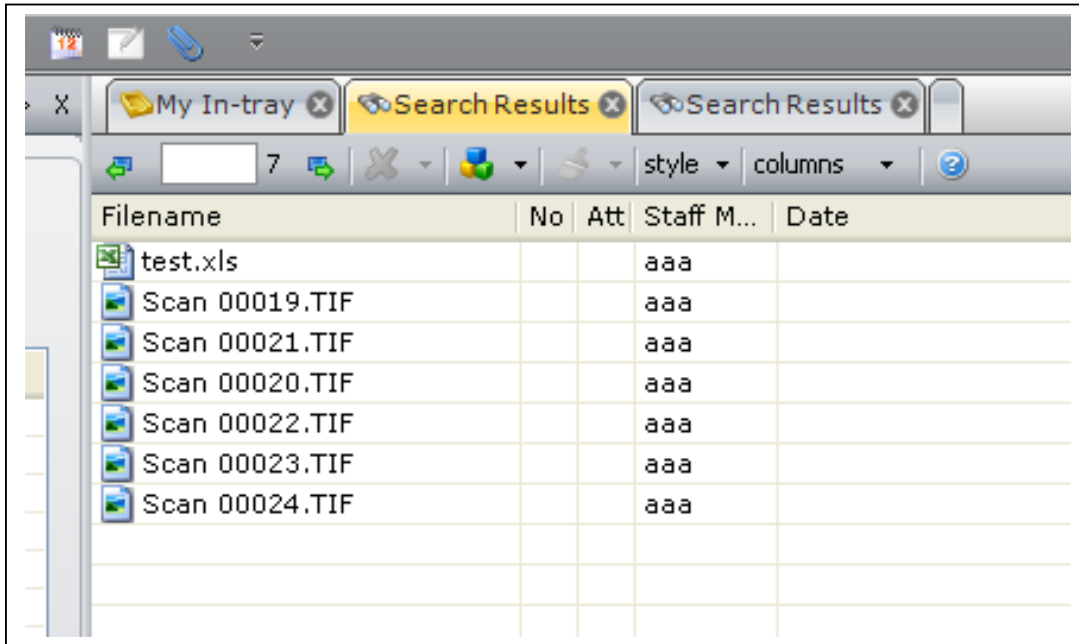


# FILESTREAM NEW FEATURES, HINTS & TIPS

## Search Tabs

Later versions of File Stream include the ability to have multiple search tabs. This allows different searches and their results to be displayed simultaneously on separate tabs. One of the tabs can display the in-tray. Previously carrying out a search would prevent the display of the in-tray or the results of an earlier search. The screen shot below illustrates this:



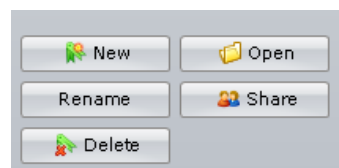
## Bookmarks

Another new feature allows you to "Bookmark" frequently used documents. For example, if you have a number of documents that you frequently refer to e.g. Price Lists, Operating Instructions etc

You will find this icon on the Document tab.

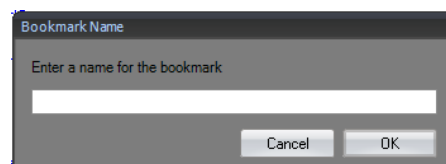


Click on it and these buttons can be seen in a new panel.



Click on the New button and type in a name for the bookmark and click OK.

A bookmark symbol appears in the Bookmark Panel. Drag and Drop onto the symbol any documents that you want to associate with it e.g. Price Lists.



In this way you can build up a number of different bookmarks each of which can be linked to one or more documents.

Then, whenever you need to find documents that have been bookmarked, click on the bookmark symbol, then click on the relevant bookmark and Open to instantly find them again.

## Convert to Image

Almost any document can be converted into an image file in File Stream. You can find the icon to do this on the Document tab.



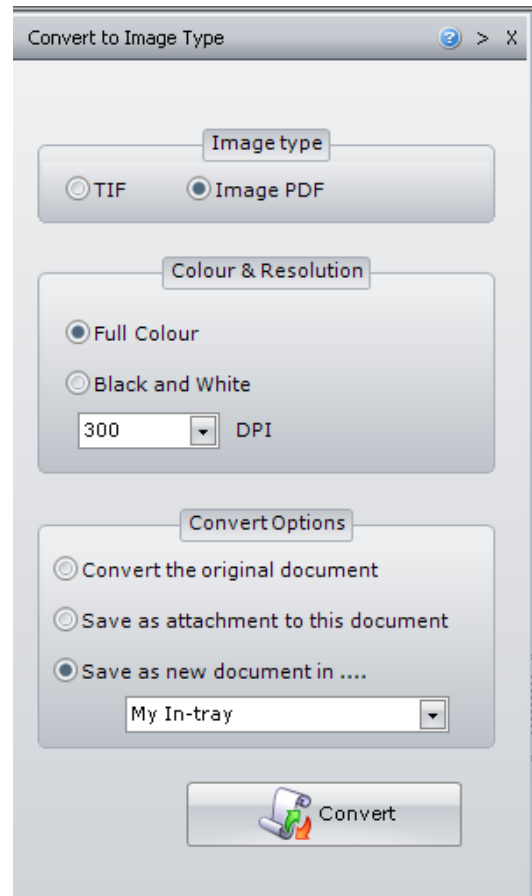
The following panel then opens up:

As can be seen Image PDFs and TIF files can be produced from the original document. Both of these file types can be annotated which is often a reason for creating them.

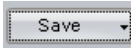
Even text type PDF's (which cannot be annotated) can be converted to image PDFs.

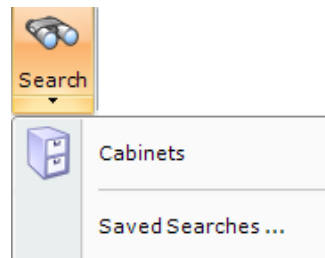
Note that there are several options for creating the new document i.e. it can replace the original, be an attachment of the original or be a new document in one of your in-trays.

You can also vary the DPI and create a colour or B&W image.



## Saved Searches

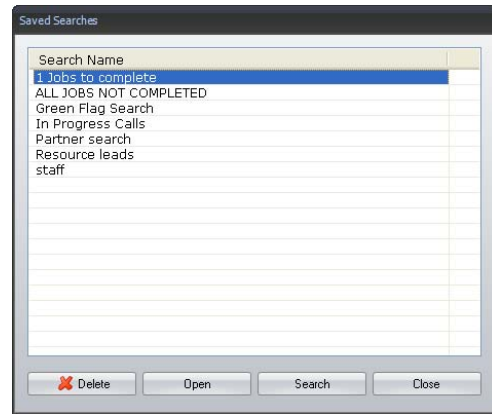
If there are repetitive searches that you frequently carry out in File Stream which use the same search values, these can be saved. Note that at the bottom of the Search panel there is a button:  Clicking on this will save the search settings and prompt you to give the



When you next need to use this search, click on the small arrow below the Search icon and select Saved Searches.

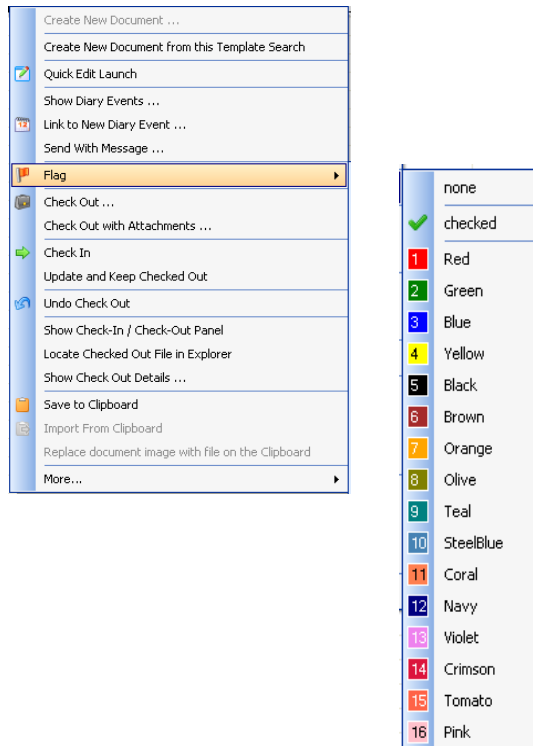
A list of previously saved searches will then be seen. These are available for all users and are therefore shared.

Select the Search required and click on the Search button. This will then take you to the correct cabinet and immediately carry out the search using the stored settings.



## Flags

Any document can be marked with a coloured flag to visually indicate a status. This can be done in List View by right clicking and in Image View by clicking on the small blue down arrow just above the document image. Both of these actions produce the Document Menu shown below. Click on Flag and the list of flag options is shown. Any of these can be selected.



When subsequent searches are made the flag status of documents can be displayed in one of the columns. This can be used to search or to sort the documents as well as to display the status of a large number of documents in a single view.

Filename	No	Att	Company	Fla	Contact	Docum
ABC Ltd (Contact Sheet).f...			ABC Ltd	2	John S...	Contact...
BBC Ltd. (Contact Sheet)....			BBC Ltd	3	Janice...	Contact...