



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.

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. The next part can only be done by someone who has Administrator right in File Stream: <ul style="list-style-type: none"> - Go to Users on the Administration 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 4.x"<br="" data\filestream="" ltd\filestream="" settings\application=""></user>\local> " C:\Documents and Settings\ <user>\application 4.x"<br="" data\filestream="" ltd\filestream=""></user>\application> On Vista / Windows 2008 :- " C:\Users\ <user>\appdata\local\filestream 4.x"<br="" ltd\filestream=""></user>\appdata\local\filestream> " C:\Users\ <user>\appdata\roaming\filestream 4.x"<="" ltd\filestream="" td=""> </user>\appdata\roaming\filestream>
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?	<p>Scan profiles are saved in xml files in the following folder ...</p> <p>"C:\Documents and Settings\<username>\Local Settings\Application Data\FILEstream Ltd\FILEstream 4.x\ScanProfiles"</username></p> <p>where <username> is the user's log on profile folder.</p> <p>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.</p>
S2	I can't see the Scan button in the Scan Panel	<p>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".</p> <p>If your resolution is already at its highest setting you can minimise the ribbon menus in File Stream as follows:</p> <ol style="list-style-type: none"> 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?	<p>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</p>
Searching		
SR1	How do I find documents that have been OCR'd?	<p>To find all documents that have been OCR'd use "OCR Search" tab in "Search" panel and search for a single underscore (_).</p>
SR2	Cannot find documents that should be in the cabinet.	<p>See D2 above as you might need to expand the document date range.</p>
SR3	What can I do with the multiple tabs in File Stream?	<p>These tabs are a little like the equivalent in Excel. Each one can contain an in-tray or a set of search results. If you want to keep a search result for use later just open another tab when you want to start a new search.</p>

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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[File Stream Document Management](#)