DeskTopBinder V2

Introduction Guide

This guide provides information about the features and display of DeskTopBinder V2. For detailed operational procedures, see *DeskTopBinder V2 Help*.

1 Overview

1.1 DeskTopBinder V2

There are two types of DeskTopBinder V2: DeskTopBinder V2 Professional and DeskTopBinder V2 Lite. Both are described as DeskTopBinder V2 in this Introduction Guide.
DeskTopBinder V2 can integrate various kinds of data, such as files made with different applications, scanned image data, and existing image files for total document management. Each document can have specific document properties in addition to the file name. DeskTopBinder V2 can also display files other than image files using Easy Viewer or Viewer and extract text from image data using OCR. Furthermore, when networking with network devices, functions for inputting and outputting documents are available. Depending on the network devices, saved documents in the Document Server can be captured by DeskTopBinder V2.
DeskTopBinder V2 Professional has all the functions of Desk-TopBinder V2 Lite plus some additional functions.

The following are not possible with versions earlier than Ver 2.XXX of DeskTopBinder V2 Professional and DeskTopBinder V2 Lite:

■ Preview and Print

■ Add documents automatically

The following are not possible with DeskTopBinder V2 Lite (all versions):

■ Convert to PDF

■ Convert to Text (with OCR)

■ Send by E-mail

■ Import HTML

■ Export HTML

■ Export Document Properties Summary in CSV format

■ Entry Assistant

■ Print Document Properties Summary by List

■ Specific Search

The following is not possible with DeskTopBinder V2 Professional (versions earlier than Ver 2.XXX) and DeskTopBinder V2 Lite (all versions):

■ Content Text Search of DeskTopBinder V2 Documents

Incorporated with the ScanRouter V2 delivery server, Desk-TopBinder V2 enables users to view documents in in-trays and deliver them. The ScanRouter V2 delivery server must be configured using Extended Features in advance. ScanRouter V2 has three versions: ScanRouter V2 Professional, ScanRouter V2 Lite and ScanRouter Enterprise.

Incorporated with ScanRouter DocumentServer, DeskTop-Binder V2 enables users to access and control documents in the server from client computers. ScanRouter Document-Server must be configured using Extended Features in advance.
Each document can have specific document properties in addition to the file name. These properties can be used to search for necessary documents.

1
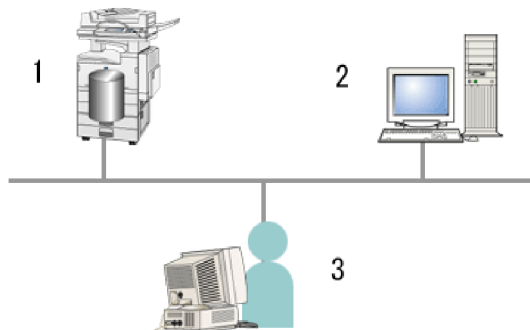
1. Network Devices

You can input or output documents using network devices. Document Server is available depending on the network devices.

2.Server Computer

ScanRouter V2 Lite/Professional and ScanRouter Enterprise is installed.

3.Client Computer

DeskTopBinder V2 is installed.

1.2Starting and Exiting DeskTopBinder V2

Starting

❶ Click [Start], and then point to [Programs].

❷ Point to [DeskTopBinder V2], and then click [DeskTop-Binder V2].
DeskTopBinder V2 starts.

<Note>
•You can double-click a linked document file (.RDL) in a client computer to start Viewer.

Exiting

❶ From the [File] menu, select [Exit].
DeskTopBinder V2 closes.

<Note>
•If the [Display list of expired documents on exit] check box on the [My Cabinet Properties] dialog box is selected, the documents are searched and the [Expired Document] list appears when you quit DeskTopBinder V2. From the [Expired Document] list, you can delete unnecessary documents.
•If the [Delete Job Binding documents 24 hours after they were created] check box on the [Job Binding (RPCS Printer) Properties] dialog box is selected, a confirmation dialog box appears when you quit DeskTopBinder V2.

1.3Adding Features

New network devices can be added by selecting [Extended Features] from the [Tools] menu. These devices are displayed under the DeskTopBinder V2 tree and can be used in cooperation with DeskTopBinder V2.
Using the network devices, the following operations are possible:

■ Control files in a client computer with DeskTopBinder V2

■ Control documents in ScanRouter DocumentServer

■ Create shared cabinets to make DeskTopBinder V2 documents available for multiple users

■ In cooperation with ScanRouter V2, view documents in the in-trays and deliver them with DeskTopBinder V2

■ Control documents in the Document Server

■ Control documents in Job Binding (RPCS Printer)

<Note>
•For more information about network devices, see *DeskTopBinder V2 Help.* ([Extended Features] in [Overview])
•The Document Server function can be selected only when network devices support the same function.
•To use Job Binding, an RPCS printer driver must be installed.
•Functions which can be added vary depending on the system environment.

Setting Features from Extended Features

❶ From the [Tools] menu, select [Extended Features].
The [Extended Features] dialog box appears.

**❷** Click the Network icon, and then select [Document Server] from the [Selectable function(s)] list.
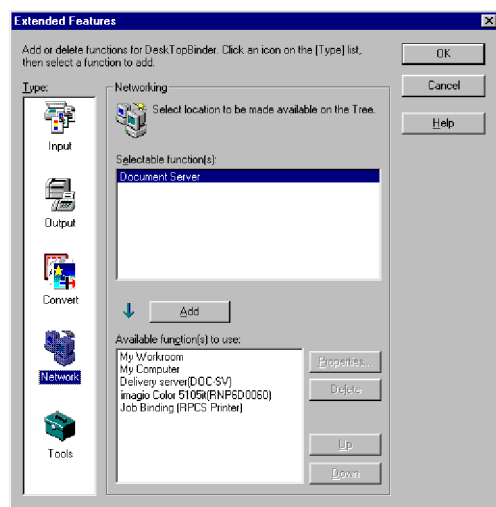
❸ Click [Add].
The [Document Server Properties] dialog box appears.

❹ Make the properties settings, and then click [OK].
[Document Server] is displayed in the [Available function(s) to use] list.

❺ Click [OK].

2 Document Management

2.1 Cabinets and Folders

Added documents are stored in a cabinet. In this cabinet, you can create folders and use them to sort documents. This cabinet has a trash can where deleted files and documents are placed.
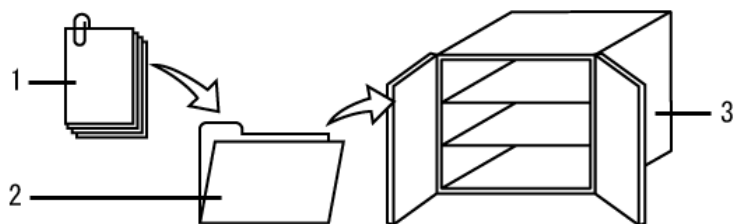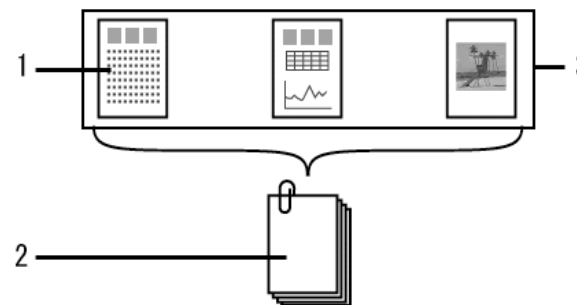

    1. Document
    2. Folder
    3. Cabinet

<Note>
•When DeskTopBinder V2 is installed, no more than one My Cabinet can be created, however, shared cabinets can be created as needed.

2.2 Documents and Sections

You can add multiple files made with various applications as one document. When saving multiple files as a document, one file becomes one section, and one document is composed of multiple sections.

1. Section
2. Document
3. Data made with applications and scanned image data

2.3 Document Properties and Document Type

Document properties, including information such as the creator, document status, and expiration date, make document management easier.
The document type determines the displayed items for document properties. Each document can only be configured as one document type. Also, each cabinet can be configured for certain document types. By separating documents according to document type, document management becomes easier.
In addition to the basic document type, ScanRouter V2 specific document types are available with ScanRouter V2. Documents added from input devices by way of ScanRouter V2 Lite/Professional and ScanRouter Enterprise can be configured as a ScanRouter V2 specific document.

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Document Properties in DeskTopBinder V2

Using DeskTopBinder V2, you can configure document proper-
ties for each document and check the properties items, such
as document name, size, location, date added/modified, cre-
ator, work status, and expiration date from properties.

Document Properties and Document Type in ScanRouter DocumentServer

You can configure document properties for each document and
confirm them by using Properties.
Using ScanRouter DocumentServer, you can also configure
document type.The document properties displayed may differ
depending on the document type. By configuring document
type, efficient management of various kinds of documents
becomes possible. Each document can only be configured as
one document type. Document types must be created by the
administrator in advance.

Document Properties and Document Type of In-Tray Documents

The document properties displayed may differ depending on
the document type.
Each document delivered in the in-tray of ScanRouter V2 Lite/
Professional and ScanRouter Enterprise has a specific docu-
ment type depending on the capture method.

2.4 Document Shortcuts

Shortcuts of ScanRouter DocumentServer Documents

Using ScanRouter DocumentServer, you can create shortcuts
to display frequently used documents easily. For example, you
can create a shortcut for a document with a long path and
paste it in a folder with a short path, or you can copy a shortcut
of a document with a long path and paste it in a DeskTopBinder
V2 folder. By double-clicking on the shortcut you can immedi-
ately display the document. This allows easy access for fre-
quently used documents.

2.5 Security in ScanRouter DocumentServer

You can configure passwords for each ScanRouter Document-
Server cabinet to control users. There are two kinds of pass-
words: read-only and full access. Configuring passwords for
each object can restrict viewers and prevent manipulation of
documents.
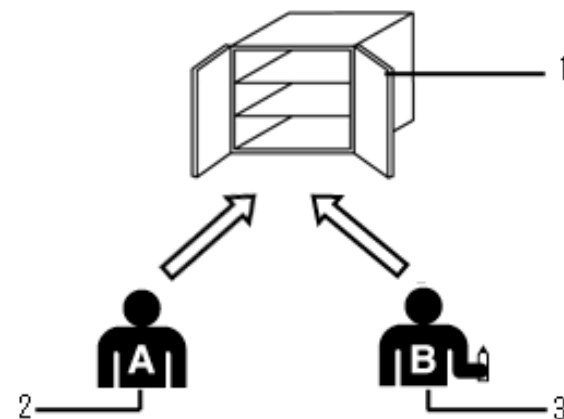
1. Cabinet
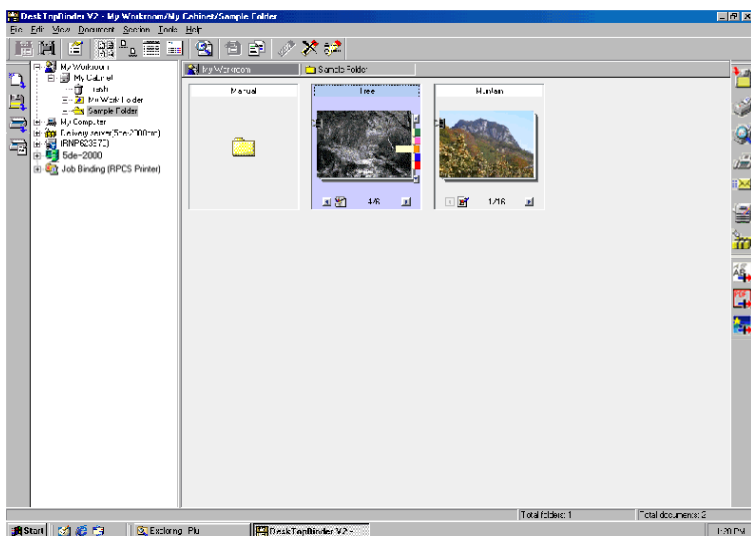2. Read-only
3. Full access

3 Using DeskTopBinder V2

3.1 Structure of DeskTopBinder V2

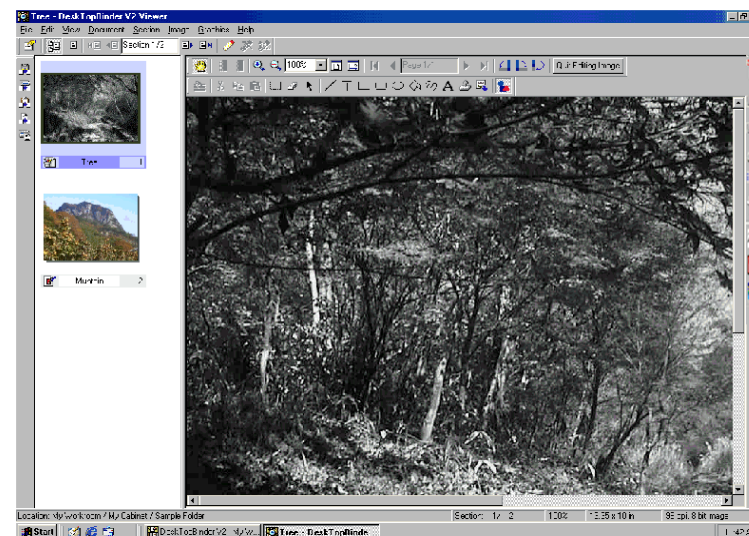DeskTopBinder V2 has Desk and Viewer displays.

■ Desk Display
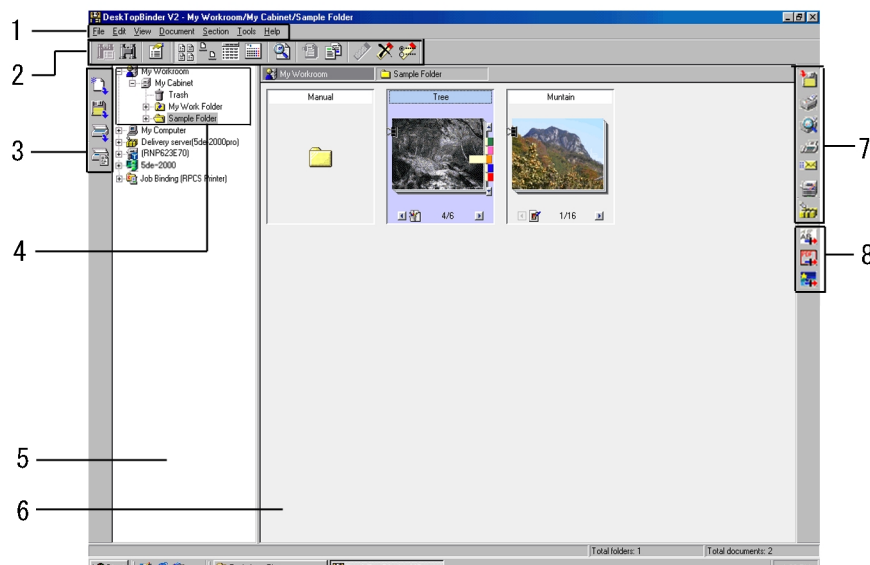Shows a document list. This display is used to operate
DeskTopBinder V2.

■ Viewer Display
Shows the contents of a document. This display is mainly
used to edit a document.

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4 Desk Features

4.1 Viewing the Desk Display

1:Menu Bar
   Use this to perform operations on the display.
2:Standard Toolbar
   Use this to perform standard function operations such as searching, displaying properties, and switching views.
3:Input Toolbar
   Use this to add existing files and scanned documents.
4:My Workroom
   Displays My Cabinet and shared cabinets.
5:Tree Pane
   Displays My Cabinet of DeskTopBinder V2 and network devices added using the Extended Features function. Just after installation, only My Workroom is displayed.

6:Document List Pane
   Displays folders and documents in a cabinet or a folder selected from the tree.
7:Output Toolbar
   Use this for printing, sending by E-mail and fax transmission. Except ![icon] Export Document icon, ![icon] Print icon and ![icon] Preview and Print icon functions configured using Extended Features are displayed.
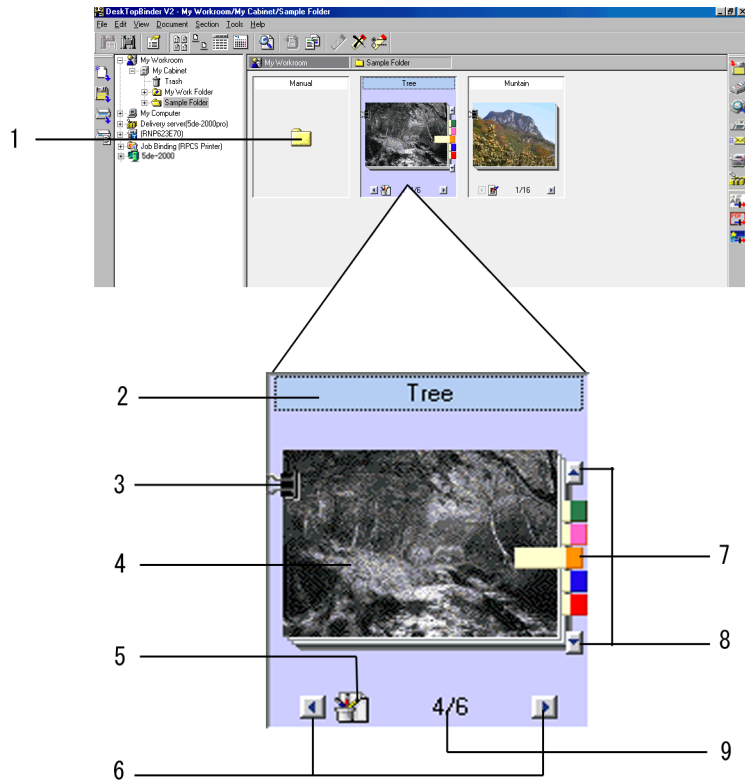8:Conversion Toolbar
   Use this to convert documents or sections into images, PDF files and text. Functions configured using Extended Features are displayed.

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Document View Varieties

The following views are available:

■ Thumbnails View

1:Folder Icon

2:Folder or Document Name

3:Clip

When a document is composed of multiple sections, a clip is displayed.

4:Section Thumbnail

The section thumbnail is displayed. Thumbnails may not be created for some sections.

5:Section Icon

Shows an icon of the application which the section was created with.

6:[Previous Section][Next Section] Buttons

These buttons appear when a document is composed of multiple sections. Use them to move through the sections of a document.

7:Note

Click this to view the marked section. Double-click to display the [Note Contents] dialog box.

8:Note Leaf

When six or more notes are attached to one document, only five notes are displayed, and the [Note Leaf] buttons appear. Use these buttons to move through the marked sections of a document.

9:Current Section Number/Total Section Number

Shows the current section number and the total number of sections.

■ Icons View
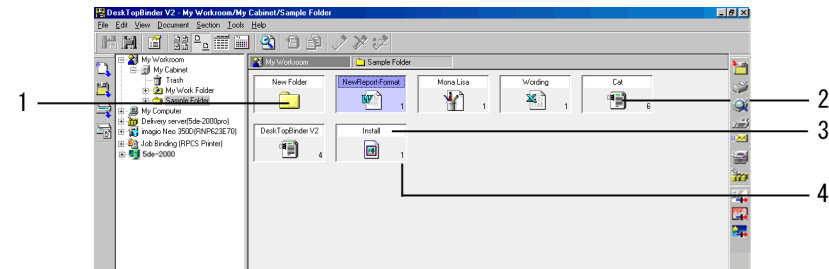
1:Folder Icon

2:Document Icon

The document icon is displayed. When a document is composed of multiple sections, the icon is displayed with a clip attached.

3:Folder or Document Name

4:Total Section Number

Shows the total number of sections in the document.

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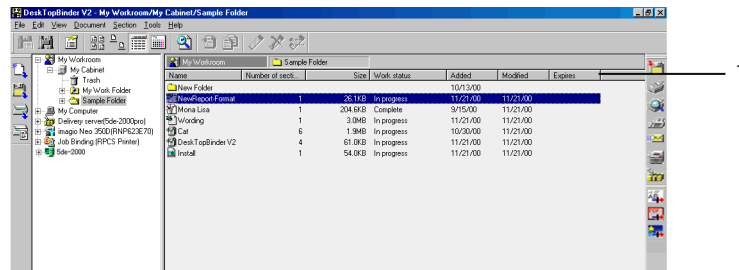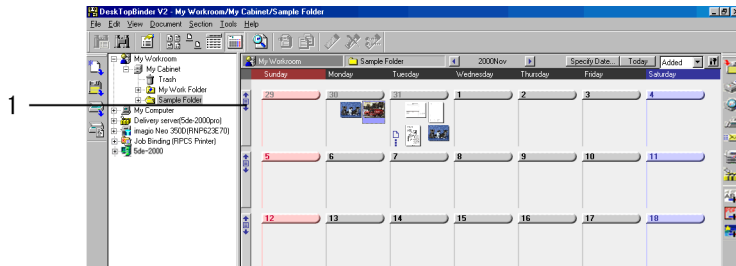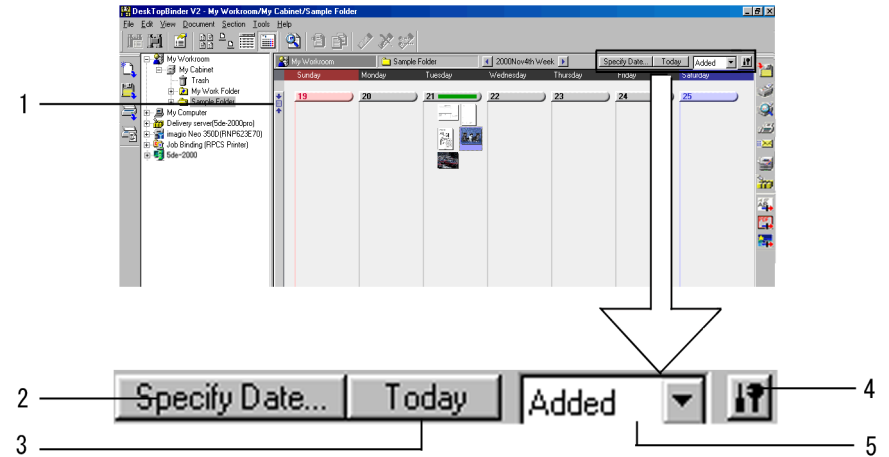■ **Details View**

1:Displayed Items
Click each item to sort documents. In addition, the documents stored in ScanRouter DocumentServer or the in-tray can be displayed by document type.

■ **Calendar View**
•Monthly View

•Weekly View

1:Monthly/Weekly Button
Use this to switch between the weekly and monthly calendar.
2:[Specify Date] Button
Shows the month or week including the specified date.
3:[Today] Button
Shows the current month or week.
4:[Calender Settings] Button
Select Monday or Sunday as the first day of the week in the calendar.
5:Added/Modified Date
Select to display by the added date or modified date of the document.

<Note>
•You can directly change a folder or document name in My Cabinet or shared cabinets.

•To show the unread status of a document, the unread mark [ ] is displayed in the Thumbnails view and is shown in red in the Details view.
•The view type and view contents may differ depending on the network devices.

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4.2 Displaying Contents of a Document

The following methods are available to display the contents of a document:

■ Using Easy Viewer
   Select [Easy Viewer] from the [View] menu or click the [Easy Viewer] button on the toolbar. Then select a document from the document list pane.

■ Using Viewer
   From the [Document] menu, select [Open in Viewer].

■ Using an Application
   Three methods are available:
   •Double-click a document composed of one section created with an application file.
   •In the Thumbnails view, select a section, and then select [Open in Application] from the [Document] menu.
   •In the Icon view, Details view, or Calendar view, select a document containing only one section, and then select [Open in Application] from the [Document] menu.

Displaying a Document Using Easy Viewer

You can easily display the contents of a document section by section.

Click 🔍 [Preview] button, and then select a document on the document list pane.
The size of the Easy Viewer window is changeable.
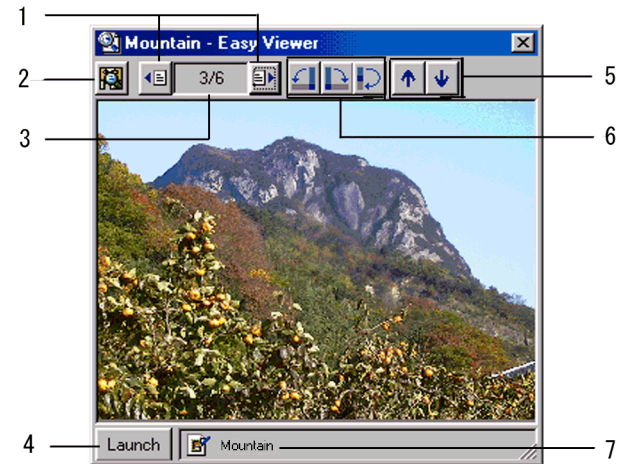
1:[Previous Section] [Next Section] Buttons
   Use these buttons to move through the sections of a document.
2:[Open Viewer] Button
   Use this to start Viewer. Easy Viewer is closed.
3:Current Section Number/Total Section Number
   Shows the current section number and the total number of sections.
4:[Launch] Button
   Launches an application. Easy Viewer is closed.
5:[Previous Document][Next Document] Buttons
   Use these buttons to move from document to document.
6:[90×Left] [90×Right] [180×] Buttons
   Use these buttons to rotate a displayed section image. The rotated image cannot be saved.
7:Section Name

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4.3 Controlling Documents

<Reference>
•For details, see Help.

Adding Documents

To add a document, start from the [File] menu or Input toolbar.
The following methods are available:

■ Create a new file using an application
A new file created with an application is added as a document.

■ Add a document from a file
An existing file is added as a document. You can use the drag-and-drop operation.

■ Add a document using a scanner
A scanned image is added as a document.

■ Add a document using easy scanning
Configure the scan-input conditions in advance. The image scanned with an easy scanning compliant scanner is added as a document.

<Note>
•Scan or easy scanning settings must be configured using Extended Features.

Adding Documents Automatically

Files saved in the specific Windows folder can be added automatically to DeskTopBinder V2 using the Auto-addition tool. There are two methods for auto-addition: adding files periodically and adding files from the menu.

■ Settings for Auto-addition
From the [File] menu, point to [Auto-addition Tool], and then select [Properties].

In the [Auto-addition Tool Properties] dialog box, make the necessary settings.

■ Periodic Addition
Files are added periodically with the settings in the [Auto-addition Tool Properties] dialog box.
To add files periodically, Auto-addition Tool must be started.

■ Manual Addition
From the [File] menu, point to [Auto-addition Tool], and then select [Launch].
Files are added with the settings in the [Auto-addition Tool Properties] dialog box.

<Note>
•Auto-addition Tool can also be started from the [Start] menu of Windows.
•The icon is displayed when you start DeskTopBinder V2. Right-click the icon. You can also add files and make settings from the menu.

Searching Documents

To search for documents, start from the [File] menu or General toolbar.
The following methods are available:

■ Specific Search
Searches using detailed conditions

■ Broad Search
Searches only using words or date

Arranging Documents

The following methods are available:

■ Display properties*1, *2, *3
You can check the document properties and document type.

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■ Create thumbnails*1, *2, *3
 When section thumbnails are created, you can find and
 view documents in the Thumbnails view.

■ Combine/Separate documents*1, *2,
 Use to combine multiple documents or to separate multiple
 DeskTopBinder V2 documents into one-section
 documents.

■ Add/delete a note and change note contents*1, *2, *3
 Adding/deleting a note on a section makes document
 arrangement easier.
 You can change the color of a note and enter a comment.

■ Create Web Viewer Display data*3
 Use to create Web Viewer Display data.

■ Create Content Text Search data*2, *3
 Use to create Content Text Search data.
*1 - Functions available with DeskTopBinder V2 Lite
*2 - Functions available with DeskTopBinder V2 Professional
*3 - Functions available with ScanRouter DocumentServer

<Note>
•Some functions may not be available depending on the network
 devices. For more information, see *DeskTopBinder V2 Help*.

Printing/Outputting/Converting Documents

To print, output or convert documents, start from the [File]
menu, or Output or Conversion toolbar.
The following methods are available to print or output docu-
ments:

■ Export as files

■ Print using Easy Print*

■ Send by E-mail

■ Fax transmission (Send by Fax)

■ Deliver from ScanRouter V2 delivery server

■ Print

■ Preview and Print*
* - An RPCS printer driver is required.

<Note>
•Send by E-mail, Easy Print, fax transmission must be configured
 using Extended Features.
•To use fax transmission, a fax driver is required. For information
 about supported fax drivers, see the DeskTopBinder V2 Readme file.
•To use Send by E-mail, a supported mailer must be set as the
 default mail application in Windows.

To convert documents, the following methods are available:

■ Convert to Image

■ Convert to PDF

■ Convert to Text (with OCR)

<Note>
•Convert to Image, Convert to PDF, and Convert to Text (with OCR)
 must be configured using Extended Features.

Adding/Deleting Cabinets

You can add ScanRouter DocumentServer cabinets to be used
with DeskTopBinder V2 as needed. You can also delete unnec-
essary cabinets.

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4.4 Maintenance

Arranging Folders

You can create, delete, move, and change the name of folders.

Creating ScanRouter DocumentServer Document Shortcuts

You can create shortcuts and place them as needed.

Adding Features

To add features, select [Extended Features] from the [Tools] menu.
The following features are available:

■ Input functions
Scan, easy scanning

■ Output functions
Easy Print, Send by E-mail, Send by Fax, Deliver, Preview and Print

■ Convert functions
Convert to Image, Convert to PDF, Convert to Text (with OCR)

■ Network functions
My Computer, ScanRouter DocumentServer, ScanRouter V2 delivery server, Document Server, Job Binding (RPCS Printer)

■ Tools functions
Export Document Properties Summary in CSV format, Export HTML, Import HTML

<Note>
•For more information about adding features, see *DeskTopBinder V2 Help*. ([Extended Features] in [Overview])

Backing Up DeskTopBinder V2 Cabinets and Folders

For backups, start from the [File] menu. Periodic backup and extracting backup data are possible.

■ Manual Backup
Select the folder to be backed up. From the [File] menu, select [Backup]. In the [Backup] dialog box, select the objects to be backed up. In the [Save As] dialog box, specify the name for the backup file and the location where the file is to be saved.

■ Automatic Backup
Click the My Cabinet icon. The [My Cabinet Properties] dialog box appears. Click the [Backup] tab and make the necessary settings.

■ Extract Backup Data
Use Windows Explorer and uncompress the file.
In the [Extract To] dialog box, click [Browse DeskTopBinder Tree]. Specify the location for the file and uncompress.

<Note>
•For more information about backups, see *DeskTopBinder V2 Help*.
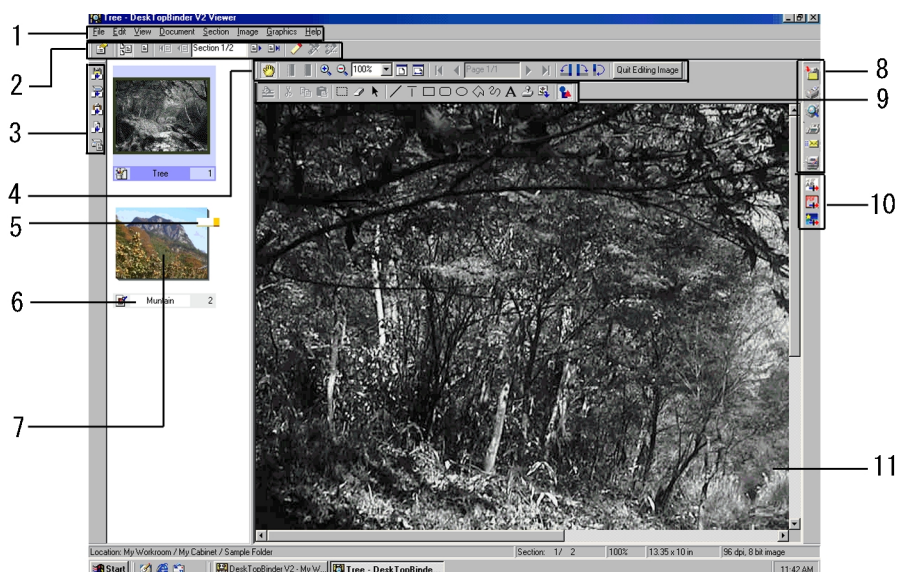([Backup] in [Operations for DeskTopBinder V2])

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5 Viewer Features

5.1 Viewing the Viewer Display

When a DeskTopBinder V2 Document Is Displayed

The menu and toolbars look different depending on whether an image section or non-image section is displayed.
To edit an image, click [Edit Image] from the [Section] menu or Image View toolbar.

1:Menu Bar
   Use this to perform operations on the display.
2:Standard Toolbar
   Use this to perform standard function operations such as switching sections and adding notes.
3:Input Toolbar
   Use to add existing files and scanned documents.
4:Image Viewing Toolbar
   Use to zoom in, zoom out, or rotate an image.

5:Note
   Use this to attach or delete a note, or to change the note contents.
6:Section Name
   Use this to change the section name.
7:Section List Pane
   The section thumbnail list in a document is displayed.
8:Output Toolbar
   Use this for printing, sending by E-mail and fax transmission. Except ![icon] Export Document icon, ![icon] Print icon and ![icon] Preview and Print icon, functions configured using Extended Features are displayed.
9:Drawing Toolbar
   Use this to draw lines, polygons and circles on an image.
10:Conversion Toolbar
   Use this to convert documents or sections into images, PDF files and text. Functions configured using Extended Features are displayed.
11:Section Pane
   The contents of the currently selected section are displayed. Only image sections can be displayed.

<Note>
•The Image Viewing toolbar appears only when an image section is displayed.

### When a ScanRouter DocumentServer Document Is Displayed

The menu and toolbars look different depending on whether an image section or non-image section is displayed. To update a document, click [To Update Mode]. To edit an image of an image section, switch to the Edit Image mode. You can switch the mode from the [Section] menu or by using the image viewing toolbar.

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■ Viewer Display

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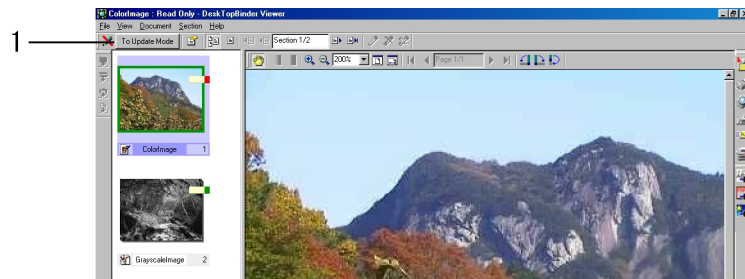
1. [To Update Mode] Button

■ Edit Image Mode Viewer Display

1   2
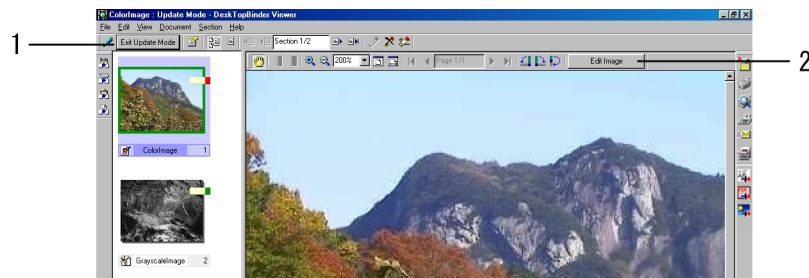
1. [Exit Update Mode] Button
2. [Edit Image/Quit Editing Image] Button

5.2Managing Sections

<Reference>
•For more information, see Help.

Changing the Section Order

To change the section order, start from the menu, or move a section thumbnail in the thumbnail pane using a drag-and-drop operation.

Inserting/Replacing a Section

To insert/replace a section, start from the [File] menu. The types of data you can insert/replace are:

■ Data imported from a file

■ Image data scanned with a scanner

■ Clipboard images

■ Data captured from added documents

■ Image data scanned using easy scanning

<Note>
•To insert or replace a section in a ScanRouter DocumentServer document, you must first switch to the Update Mode.
•To use a Scan or easy scanning to insert or replace a section, you must first configure them using Extended Features.

Printing/Outputting/Converting a Section

To print, output or convert a section, start from the [File] menu, the Output toolbar or Conversion toolbar.
The following methods are available to print or output sections:

■ Export as files

■ Send by E-mail

■ Print using Easy Print

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■ Fax transmission (Send by Fax)

■ Preview and Print

■ Print

<Note>
•To use Send by E-mail, Easy Print, and Send by Fax, these func-
tions must be configured using Extended Features.

The following methods are available to convert sections:

■ Convert to Image

■ Convert to PDF

■ Convert to Text (with OCR)

<Note>
•To use Convert to Image, Convert to PDF and Convert to Text (with
OCR), these functions must be configured using Extended Features.

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Editing an Image Section

To edit an image, click [Edit Image] from the [Section] menu or
Image Viewing toolbar.
To draw a figure, start from the [Graphics] menu or Drawing
toolbar.
The following are available for editing an image:

■ Insert Text

■ Stamp

■ Insert Illustration

■ Straight Lines

■ Horizontal/Vertical Lines

■ Squares/Rectangles

■ Rounded Rectangles

■ Ovals

■ Polygons

■ Freehand