream images folder across the network to the new server. □ Install SQL on the new server and then attach the database files and make sure that the relevant users can still access them. □ Share the entire File Stream folder again and set permissions. □ Log in to File Stream as admin and change route box locations and also the images location as this will be pointing to the old server which will cause issues. □ You will also need to set up the msi folder so all computers will be looking at the new location for the updates as and when they are released.

Diary		
DI1	**What can I do with the diary in File Stream?**	As well as all the usual diary / calendar functions such as managing meetings, repeating appointments, holidays etc.you can link each diary entry to any document in File Stream. To do this all you have to do is highlight any linked documents and click on "link Documents" button when creating the diary entry.
Documents		
DO1	**Signatures in Annotations**	You can annotate a signature onto a document. First of all, write your signature onto a piece of paper and scan it in to create an editable file such as a JPEG or TIFF. Next, crop this file using Microsoft Office Picture Manager or similar to get rid of the white space around your signature. The next part can only be done by someone who has Administator right in File Stream: - Go to Users on the Administation tab and select Edit for the required User name. - In the Edit User pane there is a section headed Signature. - Click on the Set button and then browse to the required signature and click on the Open button. - Click on Save and your signature is now available to annotate onto any image document.
DO2	**What Documents can be annotated?**	Almost all image documents can be annotated. The types mainly seen are TIFF, JPEG, GIF & PDF. Beware that not all PDFs are image PDFs. Those that are, are called "PDF Image - Adobe Acrobat file" in File Stream. However using the "Convert to Image" command you can convert almost any file (inc a non-image PDF) into an image PDF so you can annotate it. You'll find this command on the Document tab.

Error Messages		
E1	**"Root Element is Missing"**	One of the settings files has become corrupted and needs to be deleted, after which FILEstream will start up properly again and the file will get re-created automatically. The file in question is called “panelsettings.xml” and it will be in one of these folders on the user’s machine ... On Windows XP / Windows 2003 :- "C:\Documents and Settings\<user>\Local Settings\Application Data\FILEstream Ltd\FILEstream 4.x" "C:\Documents and Settings\<user>\Application Data\FILEstream Ltd\FILEstream 4.x" On Vista / Windows 2008 :- "C:\Users\<user>\AppData\Local\FILEstream Ltd\FILEstream 4.x" "C:\Users\<user>\AppData\Roaming\FILEstream Ltd\FILEstream 4.x"
Folders / In-trays		
F1	**What are Shared Folders?**	You can create an in-tray folder which you can share with other users. This can for example be used where a lot of scanned documents need indexing and the workload can be shared across more than one user. To create such a folder click on the In-Tray Folders icon on the Standard ribbon. Right click on My In-tray and select the New In-tray option. Give it an appropriate name and then right click on it and select Sharing. This will allow you to select the users that you want to share this with. You can then drag and drop documents into it for them to work with.
F2	**Can I Drag & Drop documents into my In-tray**	All In-trays have an associated Route Box folder. This takes documents from outside File Stream and moves them into the In-tray. The full network address of each users routebox is displayed in their user record which is accessible to all File Stream Adminstrators. To create a shortcut to this, roght click on the desktop and create a new short cut. You can then browse to the location of the routebox and create the shortcut. To move files into this just drag and drop files onto the icon and watch them appear in your In-tray.
Help		
H1	**How do I find Help on a topic?**	At any point click on the round blue question mark icon for available context sensitive help. 

Scanning		
S1	How to make scan profiles visible to other users	Scan profiles are saved in xml files in the following folder ... "C:\Documents and Settings\<username>\Local Settings\Application Data\FILEstream Ltd\FILEstream 4.x\ScanProfiles" where <username> is the user's log on profile folder. if you want scan profiles to be seen by another user on the same machine or if you want them visible on other machines, you need to copy the xml files across to the correct user's folder as above.
S2	I can't see the Scan button in the Scan Panel	If your screen resolution is set to below 1280 x 1024 the "Scan" button is effectively off the bottom of your screen. In the first instance see if your resolution can be increased by right clicking on your "Desktop" and selecting "Properties / Settings". If your resolution is already at its highest setting you can minimise the ribbon menus in File Stream as follows: 1. Click on the Red / Yellow / Blue triangle in the top LH corner of your File Stream screen 2. Right click anywhere in the small panel that appears and select the "Minimise Ribbon" option. 3. You should now see the scan button. 4. To Maximise the Ribbon Menus again repeat 1 & 2 above but select "Maximize Ribbon" option.
S3	Web Module - How to scan?	When scanning in the web module, users are not aware that they have to select the scanned pages and press the "Import" button to transfer them to the in-tray. Users are simply scanning and then they close the scan window but they don't see any documents in their in-tray. Scans are not lost, the system remembers scanned pages locally on the machine so you can always go back to the scanning window on that PC and transfer them later, but they need to be told about how to do scanning in the web module
S4	How can I separate scanner output into separate documents?	If a large number of documents are scanned in together it is difficult & time consuming to group the scanned images together to re-create the documents that were scanned in. If all the documents have the same number of pages, this grouping can be done automatically via one of the scanning settings. But if they are different,then a "separator" can be used to achieve this. This can be a blank sheet, or even better a distinct mark such as a small black sticker placed at the point of separation. This can be removed afterwards if required.This method works for directly connected scanners and for network multi-function devices. Please contact us on 0118 932 8900 for further information.
Searching		
SR1	How do I find documents that have been OCR'd?	To find all documents that have been OCR'd use "OCR Search" tab in "Search" panel and search for a single underscore (_).
SR2	Cannot find documents that should be in the cabinet.	See **D2** above as you might need to expand the document date range.
SR3	What can I do with the multiple tabs in File Stream?	These tabs are a little like the equivalent in Excel. Each one can contain an in-tray or a set of serach results.If you want to keep a search result for use later just open another tab when you want to start a new sesrch.

Users / Permissions		
U1	**How to set up a New User?**	This is done through "User Maintenance" by the Systems Administrator. Click on the Administration tab and select "Users / New". Click on the "Help" icon (round blue icon with ? on it) to see a short Help video. 
U2	**I have forgotten my password, how can I get a new one?**	This is done through "User Maintenance" by the Systems Administrator. Click on "Administration" tab and select "Users". Then select the user's name and edit the record to set up a new password.
U3	**User permissions required for File Stream?**	Users require permissions to access drives to allow them to read / create / edit documents and databases used by File Stream. Where an user does not have the requisite Windows access rights to carry out the File Stream tasks their role requires a Windows error message will appear that indicates this. This is not a File Stream error,
U4	**Administrator login not working.**	This can occur if the Administrator password has been entered incorrectly 3 or more times. At this stage the Administrator needs to contact Filestream Ltd on 0118 932 8900 who can then access the PC via Webex and resolve the problem.
Web Module		
W1	**Web Module - What does a New User have to do?**	When you create a new user account, that user needs to log-in in the main system at least once before they can log into the web module. The user's main in-tray, deleted items folder and other bits and pieces get created when they log into the main system for the first time. Administrators should be asked to log in as the new user once before giving them access to the web module. (the same applies to logging in to the outlook add-ins or using the API or other scripts to log in, each user has to log in once in the main system before they can work in the other modules)
W2	**Web Module - User Timeout**	The web service is designed to automatically log out inactive sessions after 20 minutes of inactivity. When this happens it is necessary for the user to log in again.
W2	**Web Module - Restrictions**	Some document functions such as Append and Delete are not available in the Web Edition.

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