DeskTopBinder
Version 4

Introduction Guide

This guide provides information about the features and displays of DeskTopBinder. For detailed operation procedures, see DeskTopBinder Help.

1 Let's Start Using DeskTopBinder

Before using DeskTopBinder, read this chapter to understand the basic operation of DeskTopBinder.
The explanations in this chapter are limited to the operations available inside My Cabinet, although DeskTopBinder enables users to share documents in the server by connecting to ScanRouter DocumentServer.

1.1 Starting and Quitting DeskTopBinder

Starting

❶ Click [Start], and then point to [Programs].
❷ Point to [DeskTopBinder], and then click [DeskTopBinder].
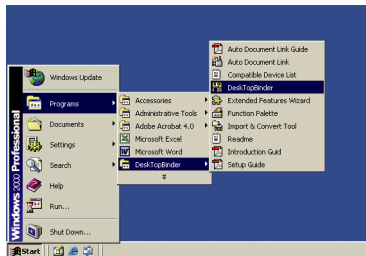
DeskTopBinder starts.
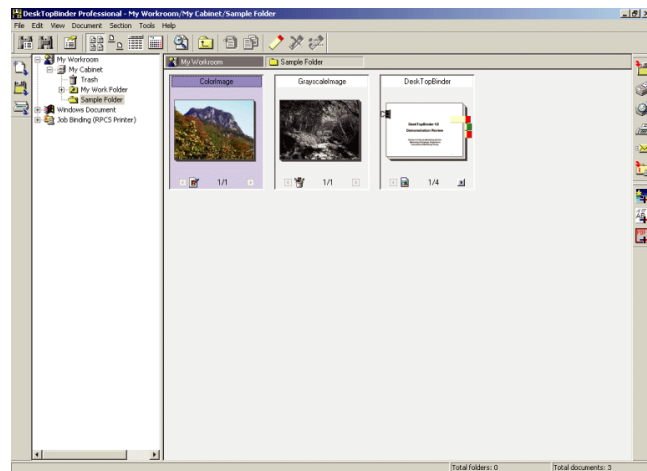
<Note>
•Extended Features Wizard appears when DeskTopBinder is started. Add functions such as input functions, print functions, and network devices as needed.
•On the first page of Extended Features Wizard, if you select the [Do not show this screen when launching DeskTopBinder] check box, Extended Features Wizard will not be shown when you subsequently start DeskTopBinder.

<Reference>
•For details about Extended Features, see p.15 "3 Extended Features of DeskTopBinder".

Quitting

❶ On the [File] menu, click [Exit].
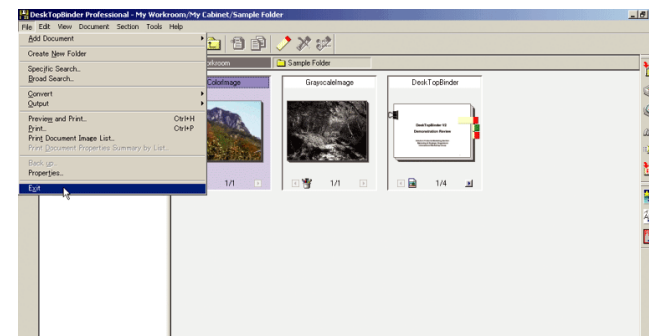
DeskTopBinder exits.

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

1.2 Basic Operations

This section explains the following basic document operations frequently performed using DeskTopBinder.
Follow the procedures below to start operating DeskTopBinder.

- ■ Adding Documents
- ■ Displaying Documents
- ■ Printing Documents
- ■ Searching for Documents
- ■ Editing Documents

Adding Documents

Although various methods are available to add documents to DeskTopBinder, adding files from Windows Explorer using a drag-and-drop operation and adding documents using a scanner are described as examples.
When an original is scanned using a scanner, the image data of the scanned original can be added to DeskTopBinder as a document.
When a file is added from Windows Explorer, the file can be added to DeskTopBinder as a document. The file format remains unchanged from when the file was created with an application.

Adding Files Using a Drag-and-Drop Operation

❶ Drag a file from Windows Explorer and drop it in a folder in the tree pane of DeskTopBinder, or drop it in the document list pane.
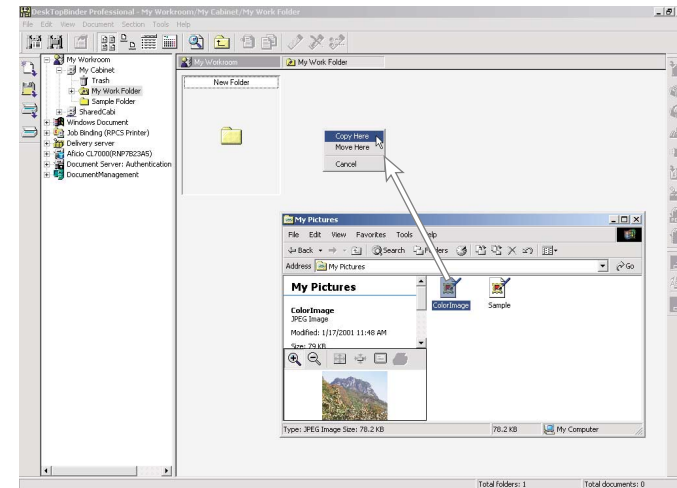
❷ On the menu, click [Copy Here] or [Move Here].
The document is added.

1
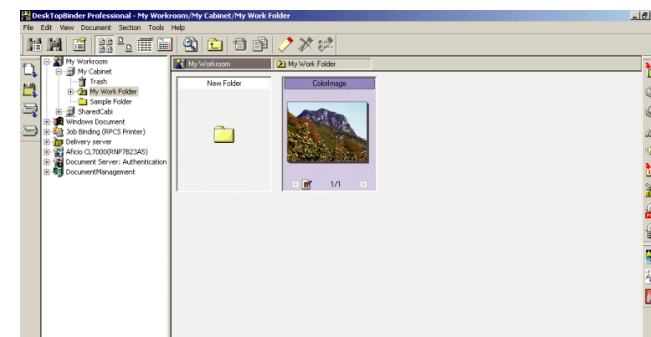
Adding Documents Using a Scanner

<Note>
•To add documents using a scanner, a TWAIN driver compliant with the scanner must be installed in a client computer beforehand.

1 In the tree pane, select the folder where you want to add the document.
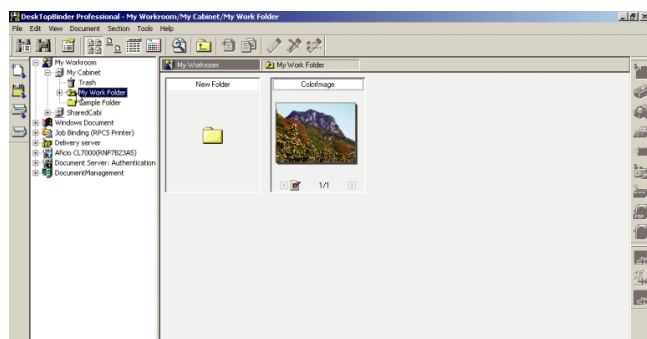
2 On the [File] menu, point to [Add Document], and then click [Scan].
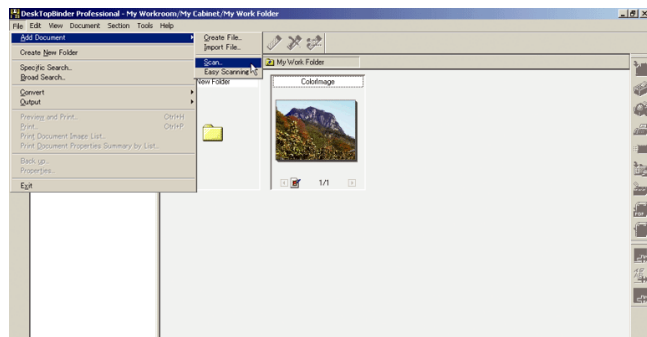
Viewer starts and the dialog box for scanner settings appears.

3 Make the necessary scanner settings, and then scan.
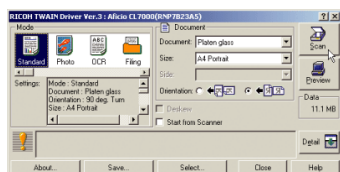
The confirmation message about completing the scan appears.

4 Click [Complete].
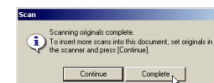
5 On the [File] menu of Viewer, click [Exit].
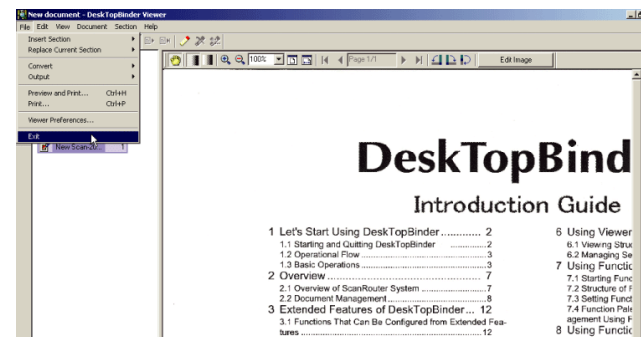
The [Enter Document Properties Summary] dialog box appears.

6 Enter document properties, and then click [OK].
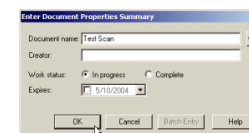
Viewer quits and the scanned original is added as a document.

<Note>
•When documents cannot be added using a scanner, check that the scanner - compliant TWAIN driver is installed in a client computer, or Scan is configured from Extended Features.

<Reference>
•For details about Extended Features, see p.15 "3 Extended Features of DeskTopBinder".

1

Displaying Documents

Three methods are available to display documents: using Easy Viewer, using Viewer, and using an application.
When a document is displayed using Easy Viewer, leafing through documents is possible. This allows searching for necessary documents by checking the contents of documents.
When a document is displayed using Viewer, various operations can be performed for specified files (sections) that make up the document.
When a document is displayed using the application used to create it, editing the contents is possible.

Displaying Documents Using Easy Viewer

❶ In the document list pane, select the document you want to display.

❷ On the [View] menu, click [Easy Viewer], or click 🔍, the [Easy Viewer] button.
Easy Viewer starts and the document is displayed.
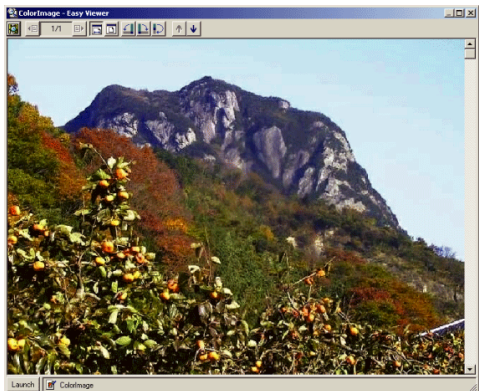
Displaying Documents Using Viewer

❶ In the document list pane, select the document you want to display.

❷ On the [Document] menu, click [Open in Viewer].
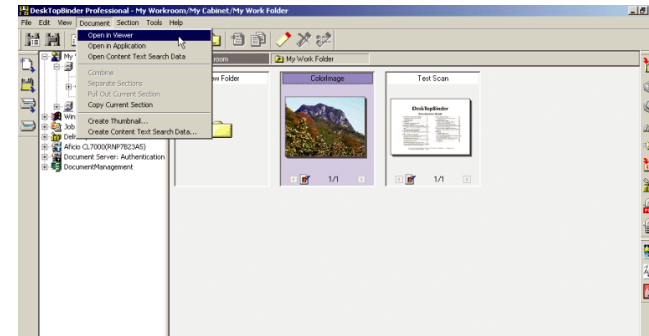
Viewer starts and the document contents are displayed.
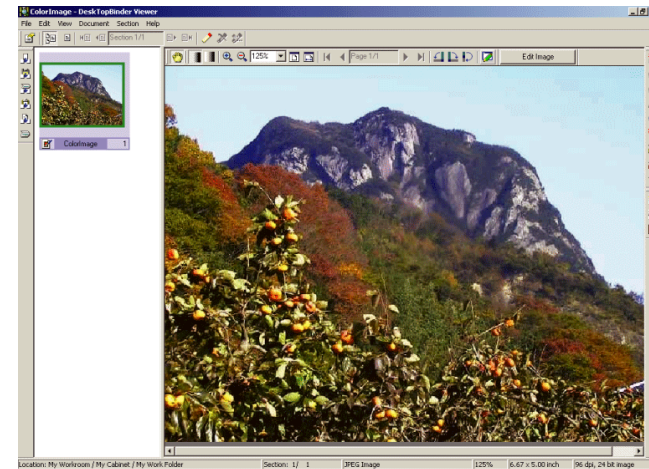
Displaying Documents Using an Application

❶ In the document list pane, select the document you want to display using an application.

❷ On the [Document] menu, click [Open in Application].
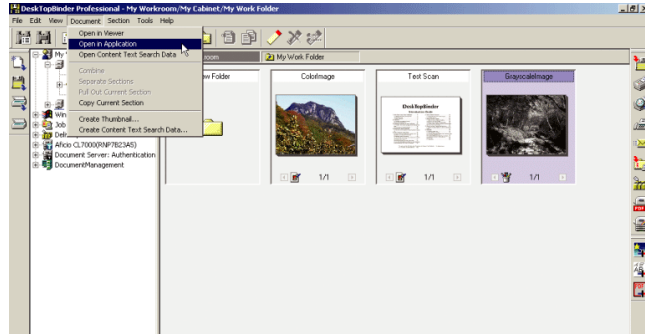
The application starts and the document is displayed.
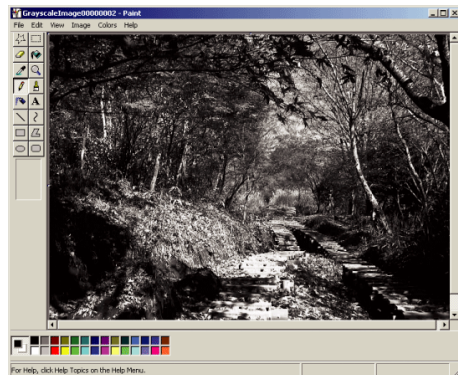
Searching for Documents

Documents can be searched through information set in document properties.

Two methods are available to search for documents: Broad Search and Specific Search.

Broad Search enables searching for documents by words or date, and Specific Search enables searching for documents using more specific conditions.

The procedure for Broad Search is described here as an example.

After a search is complete, documents are listed in the [Search Results List] window. Displaying and printing documents is also available from the window.

Searching for Documents with Broad Search

❶ In the tree pane, select the cabinet or folder you want to search through.

❷ On the [File] menu, click [Broad Search], or [⊞], the [Broad Search] button.

The [Broad Search] dialog box appears.

❸ Make the necessary search settings in the [Search string(s)] box or in other items, and then click [Search].
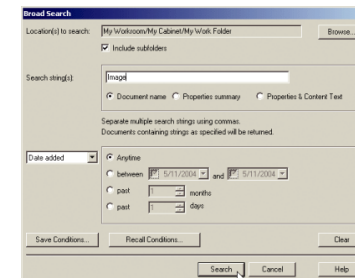
The confirmation message about completing the search appears.

❹ Click [List Results].
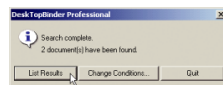
The [Search Results List] window appears and the documents found are displayed in the list.
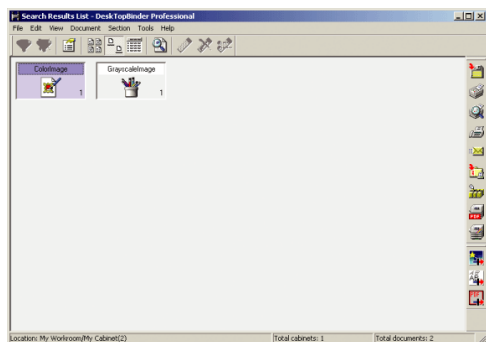
❺ On the [File] menu, click [Close].
The [Search Results List] window closes.

Printing Documents

In addition to ordinary printing, printing with Preview and Print, Easy Print, and other print methods are available.
The procedure for making detailed print settings with Preview and Print and printing after you have checked the print condition is described as an example.

Printing Documents with Preview and Print

<Note>
•To print documents with Preview and Print, an RPCS printer driver must be installed on a client computer beforehand.

❶ In the document list pane, select the document you want to print.

❷ On the [File] menu, click [Preview and Print], or click 🔍 the [Preview and Print] button
The [Preview and Print] dialog box appears.

❸ Make the necessary print settings after previewing with the print settings including Layout and Duplex.
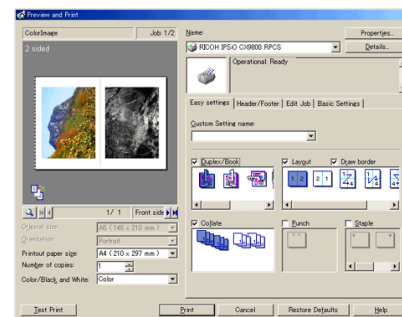
❹ Click [Print].
Printing starts.

<Note>
•When documents cannot be printed, check that an RPCS printer driver is installed in a client computer, or Preview and Print is configured from Extended Features in DeskTopBinder.

<Reference>
•For details about Extended Features, see p.15 "3 Extended Features of DeskTopBinder".

Editing Documents

Documents can be edited by two methods: by starting Viewer, or by starting the application used to create the document.
Using Viewer, operations such as changing order and rotating are possible for files (sections) that make up the document. For image files: inserting text, drawing figures, and other image processing functions are possible.
Using the application the document was created in, specific files in the document can be edited in detail.
The procedures for inserting text into an image, editing the text, and moving an enclosed area on an image using Viewer are described as examples.

1

Inserting Text into an Image

① Display an image document using Viewer.
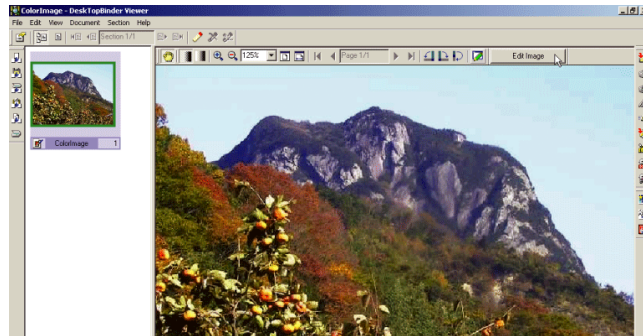
② Click [Edit Image].

The Edit Image toolbar and the [Graphics] menu appear.

③ On the Edit Image toolbar, click ![A], the [Insert Text] button, or on the [Graphics] menu, point to [Draw], and then click [Insert Text].

This changes the pointer to ＋ .

④ Drag to draw a box for entering text.

A text box is displayed and a cursor appears inside it.
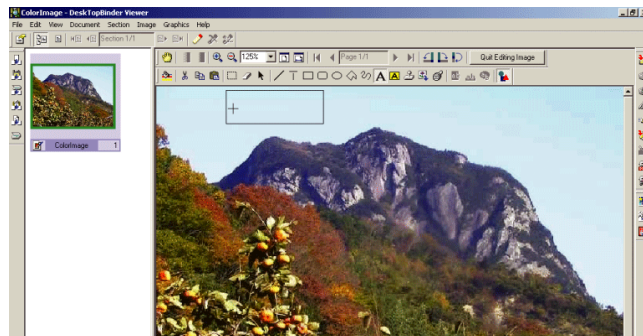
⑤ Enter text.
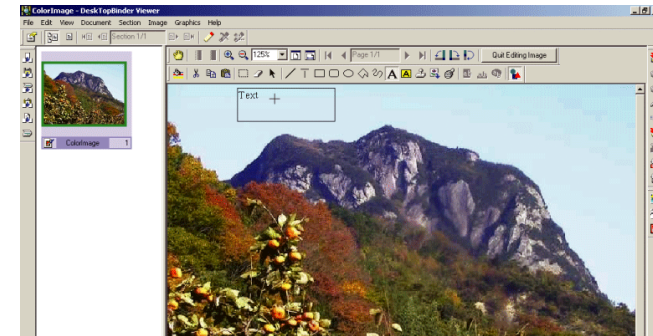
⑥ Click ![arrow], the [Select Image Objects] button, or another button for figure objects to quit inserting text.

⑦ To change text properties settings, such as font, size, and text color, click ![arrow], the [Select Image Objects] button, and then click the text.

⑧ The text box is selected.
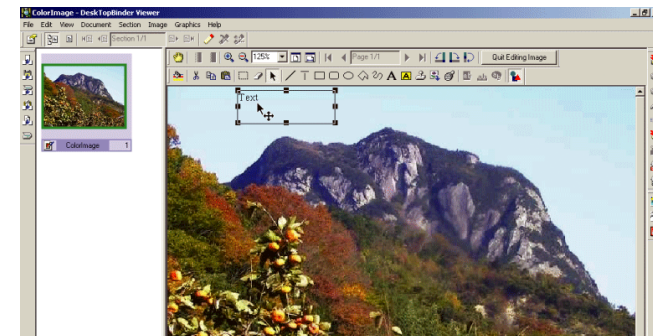
9 On the [Graphics] menu, click [Drawing Properties].
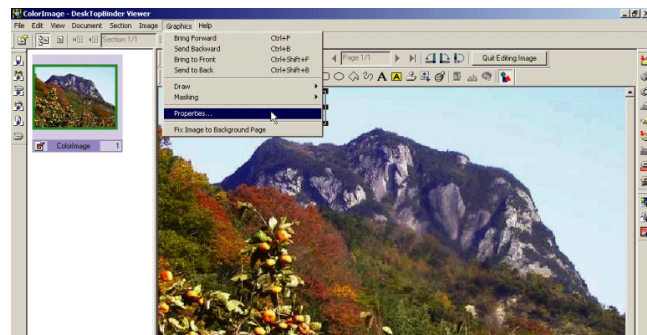
10 In the [Text Properties] dialog box, change the font, size, color, alignment, and other text settings.
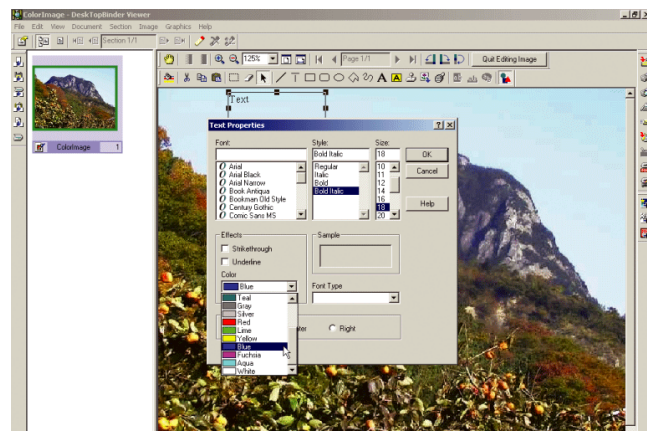
11 Click [OK] to quit changing the text properties.
The text properties are changed.
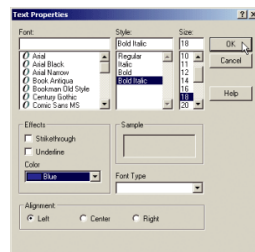
12 Click [Quit Editing Image].

<Note>
•Changes made in the [Text Properties] dialog box are applied to all characters in the text box.

Moving an Enclosed Area in an Image

1 Display an image document using Viewer.
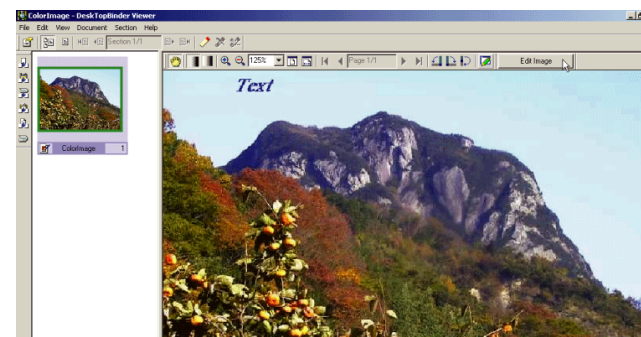
2 Click [Edit Image].

The Edit Image toolbar appears.

3 On the Edit Image toolbar, click [icon], the [Select Range] button.

This changes the pointer to ＋ .

1

4 Drag to draw a rectangle to enclose the desired area.

The specified area is enclosed by a dotted rectangle.
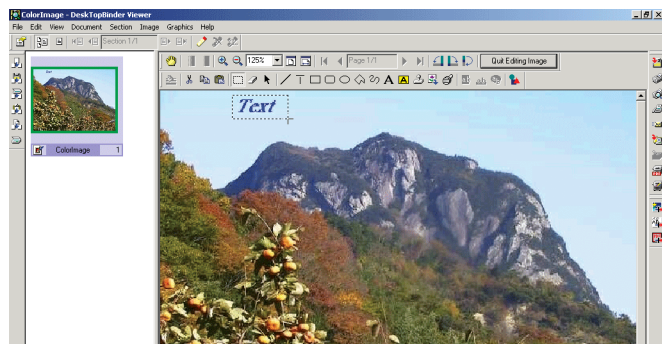
5 Place the pointer on the enclosed image.

This changes the pointer to 🖱 .

6 While pressing the left mouse button, drag the enclosed image to the desired position.

7 Click [Quit Editing Image].

After you have mastered the basic operations of DeskTop-Binder with the help of the explanations described in this chapter, you can start to use the other operations and functions.

For more information about operating DeskTopBinder, see DeskTopBinder Help. On the [File] menu, point to [Help], and then click [Contents].

2 Overview

2.1 Overview of ScanRouter System

ScanRouter System is a group of software products that integrates various kinds of data, such as scanned-in/fax-received image data and files made using different applications, to provide document management.
In addition to DeskTopBinder, ScanRouter System includes ScanRouter V2 Lite/Professional, ScanRouter Enterprise, ScanRouter EX Professional/Enterprise, ScanRouter DocumentServer, ScanRouter Web Navigator, and others.
ScanRouter System reduces wastage by sorting and managing paper documents that accumulate daily as electronic data. ScanRouter System documents can be searched, viewed, printed, and edited any time. They can also be sent by e-mail to a person who needs them.
Furthermore, access rights can be configured to restrict user access and the operations individual users can perform. By configuring access rights, secure document management becomes possible.
The illustration below shows how ScanRouter System products connect.
Depending on product combinations, connection or certain functions may not be possible.
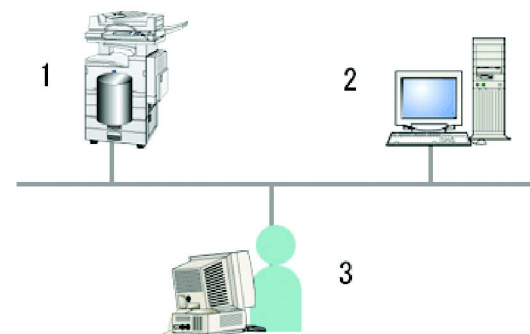
1. Network devices
   You can input or output documents using network devices. The Document Server is available depending on the network devices.
   When Document Server is installed in a network device, the Document Server receives scanned-in, faxed, and copied documents. Documents in the Document Server can be used from DeskTopBinder.
2. Server computer
   ScanRouter V2 Lite, ScanRouter V2 Professional, ScanRouter Enterprise, ScanRouter EX Professional, ScanRouter EX Enterprise, or ScanRouter Document-Server is installed.
3. Client computer
   DeskTopBinder is installed.

DeskTopBinder

<Important>
•There are two types of DeskTopBinder: DeskTopBinder Professional and DeskTopBinder Lite. Both are described as DeskTopBinder in this Introduction Guide. Note that DeskTopBinder Professional has all the functions of DeskTopBinder Lite plus some additional functions.

<Reference>
•For details about differences between DeskTopBinder Professional and DeskTopBinder Lite, see p.39 "9.3 Functional Differences between DeskTopBinder Professional and DeskTopBinder Lite".

DeskTopBinder can integrate various kinds of data, such as files made with different applications, scanned image data, and existing image files for total document management.
When only DeskTopBinder is used, documents created on a computer can be managed. However, by adding network devices from Extended Features, you can view and manage documents in ScanRouter V2 Lite/Professional, ScanRouter Enterprise, or ScanRouter EX Professional/Enterprise in-trays, or ScanRouter DocumentServer cabinets using DeskTopBinder. Furthermore, when DeskTopBinder is used with network devices, adding scanned-in documents and outputting (Print and Send by Fax) documents from DeskTopBinder are available. Depending on the network devices, saved documents in the Document Server can be copied to DeskTopBinder. Documents in the Document Server can also be printed and outputted from DeskTopBinder.

ScanRouter V2 Lite/Professional, ScanRouter Enterprise, and ScanRouter EX Professional/Enterprise

Incorporated with the ScanRouter delivery server, DeskTop-Binder enables users to view documents in in-trays and deliver them. The ScanRouter delivery server must be configured using Extended Features in advance. ScanRouter has five types: ScanRouter V2 Professional, ScanRouter V2 Lite, ScanRouter Enterprise, ScanRouter EX Professional, and ScanRouter EX Enterprise.

ScanRouter DocumentServer

Incorporated with ScanRouter DocumentServer, DeskTop-Binder enables users to access and control documents in the server from client computers (DeskTopBinder). ScanRouter DocumentServer 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.

2.2 Document Management

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.
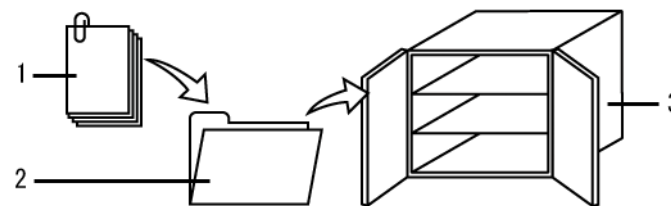
1. Document
2. Folder
3. Cabinet

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

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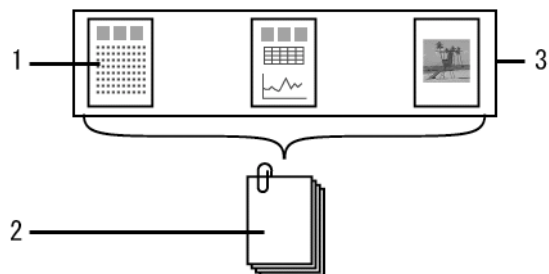
1. Section
2. Document
3. Data made with applications and scanned image data

Document Properties

Document properties are attribute information configured for each document.
With DeskTopBinder, document properties can be configured or checked on the [Summary] and [Contents] tabs in the properties dialog box. For properties of the document management server or delivery server documents, [Document type] can separate documents according to document type and manage them.

Summary

Document properties summary, including information such as the creator, work status, and expiration date, make document management easier.
Using DeskTopBinder, you can configure properties summary for each document and check them using Properties. Items that can be checked are document name, size, location, date added/modified/created, creator, work status, and expiration date.
The document type determines the displayed items for document properties summary of the document management server or delivery server documents.

Contents

A document is composed of multiple sections. On the [Contents] tab, information about sections can be checked.
You can check status of thumbnail and Content Text Search data creation for sections. If necessary, you can create them again.

Document Type

For ScanRouter DocumentServer, ScanRouter V2 Lite/Professional, ScanRouter Enterprise, and ScanRouter EX Professional/Enterprise, [Document type] is available on the [Summary] tab in the document properties dialog box.
Each cabinet can be configured to hold documents with certain document types. By separating documents according to document type, document management becomes easier.
In addition to the basic document type, ScanRouter specific document types are available with ScanRouter. Documents added from input devices by way of ScanRouter V2 Lite/Professional, ScanRouter Enterprise, and ScanRouter EX Professional/Enterprise can be configured as a ScanRouter specific document.

Document Type in ScanRouter DocumentServer

Using ScanRouter DocumentServer, you can configure document type.Displayed items on the [Summary] tab in the properties dialog box 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.

2

Document Type of In-Tray Documents

Each document delivered in the in-tray of ScanRouter V2 Lite/Professional, ScanRouter Enterprise, and ScanRouter EX Professional/Enterprise has a specific document type depending on the capture method.
Displayed items on the [Summary] tab in the properties dialog box may differ depending on the document type.

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 folder. By double-clicking the shortcut you can immediately display the document. This allows easy access for frequently used documents.

Security for Document

ScanRouter DocumentServer, ScanRouter V2 Lite/Professional, ScanRouter Enterprise, and ScanRouter EX Professional/Enterprise have the following security functions to restrict access to documents viewed and used by multiple users.

Security and Access Rights in ScanRouter Document-Server

Each ScanRouter DocumentServer cabinet and folder has an access control list (ACL) to restrict user access and the operations they can perform. Configuring access rights for each cabinet or folder restricts access and prevents unwanted document tampering. Various kinds of access rights are available, including, viewing only, editing, and deleting.

<Note>
•ScanRouter DocumentServer Ver.1.XXX restricts user access by passwords configured for each cabinet.

•Individual ScanRouter DocumentServer Ver.2.XXX documents and shortcuts do not have ACL. However, access to them can be controlled by the same ACL settings configured for the cabinet or folder where they are stored.
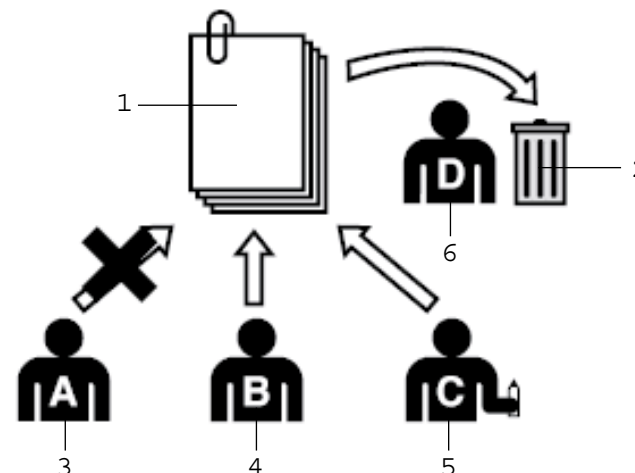
1. Document
2. Trash can
3. No access rights
4. Viewing possible
5. Editing possible
6. Deleting possible

Security and Access Rights in ScanRouter EX Professional/Enterprise

Each ScanRouter EX Professional/Enterprise in-tray has an access control list (ACL) to restrict users and the operations they can perform. Configuring access rights for each in-tray restricts viewers and prevents unwanted document tampering. Only users who have specific access rights can access documents in an in-tray to view and copy them to a client computer.

<Note>
•ScanRouter V2 Lite/Professional and ScanRouter Enterprise restrict user access using passwords configured for each in-tray.

3 Extended Features of DeskTopBinder

Extended Features settings are required for various DeskTopBinder functions.
To perform document operations in cooperation with ScanRouter V2 Lite/Professional, ScanRouter Enterprise, ScanRouter EX Professional/Enterprise, ScanRouter DocumentServer, or Document Server, they must be added as network devices from DeskTopBinder Extended Features.
After they are configured as network devices, the icons for network devices appear under the DeskTopBinder tree.
Using Extended Features, you can also configure input/output functions, conversion functions, and tools to use them with DeskTopBinder.
You can also change properties of functions and delete unnecessary functions.
Before using DeskTopBinder, be sure to add and configure functions from Extended Features.

3.1 Functions That Can Be Configured from Extended Features

The following functions can be configured from DeskTopBinder Extended Features:

■ Input functions
  Scan, Easy Scanning

■ Output functions
  Easy Print, Send by E-mail, Send by Fax, Deliver, Print, Preview and Print, Save in Job Binding, PDF Direct Print

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

■ Network functions
  Windows Document, Document Management Server, Scan-Router DocumentServer V2, ScanRouter V2 delivery server, ScanRouter EX, Document Server, Document Server: Authentication/Encryption, Job Binding (RPCS Printer)

■ Tools functions
  Export Document Properties Summary in CSV format, Export HTML, Import HTML, Entry Assistant, Print Document Properties Summary by list, Print Document Image List

<Note>
•The Document Server function can be selected only if network devices support that function.
•An RPCS printer driver must be installed to use Job Binding.
•Functions that can be added vary depending on the system environment.

Incorporating with Network Devices

The related devices or programs are displayed under the DeskTopBinder tree and can be used in cooperation with DeskTopBinder.

Using these functions, the following are possible:

■ Control Windows Document with DeskTopBinder

■ Control documents in ScanRouter DocumentServer

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

■ In cooperation with ScanRouter, control documents in the in-trays

■ Control documents in the Document Server

■ Control documents in Job Binding (RPCS Printer)

<Reference>
•For more information about possible functions incorporated with network devices, see DeskTopBinder Help.

3

3.2 Procedures in Extended Features

New functions can be added by selecting [Extended Features] on the [Tools] menu or using Extended Features Wizard.

Settings in Extended Features Wizard

Start Extended Features Wizard for settings.
With Extended Features Wizard, select [Easy settings] or [All function settings] as the method for adding functions.

■ **Easy settings**
[Easy settings] enables the settings for functions with a simple operation by following the instructions on the display.
However, functions that can be configured are the following:
•Print functions
•Scanner functions
•Document Server
•Connection to document management servers
•Connection to delivery servers

■ **All function settings**
[All function settings] enables the addition and setting of all functions.
The operation for [All function settings] is the same as that performed from the Extended Features menu ([Extended Features] on the [Tools] menu).

Starting Extended Features Wizard

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

❷ Point to [DeskTopBinder], and then click [Extended Features Wizard].
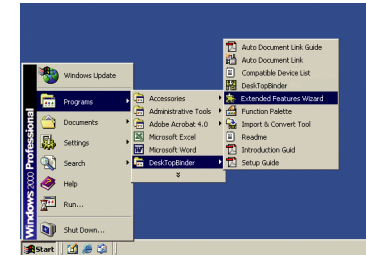
The [Extended Features Wizard] dialog box appears.

<Note>
•Right-clicking the Function Palette icon on the task bar is another way to start Extended Features.
•On the first window of Extended Features Wizard, if you did not select the [Do not show this screen when launching DeskTopBinder] check box, Extended Features Wizard will thereafter always appear when you start DeskTopBinder.

Procedures for Settings in Extended Features Wizard

Follow the procedure below as an example of making function settings using [Easy settings].

❶ Start Extended Features Wizard.

❷ Click [Easy settings], and then click [Start].
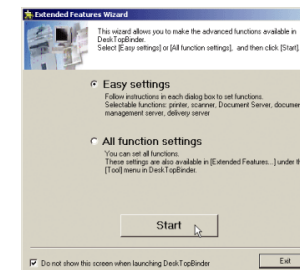
The [Printing Function1] dialog box appears.

❸ Make the necessary settings for print functions, and then click [Next].

<Note>
•To make Preview and Print settings, an RPCS printer driver must be installed in a client computer beforehand. For more information about RPCS printer drivers, see the Compatible Device List.
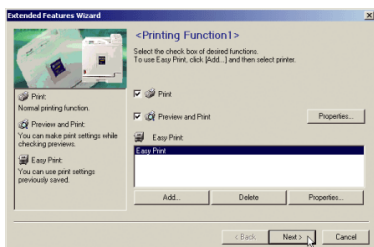
The [Printing Function3] dialog box appears.

❹ Make the necessary PDF Direct Print settings, and then click [Next].

<Note>
•Only printers that support PDF Direct Print can be used.
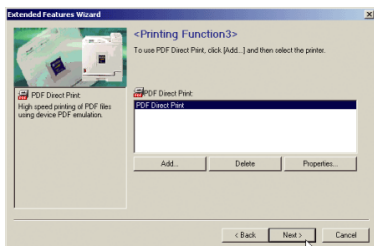
The [Scanner Function] dialog box appears.

❺ Make the necessary settings for scanner functions, and then click [Next].

<Note>
•To make scanner function settings, a TWAIN driver compliant with the scanner must be installed in a client computer beforehand.
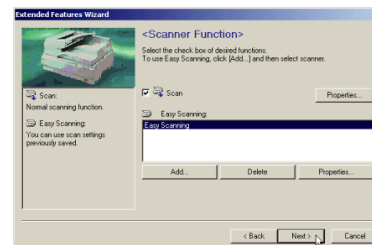
The [Document Server] dialog box appears.

❻ Make the necessary settings for Document Server, and then click [Next].
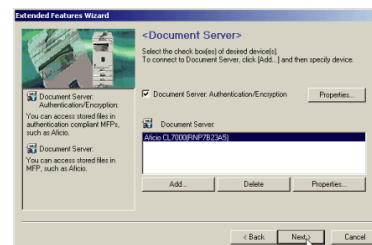
<Note>
•You may be asked for a password depending on the network device you are connecting. For more information about the password, consult the administrator of the network device.

The [Document Management Server Connection] dialog box appears.

3

❼ Make the necessary settings for document management servers to be connected, and then click [Next].
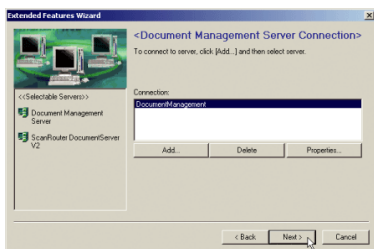
<Note>
•You may be asked for a password depending on the network device you are connecting. For more information about the password, consult the administrator of the server.
  The [Delivery Server Connection] dialog box appears.

❽ Make the necessary settings for delivery servers to be connected, and then click [Next].
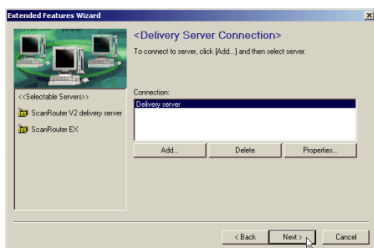
<Note>
•You may be asked for a password depending on the network device you are connecting. For more information about the password, consult the administrator of the server.
  The [Completion of Extended Features Settings] dialog box appears.

❾ Check the Extended Features settings, and then click [Finish].

<Note>
•If there is no Document Server, document management server, and delivery server on the network, Extended Features settings cannot be made.

Settings in Extended Features Menu

Start DeskTopBinder, and then click [Extended Features] on the [Tools] menu.
The procedure for adding a network device Document Server is given here as an example.
When Document Server is added, documents in Document Server can be viewed and managed using DeskTopBinder.

<Reference>
•For setting procedures for other functions, see DeskTopBinder Help.

❶ On the [Tools] menu, click [Extended Features].
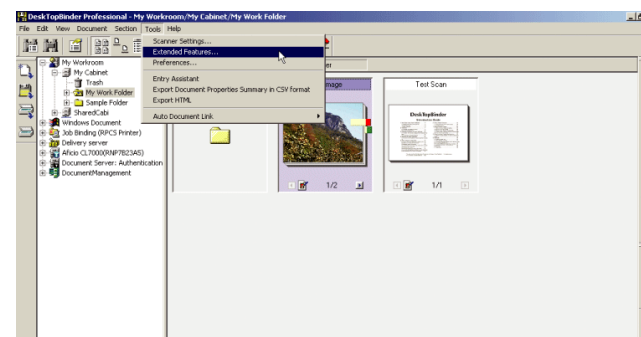
The [Extended Features] dialog box appears.

❷ Click the Network icon, and then select [Document Server] in the [Selectable function(s)] list.

3
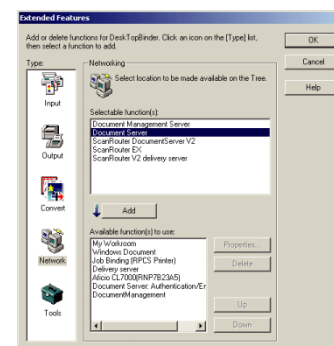
❸ Click [Add].

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].

3

4 Structure of DeskTopBinder

4.1 DeskTopBinder Displays

DeskTopBinder consists of the following: Desk display, Viewer display, and Function Palette.
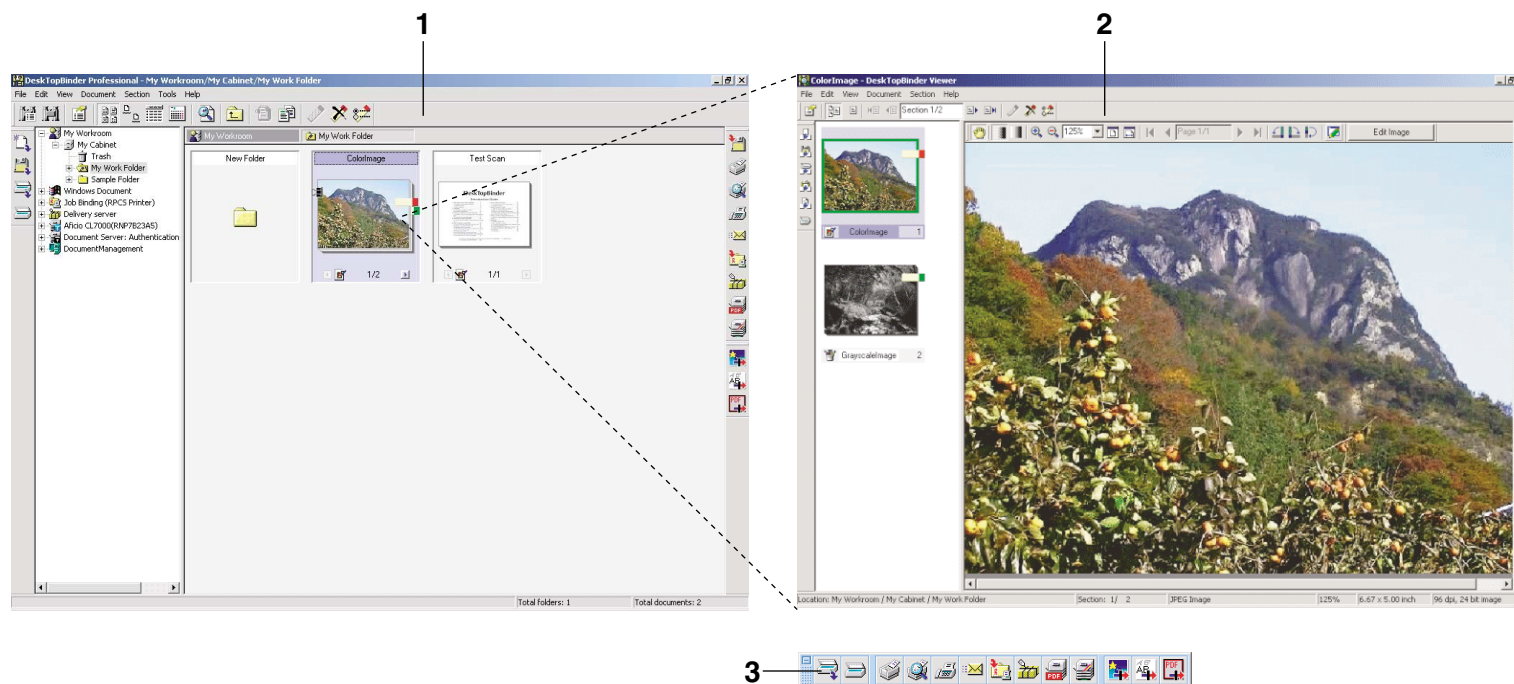
1:Desk display
    Displays a document list. This display is used when performing DeskTopBinder operations.
2:Viewer display
    Displays the contents of a document. This display is mainly used when editing a document.
3:Function Palette
    DeskTopBinder input, output, and conversion functions can be used by clicking a button or dropping a file onto a button using a drag-and-drop operation.

5 Using Desk

5.1 Desk Display Layout
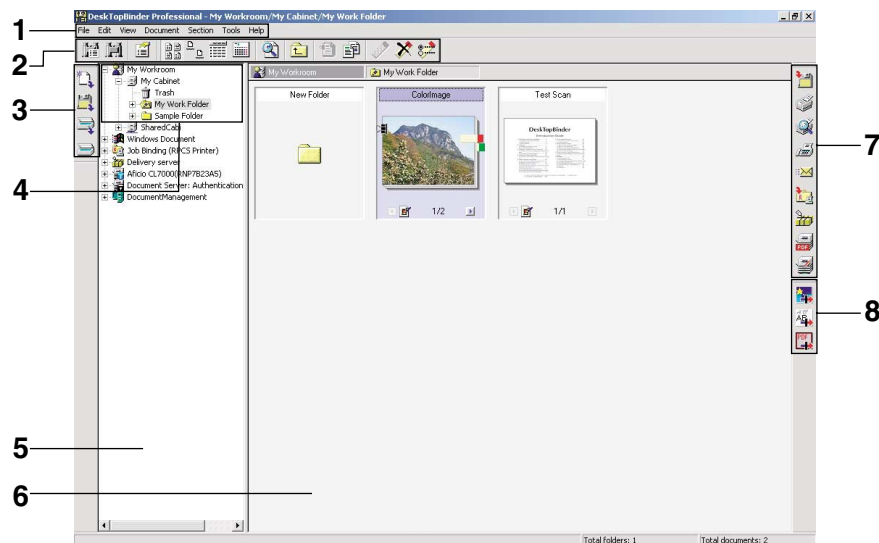
1:Menu bar
Use this to perform operations on the display.

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 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. 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.

5

Display Method of the Document List

The document list can be viewed in four formats: Thumbnails, Icons, Details, and Calendar. The following describes each view.

<Note>
•The document list of Windows Document cannot be displayed in the Thumbnail view and Calendar view.

■ Thumbnail view
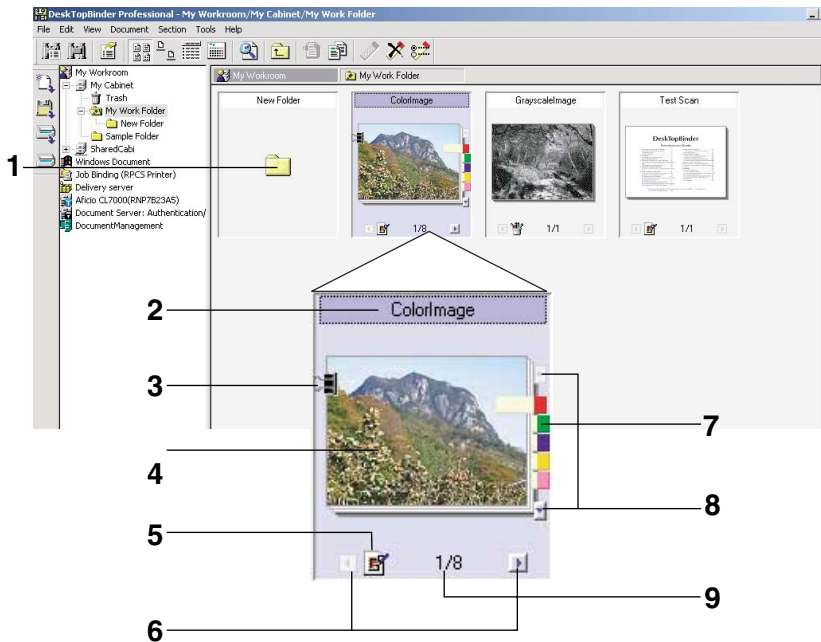
1:Folder icon
2:Folder or document name
3:Clip
　When a document is composed of multiple sections, a clip is displayed.
4:Section thumbnail
　The section thumbnail is displayed. Thumbnails may not be created for some sections.

5:Section icon
　Displays 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
　Displays the current section number and the total number of sections.

■ Icons view
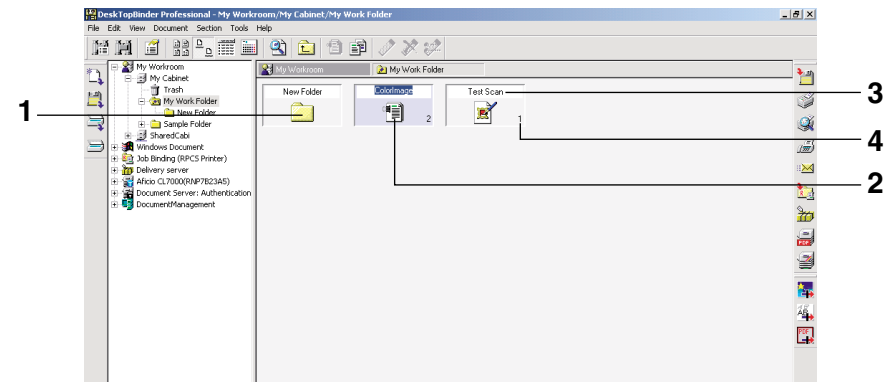
1:Folder icon
2:Document icon
　The document icon is displayed. When a document is composed of multiple sections, the icon is displayed with a clip attached.
3:Folder or document name
4:Total section number
　Displays the total number of sections in the document.

5

■ Details view
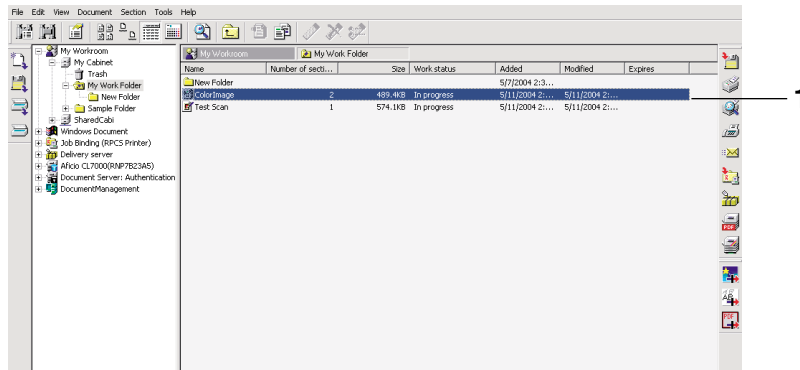
1:Displayed items
    Click each item to sort documents. In addition, the doc-
    uments stored in the document management server or
    an in-tray of the delivery server can be displayed by
    document type.

■ Calendar view
 •Monthly view
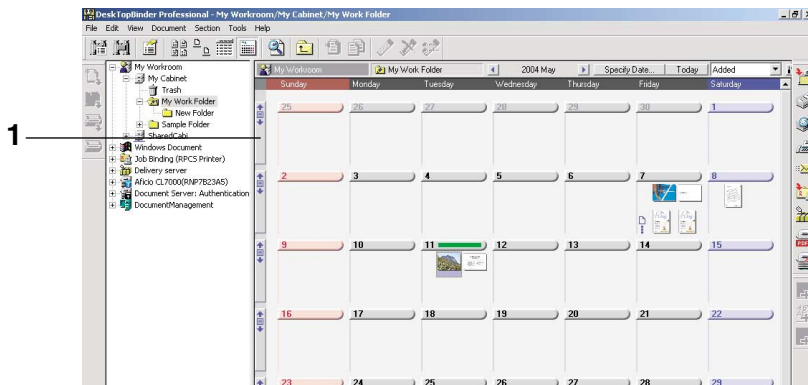
•Weekly view
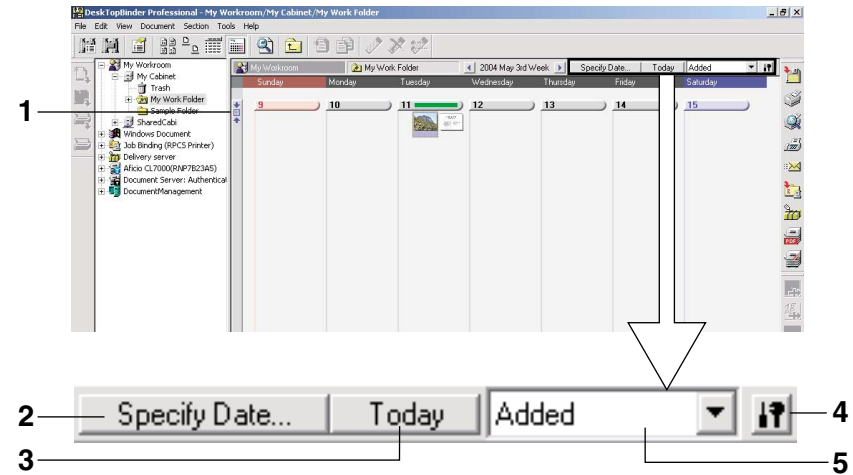
1:[Monthly][Weekly] buttons
    Click this to switch between the weekly and monthly
    calendar.
2:[Specify Date] button
    Displays the month or week including the specified
    date.
3:[Today] button
    Displays the current month or week.
4:[Calender Settings] button
    Select Monday or Sunday as the first day of the week
    on the calendar.
5:[Added][Modified][Created] 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 net-
 work devices.

5

5.2 Displaying Contents of a Document

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

■ Using Easy Viewer
In the document list pane, select a document to display, and then click [Easy Viewer] on the [View] menu, or click

, the [Easy Viewer] button on the toolbar.

■ Using Viewer
In the document list pane, select a document to display, and then click [Open in Viewer] on the [Document] menu.

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

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

<Note>
•When a document consists of multiple sections, the application used to create the first section starts - except when a section can be selected in the Thumbnails view. To display a second or later section, display the document using Viewer, select the section to display using an application, and then click [Open in Application] on the [Document] menu or double-click the section.

Structure of Easy Viewer

Using Easy Viewer, you can easily display the contents of a document section by section.
The size of the [Easy Viewer] window is changeable.
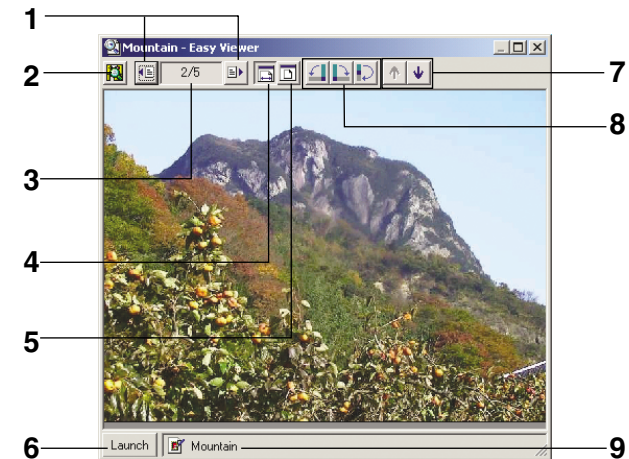
1:[Previous Section] [Next Section] buttons
Click these buttons to move through the sections of a document.
2:[Open Viewer] button
Click this to start Viewer. Easy Viewer is closed.
3:Current section number/total section number
Displays the current section number and the total number of sections.
4:[Fit to Width] button
Fits the current section to the width of the window.
5:[Fit in Window] button
Fits the current section to the overall size of the window.
6:[Launch] button
Launches an application. Easy Viewer is closed.
7:[Previous Document] [Next Document] buttons
Use these buttons to move from document to document.
8:[90°Left] [90°Right] [180°] buttons
Click these buttons to rotate a displayed section image. The rotated image cannot be saved.
9:Section name

5

5.3 Adding Documents

<Reference>
•For details, see DeskTopBinder Help.

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 docu-
ment.

■ Add a file as a document
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.

5.4 Checking and Transferring Newly Arrived Documents

Using Auto Document Link, files from the following monitored
items can be transferred and added to DeskTopBinder and
ScanRouter DocumentServer as documents, or saved to Win-
dows folders as files: delivery server in-trays, specified Win-
dows folders, Fax Received Files from network devices, and a
Caplio digital camera.
There are two methods for transfer: transferring automatically
and transferring manually.

<Reference>
•For details about Auto Document Link, see *Auto Document Link Guide.*

■ Settings for transfer
On the [Tools] menu, point to [Auto Document Link], and
then click [Properties].
In the [Auto Document Link Properties] dialog box, select the
item to be monitored, and then make the necessary settings.

■ Automatic transfer
Documents or files in the monitored items are transferred
automatically to the specified locations with the settings in
the [Auto Document Link Properties] dialog box.
To transfer documents or files automatically, Auto Docu-
ment Link must be started.

■ Manual transfer
On the [Tools] menu, point to [Auto Document Link], and
then click [Check New Data].
Documents or files in the monitored items are transferred
to the specified locations with the settings in the [Auto Doc-
ument Link Properties] dialog box.

<Note>
•Auto Document Link can also be started from the [Start] menu of
Windows.
•The icon of Auto Document Link appears on the taskbar when you
start DeskTopBinder. Right-click the icon. You can also make set-
tings and check new data from the menu.

5

Searching for Documents

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

■ Specific Search
Searches using keywords or Content Text Search data

■ Broad Search
Searches only using words or date

<Note>
•With ScanRouter DocumentServer (Ver.2.XXX), Advanced Search is available to refine the search.
•With ScanRouter DocumentServer (Ver.2.XXX), the folder search function is also available.

5.5 Arranging Documents

The following methods are available to arrange documents from DeskTopBinder:

■ Display properties
You can check the document properties and document type.

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

■ Combine/separate documents
Use to combine multiple documents or to separate multiple DeskTopBinder documents into one-section documents.

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

■ Create Content Text Search data
Use to create Content Text Search data.

<Note>
•Content Text Search data cannot be created using DeskTopBinder Lite.

5.6 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 documents:

■ Export as files

■ Print using Easy Print*

■ Send by E-mail

■ Fax transmission (Send by Fax)

■ Deliver by ScanRouter delivery server

■ Save in Job Binding

■ PDF Direct Print

■ Print

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

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

5

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.

5.7 Document Management (available when ScanRouter DocumentServer is connected)

<Note>
•For the following operations, ScanRouter DocumentServer must be
 added from Extended Features beforehand.

Adding/Deleting Document Management Server Cabinets

You can add ScanRouter DocumentServer cabinets to be used
with DeskTopBinder as needed. You can also delete unneces-
sary cabinets.
To add a cabinet, select ScanRouter DocumentServer in the
tree pane. On the [File] menu, point to [Cabinet], and then click
[Add to Tree].
To delete a cabinet, select the cabinet you want to delete from
the tree. On the [File] menu, point to [Cabinet], and then click
[Remove from Tree].

Document Management with Document Management Server

The following document operations are available only with
ScanRouter DocumentServer:

■ Perform Auto-adjust Image Orientation*1,*2
  To automatically recognize image orientation and adjust
  orientation.
■ Extract text as document name*1,*2
  To replace the current document name with text extracted
  from the first section.
■ Create Web Viewer Display data*2
  To create Web Viewer Display data. When Web Viewer
  Display data is created, documents can be viewed using
  ScanRouter Web Navigator through a Web browser.
■ Create PDF data*2
  Use to create PDF data. With PDF data, documents can
  be displayed clearly using Acrobat Reader even if the
  application used to create the document is not installed in
  a client computer.
■ Manage versions*2
  You can manage document update history. It is also possi-
  ble to check the background of the update and the user
  who updated the document by configuring notes for each
  version.
  Managing versions is also possible from Viewer.
■ Change access rights*2
  To change access rights to configure operations each user
  can perform for folders or documents.

*1 - Functions available with ScanRouter DocumentServer
*2 - Functions available with ScanRouter DocumentServer
(Ver.2.XXX)

<Note>
•Some functions may not be available depending on the type and
 version of the connected document management server.

5

6 Using Viewer

6.1 Structure of the Viewer Display

DeskTopBinder Document

The menu and toolbars appear differently depending on whether an image section or non-image section is displayed. To edit an image, click [Edit Image] on the [Section] menu or Image Viewing toolbar.
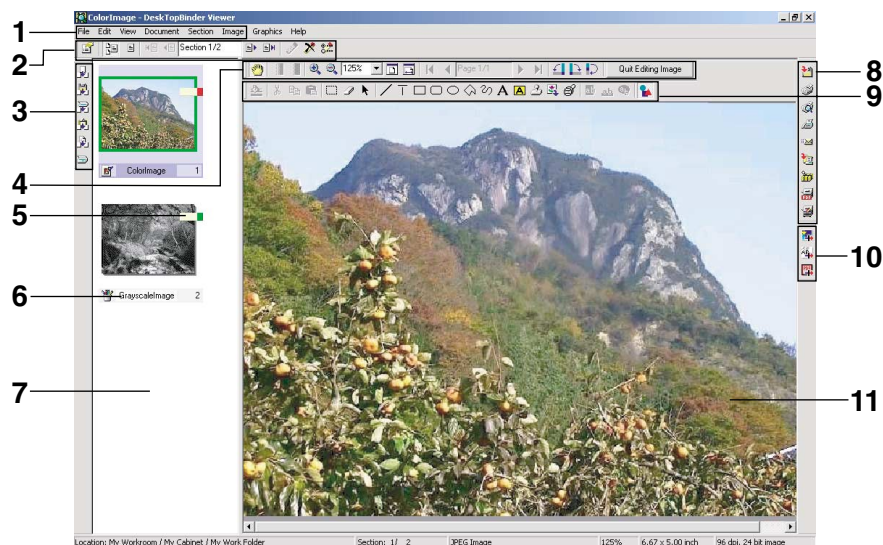
1:Menu bar
  Use this to perform operations on the display.
2:Standard toolbar
  Use this to perform standard function operations such as switching sections and adding notes.
3:Input toolbar
  Use this to add new images, existing files, and scanned documents.

4:Image Viewing toolbar
  Use this to zoom in, zoom out, or rotate an image.

  If you leave Edit Image mode, [icon] appears. Click [icon] to display the [Camera Image Correction] dialog box.
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. Functions configured using Extended Features are displayed.
9:Drawing toolbar
  Use this to draw lines, polygons, and circles and perform masking 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.

6

ScanRouter DocumentServer (Ver.1.xxx) Document

The menu and toolbars appear differently 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.

■ Viewer display
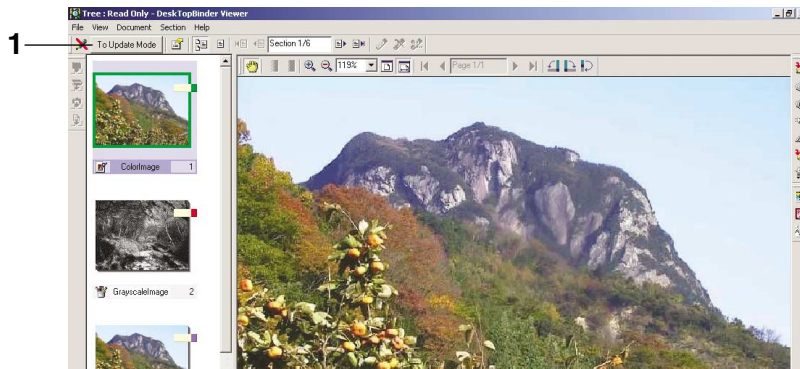
1:[To Update Mode] button

■ Edit Image Mode Viewer display
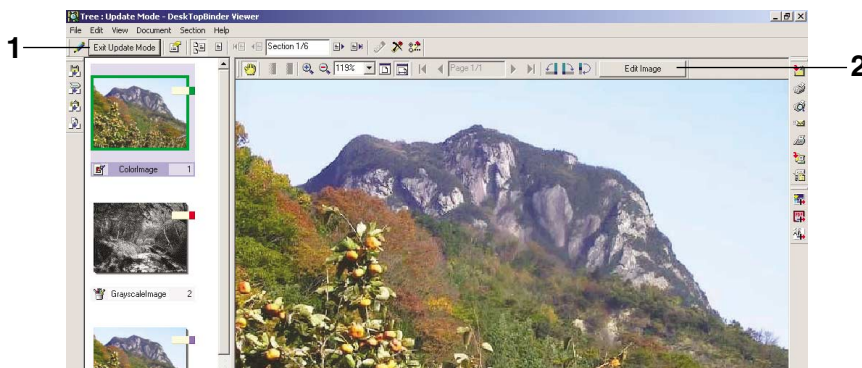
1:[Exit Update Mode] button
2:[Edit Image/Quit Editing Image] button

6

ScanRouter DocumentServer (Ver.2.XXX) Document

Select original data or PDF data as the data type to display. The menu and toolbars appear differently depending on the data displayed.

When original data is displayed, the menu and toolbars appear differently 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.

■ PDF data in Viewer display
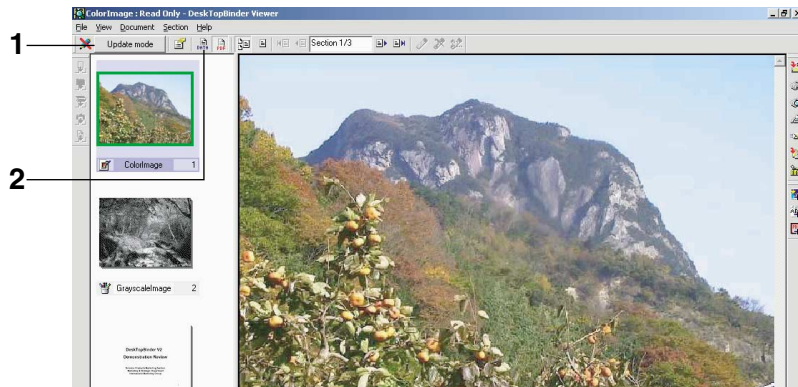
1:[To Update Mode] button
2:[Original Data] button

■ Original data in Viewer display
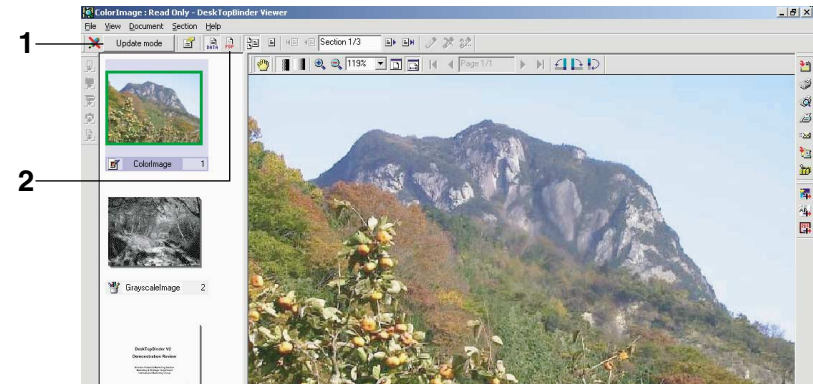
1:[To Update Mode] button
2:[PDF Data] button

■ PDF data in Update Mode Viewer display

1:[Exit Update Mode] button
2:[Original Data] button

6

■ Original data in Edit Image Mode Viewer display
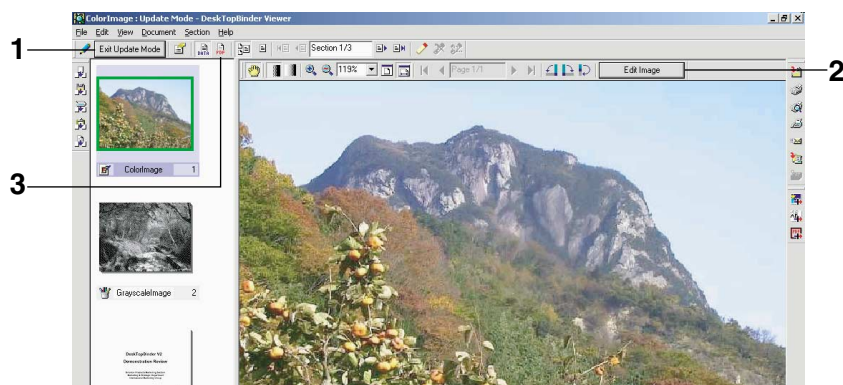
1:[Exit Update Mode] button
2:[Edit Image/Quit Editing Image] button
3:[PDF Data] button

6.2 Managing Sections

<Reference>
•For more information, see DeskTopBinder Help.

Changing the Section Order

To change the section order, use the [Section] menu, or move a section thumbnail in the thumbnail pane using a drag-and-drop operation.

Inserting/Replacing a Section

To insert or replace a section, start from the [File] menu. The following types of data can be inserted or replaced:

■ New images (blank image file)

■ 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.
•New images can only be inserted. Replacing an existing section with a new image is not possible.
•To use a Scan or easy scanning to insert or replace a section, you must first configure them using Extended Features.

6

Printing/Outputting/Converting a Section

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

- ◾ Export as files
- ◾ Send by E-mail
- ◾ Deliver by ScanRouter delivery server
- ◾ Print using Easy Print
- ◾ Fax transmission (Send by Fax)
- ◾ Save in Job Binding
- ◾ PDF Direct Print
- ◾ Preview and Print
- ◾ Print

<Note>
•To use Send by E-mail, Deliver, Easy Print, Send by Fax, Save in Job Binding, and PDF Direct Print, you must first configure them 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), you must first configure them using Extended Features.

Editing an Image Section

To edit an image, click [Edit Image] on 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
- ◾ Comment
- ◾ Stamp
- ◾ Insert Illustration
- ◾ Date Stamp
- ◾ Straight Lines
- ◾ Horizontal/Vertical Lines
- ◾ Squares/Rectangles
- ◾ Rounded Rectangles
- ◾ Ovals
- ◾ Polygons
- ◾ Freehand
- ◾ Masking

<Note>
•To use Masking, you must first make settings for Masking using Viewer Preferences.

6

Correcting a Camera Image

In the [Camera Image Correction] dialog box, you can correct a camera image and check image information.
To display the [Camera Image Correction] dialog box, on the [Section] menu, click [Camera Image Correction], or click [Camera Image Correction] on the toolbar.

■ Correct brightness and contrast automatically

■ Correct brightness and contrast manually

■ Revert an image to its original form

■ Display image information

■ Change zoom ratio

■ Check or edit a camera memo

■ Play voice memo

<Note>

•In Edit Image mode, [icon] does not appear on the menu nor the tool-bar.

6

33

7 Using Function Palette

Function Palette is available on computers with DeskTopBinder installed. Input, output, and convert functions of DeskTopBinder are displayed as buttons on Function Palette if these are configured in advance using DeskTop Binder Extended Features. By clicking a button on Function Palette, operations such as scanning and adding a document can be performed without starting DeskTopBinder. Some of these operations such as Print, Preview and Print, and Convert to Image can also be performed by dropping a Windows file on a button using the drag-and-drop operation.

<Note>
•To use the functions described above with Function Palette, you must first configure them using Extended Features Wizard or from DeskTopBinder Extended Features.

7.1 Starting and Quitting

Starting

❶ Click [Start], and then point to [Programs].
❷ Point to [DeskTopBinder], and then click [Function Palette].
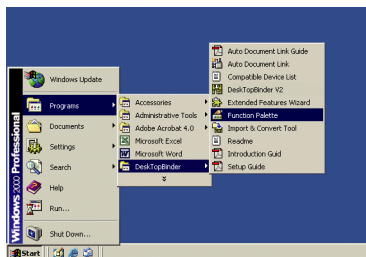
Function Palette starts, and the icon appears on the task-bar. The palette appears on desktop.

<Note>
•If Function Palette is selected to be added to the startup menu when installing DeskTopBinder, Function Palette automatically starts when you log on to Windows.

Quitting

❶ Right-click the icon on the taskbar, and then click [Exit] on the menu.

Function Palette exits.

7.2 Structure of Function Palette

There are two types of Function Palette: Function Palette and task icon.

Function Palette

Buttons for input, output, and convert functions specified in Properties are displayed on the desktop.
When you click a button on Function Palette or drop a file on a button using the drag-and-drop operation, the following operations are available:

■ Input:
   Scan, Easy Scanning

■ Output:
  Print, Preview and Print, Send by E-mail, Deliver, Send by Fax, Save in Job Binding, PDF Direct Print, Easy Print.

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

<Note>
•Settings for the display style of the buttons on Function Palette can be made using Properties. On the task icon menu, click [Properties].
•When you make changes to Extended Features settings, restart Function Palette, or display Properties, and then click [OK].

Task icon

From the menu that appears when you right-click the task icon, Function Palette properties settings and the following operations are available.

■ Switch between display and non-display of Function Palette
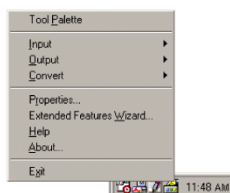
■ Perform input functions

■ Perform output functions

■ Perform convert functions

■ Make Function Palette properties settings

■ Start Extended Features Wizard

■ Display version

■ Display Help

■ Quit Function Palette

7.3 Setting Function Palette

Function Palette settings can be made using Function Palette Properties. In the [Properties] dialog box, the following operations are available:

■ [Display] tab
  Makes settings regarding the display style of Function Palette and the buttons.

■ [Operation] tab
  Makes settings regarding operation of Function Palette when printing and outputting.

■ [Contents] tab
  Makes settings regarding the buttons displayed on Function Palette.

Follow the procedure below to make properties settings.
❶ On the menu that appears when you right-click the task icon, click [Properties].
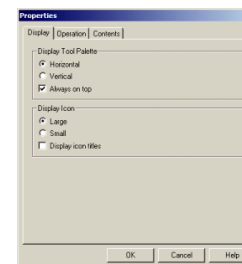
The [Properties] dialog box appears.
❷ Make the necessary Function Palette settings on each tab.
❸ Click [OK].

7

7.4 Performing Document Management Using Function Palette

Adding Documents

Using Function Palette, scanning originals with a scanner and saving the data in the specified location is possible.

Follow the procedure below to scan originals.
❶ Click the Function Palette [Scan] button, or on the task icon menu, point to [Input], and then select a function.

A dialog box for scanner settings appears.
❷ Make the necessary scanner settings, and then scan.
The confirmation message about completing the scan appears.
❸ Click [Complete].
The [Save As /Add As] dialog box appears.
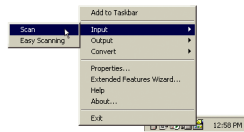❹ Specify a saving location, and then click [OK].
Scanned data is saved to the specified location.

<Note>
•The name of a document created by scanning automatically becomes "New Scan", followed by the date and time and a serial number.
•If you want to make a series of scans, place the next original in step ❸, and then click [Scan].

Outputting Documents

Printing and outputting Windows files is possible using Function Palette.
Follow the procedure described as an example of printing a file.

Printing from the Menu or the Button
❶ Click the Function Palette [Print] button, or on the task icon menu, point to [Output], and then select a function.
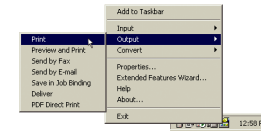
A dialog box for selecting a file appears.
❷ Select the file you want to print, and then click [OK].
The [Output File List] dialog box appears.
❸ Make file order settings for printing, and then click [OK].
A dialog box for printing appears.
❹ Make the necessary print settings.
❺ Click [OK].
Printing starts.

Dragging Files to the Button
❶ Drag a file you want to print, and drop it on the Function Palette [Print] button.
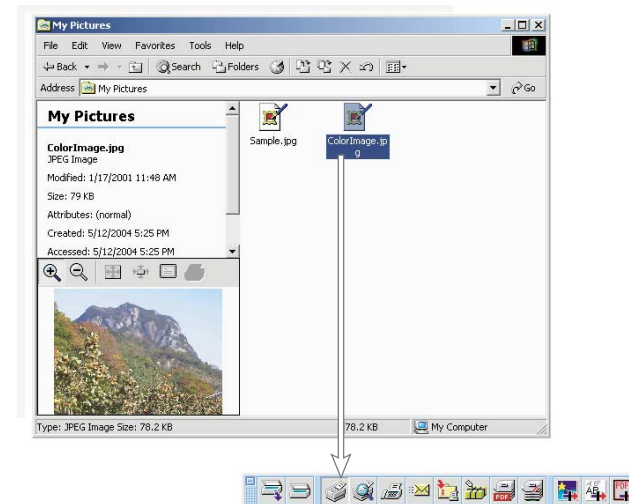
The [Output File List] dialog box appears.

7

36

❷ Make file order settings for printing, and then click [OK].

A dialog box for printing appears.

❸ Make the necessary print settings.

❹ Click [OK].

Printing starts.

<Note>
•The [Output File List] dialog box appears only when the [Display dia-
log to change the file order] check box is selected in Properties.
•Printing and outputting of DeskTopBinder documents is possible
using the drag-and-drop operation. This operation is available only
for documents that can be exported.

Converting Documents

Converting files to image, PDF, and text format is possible
using Function Palette. Follow one of the procedures below to
convert a file to an image file.

Converting from the Menu or the Button

❶ Click the Function Palette [Convert] button, or on the task
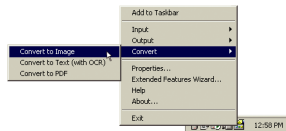icon menu, point to [Convert], and then select [Convert to
Image].

A dialog box for selecting a file appears.

❷ Select the file you want to convert, and then click [OK].

The [Conversion File List] dialog box appears.

❸ Make file order settings for conversion, and then click [OK].

The [Convert to Image] dialog box appears.

❹ Make the necessary convert settings, and then click [OK].

The [Save As /Add As] dialog box appears.

❺ Specify a saving method, and then click [OK].

The file is converted to an image file.

Dragging Files to the Button

❶ Drag a file you want to convert, and drop it on the Function
Palette [Convert] button.
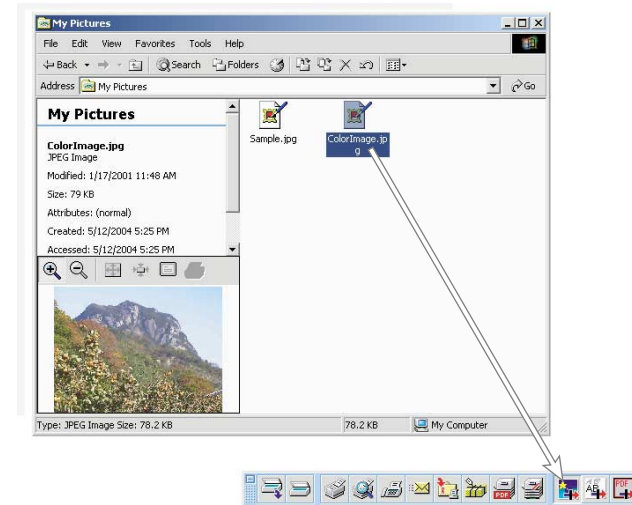
The [Convert File List] dialog box appears.

❷ Make file order settings for conversion, and then click [OK].
The [Convert to Image] dialog box appears.

❸ Make the necessary convert settings, and then click [OK].

The [Save As /Add As] dialog box appears.

❹ Specify a saving method, and then click [OK].

The file is converted to an image file.

<Note>
•The [Convert File List] dialog box appears when it is configured to be
displayed in Properties.
•Converting of DeskTopBinder documents is possible using the drag-
and-drop operation. This operation is available only for documents
that can be exported.

7

8 Maintenance

8.1 Backing Up Data in Cabinets and Folders

Back up My Cabinet data in DeskTopBinder to avoid loss of data due to hardware or software failure.
For backups, start from the [File] menu. You can make settings to receive notification of periodic data backup. Backed up data can also be retrieved.

■ Manual backup
Select the folder you want to back up. On the [File] menu, click [Back Up].
In the [Back Up] window, select the objects you want to back up.
In the [Save As] window, specify the name for the backup file and the location where you want to save the file.

■ Periodic backup
Click the My Cabinet icon. The [My Cabinet Properties] dialog box appears. Click the [Backup] tab, and then 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 Help.

8

9 Appendix

9.1 Printer Driver Preview and Print Function

The Preview and Print function is also available on client computers that have DeskTopBinder installed.

<Reference>
•For more information about network devices that support the Preview and Print function, see the Compatible Device List.

9.2 Import & Convert Tool

Import & Convert Tool is also available on client computers that have DeskTopBinder installed.
Import & Convert Tool enables you to collectively add files in Windows folders to DeskTopBinder My Cabinet.
These files can then be converted to image or PDF files.

<Note>
•If files cannot be converted to PDF, check if Convert to PDF is configured from Extended Features.

<Reference>
•For details about Import & Convert Tool operations, see DeskTopBinder Help.

9.3 Functional Differences between DeskTopBinder Professional and DeskTopBinder Lite

DeskTopBinder Professional has all the functions of DeskTopBinder Lite plus some additional functions.
The following functions are not possible with DeskTopBinder Lite:

■ Convert to PDF

■ Convert to Text (extract text from image using 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

■ Content Text Search for DeskTopBinder My Cabinet documents

■ Create Content Text Search data

■ Connection to ScanRouter DocumentServer

<Note>
•To display application data using Viewer or to display it as image data using DeskTopBinder Lite, the application used to create the data must be installed on the client computer.

9

9.4 Registrable Numbers in DeskTopBinder

The recommended numbers of folders, documents, sections, and shared cabinets that DeskTopBinder can manage are as follows:

■ Folders:
  200 or less recommended per cabinet
  50 or less recommended per folder

■ Documents
  1000 or less recommended per cabinet
  100 or less recommended per folder

■ Sections
  1000 or less recommended per cabinet
  100 or less recommended per folder
  100 or less recommended per document

■ Shared cabinets
  Maximum of 49

9.5 File Types

Files Created Using Applications

DeskTopBinder can manage files with the extensions below. When these files are used with DeskTopBinder, the respective applications must be installed.

■ .txt
  WordPad or another text editor must be installed.

■ .doc (a file created using Microsoft(R) Word 97/98/2000/version 2002/2003)
  Microsoft(R) Word 98, Microsoft(R) Word 2000, Microsoft(R) Word version 2000, or Microsoft(R) Word 2003 must be installed.

■ .rtf (a file created using Microsoft(R) Word 97/98/2000/version 2002/2003)
  Microsoft(R) Word 98, Microsoft(R) Word 2000, Microsoft(R) Word version 2000, or Microsoft(R) Word 2003 must be installed.

■ .ppt (a file created using Microsoft(R) PowerPoint(R) 97/2000/version 2002/2003)
  Microsoft(R) PowerPoint(R) 2000, Microsoft(R) Power-Point(R) version 2000, or Microsoft(R) PowerPoint(R) 2003 must be installed.

■ .xls (a file created using Microsoft(R) Excel 97/2000/version 2002/2003)
  Microsoft(R) Excel 2000, Microsoft(R) Excel version 2000, or Microsoft(R) Excel 2003 must be installed.

■ .pdf (a file created using Adobe Acrobat 3.0/4.0/5.0/6.0)
  Adobe(R) Acrobat 4.0 or later must be installed.

Image Files

Scanned documents and the following image files are displayed as thumbnails in the document list pane and the section list pane of Viewer. Exif information (such as shooting date) of Exif-compliant files is set to document properties when they are added. You can display Exif information using Properties. All digital cameras have a shoot date recording function; however, camera memo recording is unique to the Caplio digital camera.
Only files listed below are treated as image files.

Only files listed below are treated as image files.

■ BMP (Uncompressed)
  Black & White (1 bit), 256 colors (8 bits), Grayscale (8 bits), Full Colors (24 bits)

■ TIFF compliant to multi-pages (Uncompressed)
  Black & White (1 bit), 256 colors (8 bits), Grayscale (8 bits), Full Colors (24 bits)

9

■ TIFF compliant to multi-pages (ITU-T G3 FaxMH, ITU-T G3 FaxMR, ITU-T G4 FaxMMR, Huffman (MH))
   Black & White (1 bit)

■ TIFF compliant to multi-pages (JPEG (JFIF) -YCbCr)
   Grayscale (8 bits), Full Colors (24 bits)

■ TIFF Class F compliant to multi-pages (ITU-T G3 FaxMH, ITU-T G3 FaxMR, ITU-T G4 FaxMMR)
   Black & White (1 bit)

■ JPEG (Normal, Progressive)
   Grayscale (8 bits), Full Colors (24 bits)

■ PNG
   Black & White (1 bit), 256 colors (8 bits), Grayscale (8 bits), Full Colors (24 bits)

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9