

# *Aquarius DMS*

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Administrator's Guide

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# Overview

## What is AQUARIUS DMS?

AQUARIUS DMS is a software for managing large amounts of documents. AQUARIUS allows to scan documents, index the document for fast access through a Query Wizard, move documents to massive storage disks (like Optical Disks, Zip Disks, CD's, etc.) and view the scanned documents through the Viewer.

AQUARIUS DMS is an easy to learn software, consisting of a friendly interface that allows the users to move through all the different options using Wizard like screens.

### AQUARIUS INTEGRATION

AQUARIUS DMS is an Open System that allows interoperation with other software applications through the use of the following technologies:

- **ODBC:** Standard interface that enables the application to access different database management systems through Structure Query Language (SQL). Supported engines include: Microsoft SQL Server, Oracle, IBM DB/2, Sybase, among others, and desktop databases such as: MS Access, MS FoxPro, dBase, Paradox, Excel, and comma-separated -value files.
- **DDE:** A feature that allows other programs to share data or send commands directly to AQUARIUS. In this case AQUARIUS works as a “DDE Server”.
- **OLE:** Enables you to create OLE objects within the AQUARIUS viewer. AQUARIUS integrates transparently with MS Office suite and many other OLE server software.
- **Internet Technology:** The AQUARIUS web browser integration allows the use of technologies like ActiveX, Plugins, VB-Script, Java Applets, HTML, XML and Java-Script.
- **AQUARIUS Script:** A visual-like Basic scripting language that allows customization of AQUARIUS-DMS for your particular needs. Common uses for AQUARIUS Scripts are: automation of repetitive tasks, integration with Legacy Systems, customization and addition of new features.
- **Auto Link:** Allows access to documents from a command line or from another software application.

### OTHER FEATURES

AQUARIUS-DMS also integrates other features:

- **Messaging & Workflow:** Allows to send and receive messages and documents to and from local users and over the Internet. The **Workflow** allows to predefine document flow, based on a process within an organization. Aquarius messaging can be integrated with Microsoft Outlook and Exchange.
- **OCR:** Converts document images into text documents for full text search retrieval.
- **Cold / ERM:** AQUARIUS-DMS integrates with AQUARIUS-ERM (Enterprise Report Management) to allow access to digital reports extracted from Legacy Systems. Reports can be annotated and exported to Excel. The use of Form overlays are among other features included in AQUARIUS-ERM.
- **Web Based Imaging:** Aquarius documents can be accessed from any web browser, simplifying the distribution of the information across an organization and the Internet.

## Information Structure

The Aquarius DMS structure is composed of two kinds of databases:

**Registration Database:** which contains general information about the Applications, License, Users, Security groups, Audit Trails and System messaging. By default this database is installed in MS Access format in the application directory (Usually *C:\Program Files\Aquarius*). It is recommended that only one Registration Database be shared for a Company-Wide installation.

**Application Database:** which contains information regarding all documents within the system. Several Application Databases may exist in an installation, depending on users needs. The database engine for each Application Database will depend on performance requirements and the system environment.

### DOCUMENT TYPES

Inside each application we have two kinds of Document Types:

**User Defined Document Types:** With these document types you can create queries to access documents and images. These document types can be customized by the System Administrator.

**Virtual Document Types:** These are auxiliary document types within Aquarius-DMS. The virtual document types are:

- **The Personal Document Type:** This document type represents the Desktop of each user. Every user has only one document type of this kind. It contains documents that are accessed only by their owner.
- **Current Query:** When a user makes a query the results are placed in this document type.

- **Bookmark:** This is where shortcuts to frequently accessed documents can be placed by the users.
- **Clipboard:** This document type is used like a shared folder for other users and for the movement of documents from one document type to another.
- **Trash Bin:** Here every deleted document is saved. This allow users to go back to this document type and restore documents that were erased by mistake. This works just for documents of a user defined document type.
- **Current Messages:** Here is where the attachments of System Messages are viewed.
- **Reports:** Here is where the results from queries to the Aquarius ERM database are placed.

### ***DOCUMENTS***

Document Types contain documents represented physically as .DID files. These files group images as pages. Documents can also contain sections that group pages by categories.

Pages can be files of almost any type, including: Images (TIF, BMP, AWD and JPG, GIF, PCX, XIF, DCX, WIFF in read only mode), Text Files (RTF, ASCII, Word documents), Internet Files (URL, HTML, XML, Plugins), COLD/ERM Reports, links to other documents and practically any valid windows file accessed through OLE or MIME.

## **Installing AQUARIUS DMS**

### **Hardware Requirements**

#### Minimum Requirements

Intel 486, 100Mhz, 16MB RAM, +30MB Free in HDD, CD-ROM, VGA 640x480

#### Suggested Requirements

Pentium 150Mhz or better, 32 MB RAM, +30MB Free in HDD, CD-ROM, SVGA 800x600

### **Software Requirements**

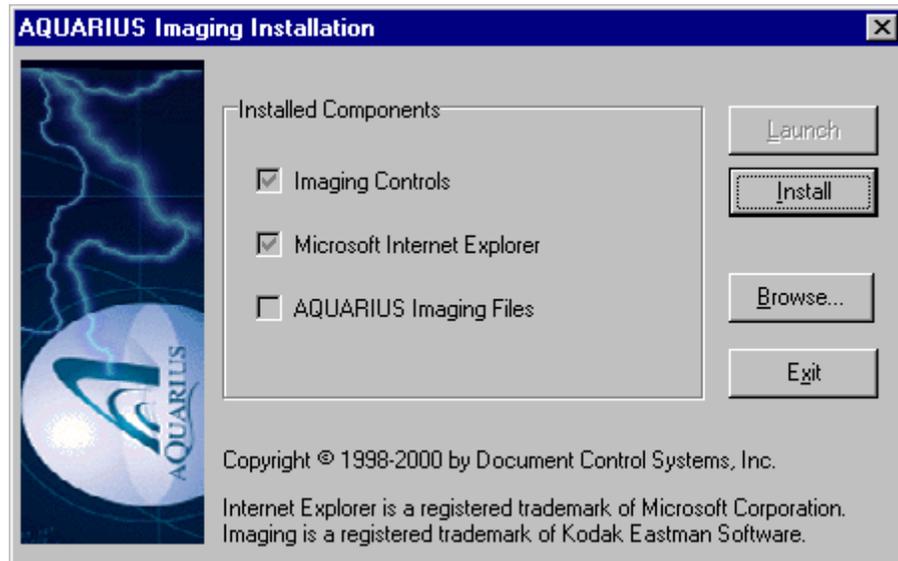
- Eastman Imaging Professional 2.0 or greater. You can install Imaging Professional 2.5 from your Aquarius installation cd.
  - ⇒ Insert the Aquarius installation cd in your CD-ROM drive.
  - ⇒ Select Run from the Taskbar Start menu.
  - ⇒ Type "*cd drive letter\Imaging Pro 2.5\Setup.exe*" (i.e. "e:\ Imaging Pro 2.5\setup.exe"); include the quotation marks.

⇒ Follow the steps indicated by the installation wizard.

- MSIE 3.x or greater.

**Installation**

- Insert the Aquarius installation cd in your CD-ROM drive.
- An installation Dialog Box will pop-up showing the already installed components.



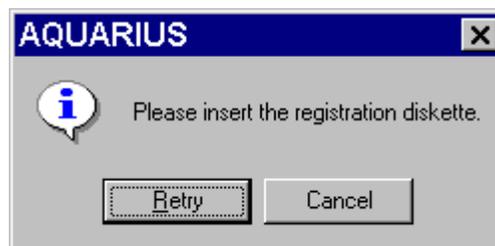
- Press the “**Install**” button. The Aquarius Installation process will start.
- Follow the steps indicated by the installation wizard. It is recommended that you use the default directories suggested by the setup programs:

*C:\Program Files\Imaging Professional* For Imaging Professional

*C:\Program Files\AQUARIUS* For AQUARIUS

Once the installation is completed, the next step is to register your software.

- Start Aquarius.
- The first time Aquarius runs, you will be prompted to enter the registration disk.



- Insert you Aquarius registration diskette in your floppy drive, and press “**Retry**”.
- The Aquarius Registration Information window will appear next.

- Fill out the “Company Name”, “Serial Number”, “Number of Users” and “Edition” fields according to the values specified in the “Info.txt” file located in your Aquarius Registration diskette; filling out the “Special Message” field is optional.
- Press “Save”.

## Application Components & Optional Software

### Required Programs

<i>Imaging Professional 2.0 (or greater) Setup</i>	located in the CD at \Setup\Imaging\Setup.exe
<i>Microsoft Internet Explorer 3.x</i>	located in the CD at \Setup\MSIE302.exe
<i>AQUARIUS Full Version Setup</i>	located in the CD at \Setup\Main\Setup.exe

AQUARIUS-DMS setup installs the ODBC Drivers, Template databases, Default Registration Database, Default Application Database, Required DLLs & Program.

If Imaging Pro or MSIE are not installed properly, AQUARIUS-DMS could have difficulties accessing the Document Center or Document Viewer.

### Other Needed Components

#### SCSI Drivers

Used for scanner & CD-RW. These drivers usually come with the SCSI card.

Generic SCSI drivers may be found in **Control Panel/New Hardware**.

### Printer Drivers

Used for printing documents. These drivers usually come with printers. Generic printer drivers may be found in **Control Panel\Printers\Add Printer**.

### TWAIN Drivers

Used for scanning. These drivers usually come with twain scanners.

Some TWAIN drivers may be found in the AQUARIUS CD at **!Setup\!Twain**.

### Kofax Drivers

Used for high productivity scanning. These drivers usually come with the Kofax Accelerator Board.

### Adaptec DirectCD

Used for moving documents to CD. These drivers come with some CD-RW models. But may also be downloaded at [www.adaptec.com](http://www.adaptec.com). An upgrade to version 2.5a can be found on the AQUARIUS CD at **!Setup\!CDRW**.

### AQUARIUS Viewer

Used for viewing documents with Window's Imaging standard that comes with Windows 95 or 98. If you plan to create CDs with the databases & viewer, it is recommended that you copy the **Viewer** directory on the AQUARIUS CD to **C:\Program Files\AQUARIUS\Viewer**, and configure this path in the mover. An alternative is to configure the mover to read directly from the Viewer directory on the **AQUARIUS** CD, if the mover workstation has both a CD-ROM and CD-RW installed.

### NT 4.0 Service Pack 3

Used when installing **AQUARIUS** on Windows NT 4.0. It can be found in the directory **WT4SP** on the **AQUARIUS** CD.

### ODBC Driver

Used when accessing application databases with other engine different to MS Access. **AQUARIUS** installs the most common ODBC drivers.

## Optional Programs

### Microsoft Agent

Used to show the Merlin wizard for self explanation of modules and demonstrations. Install the Merlin avatar from **!Setup\!merlin.bat** on the **AQUARIUS** CD or install **MSagent.exe**, then **cgram.exe** and copy the **Merlin.acs** to **C:\Program Files\AQUARIUS**.

### Acrobat Reader 3.x

Used for viewing PDF documents within **AQUARIUS** and the **AQUARIUS** documentation. The Acrobat Reader Plugin for MSIE is used. It can be found on the **AQUARIUS** CD at **!Docs\!ar302.exe** or downloaded from [www..Adobe.com](http://www.Adobe.com)

### Microsoft Office

Used for viewing Office documents within **AQUARIUS**.

### ZipMagic

Used to compress and access compressed documents in zip format. Converts zip files into windows folders. It can be found at [www. Zipmagic. com](http://www.Zipmagic.com). Instead the **DriveSpace**<sup>3</sup> driver that comes with Windows 95 can be used.

### MSIE Plugins

Installed within MSIE the plugins allows viewing of additional MIME types within **AQUARIUS**. To configure **AQUARIUS** to use the MIME extension with the MSIE plugin, modify the **MIME** key in the **GENERAL** section of the configuration file, usually located at **C:\Windows\AQUARIUS.INI**, or through the workstation settings in the setup of the AQUARIUS Setup.



# Getting Started

## The Aquarius's Main Window

The Aquarius's main window may not be the same between applications due to the menu's customization capability. However, we will explain a configuration for the window which may approach the default.



The window's title reflects the name of the current user. Inside the Aquarius's logo will appear the name of the company that registered the product and any special message entered for this purpose in the registration window.

### Selecting Menu Option

To select one of the options within the window use the mouse click (or the arrow Keys and Enter) to access the underlined menu option. When an option is selected, the AQUARIUS main window is minimized to the system tray.

### Selecting an Application

Below, the title “Application” a selection box lists all the applications available. The creation and maintenance of applications is explained in the Creating Applications Section.



### Accessing Messages

Next to the “Application” selection box we see the number of the messages received by this user. Clicking the text “Messages” takes us to the Message Center.

### Options

The “Options” button displays a menu with some useful options.



- >> The “**Check Inbox**” option loads the Message Center and checks for new messages.
- >> “**Change Password**” displays the Change User Password window.



This window prompts the user to enter a new password. After pressing “**Save**” the new password is saved and will be needed for future logging into AQUARIUS-DMS. Here, the Administrator can change the user’s password.

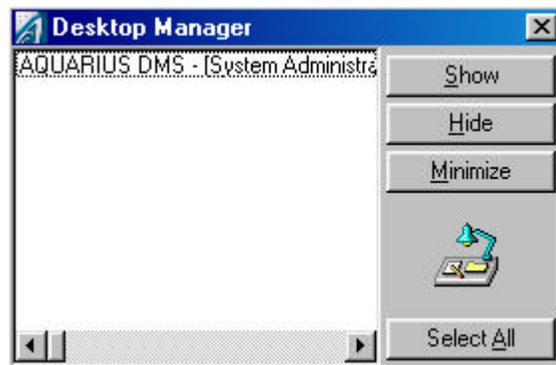
- >> “**Setup Menu Options**” brings up the Menu Setup window, used to customize the AQUARIUS menu.



- » The “**Merlin Wizard**” option toggles the appearance of the Merlin Wizard, an animated character who explains the use of the AQUARIUS in his own words.
- » The “**About**” option, shows registration and copyright information.

### Desktop

The “**Desktop**” button displays a small window called the “**Desktop Manager**”, which lists the opened Aquarius windows and allows to navigate between them.



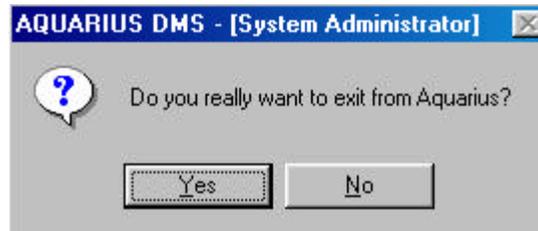
Double-clicking a window in the Desktop Manager is the same as pressing the “**Show**” button: it brings up the window; selecting “**Hide**” will make the window disappear from the screen. Minimize reduces it to the taskbar icon. In any case, the “**Show**” button brings them back to the screen.

### Logoff

The “**Logoff**” button finishes the current user session and displays the login window.

**Exit**

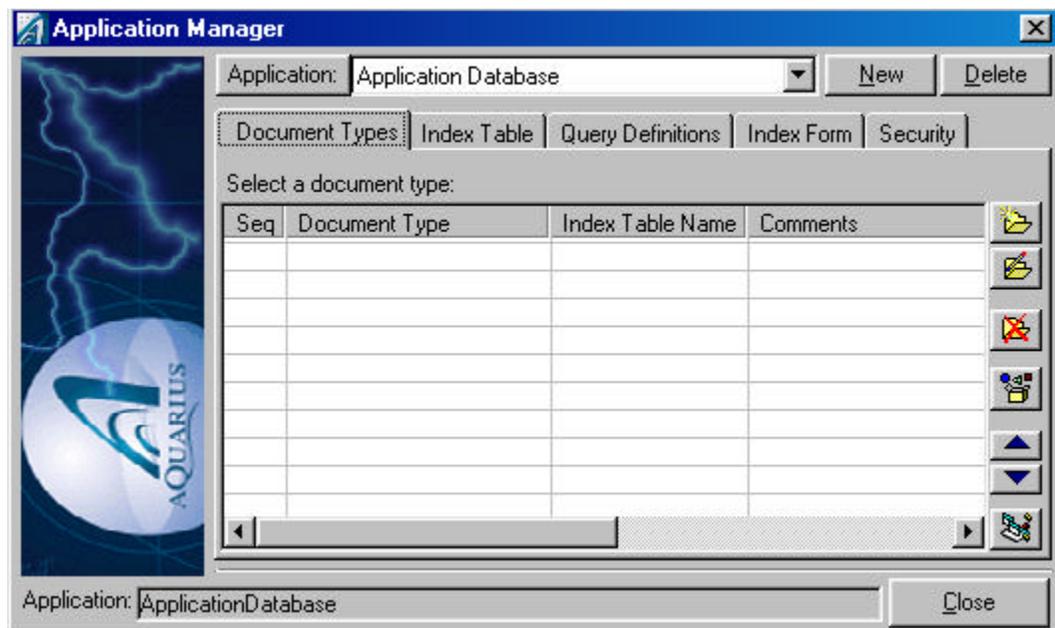
Quit AQUARIUS.



## Application Setup

### ***Application Setup Basics***

The “**Application Manager**” window is the Aquarius’s main configuration center, here we can create applications, document types, fields, etc.



The Application Setup window consists of:

- A combo box, at the top of the window, where the available applications can be selected, and two buttons: “New” and “Delete”.
- The buttons “New” and “Delete”, to create and delete applications.
- The “Application” button is a shortcut to the 32Bits ODBC configuration.

- » A group of tabs to configure the selected application. After selecting an application, the content of these tabs will change to reflect the current properties.
- » A toolbar located to the right side of the window. This toolbar changes for each of the tabs and represents the available options for the current tab.
- » The path and filename of the current application, at the bottom of the window. This value may also display an ODBC Data Source Name.
- » The “close” button.

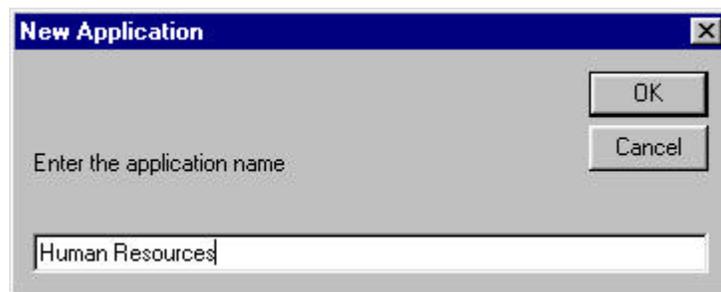
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**See also**

How to create, delete and edit Document Types.

## ***Creating Applications***

To create an application, press the “New” button. Immediately a window opens to type the name for the application.



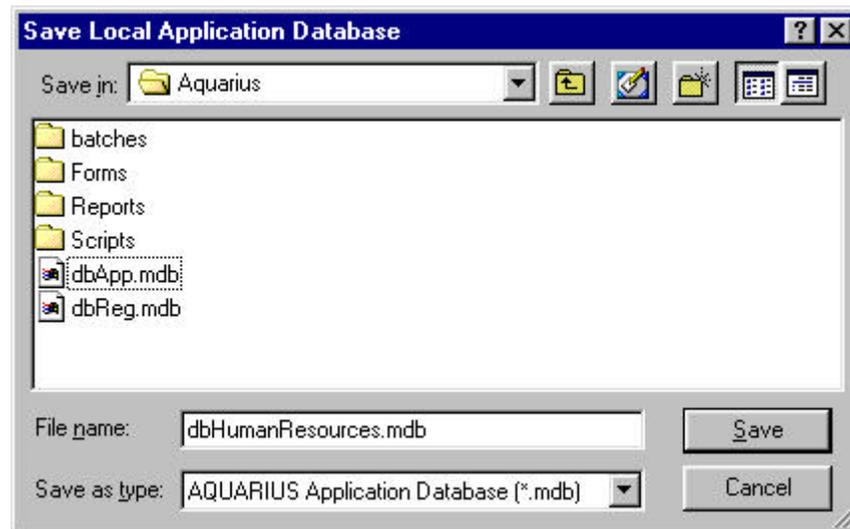
### **Application Types**

The next step is to identify the location of the database file for the application. Databases can be local, remote or server type (such as Microsoft SQL Server ®, Oracle ®, etc.), being the local and existing Application database types typically Microsoft Access ® databases.



### Local Applications

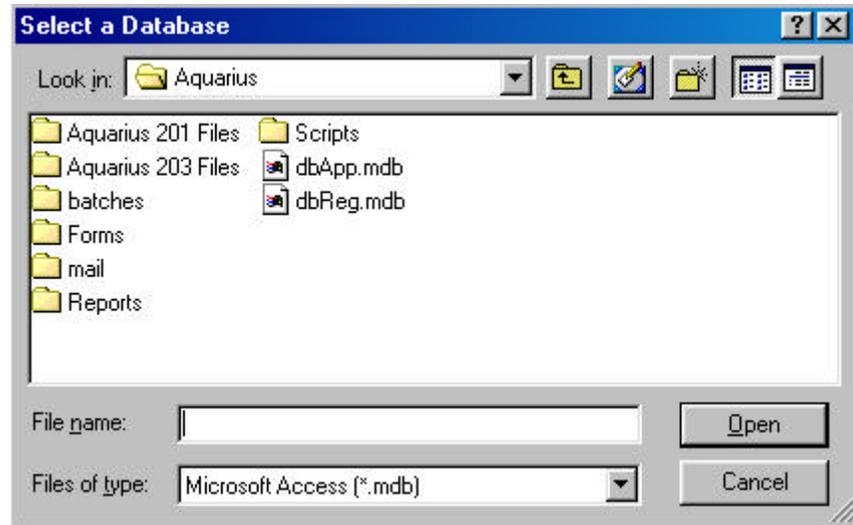
When an application is going to be created locally in MS Access format, it is only necessary to type the filename of the database. A typical save dialog box appears to type a name for the application database file. The application database is created based on the *Template.App* file.



After saving the database, a dialog box appears displaying the full path to the application database.

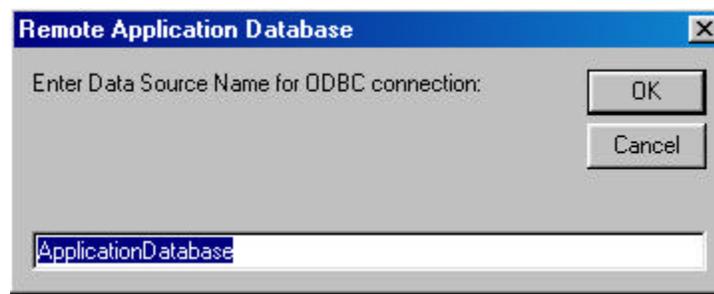
### Existing Application Database

When selecting “**Existing Application Database**” an open dialog box will appear for you to select the application database file. UNC paths are also allowed.



### SQL Server Application Database

If the application will use an SQL database, select the **“SQL Server Application Database”** option. A screen will be displayed asking for the corresponding Data Source Name.



### Export Application to SQL Server

Some steps are required before proceeding with the **“Export Application”**:

1. Create a new SQL Server Database.
2. Grant “Public” rights to the NT users or group for the created database. Be sure that all AQUARIUS users are defined in the NT domain.
3. Create a Data Source Name (DSN) associated to SQL Server Database in every network station that will access the application. It is highly recommended to use trusted connections.
4. From the Application Manager option in AQUARIUS-DMS create a new application and select the “Export Application to SQL Server”; here you will be prompted for the SQL database Data Source Name and the Microsoft Access database to be exported.
5. Delete from AQUARIUS the application using the Microsoft Access database.
6. Follow these steps for each Application Database and Registration Database.

### ***Custom Application Database***

For applications accessed through DSN, use the option “**Custom Application Database**” to type the name of the driver to use, and the Data Source Name existing in the ODBC. A DSN-Less connection may also be specified. This option is used for applications stored in database engines different to MS Access and SQL Server or existing applications accessed through a DSN.

### ***Deleting Applications***

To delete an application, select the application and press the “**Delete**” button. A message prompting for confirmation pops up, select “**Yes**” and the application will be deleted. Deleting an Application does not remove it physically from the hard disk or the database engine, it is only unregistered from the Registration Database.

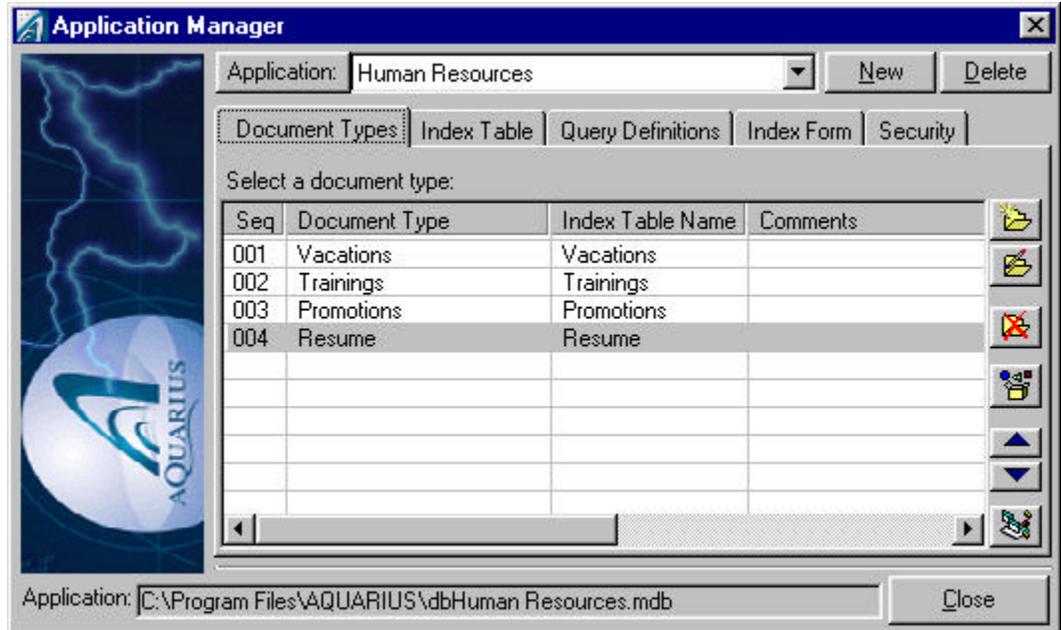


To delete an Application physically, it should be done through Windows Explorer or through the database engine. Any associated DSN configuration in the ODBC settings should also be removed manually.

## **Defining Document Type**

### ***Document Type Basics***

An AQUARIUS Document type is the area where AQUARIUS documents are placed for further access. A document type could be: Bills, Statements, Profiles, etc.



The “**Document Types**” tab is used for creating and maintaining document types. The buttons located to the right side of the tab accomplish these tasks:

- >> Create new Document Type.
- >> Edit Document Type.
- >> Delete Document Type.
- >> Bring up the Aquarius Setup window.
- >> Move the current Document Type up.
- >> Move the current Document Type down.
- >> Bring the Script Developer Window up.

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#### See also

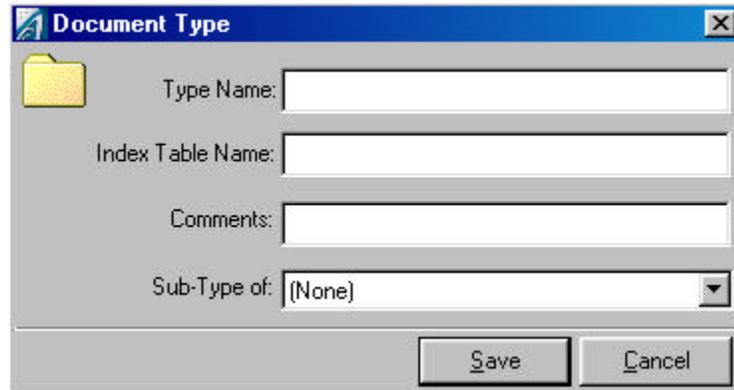
How to Create, Delete and Edit Document types.

## ***How to Create, Delete and Edit Document Types***

### **Create Document Types**



The “**Create New Document Type**” button displays a window where the document type description, index table name, optional comments, and the parent document type can be set.



The Index Table is where all the index information about the document type is stored. The index table name should follow the naming convention used for those of the database engine.

The Sub-Type field is to determine a hierarchy of document types. For more details on how to use the sub-document type option, consult the Sub-Document Type section.

### **Edit Document Type**



The “**Edit Document Type**” button displays the same window as the “**New**” button. Here, the user can modify the document type name, description and comments.

### **Delete Document Types**



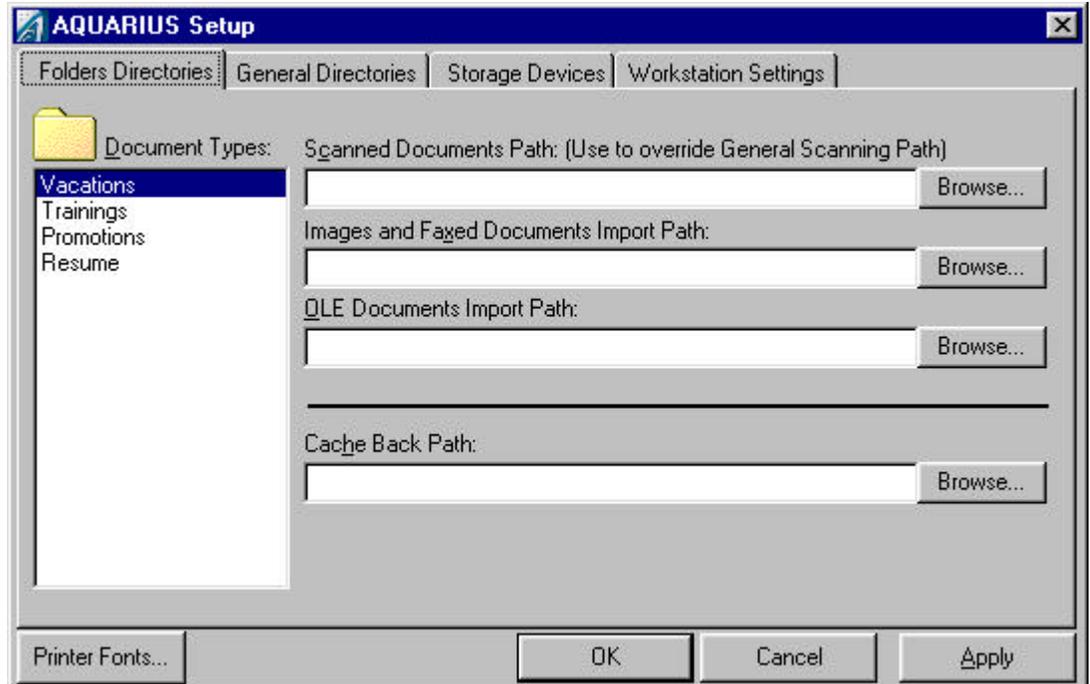
The “**Delete Document Type**” button deletes the document type and all definitions associated to it. Selecting this option invokes a warning message to confirm the operation. Be careful using this option, as it is irreversible.

### **AQUARIUS Setup**



The “**AQUARIUS Setup**” button invokes a standard option of AQUARIUS-DMS commonly accessed through the default main menu.

When the button is pressed a window appears allowing the user to modify the path and the folder directories AQUARIUS uses to save data.



### See also

Aquarius Setup

### Move Fields

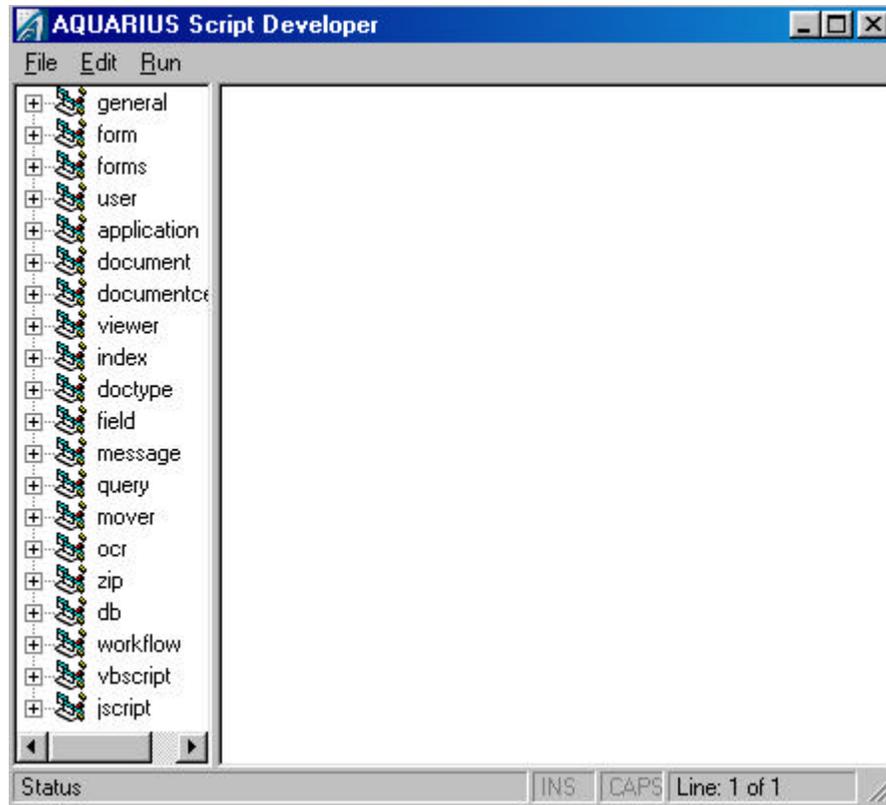


The “**Move up**” and “**Move down**” buttons change the order in which document types appear.

### Script Developer



The “**Script Developer**” button opens the Script Programming Environment of AQUARIUS. Typically a document type has an associated script to trap all events and execute automated tasks.



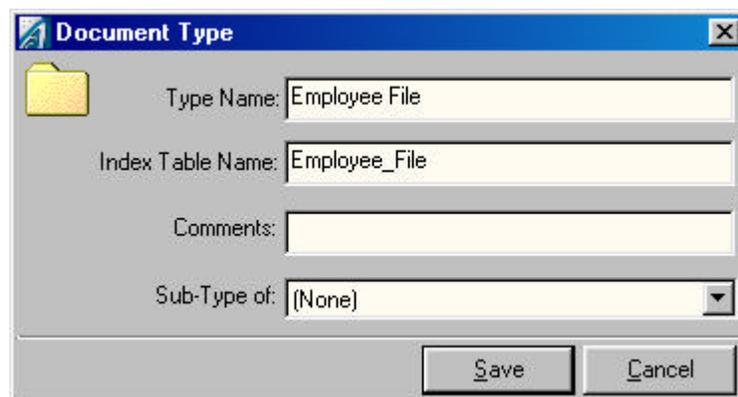
After a document type is created and selected, the next tab provides options to define and configure the fields for the document type.

### ***How to create Sub-Document Types***

A sub-document is a division within a document type. For example, in a Human Resources application, the main document type can be “Employee Files”, and the sub-document types or divisions can be “Vacations”, “Promotions”, “Training”, etc.

To create this kind of applications, follow these steps:

1. In the Aquarius Application Manager, create the main document type (i.e. Employee File).



2. Create the sub-document type specifying in the “**Sub-Type of:**” field, the main document type; in this case select Employee File.

3. Create the index fields for each document type. You must define at least one common field for all related document types; this field must have the same name (including uppercase and lowercase letters) and the same data type.

Application: Human Resources				Application: Human Resources			
Document Types				Document Types			
Index Table				Index Table			
Query Definitions				Query Definitions			
In				In			
Document Type: Employee File				Document Type: Vacations			
Seq	Field Name	Field Type	Field Length	Seq	Field Name	Field Type	Field Length
001	Doc_Id	Text	8	001	Doc_Id	Text	8
002	Employee_Number	Text	5	002	Employee_Number	Text	5
003	Employee_Name	Text	30				
004	Employee_SS	Text	11				
005	Hired_Date	Date/Ti...	16				

4. Add the fields to the “**Query Definitions**”, for each document type.
5. Add the fields to the “**Index Form**”, for each document type. Make sure that for all the document types, the field Doc\_Type is in the Index fields list.

Application: Human Resources			Application: Human Resources		
Document Types			Document Types		
Index Table			Index Table		
Query Definitions			Query Definitions		
Ind			Ind		
Document Type: Employee File			Document Type: Vacations		
Seq	Column Name	Prompt Text	Seq	Column Name	Prompt Text
001	Employee_Number	Employee Number	001	Employee_Number	Employee Number
002	Doc_Type	Document Type	002	Doc_Type	Document Type
003	Employee_Name	Employee Name			
004	Employee_SS	Employee SS			
005	Hired_Date	Hired Date			

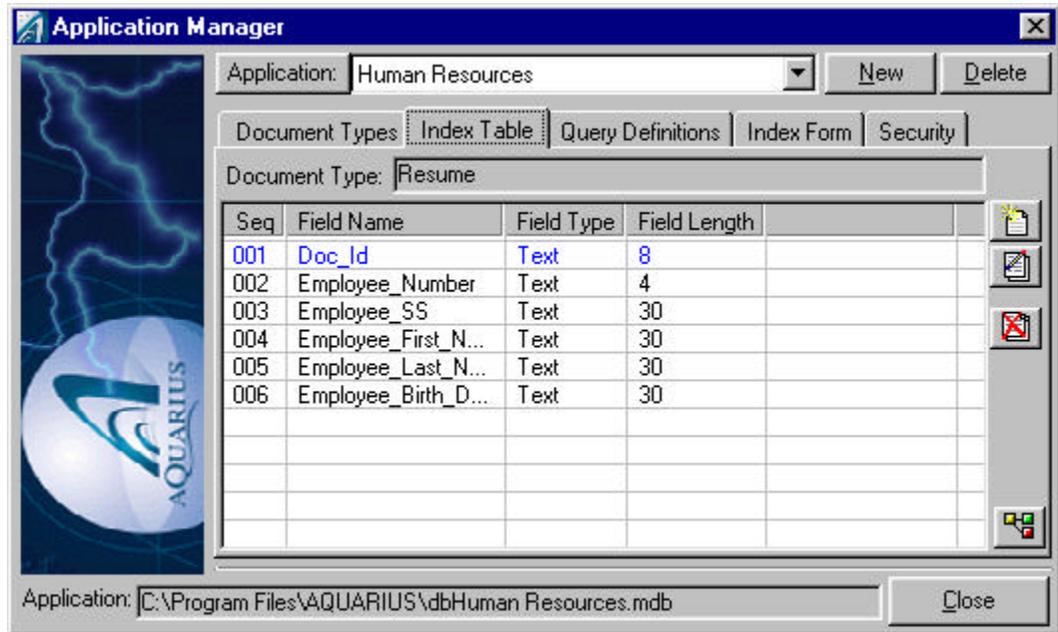
6. Create the list values for the Doc\_Type field, using the “**Setup Lists**”  button on Index Form toolbar. Selecting this option will display the “**List Boxes Setup**” window.



## How to Create, Delete and Edit Index Tables

### INDEX TABLES

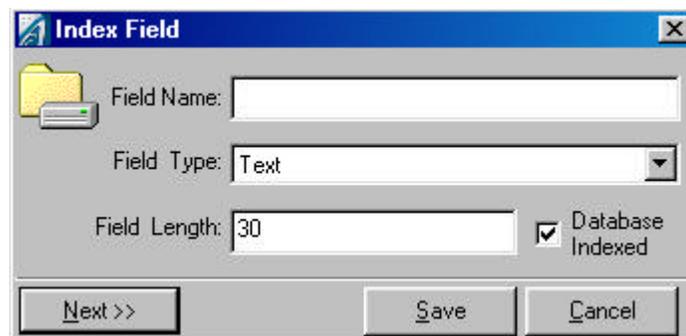
The fields defined for the Index Table are analogous to the label that would be put on the file folder in a paper based filing system. These fields are defined once, and will be used in the “**Query Definitions**” and “**Index Form**” tabs. The predefined field Doc\_Id will always appear on the Index Table tab.



To the right side of the window, three buttons provide options for adding, modifying and deleting fields:

### Create Field

 The “**New Field**” button displays a window to add a new field to the index table.



Field Name corresponds to the field name in the index table; field type refers to the data type and can be either Text, Number, Boolean, Date/Time or List. Field length indicates the length (in bytes) for the field.

Valid numeric fields have byte sizes of 2, 4 and 8. The size in bytes does not refer to the number of digits to type; but to the size of the numeric field in the database engine.

The **“Save”** button saves the changes for the field and closes; **“Next”** saves the changes and continues, and **“Cancel”** aborts the changes of the current field and closes the window.

### **Edit Field**



The **“Edit Field”** button presents the same New Field window, where the name, type and length can be modified.

### **Delete Field**

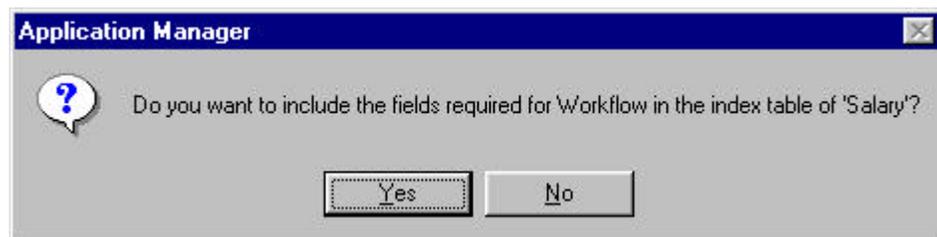


The **“Delete Field”** button deletes a field from the Index Table. Some database engines (like SQL Server 6.5) do not allow field modifications or deletion.

### **Add Fields required for Workflow**



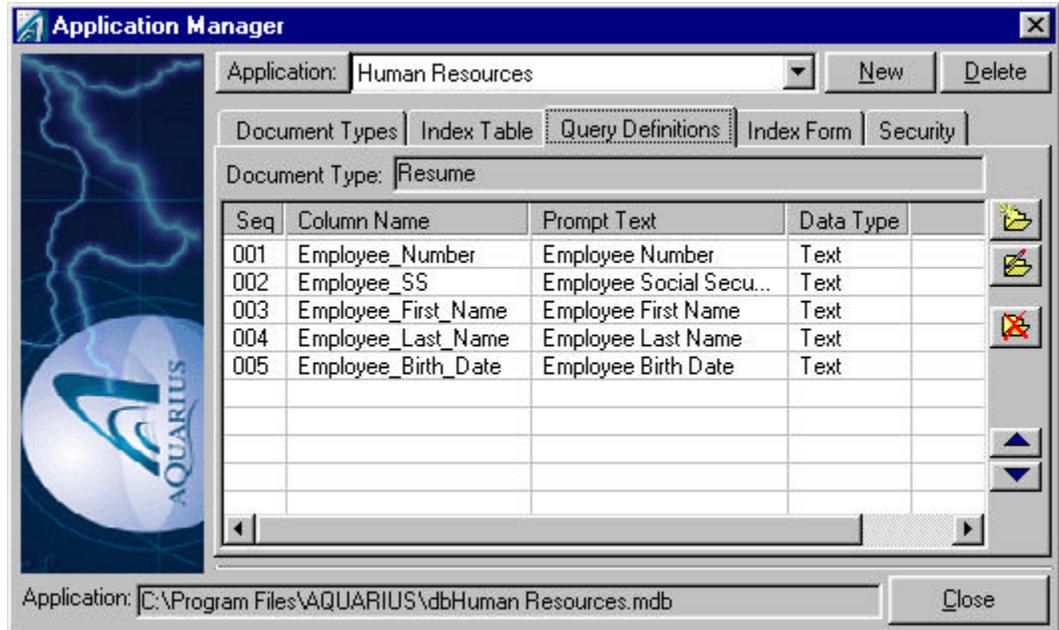
The button **“Add Fields required for Workflow”** modifies the document type table in the database adding required fields for the workflow process.



## ***How to Create, Delete and Edit Query Forms***

### **QUERY DEFINITION**

The fields in this tab will be the ones to appear in the Aquarius Query Wizard.

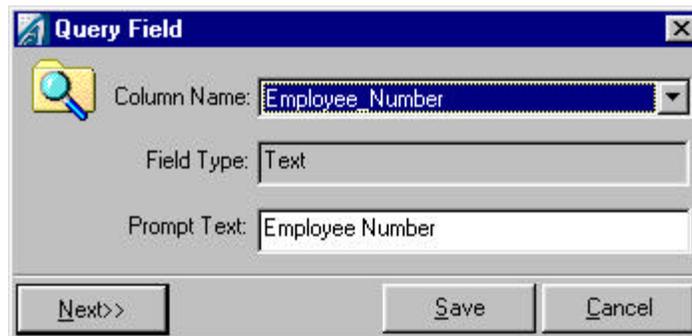


The buttons in the right side of the window allow you to perform the following actions:

#### Add Query Field



The “**Add query field**” button brings up a window to define field’s properties, including column name and prompt text. Remember that this column name refers to a field previously defined in the “Index Table” tab.



The “**Save**” button saves the changes for the field and closes; “**Next**” saves the changes and continues, and “**Cancel**” aborts the changes of the current field and closes the window.

#### Edit Query Field



The “**Edit Query Field**” button brings up the previously explained window to change the definition for an existing Query Field.

### Delete Query Field

 The “Delete Query Field” button, deletes the definition for the query field.

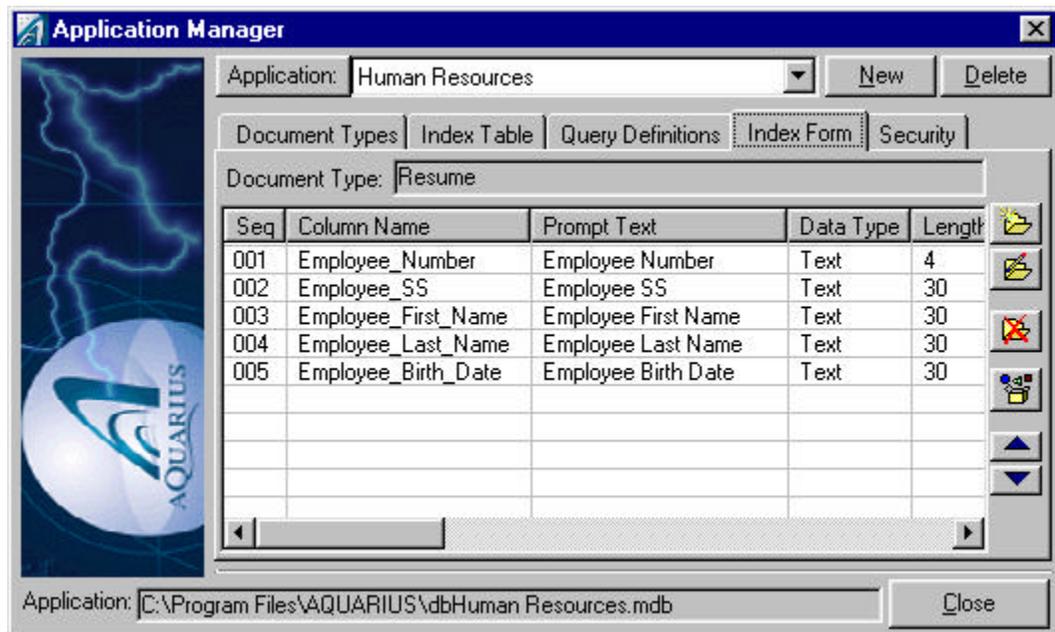
### Move Fields



The “Move up” and “Move down” buttons change the order in which the fields appear in the Query Wizard.

## ***How to Create, Edit and Delete Index Forms***

In this tab we define which fields will apply for data entry and how they are presented.



### Add Index Field



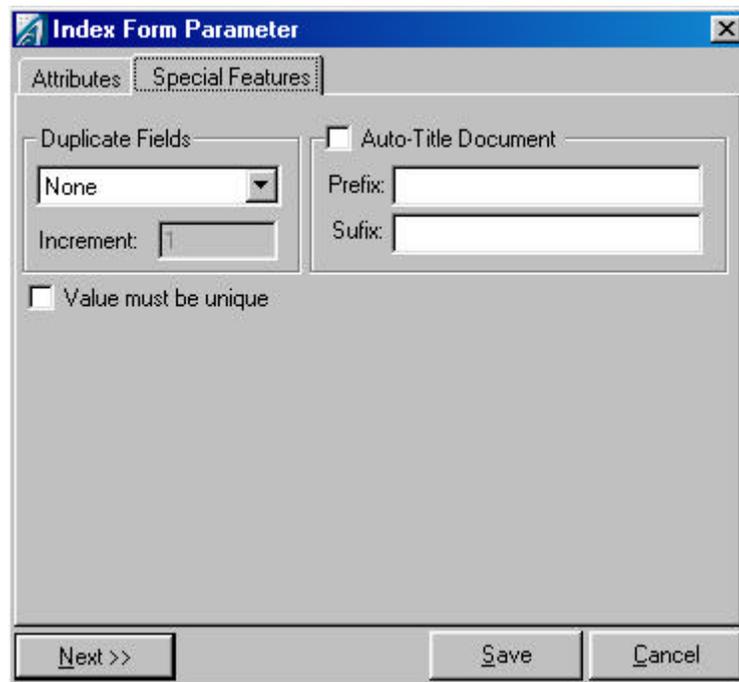
Pressing the “Add Index Field” button brings up, the Index Form Parameter window, where you can set field attributes and special features.

### The “Attributes” Tab

The screenshot shows the 'Index Form Parameter' dialog box with the 'Attributes' tab selected. The 'Column Name' dropdown is set to 'Employee Number'. The 'Data Type' is 'Text'. The 'Prompt Text' is 'Employee Number'. The 'Max Length' is set to 4. The 'Default Value', 'Input Mask', and 'Display Mask' fields are empty. The 'Required?' checkbox is checked. The 'User Edit' checkbox is checked. The 'Save Data' checkbox is checked. The 'Show Input' checkbox is checked. The 'Next >>' button is highlighted.

- » Column name, must be an existing field in the index table.
- » Prompt Text, the name of the field on the index form.
- » Max Length, the maximum length for the field in the index form.
- » Default Value, this value will appear on the field in every new index data entry for a document.
- » Input Mask. This mask will apply whenever changes are being made to the field. Available values are: { }, @, any char; ^, any char but convert it to uppercase when possible; #, digit; ?, alphabetic char; &, alphabetic char but convert it to uppercase. Examples: {M,F}, ###-####, ?##-??##, etc. AQUARIUS-DMS usually assumes the appropriate input mask, for numeric, Boolean and date types.
- » Display Mask: This mask will apply only for the field display. Available values are: @, any char; #, number; date-time formatting specifications such as mm/dd/yyyy and hh:mm:ss are also available.
- » If the field is required to be filled the checkbox “Required?” has to be checked.
- » The “User Edit” option allows to modify the contents in a field.
- » The “Save Data” is required if the information entered is going to be saved, otherwise the data will be lost.
- » The “Show Input” option is unchecked when the field selected is going to be used like a password.

### The “Special Features” Tab



- » Duplicate Fields. Includes two options: Auto duplicate, which causes the field value to duplicate its value in the next entry, useful for repetitive values among documents; and Auto increment, to increment automatically the field in each entry. The amount of the increments can also be indicated.
- » Auto title document, to automatically name the documents with the value of this field and optionally put a suffix, a prefix or both to the constructed document name. If several fields are indicated as “Auto Title”, the values of each field are concatenated.

### Edit Index Field

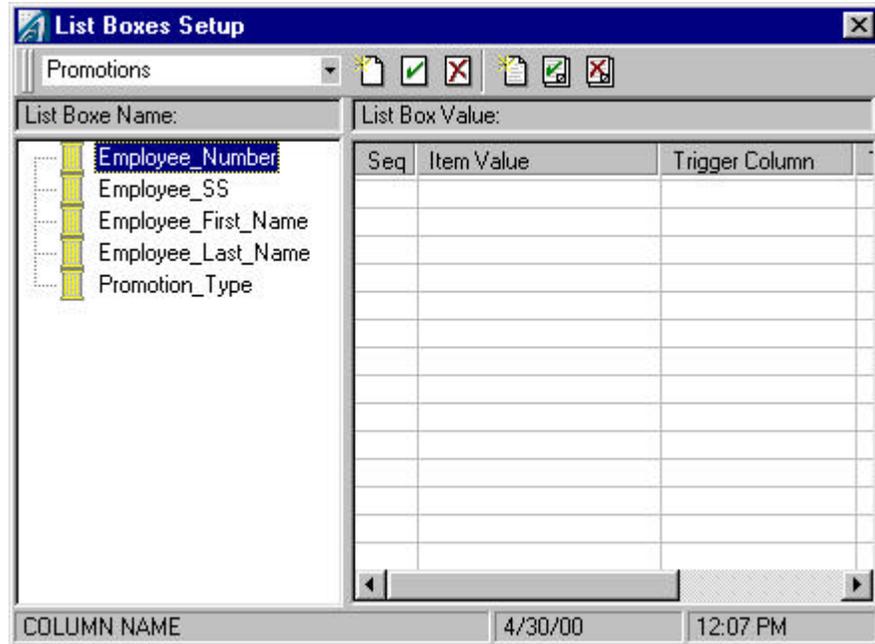
- » The “**Edit Index Field**” button brings up the “Index Form Parameters” window to change the definition for an existing field.

### Delete Index Field

- » The “**Delete Index Field**” button deletes the selected field from the Index Form.

### Setup Lists

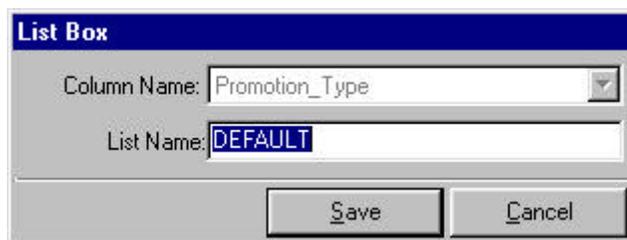
- » The “**Setup Lists**” button serves the purpose of defining the available values for list type fields. When the button is pressed the “List Boxes Setup” window appears.



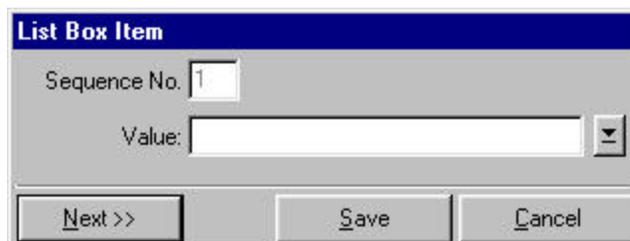
Several lists of values can be defined for a single field depending upon other field values, typically just the **“Default”** list is used.

To define a list follow these steps:

- Select the list type field.
- Press the “New List Boxes” button on the toolbar. The **“New List Box”** screen will appear for you to type a name for the list. If only one list will be used for a single field, do not change the default List Name.



- A list will appear under the selected field. To edit the list name, press the **“Change List Boxes”** button on the toolbar.
- To add values to the list, press the “New List Value” button on the toolbar. The **“List Box Item”** screen will appear for you to type the list values.

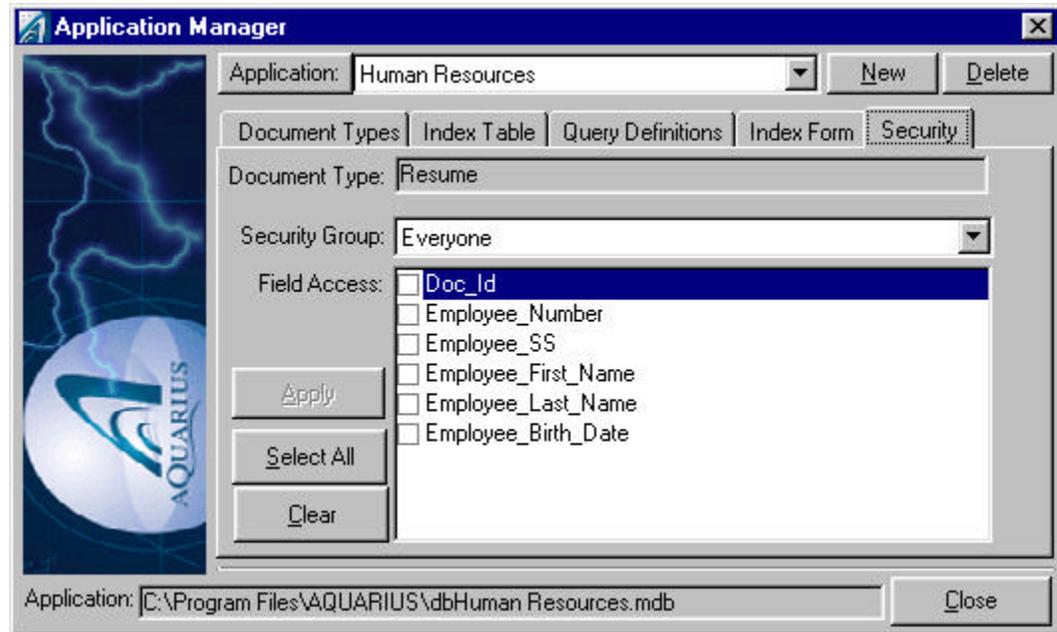


### Move Fields



The “**Move up**” and “**Move down**” buttons change the order in which the field appears in the Index Form.

## ***How to Set the Field Level Security***



Access to the fields can be restricted for some security groups. To grant field level access to a security group follow these steps:

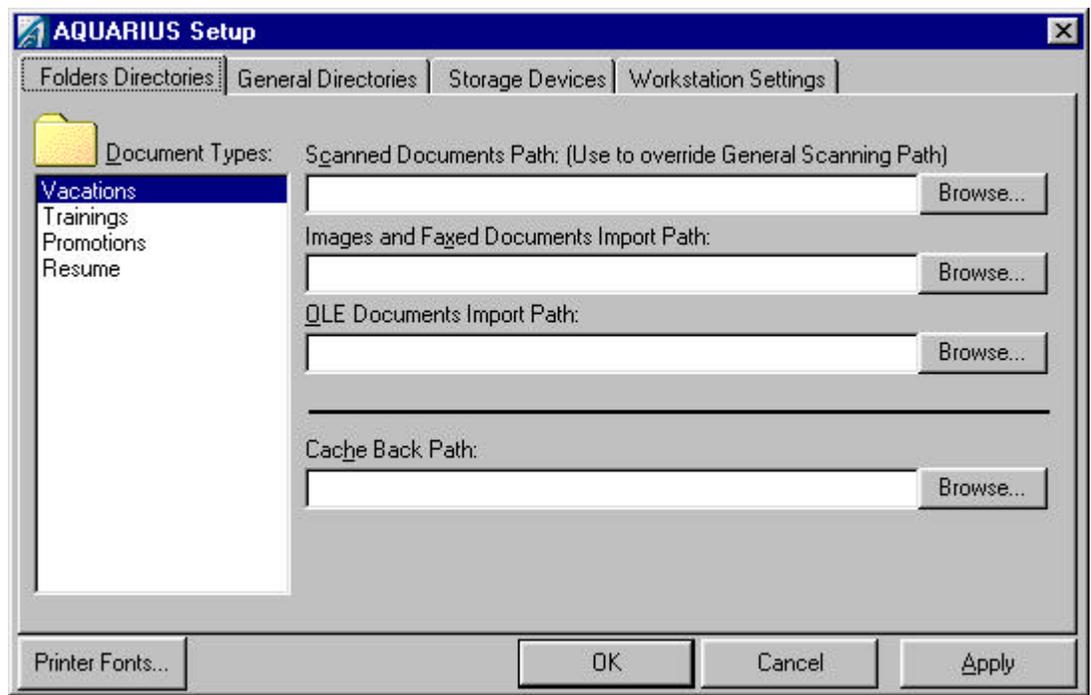
- Select the security group from the selection box labeled “**Security Group**”.
- Click on the fields you wish to grant access to. If you wish to select all the fields, press the “**Select All**” button.
- Press the “**Apply**” button.

## ***AQUARIUS Setup***

The “**AQUARIUS Setup**” window is where most of the global and workstation specific configuration is made.

### The Folders Directories Tab

- **Scanned Documents Path:** For each document type of the current application, a location to store scanned documents can be specified.
- **Images and Faxed Documents Import Path:** Location where imported images will be saved.
- **OLE Documents Import Path:** Location where imported OLE documents will be saved. Once these options are configured, any other paths specified in the “General Directories” tab will be override.
- **Cache Back Path:** Specifies where documents are stored when cached from optical media to hard disk. If the cache back path is left in blank, the default path used is \Program Files\AQUARIUS\Cache. This path applies for all existing applications.



### The General Directories Tab

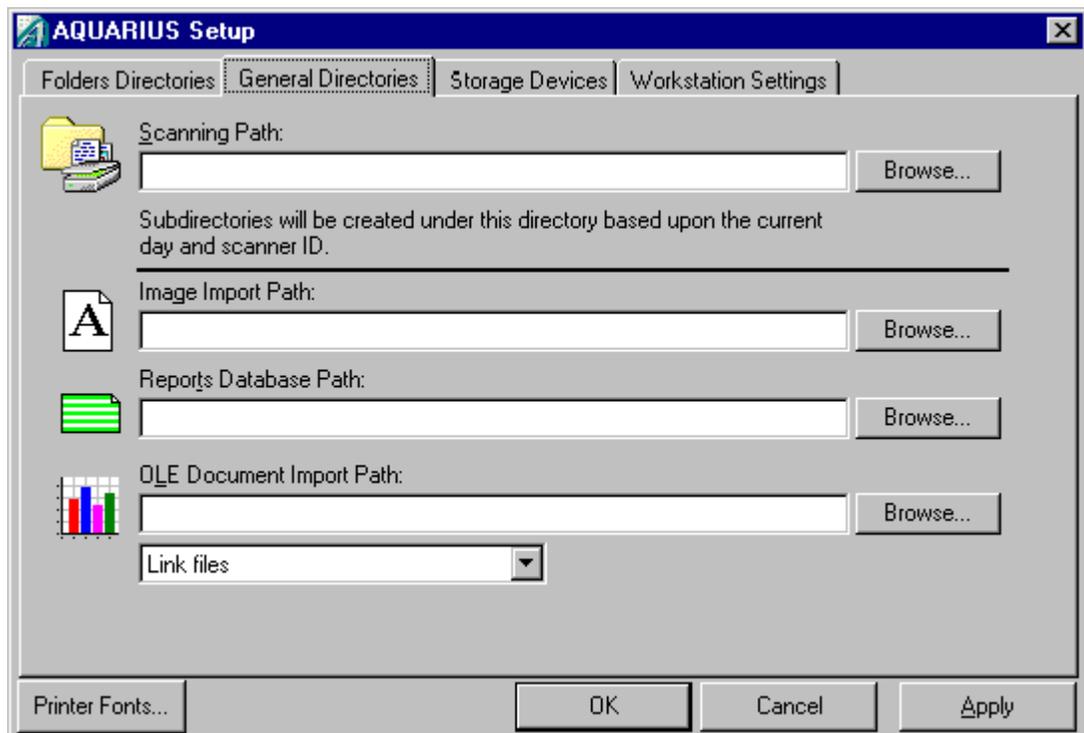
- **Scanning Path:** Path where all scanned documents of the current application will be stored. It is recommended to have one directory per application, otherwise all documents are stored in \Program Files\AQUARIUS\Batches.
- **Image Import Path:** Path to import images to.
- **Report Database Path:** Indicates where the Enterprise Report Manager (COL/ERM) database is installed.
- **OLE Documents Import Path:** Path to import OLE documents to.

- **Action selection box:** Used to indicate the action to be performed when importing any kind of files into an Aquarius document.



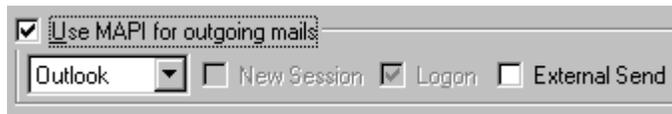
The possible actions are:

- **Link Files:** files will not be changed from their original location.
- **Copy Files:** files will be copied to the 'Image Import Path' or 'OLE Document Import Path' specified previously.
- **Move files:** files will be moved from their original location to the 'Image Import Path' or 'OLE Document Import Path' specified previously.
- **Copy if file is not shared:** files will be copied to the 'Image Import Path' or 'OLE Document Import Path' specified previously, if the file is local and not shared.
- **Move if file is not shared:** files will be moved to the 'Image Import Path' or 'OLE Document Import Path' specified previously, if the file is local and not shared.

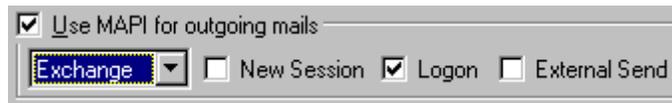


### The Storage Devices

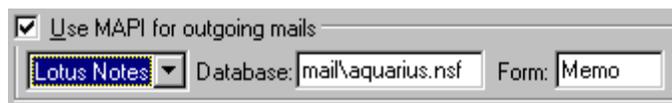
- **Map Drive...:** To map a network drive.
- **Disconnect...:** To disconnect a mapped drive.
- **Magnetic Drive Letters:** By default, every time Aquarius starts, this field is filled with all the drive letters available to the workstation. In the case you map a drive after Aquarius has started, add the new drive letter to the list.
- **Volume to Assign while Indexing:** Volume number Aquarius will assign each document when indexed. Volumes are defined in the Document Mover module.
- **Post Office Path:** Path to import incoming e-mail to. This path will only apply when using the internal Aquarius Messaging module. When the 'Use MAPI for outgoing mails' checkbox is checked and an external messaging engine is used, this path is ignored.
- **Use MAPI for outgoing mails:** Used to configure the messaging engine Aquarius will use. Once this option is checked, there are three possible mail engines:
- **Microsoft Outlook:** Enables Aquarius to use MS Outlook as the messaging engine. Use the 'External Send' option to display the MS Outlook user interface instead of the Aquarius Messaging.



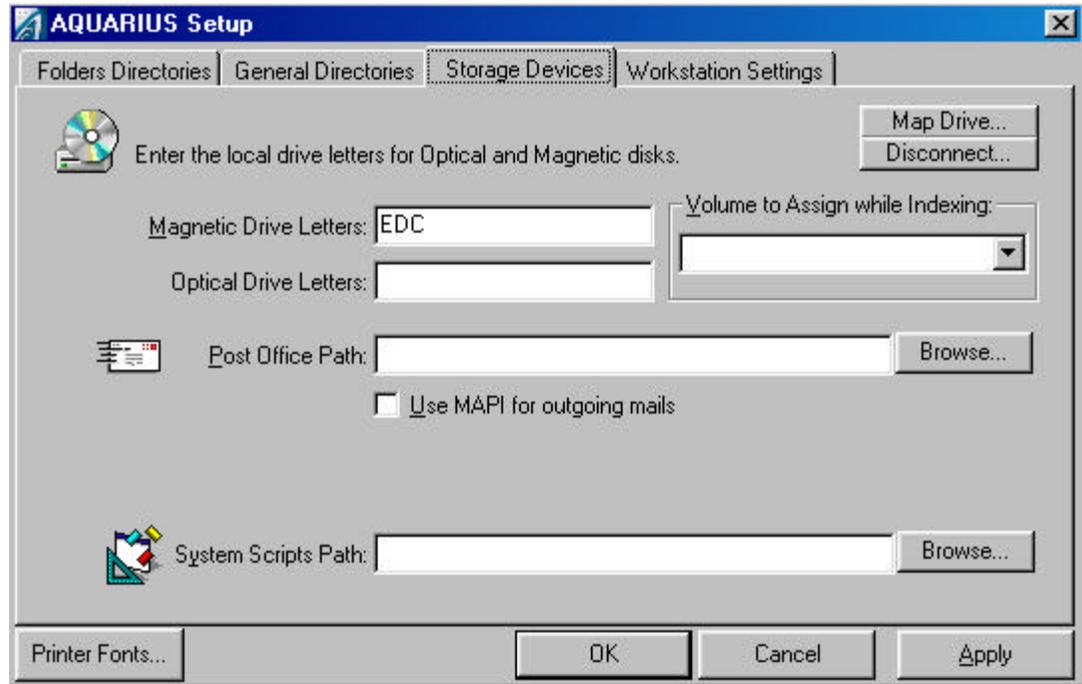
- **MS Exchange:** Enables Aquarius to use MS Exchange as the messaging engine.



- **Lotus Notes:** Enables Aquarius to use Lotus Notes as the messaging engine.

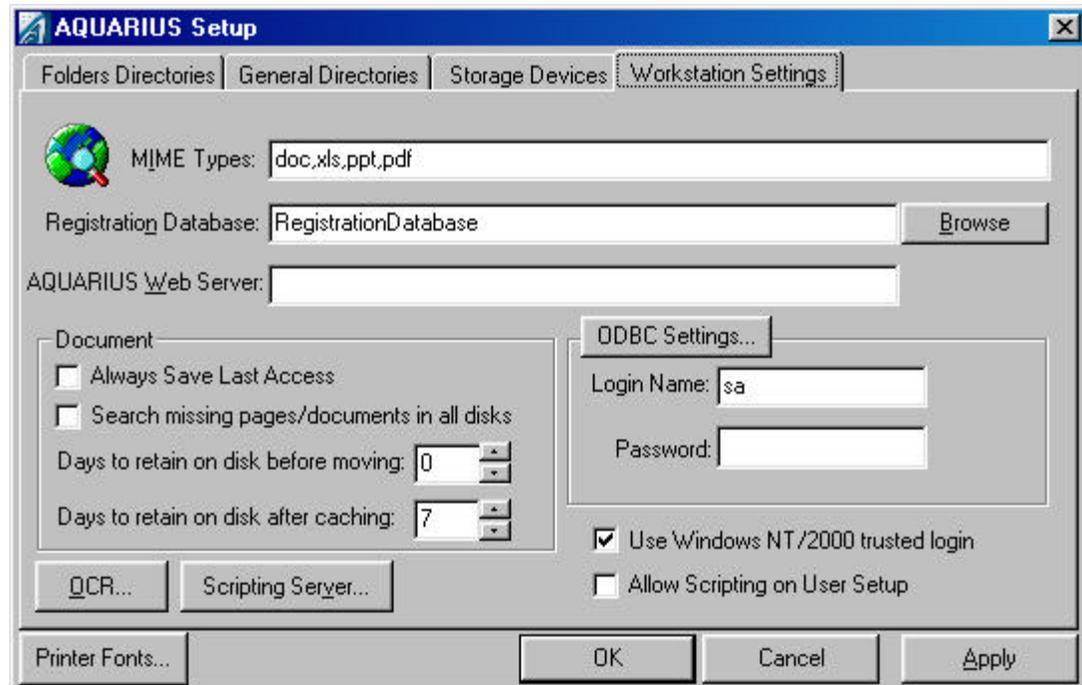


- **System Scripts Path:** specifies the path where Aquarius scripts are located. If this field is left blank, Aquarius will use "local\_machine\_home\_directory\Scripts\" (i.e. c:\Program Files\Aquarius\Scripts) as the scripts path.



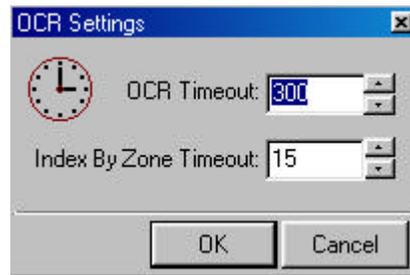
***The Workstation Settings***

These settings have to be configured for each network station.

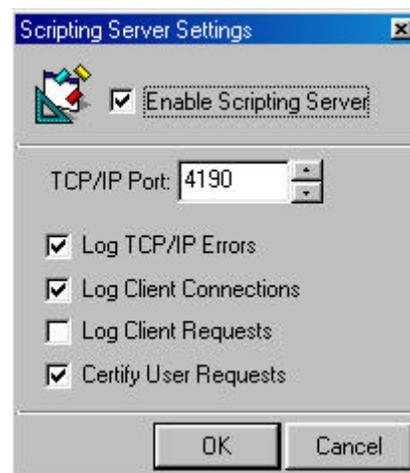


- **MIME Types:** Define which file extensions are viewed through the Web Browser OLE integration.

- **Registration Database:** Indicates the data source name or database path of the Registration Database.
- **Web Server:** Specified is the URL address of the AQUARIUS web viewer. Example: `http://127.0.0.1/img`.
- **ODBS Setting Frame:** Indicates the user ID and password to login into ODBC databases.
- **Use Windows NT Trusted Login:** Defines if users can log into AQUARIUS-DMS using the user account of Windows.
- **Allow Scripting on User Setup:** Used to automate the creation of users on your Windows NT Security.
- **The Document Frame:** Sets the number of days documents will remain on disk before they can be moved to optical volumes and after caching. Use “Always save last access” to keep track of the date of the last document accessed.
- **OCR:** Defines the time out times in number of seconds for the OCR processes.



- **Scripting Server:** Brings up the “Scripting Server Settings” window, to configure the station’s capability to run Aquarius scripts in another station.



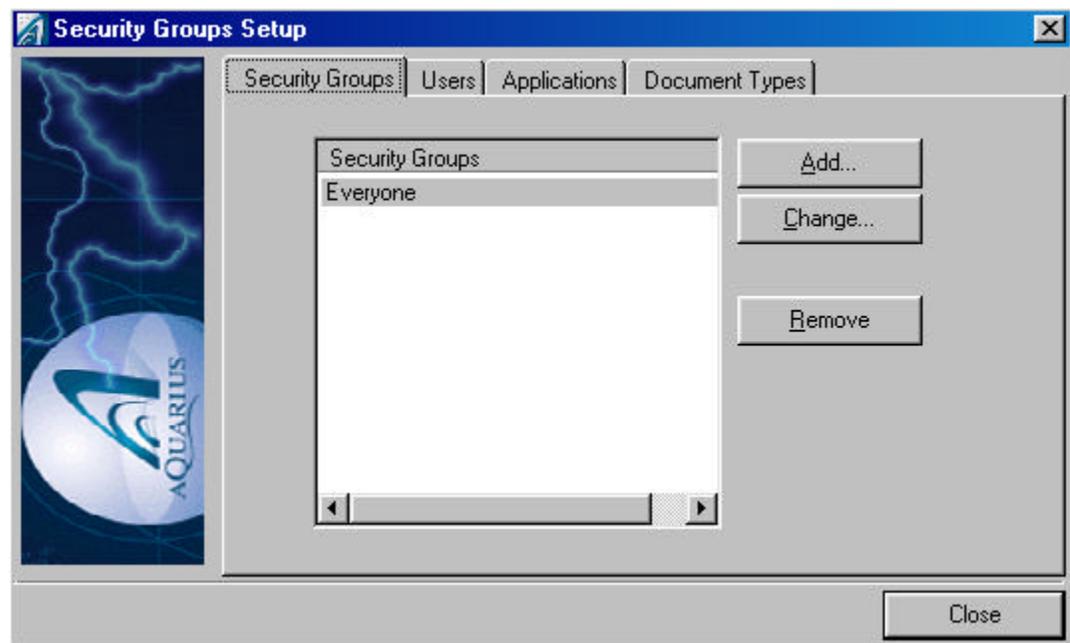
# Security

## ***Setup Security***

A security group is an entity that has been granted certain rights to access several AQUARIUS-DMS functions. Users and applications may belong to multiple security groups.

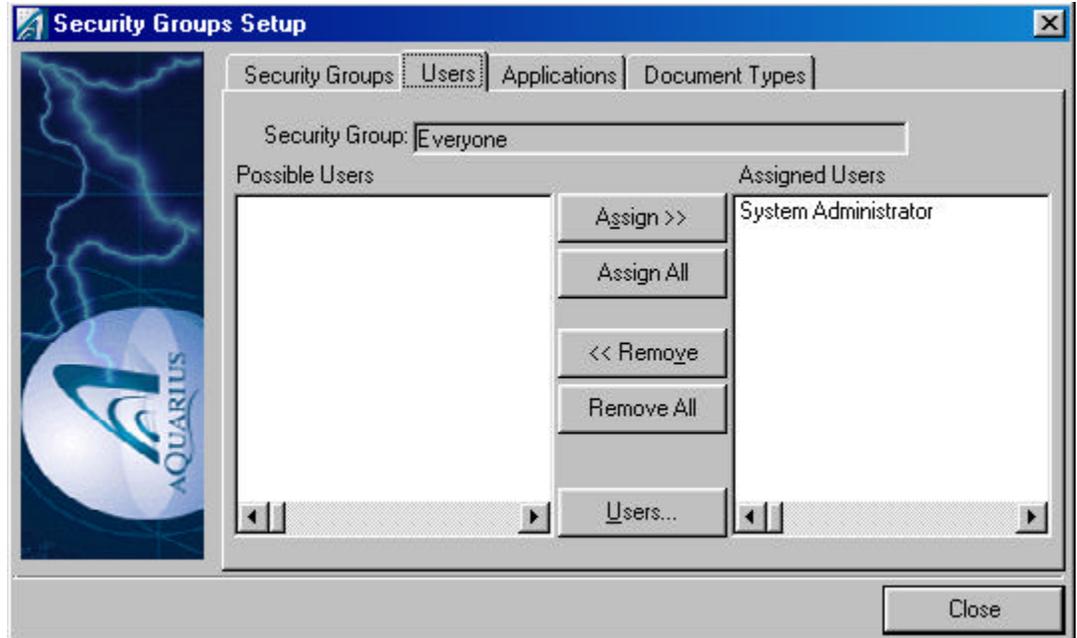
### **Security Groups Tab**

The “**Security Groups**” tab of the window shows the defined groups. There, we can create new groups, rename or delete existing ones.



### **Users Tab**

The next tab, “**Users**”, provides the mechanism to assign users to the selected group. The same operation can be done through “**Setup Users**” option.

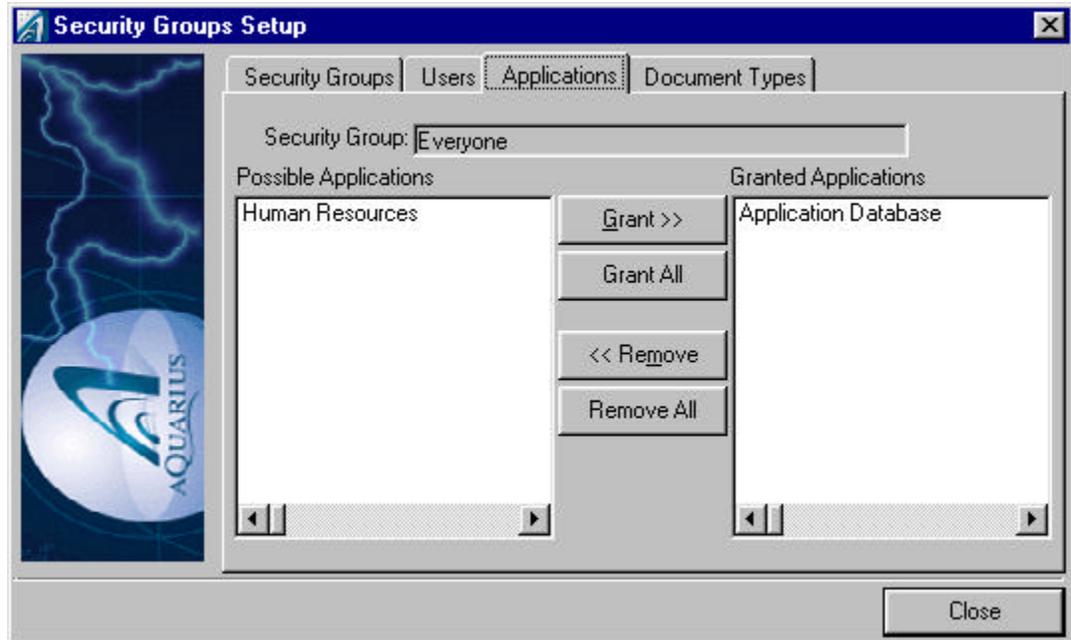


To assign a user to the selected security group, select it in the **“Possible Users”** box and click the **“Assign”** button; the user will appear in the **“Assigned Users”** box. The **“Assign All”** button moves all users to the box of assigned users. Conversely, the **“Remove”** and **“Remove All”** buttons remove users from the group.

The **“Users”** button brings up the already mentioned Setup User window.

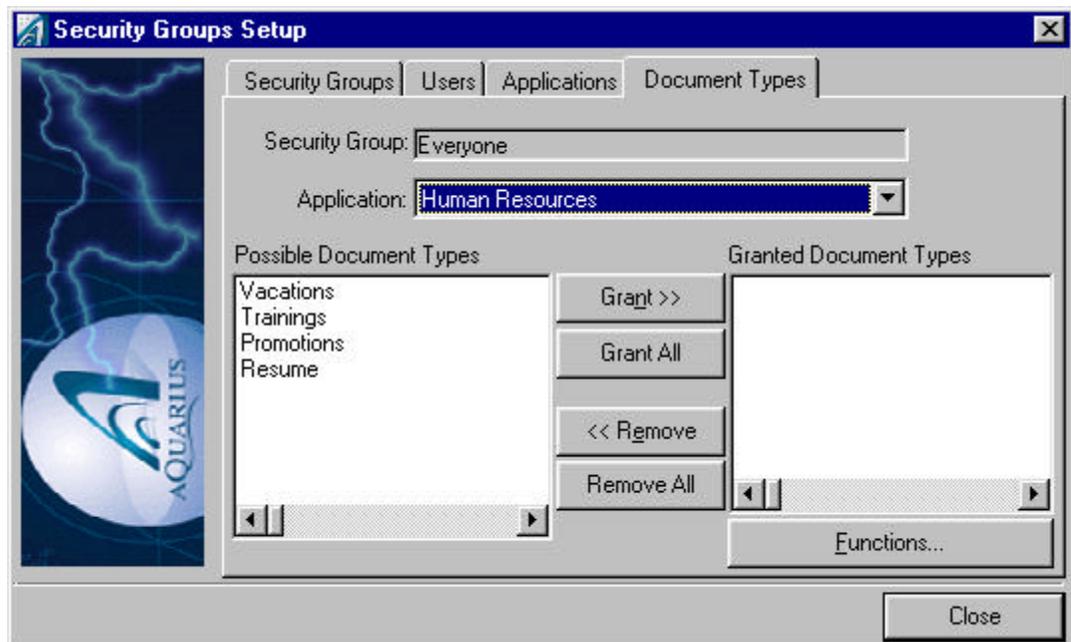
### **The Applications Tab**

The **“Applications”** tab grants the security group access to the existing applications. The **“Grant”**, **“Grant All”**, **“Remove”** and **“Remove All”** buttons operate in the same way as the ones in the **“Users”** tab.



### The Document Types Tab

After an application has been placed and selected in the box of **“Granted Applications”**, use **“Document types”** tab to configure the access of the group to the AQUARIUS functions.

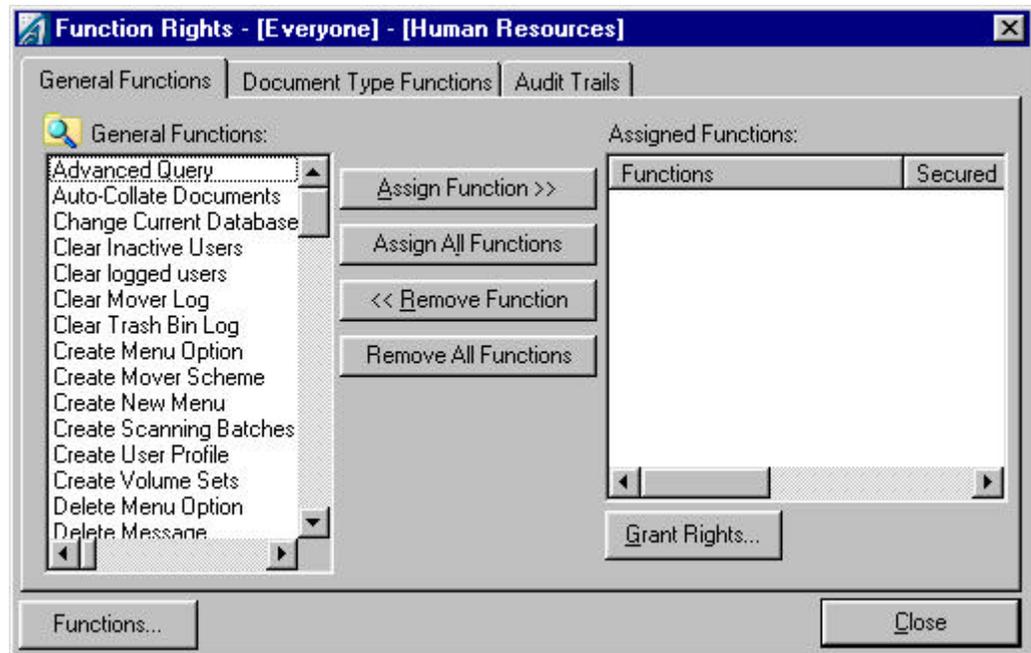


To setup the functions that are related to a folder or document type (such as Delete Pages, Copy Pages, Add Pages and so on), we should grant first access to the document types. This is not mandatory when we are assigning general functions (such as call the Document Center, Query Wizard, Setup Security, etc.).

To assign both types of functions rights (“General” and “Document Type Related”) to the selected Application, press the **“Functions...”** button. The window **“Setup Function Rights”** displays for the selected group and selected application. This should be repeated for every granted application of the Security Group.

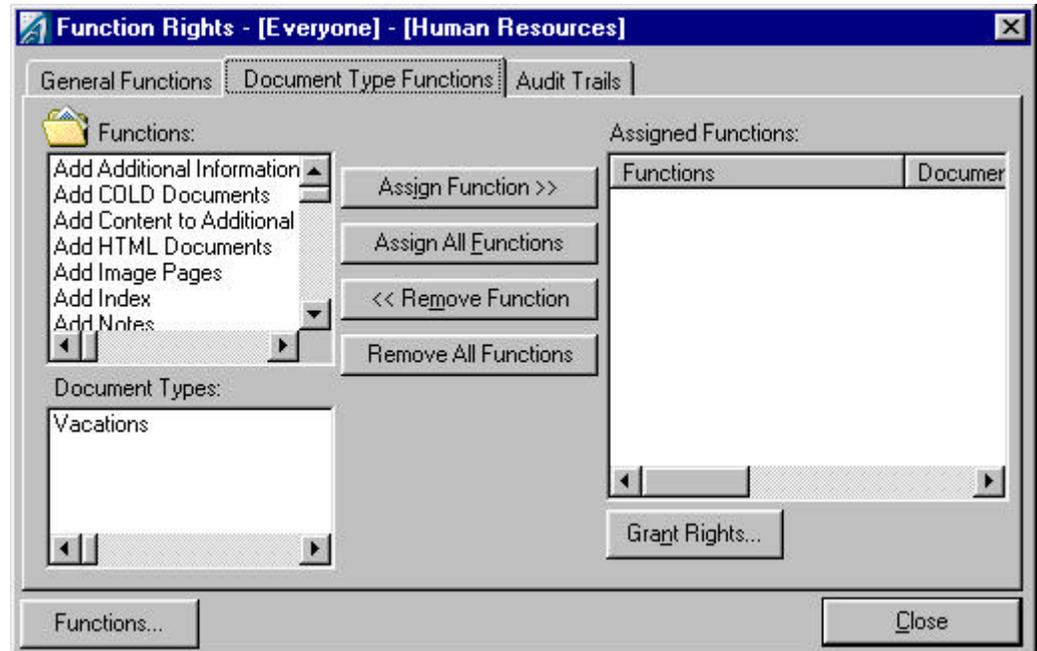
### ***The General Function Tab***

In the **“General Functions”** tab we assign the selected functions with **“Assign”**, all functions with **“Assign All”** and perform the opposite with **“Remove”** and **“Remove All”**.



### The Document Type Function Tab

The “**Document Type Functions**” tab allows the assignment of the selected functions for a Document type.



To use the “**Document Types Functions**” tab access to the document type needs to be granted (that is, in the “Document types” tab of the Setup Security Groups window). The granted document types appear in the box “**Document Type**”. We must select a document type in order to assign functions to it. The functions are assigned with steps very similar to the previously explained in “**General Functions**”.

The “**Grant Rights...**” button presents a window where security groups can be granted rights for the documents of the selected document type (Approved Documents, Secured Documents, Confidential Documents and Encrypted Documents).

A message is presented to remind the user that the selection added is going to be the default for the new document types and that it can be modified at any time.

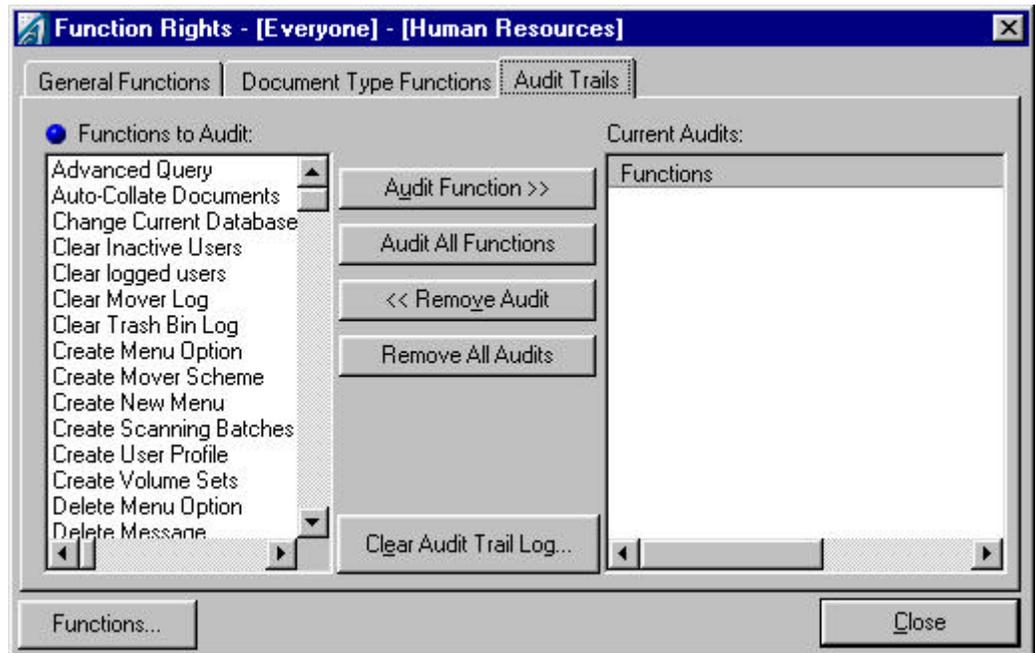


### **The Audit Trails Tab**

The last tab of the Setup Function Rights window is the “**Audit Trails**” tab. It serves the purpose of creating Audit Trails for the selected functions. It is important to create Audit Trails just for critical functions in the System, otherwise the overall performance would be affected as well as resource usage.

It is recommended to clean the Audit Trails often, in order to keep the database size as minimal as possible.

To find specific functions use **F3** in any list.




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#### See also

Setup Users

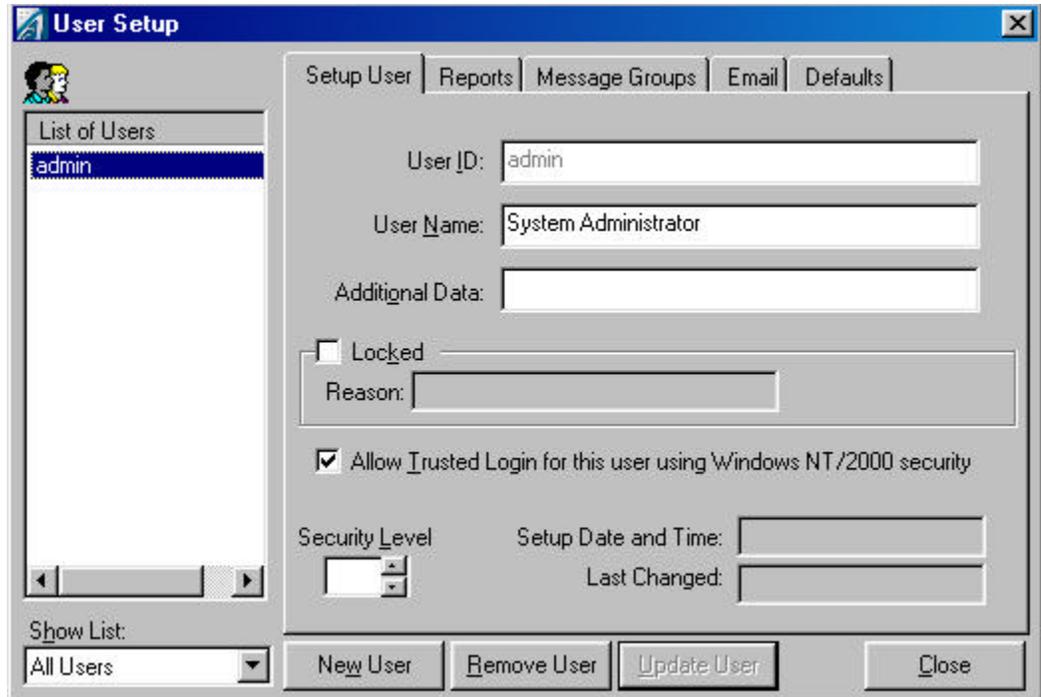
## Setup Users

The “**Setup Users**” option allows to define AQUARIUS-DMS users. There is always a pre-defined user, called “Admin”, or the System Administrator. No login window will appear as long as there is only the System Administrator in the user list. The default password for Admin is “123”.

The window to create new users is straightforward and intuitive. The “New User”, “Remove User” and “Update User” buttons maintain the user list by adding, removing or changing users.

### The Setup User Tab

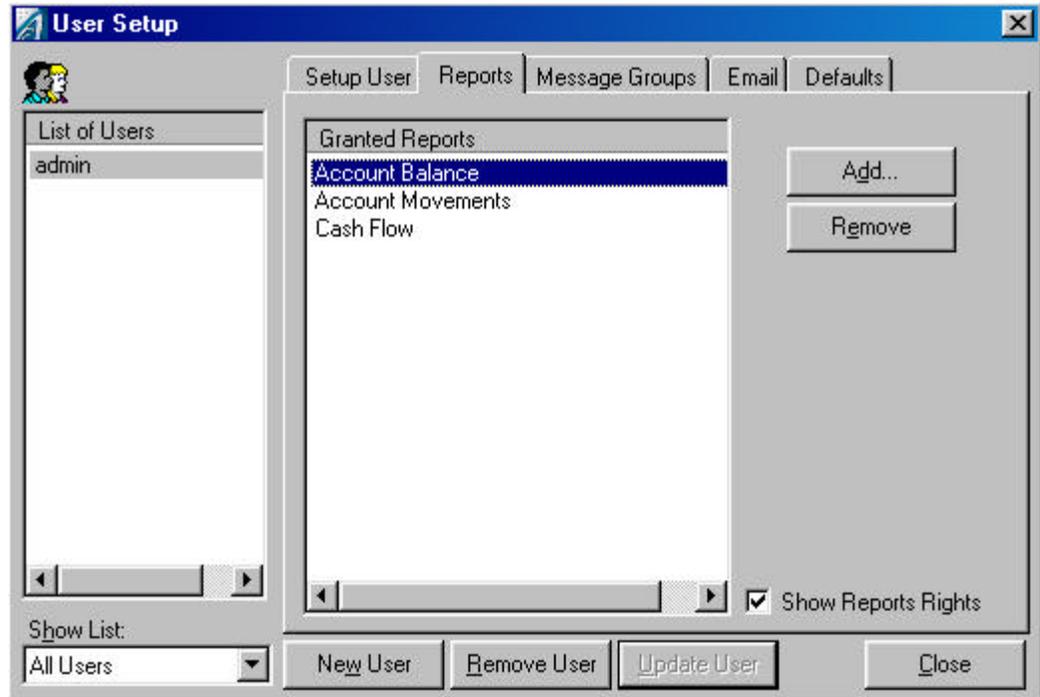
In the “**Setup Users**” tab, the main properties of the user are defined, such as Id, Name and Security Level. Lower security levels have more access. Locking a user prevents him/her to log to AQUARIUS. Allowing trusted login avoids the login window when starting the AQUARIUS, since the user is already logged through Windows security. This option works in conjunction with the “Allow Trusted Login” in the AQUARIUS Setup window.



The List of users can be displayed in several ways, to change it just select the “**Show List**” Box and select type of list wanted.

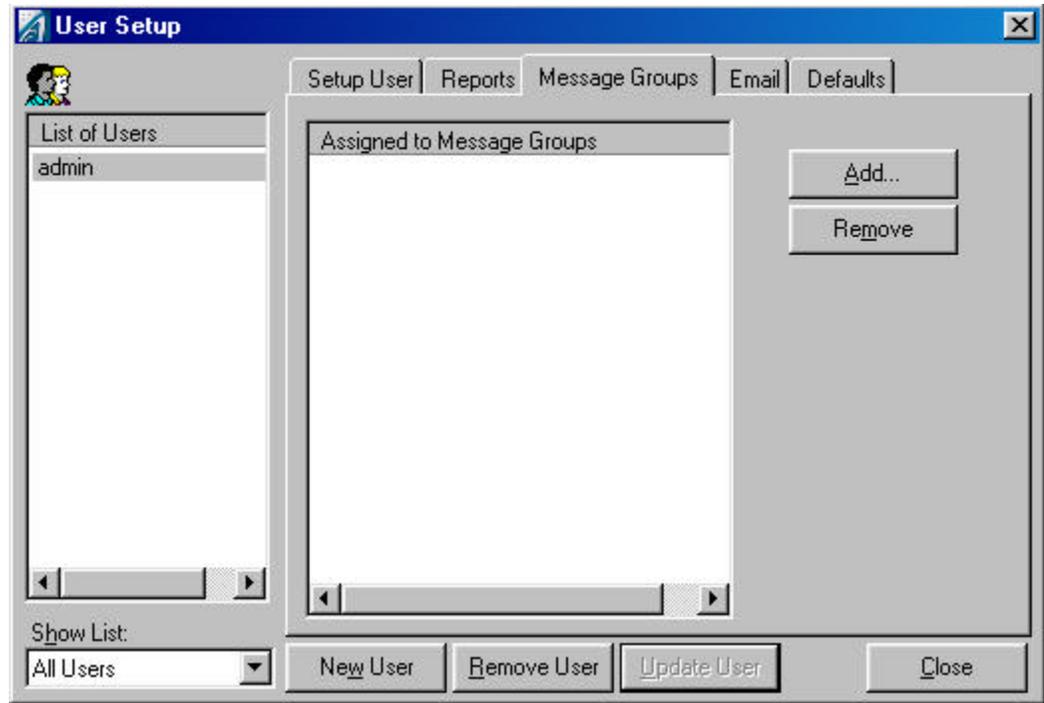
### **The Reports Tab**

This option is only available when the AQUARIUS-ERM is installed and configured on your system. In the “**Reports**” tab we grant the user access to the available reports.



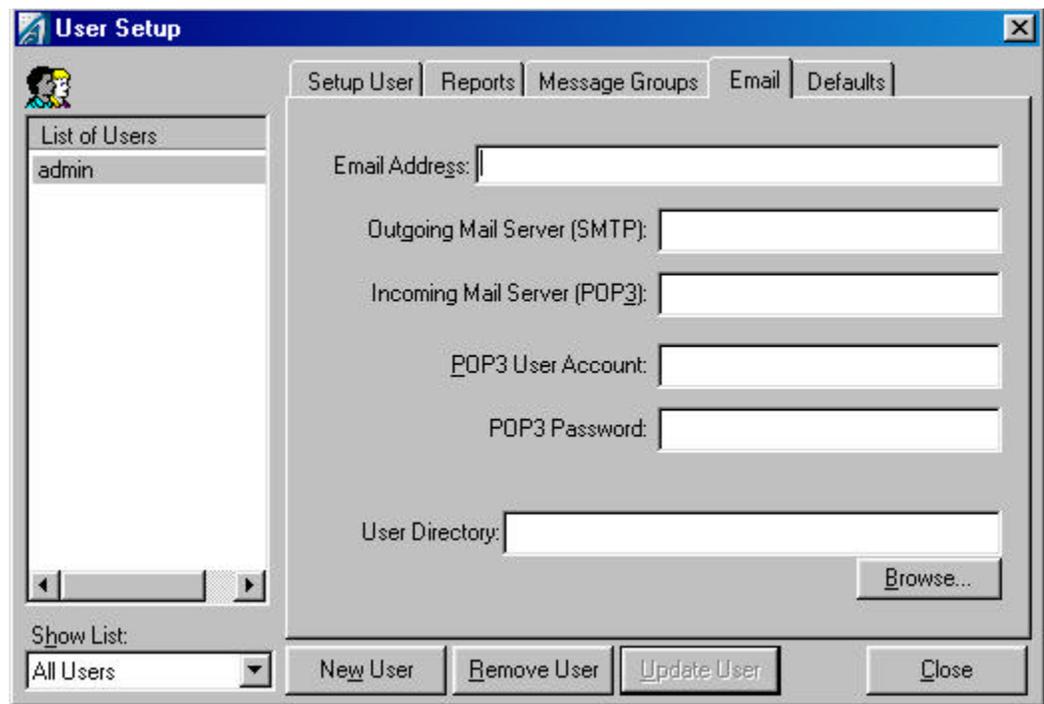
**The Message Groups Tab**

In the “Message Groups” tab we add or remove the current user from the Message Groups.



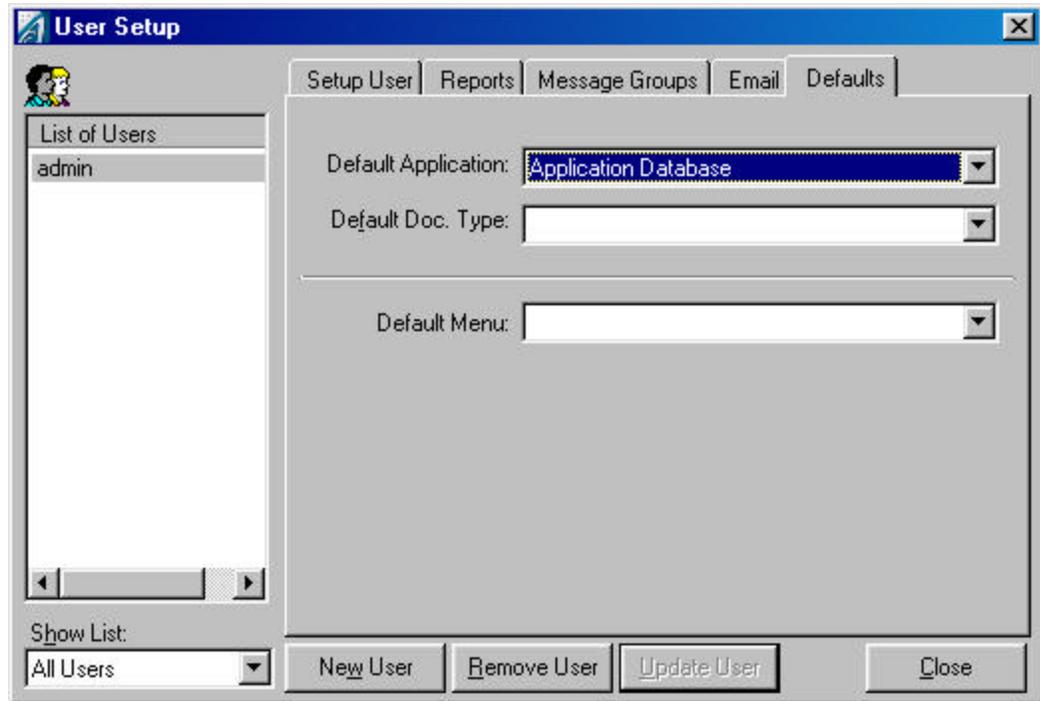
### ***The Email Tab***

The “**Email**” tab defines the user account and servers addresses to send and receive emails through the Internet, if the internal AQUARIUS Messaging System is not being used.



***The Defaults Tab***

The “**Defaults**” tab makes possible for the selected user to start AQUARIUS-DMS in a specified application, document type and menu if it is desired.



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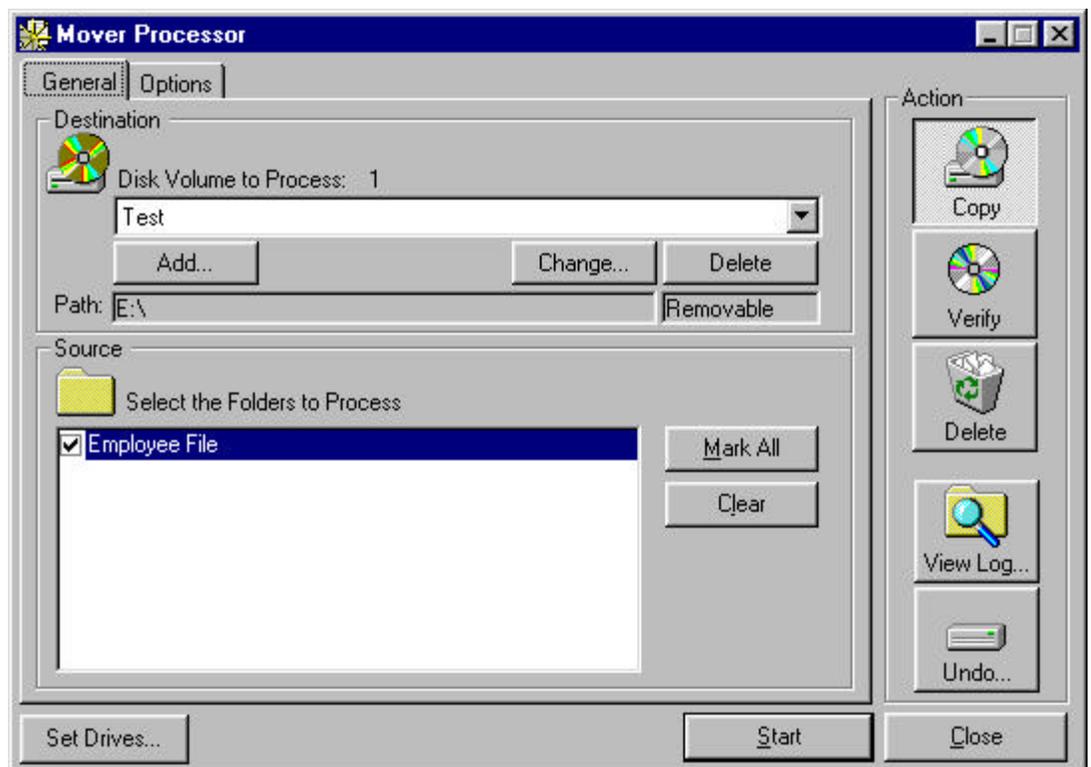
**See also**

Setup Security Groups.

# The Document Mover

## Document Mover Basics

The “**Mover Processor**” is a utility that allows transferring of indexed documents from magnetic media (where documents are stored by default) to another media or storage device (usually CD-R, Optical drives or a network disk).



Moving documents is a simple process that consist of selecting a destination volume and the document types to be moved. Also, you can select other actions to perform (*Copy & Verify* ). Use the *Delete* action just when you're sure that you are moving to a reliable media. Also, you may use the *Delete* action whenever you want to “flush” documents from the temporary magnetic area (This is an area located in a hard drive that is typically referred to as “The Cache Area”). Its strongly recommended not to delete any documents until you have verified that such documents have been “Permanently” and accurately recorded in their final “Destination”, being it a CD, Optical, etc.

It's also recommended that you perform a new move with the *Delete* action immediately after you have verified the documents in the volume. Otherwise if the volume is not mounted, image annotations done by the users could be performed on the hard disk and NOT reflected on the volume where the document is stored. The selected volume must be mounted in order for AQUARIUS to ensure that the documents already exist on the volume before deleting them from the hard disk.

If you're moving documents to a CD, the CD must be formatted with UDF (a standard format used for CD's) and the session must be open. For distribution of CDs it's recommended to include the Database & Viewer with the CD volume.

As the number of the disk volume sets are used mainly as reference, it's very important to ensure that the mounted volume is the correct one, to avoid documents to be moved to incorrect disk volumes. This mistake could cause AQUARIUS to ask for an incorrect disk volume set. This "action" can be reversed by undoing the "Move" process, task that is accomplished utilizing the "Undo" button in the "Mover Processor" window. To help avoid this situation we strongly recommend that CD's be physically labeled prior to any moving operation.

When moving, if a volume becomes full, the system requires you to create a new volume set and the remaining documents assigned to the current volume are re-assigned to the new volume created. For new indexed documents you can pre-assign a different volume, even if the volume is not full, modifying the Default Volume in *AQUARIUS Setup*.

## Preparing Disk Volume

By default all documents are created with volume 0 (zero) and every time a document is indexed, a volume set is pre-assigned and a "moving date" is assigned.

The *default volume* number that is assigned to indexed documents can be defined through the AQUARIUS Setup, in the *Storage Devices* tab. If any volume set has been created, indexed documents are pre-assigned to volume 1 (one). If any default volume has been specified, AQUARIUS uses the last volume set. This can also be overwritten through the "*DefaultVolumeSet*" in the [Index] section in the AQUARIUS.INI.

To be able to move documents, at least one volume set must exist. Volume sets are created through the *Mover Processor*, with the *Add* button that presents the window shown bellow. It is highly recommended that you create at least the **volume 1** when you create an application.



When creating a volume set for a CD, it is recommended to leave 50MB of free space to store the database, the viewer and/or to accommodate any change to documents. Additional space may be needed also if the session of a CD is left open and you require to close it in ISO 9660 format. If you select the volume path first, AQUARIUS sets the CD volume name as volume description. Also you must select the appropriate volume type for the new volume.

Physical media should be labeled with the volume name and number, so users can mount the right volume when accessing documents in not mounted volumes.

Pre-assigned volume sets can be modified manually through the Document Properties or maybe be established based on the values on the document index through the AQUARIUS Script.

By default the “*moving date*” is set to the same date of indexing. This allows to move all the indexed documents the same day they were indexed. However, in some environments, documents should remain in hard disk a few days for processing (i.e. approval, annotation, performance, etc.) before they are moved to another media. The number of days to keep the documents in hard disk after index can be set through the “*DefaultPurgeDays*” in the [Index] section of AQUARIUS.INI, specified using the AQUARIUS Script or through the *AQUARIUS Setup*.

## Caching Back Documents

Documents stored in volume read only volumes (or slow volumes) can be cached back to hard disk temporarily to allow modifications or to improve the access time. You may cache back a group of documents at once, right clicking over the document list in the Document Center, and choosing *Send to / Cache Back*. A message saying “Nothing to Process” appears if the selected documents are already on hard disk or if they were not found in the volume.

By default documents cached are stored in *\Program Files\AQUARIUS\Cache* (or the path specified in the AQUARIUS Setup) and stay on hard disk for 7 days. After this period they are moved back to a volume, next time the Mover Processor is executed. The period of 7 days can be customized through the Cache Days settings in [General] section of AQUARIUS.INI or through the Setup of AQUARIUS Setup.

# Troubleshooting

## Terminating AQUARIUS in case it Stays in Memory

If you double click the AQUARIUS icon several times, you could get a message saying that another instance of the program is already running. Just wait until the load process is completed.

In old versions of AQUARIUS, when exiting from AQUARIUS the program keeps running in the background, preventing access the application again. If this happens, press **Ctrl-Alt-Del** to invoke the Close Program Window, select the AQUARIUS task and press the **End Task** button.

## Restoring Viewer Toolbars to Factory Default

The Viewer, Index and Query Answer toolbars can be customized removing or changing the position of the icon buttons and menus. A copy of how the user configured these toolbars is stored in the Window directory. To restore any of these toolbars to the factory defaults, close the desired window (Viewer, Index or Query) and delete through Windows Explorer the respective *Viewer.tb*, *Index.tb* or *Query.tb* files located in Windows directory.

This also applies for the Viewer toolbar when upgrading from AQUARIUS Viewer Only version to full version.

## Restoring AQUARIUS Settings to Factory Default

Most of AQUARIUS settings are stored in the Registration database, and the application specific settings are stored in the respective Application database. These settings can be restored to factory defaults replacing the *Registration Database* (usually *dbreg.mdb*) with a copy of *template.rdb*, and the desired *Application Database* with a copy of *template.app*. **WARNING:** This may cause that you lose the references to all documents already existing in your system.

The settings relative to the workstation are stored in the file AQUARIUS.INI stored in the Windows directory. If this file is deleted, AQUARIUS will restore this file with the factory default settings.

## Document Center does not open and returns to Main Menu

The Document Center doesn't open and the system returns to the Main Menu, it means that a *required component of AQUARIUS is not properly installed*. For AQUARIUS full version, it is required that Imaging for Windows Professional Edition version 2.0 be installed, also, Microsoft Internet Explorer version 3.x (MSIE 3.x) must be installed.

Before trying to reinstall AQUARIUS, try ensuring that Imaging and MSIE are properly installed.

## Scanner Images appear with spots or lines

This symptom indicates that the scanner needs to be cleaned or requires maintenance.

To avoid damages in the scanning surface, ensure that staples and clips are removed from the document.

## Scanner not detected/Scanner not ready

These messages commonly occur under one of the following situations:

### **The scanner was turned off when the PC was started.**

In order for all SCSI peripherals to be recognized properly, they must be present (and turned on) before starting Windows. Usually rebooting the computer solves this problem.

This also applies for other external SCSI devices, like CD-RW and Optical jukeboxes.

### **The TWAIN scanner source was not properly selected.**

Imaging for Windows requires that you select a TWAIN source to allow scanning of documents. To select the scanner from AQUARIUS, right click over the *Scanner icon* in the *Document Center*. Then, access the *Setup Scanning Preferences* (the scanner icon in the Scanning window) and push the *Select Scanner* button.

If no scanner appears in the *Select Scanner* window, you will need to install the TWAIN drivers for the desired scanner.

### **The Scanner has a paper jam.**

If the scanner has a paper jam, you will need to remove the jammed paper and reset the scanner. To reset some scanners it's necessary to open and close the ADF (Automatic Document Feeder). Some scanners need to be turned off and on.

## Cleaning disk space

Whenever a document is removed from AQUARIUS, it is marked as deleted and does not appear in queries or in the Document Center. However, to really delete the document files and reclaim the space from the hard disk (or any other volume type), it's necessary to remove them through the *AQUARIUS Trash Bin*. For read-only media, like CDs with closed sessions or WORM optical disks, only the reference to the document in the database is removed.

All removed files are sent to the *Recycle Bin Window*. To completely recover the disk space, it is necessary to empty the *Recycle Bin*.



# DMS Web Installation

## Aquarius DMS Web Server

Today's demand for business-critical information implies fast access to valuable information, from any location around the world.

Using the power of Intranet and Internet technologies and building upon user's comfort with Web Browsers, Aquarius-Web Server is a highly innovative tool that provides immediate access to electronic documents at any time, through a LAN, WAN, or the World Wide Web.

Aquarius-Web Server drives Internet Explorer and Netscape users into a simple and intuitive user interface that provides access to all types of documents, images and reports. It is an ideal tool for 24-hour on-line access to the world.

## Aquarius DMS Web Requirements

### DMS Web Server Requirements

#### Hardware

- 128 MB RAM (Suggested: +256MB RAM)
- VGA Monitor

#### Software

- OS: Windows 95 OSR2, Windows 98, NT4 Server SP3 or greater, or Window 2000
- IIS 4.0 or PWS 4.0
- Microsoft Data Access Components 2.1 or greater
- Scripting Host Engine 5.1 or greater

### DMS Web Client Requirements

#### Software

- MSIE 3.0 or greater, or Netscape 2.0 or greater (MSIE is highly recommended).
- Kodak Imaging 2.0 (Standard or Professional) or any other browser TIF viewer (like QuickView, Pegasus, etc.).

- Internet/Intranet connection

## Aquarius DMS Web Installation

### DMS Web Installation Procedure

1. Install IIS 3.x or greater. If you installed IIS 4.x go to step 3.
2. Install Active Server Pages 2.x or greater.
3. Install Microsoft Data Access Components 2.1 or greater. This setup is usually found on your Aquarius CD, under \Service Packs\ODBC\mdac\_typ.exe
4. Install Scripting Host Engine 5.1 or great. This setup is usually found on your Aquarius CD, under \Service Packs\Scripting\ste51en.exe
5. Create the img folder under \InetPub\wwwroot.
6. Copy the DMS Web file in the img folder.
7. Share this folder for Web use as img. Set the web share permissions to Read Only, Execute Scripts, and disable the Browse Directory option.
8. Share for Web use the folders where the document images are stored.
9. Configure the globalconsts.inc file according to your DMS setup values.

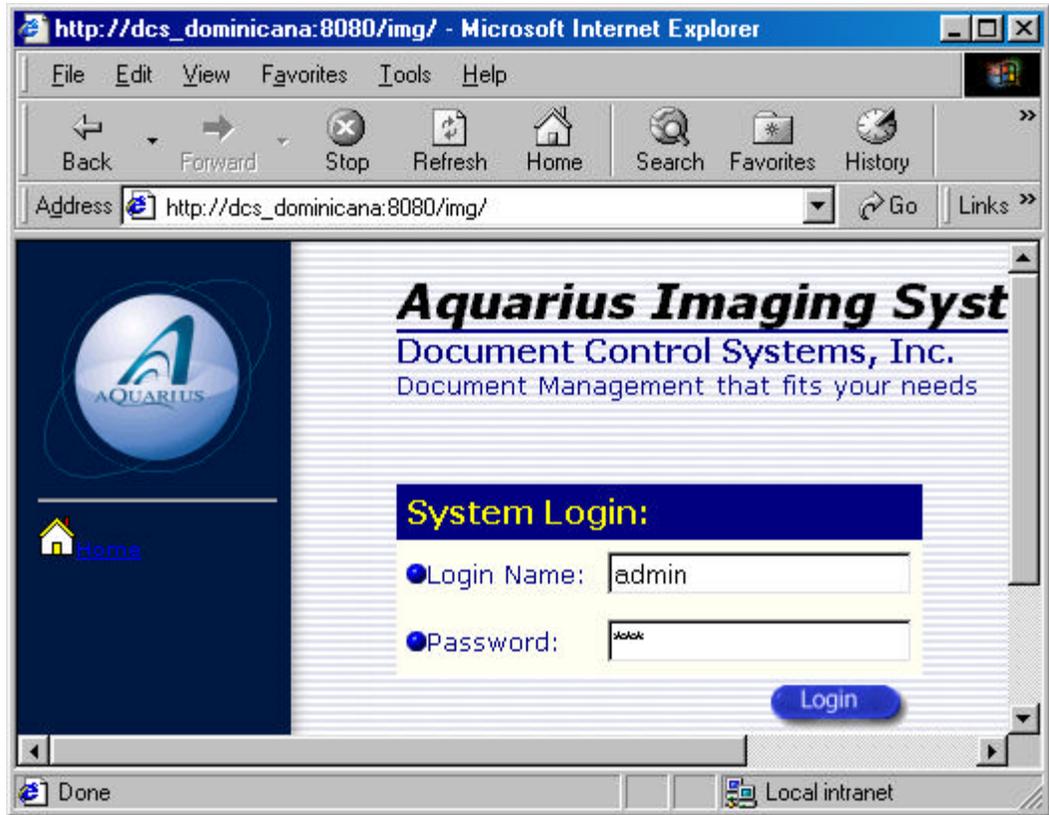
### Configuring the Globalconsts.inc File

The Globalconsts.inc file is where the DMS Web holds all the configuration information. The most important variables you must configure here are:

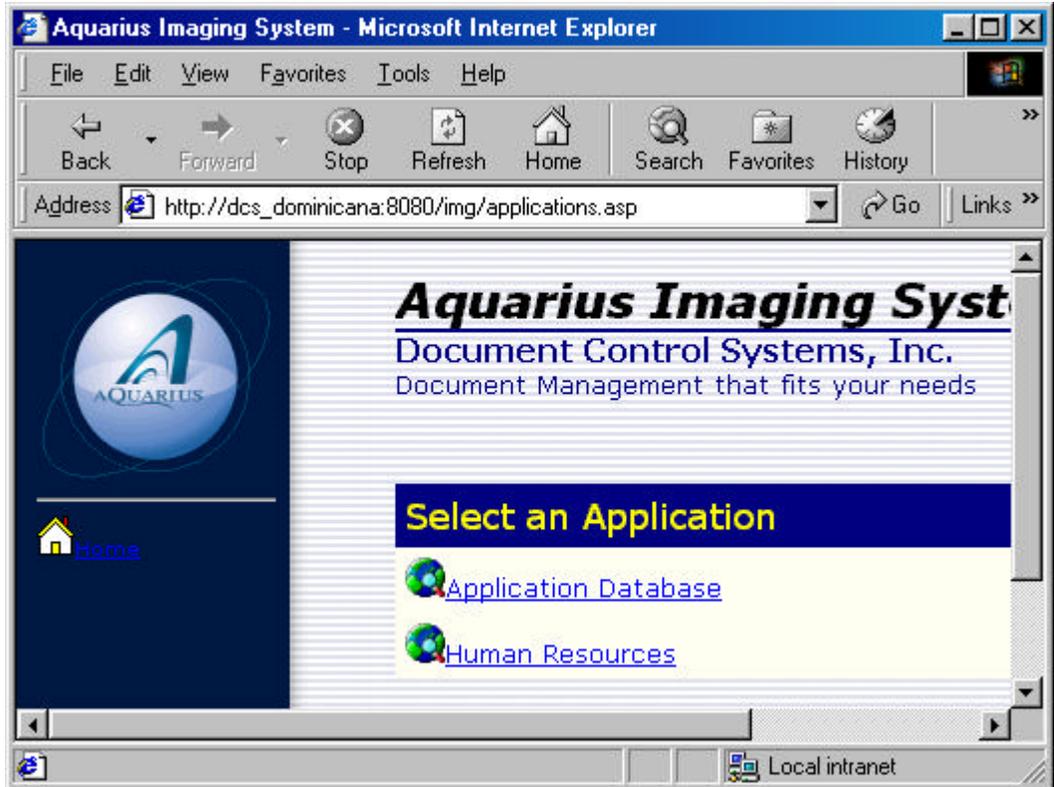
- **ServerName:** The name of server in which the DMS Web application exists.
- **LocalPaths:** The path where document images are stored; several paths can be configured, each one separated by a semicolon.
- **SharedPaths:** The web share names of the folders defined in the Local Paths variable.
- **UseAquariusERM:** True if Aquarius ERM reports will also be queried.
- **AllowScanningBatches:** True if web users need access to the Scanning Batches.
- **AllowUpdateDocuments:** True if web users will be allowed to add pages to a document.
- **DaysToKeepOnDisk:** Number of days to keep the documents in the hard disk after being indexed through the web.
- **AQUARIUSApplicationPath:** Home directory for Aquarius DMS.
- **UploadPath:** The path in the server where the users will upload the files to.
- **ODBCDriverName:** The ODBC driver for the database engine you are using.

# Aquarius Web Imaging System

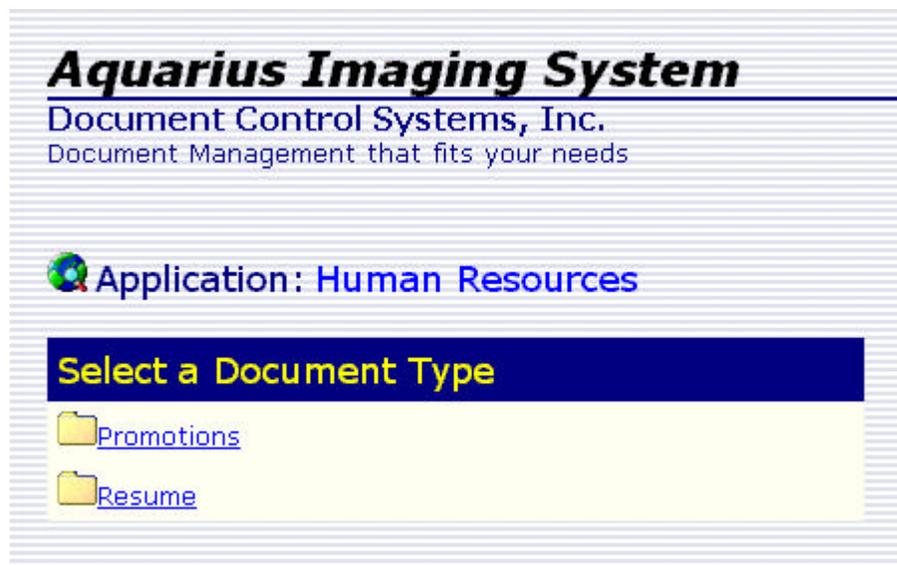
The home page for the DMS Web is the “System Login” page, where you have to specify your Aquarius Login Name and password.



After the system validates the information, the next page will allow you to select any application you have access to. To select an application, just click on the application name; this will take you to the next step, selecting the document type.



Click on the desired document type; in the next page you will be able to query the existing data.



If the Globalconsts.inc file is properly configured, in this page will also appear a link to the Scanning Batches for the application.

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