



SOHODOX

Document Management. Simplified!

USER MANUAL

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1 Introduction

The Introduction section consists of topics which will give you basic information about Sohodox. After going through this section you should have a basic understanding of Sohodox.

New Users ---

- Read the topics in this section and then go through the [Getting Started](#)^[24] section.
- Once you have familiarized yourself with the Sohodox user interface, please consider regading the following sections...

[Folders](#)^[186]

[Tags](#)^[204]

[Add a Document](#)^[47]

[Scan and Add a Document](#)^[61]

[Index Document](#)^[14]

[Search a Document](#)^[223]

- You can now go through the more advanced topics like...

[Document Types](#)^[173]

[Sohodox DB](#)^[284]

Users Using version 4 ---

- Sohodox features a completely redesigned user interface and introduces some new concepts. We recommend that you read the [Introduction to new concepts in Sohodox](#)^[19] section, the [FAQ's for users using Version 4](#)^[21] section and also the What's New section before reading other parts of this help file.
- Referring to the [Getting Started](#)^[24] tutorials will also help.
- Once you have familiarized yourself with the new user interface we would recommend reading the following sections...

[Document Types](#)^[173]

[Add a Document](#)^[47]

[Scan and Add a Document](#)^[61]

[Index Document](#)^[14]

[Search a Document](#)^[223]

- You can now go through the more advanced topics like...

[Sohodox DB](#) 

1.1 What is Sohodox

What is Sohodox?

Sohodox is a document management application. It provides you with all the tools and features you will need to create, manage and query a database of all your paper and electronic documents. Sohodox provides you with a simple platform to manage the business information residing in your documents and move towards a paperless environment in a phased, gradual manner.

How does it help?

Some of the benefits of using Sohodox are...

- Saving time lost filing and retrieving documents
- Minimizing space used for document storage
- Helping you in disaster recovery and maintaining business continuity
- Preserving organizational knowledge
- Quickly finding the document you need. Always!
- Securing your documents and letting you control access to them

How does it work?

You can add your existing electronic documents like MS Word (*.doc) files and Adobe PDF files to Sohodox by simply dragging and dropping them into Sohodox. You can add your paper documents to Sohodox by scanning them using a scanner and the built in scanning tools in Sohodox.

Inside Sohodox, you can do one of the following (or a combination of the following) to organize your documents...

- Arrange your documents into a hierarchy of folders

- Attach one or more text tags (labels) to each document. You can later search for documents containing specific tags.
- Separate documents into various types (e.g. bills, checks, letters) and store type specific information along with each document. For e.g. you can store date and amount with each bill and then easily find all bills greater than US \$100 from January 2008.
- Link documents to each other

Sohodox features full multi-user support. This means multiple users can simultaneously access and work with the same document database.

1.2 What's New in Sohodox

[Click here](#) to view the *What's New* page on the SOHODOX web site

1.3 System Requirements

System Requirements

- **Processor:** 1GHz processor (2 GHz or more recommended)
- **Memory (RAM):** 4 GB recommended
- **Free hard disk space for software installation:** 500 MB
- **Hard disk space to store documents:** Depends on the total size of the documents
- **Supported Operating Systems:** Windows Server 2008 / Windows 7 / Windows 8 / Windows 8.1 / Windows Server 2012 / Windows 10 / Windows Server 2016 / Windows Server 2019
- **Microsoft .NET Framework 2.0 and 4.5.2** (If not present, it will be automatically downloaded and installed.)
- **Microsoft SQL Server Express Edition:** Microsoft SQL Server 2014 Express (**Recommended**) or Microsoft SQL Server 2012 Express or Microsoft SQL Server 2008 Express or Microsoft SQL Server 2016 Express or Microsoft SQL Server 2017 Express
- **Microsoft SQL Server Standard or Enterprise:** This feature is supported only if you have an existing installation of SQL Server Standard or Enterprise. This needs to be purchased separately from Microsoft. Sohodox does not ship this. Support for SQL Server Standard or Enterprise based Sohodox DB is available as an optional paid module.

Note: If you are upgrading from a previous version of Sohodox, you may have to install Microsoft SQL Server Express 2014 (we provide an easy to use installer for this).

1.4 Bug Fixes

[Click here](#) to view the *Bug Fixes* page on the SOHODOX web site

2 For users upgrading from Version 5,6,7 or 8

This section has been specially written for the reference of users upgrading from Version 5, 6, 7 or 8.

For more information, please visit the link below...

<http://www.sohodox.com/support/kb/upgrading-from-previous-versions-of-sohodox>

2.1 Introduction to changes in Sohodox 9

Below are changes to features that you will see in version 9 of Sohodox:

Sohodox Server

Sohodox Server is a service which runs in the background on the machine on which Sohodox is installed in Server mode. The Server needs to be running for Sohodox Desktop Client and all other modules including the Sohodox Mobile App to work.

- Upgrading Sohodox on the server machine

By default the Sohodox Server is configured to listen on port 7733. If you change this port while installing the upgrade setup then you must ensure that the firewall is configured to allow connections on this port.

- Upgrading Sohodox on the client machine

While installing the upgrade setup on the client machine, you must enter the URL of the machine on which Sohodox Server is installed along with the port it is listening on. For example, if Sohodox server is installed on a machine named MACHINE1 having IP address 192.168.0.2 and listening on port 7733 then you can enter the URL of the Server in the setup as...

`http://MACHINE1:7733`

OR

<http://192.168.0.2:7733>

[Click here](#)^[344] to learn more about Sohodox Server

Login

Sohodox Login Manager

Sohodox Login Manager lets you specify the location of the Sohodox server. It also lets you control when and how often Sohodox Desktop Client and other Sohodox Apps should ask you to login before allowing access.

Click here to learn more about the Login Manager

- Logout behavior has changed

Starting from Sohodox version 9, users will not be logged out of Sohodox when they close the Sohodox Desktop Client. This is done so that the Sohodox Apps that are installed on the machine keep running even when Sohodox Desktop Client closes.

If you would like to change this behavior, you can do so in the Options dialog in the Sohodox Desktop Client. You can configure Sohodox to...

- * Always logout
- * Never logout
- * Prompt before logging out

- Auto-Login & Clear password options moved

The auto login and clear password options that were available from the Options dialog have now been moved to the Sohodox Login Manager

Folder Monitor

Folder Monitor is now renamed to Local Capture Folder. Everything else remains the same. You will not need change any configuration. Local Capture Folder will continue to monitor the folders that you had already configured in Folder Monitor. To add to this, the folders being monitored by the Local Capture Folder will appear in the folder list displayed when using the Send To feature to send a document to Sohodox.

[Click here](#)^[325] to learn more about Local Capture Folder and the new [Send to](#)^[348] Sohodox feature.

3 For users upgrading from versions earlier than version 5

3.1 Introduction to new concepts in Sohodox

This article is only intended for doQuments users (Before the release of version 5, Sohodox was known as doQuments) .

Sohodox addresses several limitations that existed in doQuments making Sohodox a far more flexible document management solution. This article will help users of doQuments understand the reasons for the changes and new features added in Sohodox.

Limitations with Version 4

Earlier versions of Sohodox, allowed you to define a single set of indexing fields in a database. You would then create a new record which could hold one or more documents and enter indexing information into the fields defined earlier. The indexing information would apply to all the documents in that record.

So suppose you had to manage two types of documents, checks and photographs, one approach you could take is to create indexing fields such as...

Document Type (with 'Check' and 'Photo' as the possible values)

Keywords (which could contain text keywords related to the document)

You would then store a single document (either a photo or a check) in every record of the database. This approach would enable you to manage documents of different types in a single database. Having a single database for all documents is important because the user does not have to open and close different databases in order to look for a document.

However if you wanted to store specific information for each type of document, there was no easy way to do it in version 4. For example if you wanted to store Photographer Name and Place Taken with each photograph and Check Date and Check Number with each Check, you could...

1) Create different databases for Photographs and Checks, with each DB containing indexing fields specific to the type of document it was intended to hold.

OR

2) You could create all four fields (Photographer Name, Place Taken, Check Date and Check Number) in the same DB and leave irrelevant indexing fields blank when entering indexing data

for a specific type of document.

Another way Sohodox was used to was to manage groups of documents, where each record of the DB contained multiple related documents and the indexing information entered was for the entire group of documents. Examples of this would be, having indexing fields which would hold information about a customer and then adding all documents for a customer into a single record.

The problem here was that there was no way to specify additional indexing information for specific documents which were already part of a record. Which means it was harder to search for and locate a particular document.

Sohodox

Sohodox significantly increases the number of ways you can index/classify a document. The simplest method offered is of arranging documents in a folder hierarchy. Users can create as many folders and sub folders as they want and they can also hide/share folders from/with other users. The second easy method offered is of attaching simple text tags to documents (think of it as attaching one or more labels to your documents). You can apply as many tags as required to a document. You can then search for documents to which a specific tag has been attached.

For a more structured indexing approach you can use the concept of Document Types. Document Types solve the Check and Photo problem described above. You can create two different Document Types one for Photos (with the fields Photographer Name, Place Taken) and one for Checks (with the fields Check Date and Check Number) in the same DB.

Another powerful feature is the ability to link any document to another document. You can have any number of links between documents. The combination of all these features enable you to build an extremely flexible and useful document repository.

3.2 FAQ's for users using doQuments Professional Edition

This FAQ is only intended for doQuments users (Before the release of version 5, Sohodox was known as doQuments) .

▼ What is Sohodox? What happened to doQuments Professional Edition?

doQuments Professional Edition is now renamed to Sohodox

▼ Can I upgrade from doQuments to Sohodox?

Yes you can easily upgrade from doQuments Professional edition to Sohodox. All your existing doQuments DBs will be automatically migrated to the latest version of Sohodox. An upgrade tool is available for the same.

▼ Why does it look so different?

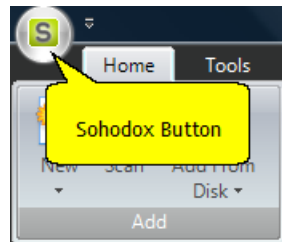
Sohodox user interface had been completely redesigned and it is now similar to the familiar MS Outlook user interface.

▼ Where have all the menus and toolbars gone?

The menus and toolbars have now been replaced with the Ribbon bar. This makes all important tools and features of Sohodox very easily accessible.

▼ I can't find the File menu

The File menu is not incorporated in any of the tabs of the ribbon bar. The File menu is replaced with a button called the Sohodox button. You will find this button at top-left corner of the main window. There are fewer options available from the Sohodox button compared to the options available from File menu of version 4. Many of those options are either incorporated in the ribbon bar or are available from the Settings pane.



▼ How do I create a new record?

There is no more a need to create a record before adding documents to it. Documents can be directly to the database by using any method such as drag & drop, scanning, import etc..

▼ What is Document Type?

Document Types are groups of indexing fields specific to a particular type of document

For example a Check may need indexing fields such as Check Number and Check Date while an Agreement may need indexing fields such as Agreement Date and Agreement Party etc. You can create as many Document Types as you want.

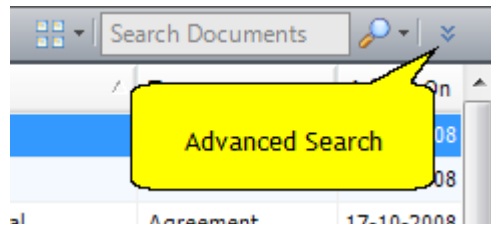
Use Document Types when you need a more structured way of method of managing your documents as compared to using Folders and Tags.

▼ Where is the Data Field Manager?

The Data Field manager is available as the Fields tab while creating or modifying a Document Type. For more info see, [Fields Tab](#)^[148]

▼ I can't find the Advanced Query?

Advanced Search pane is available by clicking the Double arrow button besides the Quick Search.



▼ Where is the Storage Folder and the System folder?

The System Folder and the Temp folder are no longer used in Sohodox. The Storage Folder is now referred as the *File Store*.

▼ Can I use my existing DB with Sohodox?

Yes you can use your existing DB's (version 4) with Sohodox but only after they have been converted to the new format. The Sohodox DB structure is VERY different from the version 4 structure. The DB in Sohodox have .gxdb extension.

▼ Where is the location.dqs/location.gxs file?

The location.dqs file is now referred to as the multi-user.gdx. The multi-user.gdx file is now stored in the ITAZ\Sohodox folder created under the folder designated as the Common Application Data folder in your Windows installation.

For Windows Vista/Windows 2008/Windows 7, this will be the C:\ProgramData\ITAZ\Sohodox folder.

For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Sohodox

Apart from multi-user.gdx file, the config.ini file is also stored in this folder.

4 Getting Started

You can manage your documents in Sohodox by using Tags, Folders and Document Types. We will learn about each of them as we find the need to use them.

We will first go through the interface of Sohodox and then, learn to use it...

Sohodox Database:

Sohodox uses a database to store all the information you add to it. It refers to this database as the Sohodox DB. When you add a file to Sohodox, it copies the file to a special folder linked to the Sohodox DB. Sohodox refers to this folder as the File Store. Information about the newly added file is stored in the Sohodox DB. The Sohodox DB also holds information about what tags have been attached to the newly added file as well any indexing data entered for the file.

Starting Sohodox:

1. Click on *Start > All Programs > Sohodox* or double click *Sohodox* icon desktop to run Sohodox.
2. The default username and password to login to Sohodox is as below...

Username : *superadmin*

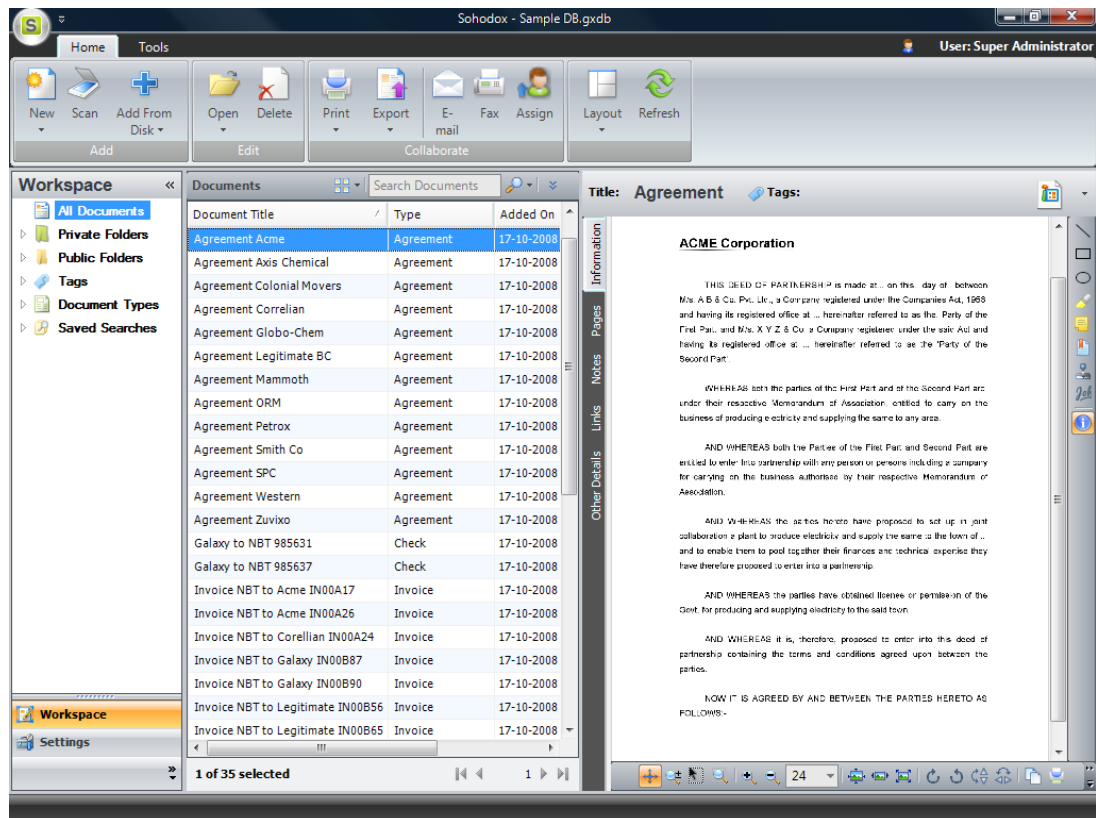
Password : *superadmin*

3. By default the Main DB will be opened and the *All Documents* node will be displayed.

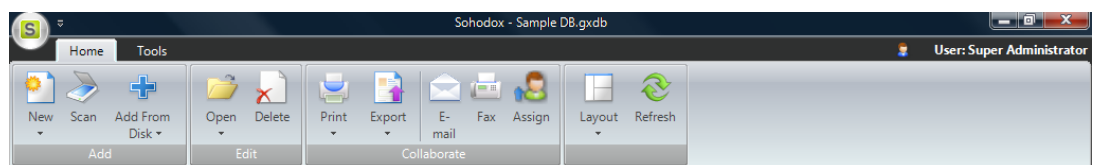
Sohodox User Interface:

This is Sohodox main window with a DB opened. The Sohodox Main window is divided into four main parts...

1. Ribbon bar
2. Navigation Pane
3. List View Pane
4. Details View (Display) Pane



1. Ribbon Bar:



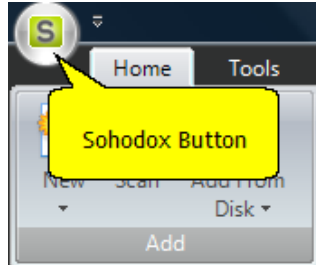
Sohodox user interface is similar to the familiar MS Outlook user interface. The menus and toolbars have been replaced with a single Ribbon bar. The Ribbon bar is divided into tabs (Home and Tools), which group related features together. This makes all important tools and features of Sohodox very easily accessible.

The Ribbon bar can be minimized by right clicking on the Ribbon bar and selecting the Minimize

the Ribbon option. You can also double click the ribbon bar tabs to minimize it.

For more details see [Home Tab](#)^[44], [Tools Tab](#)^[46]

Sohodox Button: Use the Sohodox button to login and log out of Sohodox. You can also use it for opening and closing a Sohodox DB.



2. Navigation pane:



The Navigation pane appears on the left side of Sohodox window. It gives you quick access to all the documents and data in your DB as well as the various settings for your DB. The Navigation pane contains navigation groups (e.g. Workplace, Settings) which in turn contain navigation nodes (e.g. All Documents, Folders). Selecting a navigation node displays the related information in the list view.

The Navigation pane can be minimized by clicking the Double Arrow on the top right corner of the Navigation pane.

The *Navigation pane* has the following navigation groups...

Workspace: This is your personal workplace. The workspace initially displays all navigation nodes (i.e. Folders, Tags, Document Types etc..) but you can customize the workspace to only display navigation nodes which are of interest to you.

▼ **Workspace navigation group** contains the following navigation items...

All documents: Select this node to view all documents that you are allowed to view.

Private Folders: Expand this node to view your private folders and sub folders. In this folder you can add documents and folders that you do not want other users to view.

Create New: Click this link to create a new Folder.

Public Folders: Expand this node to view the list of shared folders and sub folders. You can add documents and folders that you want to share with other users to this folder

Create New: Click this link to create a new Folder.

Tags: Expand this node to view the list of tags.

Create New: Click this link to create a new tag.

Document Types: Expand this node to view the list of Documents Types.

Saved Searches: Expand this node to view the list of saved searches.

Documents recently added by me: Select this node to view the list of recently added documents.

Custom Search: Expand this node to view the queries created and saved by you

Settings: The *Settings* group contains navigation nodes which let you access configuration settings for the system and the DB.

▼ **Settings contain the following items...**

System Settings: This node lists all the system settings options.

Users: Select this node to view/create/modify users.

Connected Users: Select this node to view all the users currently logged in to Sohodox. You can also disconnect users from here.

Security Policies: Select this node to view/modify the Inactivity Timeout for the logged in users.

Password Policies: Select this node to view/modify the user password policies.

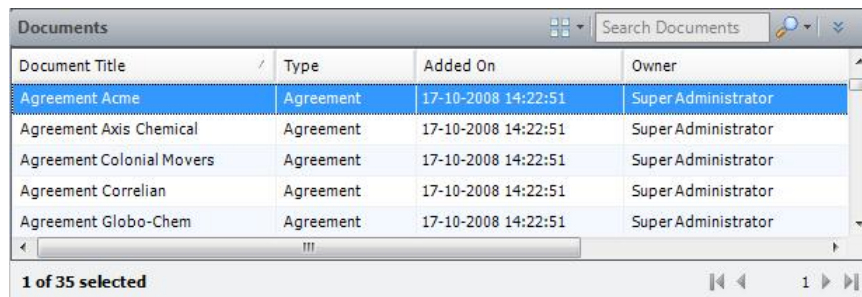
DB List: Select this node to view a list of DBs in Sohodox.

DB Settings: This node lists all the DB settings options.

Document Types: Select this node to create/modify [Document Types](#)^[173].

File Stores: Select this node to view/modify the Storage Location of the currently opened Sohodox DB.

3. List View Pane: This pane lists items related to the navigation item selected in the Navigation pane.



The screenshot shows a window titled "Documents" with a search bar "Search Documents". Below is a table with columns: Document Title, Type, Added On, and Owner. The first row is highlighted in blue.

Document Title	Type	Added On	Owner
Agreement Acme	Agreement	17-10-2008 14:22:51	Super Administrator
Agreement Axis Chemical	Agreement	17-10-2008 14:22:51	Super Administrator
Agreement Colonial Movers	Agreement	17-10-2008 14:22:51	Super Administrator
Agreement Correlian	Agreement	17-10-2008 14:22:51	Super Administrator
Agreement Globo-Chem	Agreement	17-10-2008 14:22:51	Super Administrator

At the bottom, it says "1 of 35 selected" and has navigation buttons.

- The order of the columns in the List View pane can be changed by dragging the column header and dropping it to the position you want.



The screenshot shows a window titled "Documents" with a search bar "acme". Below is a table with columns: Document Title, Owner, Added On, and Owner. A red arrow points to the "Owner" column header.

Document Title	Owner	Added On	Owner
Acme to NBT 239890	Check	17-10-2008 15:0...	SuperAdmin
Galaxy to NBT 985631	Check	17-10-2008 15:0...	SuperAdmin
Galaxy to NBT 985637	Check	17-10-2008 15:0...	SuperAdmin
Legitimate to NBT 78974	Check	17-10-2008 15:0...	SuperAdmin
Legitimate to NBT 78998	Check	17-10-2008 15:0...	SuperAdmin
NBT to ORM 287776	Check	17-10-2008 15:0...	SuperAdmin

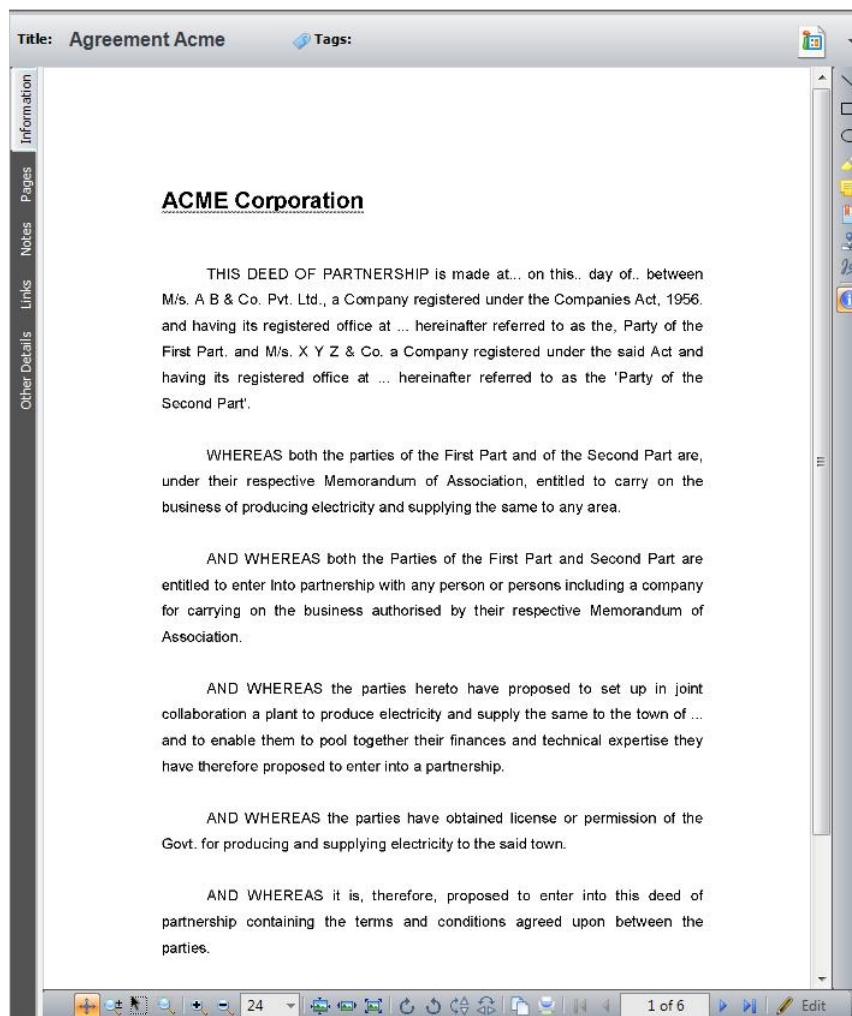
- To remove a column from the List View pane, right click a column header and deselect the column.
- By default 50 items will be displayed in a single page of the List View pane. To view the items (if any) on the other pages use the navigation buttons in the bottom right corner of the List View pane
- You can click any column header to sort in the ascending or descending order of values in that column.

See Also: [Customizing the List View pane](#)^[340]

Search: Use the *Quick Search* box to find items quickly. If you want to add more criteria to your search, use the *Advanced Search* by clicking the double arrow.



4. Details Pane: This pane displays details about the currently selected document in the List View Pane.



For more info see, [Document Details window](#)¹⁰⁸

Now, that you are familiar with the Sohodox user interface you can start using Sohodox or you can [continue with the tutorial](#)³⁶.

4.1 Managing your documents

In Sohodox you can manage your documents using any of the following methods...

- Folders
- Tags
- Document Types

You can also use a mix of the above methods.

Folders

This is the simplest and easiest way of managing your documents. You can create a folder hierarchy and then place the documents in the appropriate folders. You can also import your existing folder structure from Windows Explorer by dragging and dropping the folder structure onto a folder in Sohodox. The dropped folder, all it's sub-folders along with any files in them will get added to Sohodox.

The folder structure in Sohodox is stored inside a database and is therefore very fast. Viewing folder contents, moving documents between folders or moving folders themselves is very fast.

There are two types of folders:

Private Folders

Any folders and sub-folders a user creates under the *Private Folders* node are termed as that user's private folders. Each user has her own set of Private Folders which are not visible to any other user (except the superadmin). Any documents you add to a private folder are considered private documents. Private documents are not visible to other users (except the superadmin). Also you are set as the owner of any documents you add. An owner of a document can modify or delete that document.

You can change ownership of a document, by assigning the document to another user. In this case the document becomes the other user's private document and is no more visible to you.

Public Folders

You can make a document public by moving it from your private folder to a public folder. Any folders and sub-folders a user creates under the *Public Folders* node are termed public folders. Public folders are visible to all users. Any documents you add to a public folder are considered public documents. Public documents can be viewed and modified by any user. Public documents can only be deleted by the owner of the document (or by the superadmin).

Any public document that you own, can be made private again by moving it to any of your

private folders.

Documents you directly add to the All Documents node, a Tag node or a Document Type node are considered your private documents

Tags

Tags are keywords that can be attached to documents. You can attach multiple tags to each document. Tagging is a quick way of indexing your documents. Documents can be searched, sorted or grouped based on their tags.

Sohodox supports Dropbox integration through a pre-configured *Dropbox* tag. You can configure Sohodox to automatically sync all documents that have been assigned this tag with the Dropbox folder on your machine. Once synced, Dropbox on your machine will automatically sync those documents to your Dropbox account online as soon as the machine connects to the Internet.

In a lot of situations you will find just using the combination of *Folders* and *Tags* to be a very powerful way to manage your documents.

Document Types

Document Types allows you to use a more structured approach to manage your documents. Using Document Types, you can store specific indexing information with each document (for e.g. store Invoice Number, Invoice Date, Invoice Amount with each stored Invoice and store Sender Name, Date with each stored Letter).

The main advantage of this approach is that detailed information about each type of added document can be captured by creating very specific data fields. Doing this also increases the number of ways you can look for documents.

Sohodox ships with a few Document Types built-in such as Invoices, Checks etc.. ready for your use. If required you can easily modify these *Documents Types* by adding additional indexing fields or removing any existing indexing field. You can also delete any of these Document Types if you do not intend to use them. You can also create entirely new set of Document Types more suited to the type of documents you wish to manage.

Linking Documents

Another way to organize documents is to link them to each other. You can link any document to multiple other documents. All links are two way - so if you link a check to an invoice, when you open the invoice you will see the link to the check and when you open the check you will see the link to the invoice.

Bulk Import

You can use the Import data feature to quickly import all the required documents into the DB from CSV files. For more info see, [Import data from a CSV file](#)^[317]

For any help regarding this, contact us at support@itaz.com with your requirements. We will be

glad to help you choose the right approach.

4.2 Security Basics

Users

Sohodox lets you create as many users as you want*. For each user you must provide at least a user name and an email id. The user name is used for logging in to Sohodox and is case-insensitive. E.g. If your user name is JOHN you can login in as john, John or JOHN. Ideally a password must be provided for each user though it is not compulsory to do so (i.e. you can leave the password blank).

A Sohodox user can add/modify/delete all items (i.e. Documents & Folders) in the database, that they own. A user becomes owner of an item (i.e. Document or Folder), when the user creates that item or when an item is assigned to the user.

*Though Sohodox lets you create as many users as you want, it controls how many users can be simultaneously logged in at any given time. The maximum number of users that can be simultaneously logged in at any given time is based on the number of licenses purchased by the user.

Owner

A user becomes the owner of an item (for e.g. Document or Folder) when the user creates/adds that item. The user also becomes the owner of an item when that item is assigned to the user by another user.

Private and Public Folders

In Sohodox, you can have two types of folders, Private folders and Public folders.

Private Folders

Any folders and sub-folders a user creates under the *Private Folders* node are termed as that user's private folders. Each user has her own set of Private Folders which are not visible to any other user (except the superadmin). Any documents you add to a private folder are considered private documents. Private documents are not visible to other users (except the superadmin). Also you are set as the owner of any documents you add. An owner of a document can modify or delete that document.

You can change ownership of a document, by assigning the document to another user. In this case the document becomes the other user's private document and is no more visible to

you.

Public Folders

You can make a document public by moving it from your private folder to a public folder. Any folders and sub-folders a user creates under the *Public Folders* node are termed public folders. Public folders are visible to all users. Any documents you add to a public folder are considered public documents. Public documents can be viewed and modified by any user. Public documents can only be deleted by the owner of the document (or by the superadmin).

Any public document that you own, can be made private again by moving it to any of your private folders.

Private Documents

Documents you directly add to the All Documents node, any private folder node, a Tag node or a Document Type node are considered your private documents. You are also set as the owner of these documents. You can modify, delete or share (i.e. make public) any document you own.

You can move your private documents to any public folder to share them with other Sohodox users. These user can then view and modify (but not delete) these documents. You can also move any public document you own, back to a private folder to make it private again.

Public Documents

Public documents can be viewed and modified by all Sohodox users. Any documents you drag & drop from outside (e.g. from Windows Explorer) to a public folder in Sohodox, are considered your public documents. You are also set as the owner of these documents. You can view, modify or delete public documents that you own, while other users can only view or modify these documents.

You can also make any of your existing private documents public by moving them to any public folder. You can move any public document you own, back to a private folder to make it private again. Public documents are marked with the *shared* icon.

Password Policies

Maximum password age

Use this policy to set the maximum number of days after which a user's password will expire and will have to be changed. If you want the password to never expire, set this value to zero.

Minimum password length

Use this policy to set the minimum number of characters that a password must contain. Sohodox will not allow any user to set a password that is shorter in length than this value. If

you do not want to set a minimum value then set this value to zero.

Maximum Logon attempts

Use this policy to set the maximum number of consecutive failed logon attempts before Sohodox disables the user account. A disabled account can be enabled by the superadmin user. If you do not want to set a maximum logon attempts limit then set this value to zero.

Security Policies**Inactivity Timeout**

The Inactivity Logout policy allows you to set a time limit for application inactivity. So, if the logged in user remains inactive for the specified time period then user is automatically logout from the system. This can be used to terminate the connection to Sohodox which appears to be logged in, in case of improper shut down of user machine.

Never logout

Check this option if you want do not want inactive users to be automatically logged out of Sohodox

Application Inactivity time out

Enter the number of minutes to set the time limit for application inactivity.

Allow Remember Password and Auto-Login

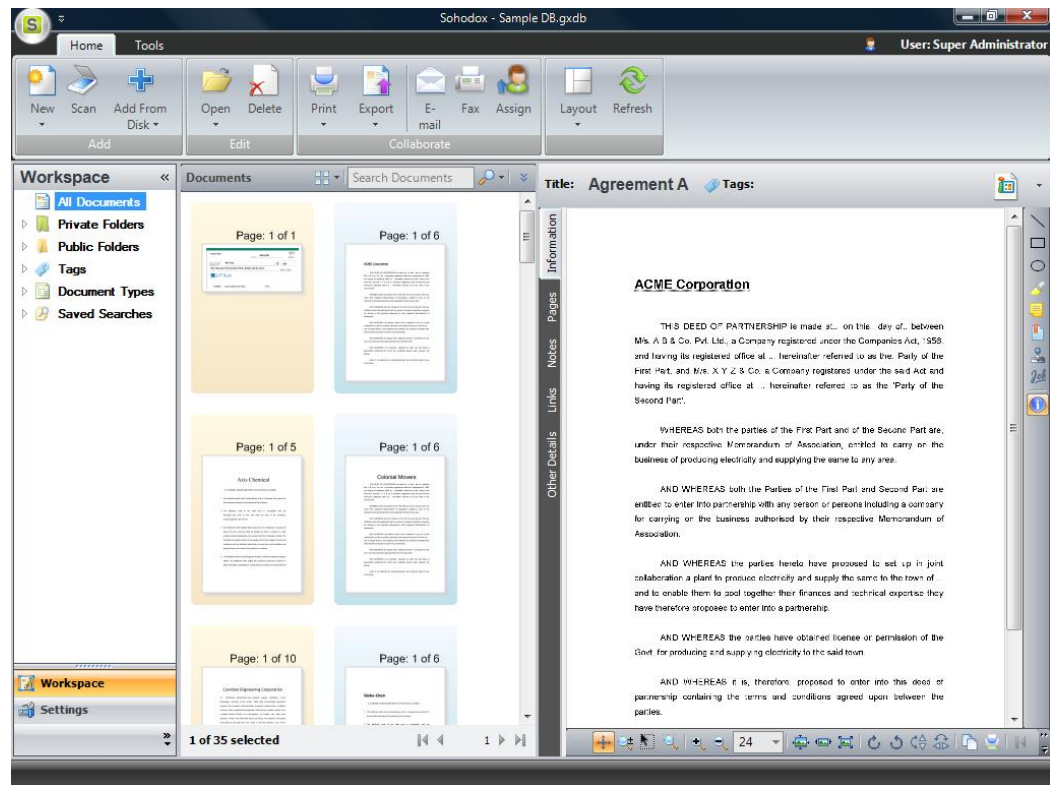
Use this policy to allow users to use the Remember password option on the login screen. This policy also allows users to choose to automatically login to Sohodox on Windows startup.

4.3 Working with Sohodox

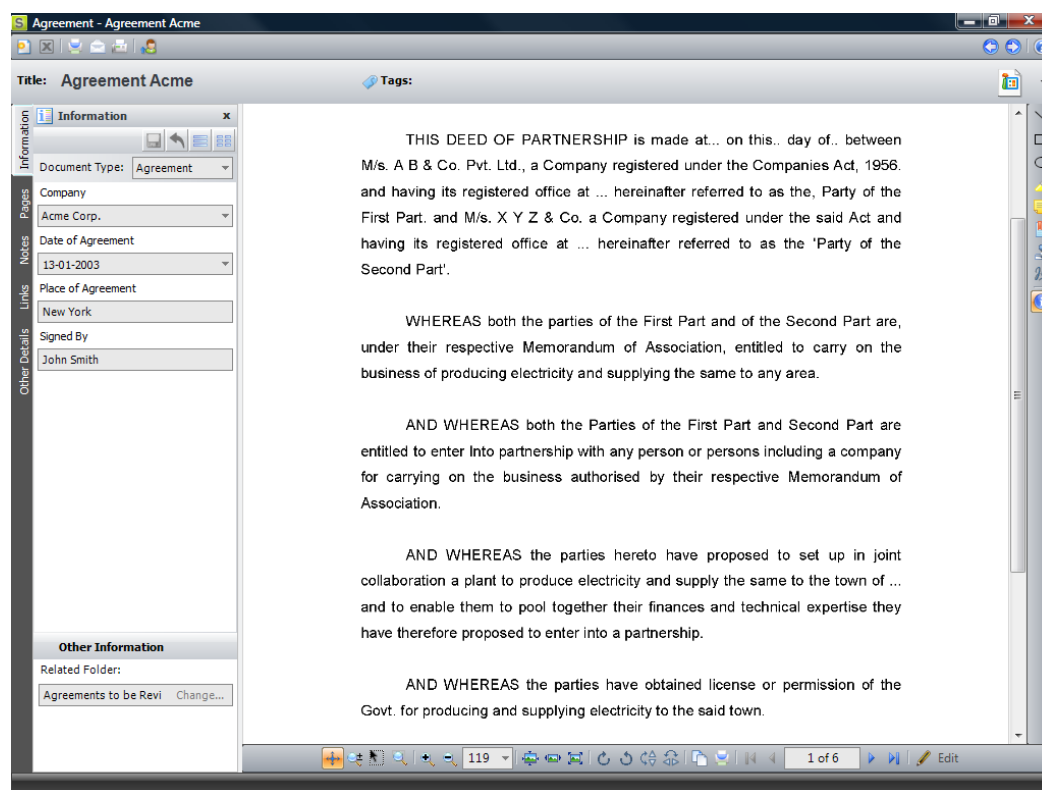
Working with Documents

When you start Sohodox, the default node selected is *All Documents*. You can change the default node that is selected on startup from the *Options* window (Sohodox button > Options).

The *All Documents* node displays all documents that the currently logged in user is allowed to view. By default 50 documents are displayed in the List View pane. To view more documents use the navigation buttons at the bottom of the List View pane. To view documents as Thumbnails click the Views button that is located towards the left of Search box and then choose *Small Thumbnails*, *Medium Thumbnails* or *Large Thumbnails*. Select the List View option from the Views drop-down to view documents as a list.



Document Details Window: Details of the document selected in the List View pane are displayed in the *Details* pane. You can also double-click any document in the List View pane, to open it in a separate window called the Document Details window.



Document Details Window

The Details window has the actions toolbar on top, towards the right is the Annotation toolbar and at the bottom is the Image toolbar. The document title is displayed in the Title box. Modify the text in this box, to change the document title. Tags can be added to a document using the Tags box. You can also remove existing tags using this box. Use the Navigation buttons on the top right corner of the Details window to go the next or previous document. Use the Navigation button on the Image toolbar to navigate between the pages of the document.

On the left side of the Document Details window there are tabs, they are *Information*, *Pages*, *Notes*, *Links* and *Other Details*.

- **Information:** The Information pane displays the *Document Type* of the document as well as the indexing information entered for the document. You can add or modify the indexing information from this pane.

Related Folder: If the document is stored in a folder, then the name of that folder is displayed in this box. You can also change the document's folder

using this box.

- **Pages:** The Pages tab displays all the pages of the document as thumbnails. The Pages panel also displays any *Bookmarks* created in the document. Thumbnails for certain file types will not be displayed.
- **Notes:** The Notes tab displays the notes or comments entered by users, regarding the document.
- **Links:** The Links tab displays the documents that are linked to the document. You can also link the document to another document from this pane.
- **Other Details:** The *Other Details* tab displays additional information about the document.

Close the Document Details window.

We will now create a folder and then add a document to our new folder.

To create a folder, expand the Folders node and click *Create New*. A new folder will be created, enter a name for the folder and hit the Enter button. The new folder will be created and automatically selected.

Now on the Home tab, click the Add from disk button. The Add Files window will now be launched. Select one or more files that you want to add and click the Open button. The documents will now be added to Sohodox and will be listed in the new folder.

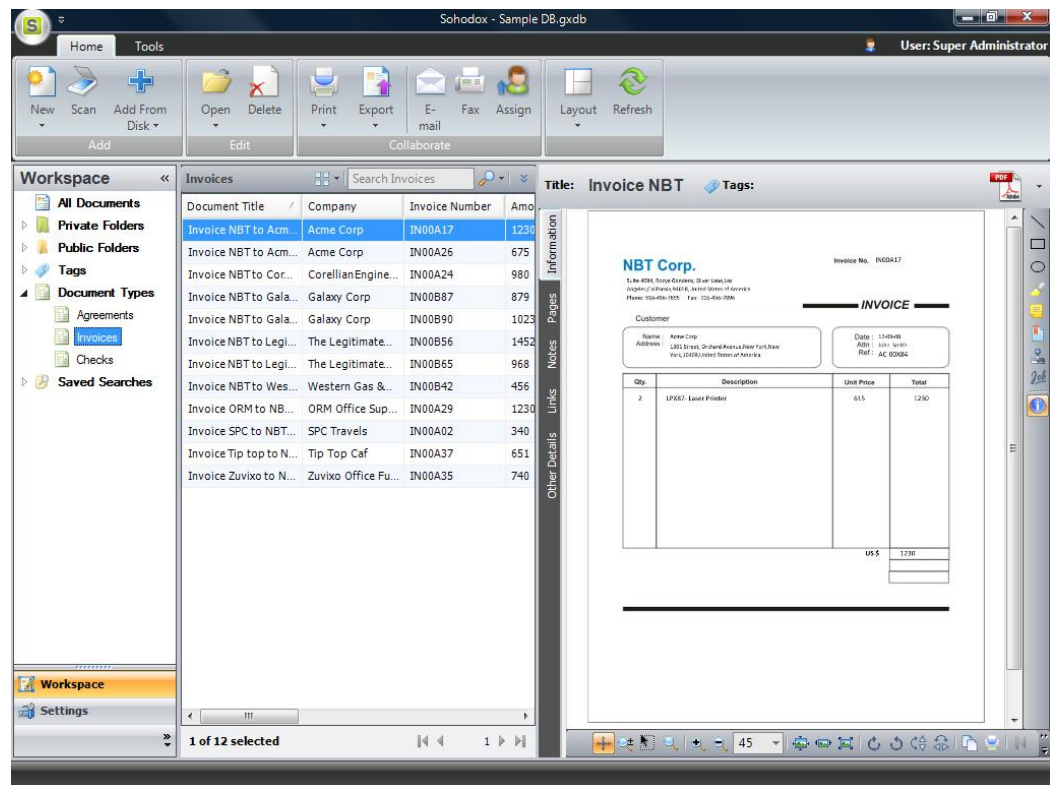
The simplest way of adding a document to Sohodox is by dragging and dropping the document on the All Documents node, on any *Folders* node, on any *Tag* node or on any *Document Type* node. You can also drag text from any source e.g. MS Word, PDF, Web page or from your email and drop it in Sohodox to automatically save it as a new file. Documents can also be added by using options like the *Find and Add* and *Scan* options. If you have an existing Folder structure that you use to manage your documents, you can use the *Add Folders from Disk* option to import the entire folder structure along with documents to Sohodox. You can also import multiple documents along with their indexing information from a CSV file.

Document Types: Double click the document that you just added to the folder to open it in its Details window. In the Information pane, you must have noticed that there are no indexing fields. This is because no Document type has been set for this document (see [Managing your documents](#)^[32])

Now, in the Information tab select a Document Type for the document. You can create a new Document Type, if the document does not belong to the types that are listed in the Document type drop-down. Document Types can be created from *Settings* node of the Navigation pane.

To view documents based on their types, in Sohodox main window expand the Document Types

node in the Navigation pane and select a document type (e.g. Invoice). All the documents that have their Document Type set to Invoice will now be displayed in the List View pane.



Document Actions: All the actions that are required to work with documents are available on the *Home* tab or on the right click menu of the list view pane. These are some of the actions that are available from the Home tab.

Email: Select the document(s) and click the *Email* button on the Home tab or right click document(s) in the List View pane and select the Email option to mail documents.

Fax: Select the document and click the *Fax* button on the Home tab. Documents can also be faxed by right clicking the document and selecting the *Fax* option.

Print: Select the document(s) and click the *Print* button on the Home tab or right click document(s) in the List View pane and select the Print option to print documents.

Annotation: You can use the *Annotation* toolbar on the right bar of the *Details* pane to mark,

highlight certain part of the document. You can also zoom, rotate or flip a document by using the *Image* toolbar at the bottom of the *Details* pane.

Full Text Search/OCR: Use the Full text feature to search for text in a document. The Full Text Search feature works by extracting text from documents that you add to a Sohodox DB and then indexing the text.

To extract text from document(s) right click that document and select the Extract and Index option.

Text extraction is done by using OCR (for image files) and IFilters (for other file types) installed on the user's machine. IFilters act as plug-ins and are a part of Microsoft Indexing Service (they are also used by Windows Desktop Search). For Sohodox to be able to extract text from a file of a particular format, an IFilter for that file format must be installed on the user's machine.

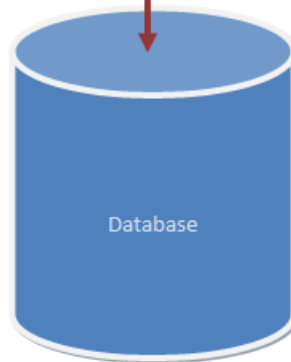
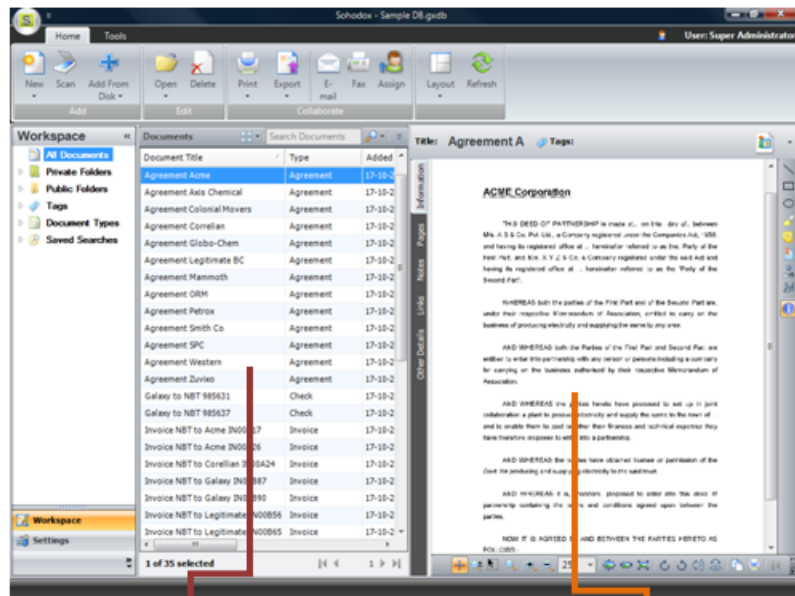
OCR is done by using the built-in OCR engine or it can be also done by using the Microsoft OCR engine (to use this feature you must have Microsoft Office Document Imaging installed). Use the Options window (available by clicking the Sohodox button) to select your default OCR engine.

That's It! Now, that you are familiar with Sohodox you can go ahead and start adding documents to it. We recommend you first learn to add documents and then learn things like creating Document Types.

4.4 Where does Sohodox store all my data?

Where does Sohodox Store all my Data?

Sohodox stores its data inside the Sohodox DB. The Sohodox DB is linked to a Windows folder. Any files you add to the Sohodox DB are copied to this folder. Sohodox refers to this folder as the DB's [File Store](#)^[290]. All indexing information you enter is stored inside the Sohodox DB. The DB also contains information which links the indexing information with the correct document in the file store. So when you try to open a document in Sohodox, its indexing data is retrieved from the DB and the document is retrieved from the File Store.



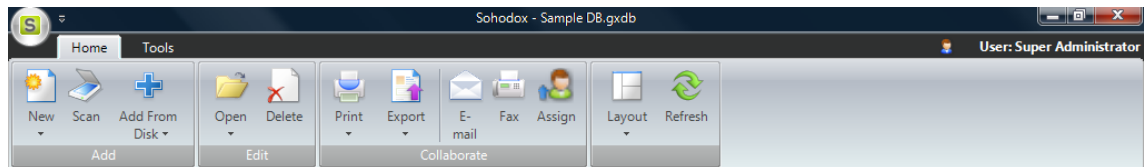
Related Topics

[What is a Sohodox DB?](#) ²⁸⁵

[Create a File Store](#) ²⁹¹

4.5 Home Tab

The *Home* tab provides quick access to the most common tasks that you will need to perform with your documents. Tasks that are related to each other are grouped in the *Home* tab. The *Home* tab is spilt into groups, they are as follows...



Add Group

The *Add* group consists of various options to add a document to a Sohodox DB. This group consists of the following buttons...

New: Click this button to add a new document.

▼ The New button has the following options...

Document: Select this option to create a new document.

Document using Template: Select this option to create and add documents using a template.

Document Type: Select this option to create a new [Document Type](#)^[173].

File Store: Select this option to create a new [File Store](#)^[290].

Scan: Click this button to [scan and add documents](#)^[77].

Add from disk: Click this button to add documents from disk.

▼ The Add from disk button has the following option...

Find and add: Select this option to [find documents on disk and add](#)^[55] it to the Sohodox DB.

Add Folders from Disk: select this option to [add folders from disk](#)^[52] to the DB.

Edit Group:

The Edit group consists of various options to edit a document. This group consists the following buttons...

Open: Click this button to open a document.

▼ The Open button has the following options...

Associated Application: Select this option to open the document in its associated document.

Selected Application: Select this option to select an application to open the document.

Delete: Click this button to delete a document.

Collaborate Group

The *Collaborate* group consists of options which can be used to move documents from one location or person to another. This group consists the following buttons...

Print: Click this button to print the data that is displayed in the [List View](#)^[29] pane.

Print Documents: Click the *Print* drop-down and select the *Print Documents* option to print documents.

Export: Click this button to export the data that is displayed in the *List View* pane. For more details see [Export data](#)^[304]

Export to CD/DVD: Click the *Export* drop-down and select the *Export to CD/DVD* to export data to CD/DVD.

E-mail: Click this button to e-mail documents.

Fax: Click this button to launch Sohodox Fax Add-on.

Route: Click this button to launch Sohodox Workflow Add-on.

View Group

The *View* group consists of options to change the layout view. This group consists the following buttons...

Layout: Click the *Layout* drop-down and select the option as per your choice to change the view.

Refresh: Click this button to refresh the display grid.





4.6 Tools Tab

The *Tools* tab consists of tools that can be used to import documents from other applications into Sohodox, it also consists of tools that can be used to customize Sohodox interface as well as your Sohodox account as per your needs.

<i>Template Manager</i>	Click this option to add, modify or delete a template.
<i>Destination Profiles</i>	Click this option to configure Sohodox to save documents to a particular folder with preset indexing information like tags, document type, data fields etc. The profiles can be selected at the time of adding documents to Sohodox without needing to enter destination details every time.
<i>Import</i>	Click this option to import indexing data and/or documents from any delimited text file to a Sohodox DB
<i>Multi-user DB</i>	Click this option to configure the Sohodox DB for multi-user scenario
<i>Convert DB</i>	Use this option to convert your Access based DB to SQL Express.
<i>Export Configuration</i>	Click on this option to export the 'multi-user.gdx' file
<i>Email Capture</i>	Use this option to capture email from your Email Client.
<i>Capture Folders</i>	Use this options to add documents automatically from watched folders.

5 Add a document

Topics Covered

1. [Drag and drop a document](#)  48
2. [Add documents from disk](#)  49
3. [Add existing folder along with the files from disk](#)  52
4. [Find and Add documents](#)  55
5. [Drag and drop text from a document](#)  59
6. [Drag and drop image from a web page](#)  60

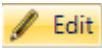
5.1 Drag and drop a document

You can add documents by dragging and dropping them to a Sohodox DB.

To Add Documents by Dragging & Dropping:

1. In Sohodox, select the *All Documents* node in the [Navigation](#)^[26] pane.
2. Using Windows Explorer select the files you want to add and drag & drop them in the List View pane.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

- By default 50 documents are displayed on the List View pane. If you have added more than 50 documents they will be moved to the next page. To view the documents displayed on the next page use the *Navigation* buttons below the List View pane.
- You will be the Owner of the documents, that you have added.
- By default documents added to Sohodox can only be viewed and modified by the owner/ creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- You can click the *Edit* button  to edit the scanned document in the Image Editor . Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
- Dragging & dropping email messages as well as email attachments from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Sohodox also supports preview of .msg files imported from MS Outlook.

Related Topics

[Drag and drop text from a document](#)^[59]

[Find and Add a document](#)^[55]

[Scan multiple single paged document](#)^[79]

[Share documents](#)

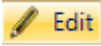
5.2 Add documents from disk

You can add documents to a Sohodox DB by clicking the *Add from Disk* button of the *Home* tab.

To Add Documents from Disk:

1. In Sohodox, select the *All Documents* node to add the documents.
2. Click the *Add from disk* button of the *Home* tab. The *Add Files* window will now be launched.
3. Select one or more files that you want to add and click the *Open* button on the *Add Files* window. The documents will now be added to Sohodox.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

- By default 50 documents are displayed in the List View pane. If you have added more than 50 documents they will be moved to the next page. To view the documents displayed on the next page use the Navigation button below the List View pane
- By default documents added to Sohodox can only be viewed and modified by the owner/creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- You can click the *Edit* button  to edit the scanned document in the Image Editor. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
- You can click any column header of the List View to sort documents in the ascending or descending order of values in that column.
- You can add your entire folders structure along with the documents on your disk that you use to organize your documents. For more info see, [Add the existing folder structure along with files from disk](#)^[52]

Related Topics

[Find and Add a document](#)^[55]

[Set a Document Type of a Document](#)^[184]

[Enter Indexing Information for a Document](#)^[166]

Drag and drop text from a document

5.3 Advanced File Addition dialog

You can now add documents using the Advanced File Addition dialog instead of the old Add from Disk dialog. (This feature is supported from Sohodox v11 or above)

To enable this option:

1. In Sohodox, click the Sohodox button (the round button on the top left) >> Options.
2. Click on the 'Advanced..' button.
3. Select the File selection dialog. Click the Edit button on the right. The 'Advanced Settings Editor' dialog will be launched.
4. In the drop down, select 'Advanced File Addition dialog'.
5. Click OK.
6. Click Close on the 'Advanced Settings Editor' dialog.
7. Click OK to close the Options dialog.

To Add Documents :

1. Select the *All Documents* node to add the documents.
2. Click the *Add from disk* button of the *Home* tab. The Sohodox Uploader window will now be launched.
3. Click on 'Select files'. Select one or more files that you want to add and click the *Open* button on the *Add Files* window. (You can also drag and drop files or folders from Windows Explorer to the 'Drop files here' box).
4. You can also select a [Destination Profile](#)^[279] on the right pane to categorize your documents.
5. Click on the Upload button. The documents will be added to Sohodox.

5.4 Add a document to Sohodox drive

You can add documents by dragging and dropping them to Sohodox drive.

To Add Documents by dragging and dropping to Sohodox drive:

1. Start Windows Explorer and click on My Computer. A list of drives will be displayed.
2. Double click the Sohodox Drive icon. If you have already logged in to Sohodox once or Sohodox is running, the drive will open without a login confirmation or else you will be prompted to enter the Sohodox credentials.
3. Double click on the MainDB to which you want to add documents. The DB will open listing Documents, Tags and Folders.
4. Double click on Documents.
5. Using Windows Explorer select the files you want to add and, drag & drop them in the Documents pane. The documents will now be added to Sohodox.

Note:

Adding files directly to the drive will always leave the file in the original location even though you have specified the option to 'Delete files from original location' after adding.

Notes:

- You will be set as the Owner of the documents, that you have added.
- You can add documents to the Folders and Tags.

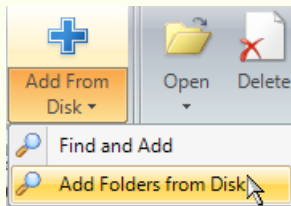
5.5 Add your existing folder structure along with files from disk

You can add the entire folder structure (on your local machine), that you use to organize your documents to the Sohodox DB.

To Add Existing Folder Structure along with Files to the

Sohodox DB:

1. In Sohodox, click the *Add from disk* drop down and select the *Add Folders from disk* option on the *Ribbon* bar. The *Add Folders from disk* window will be launched.



2. Check the folder or folder structure that you want to import to Sohodox from the *Choose folders from disk* pane.
3. Select the *Import files and folder tree* option to import both the files and the folder structure to Sohodox.
4. Check the *Use exceptions* option to use exceptions (optional).

You can use *Exceptions* to exclude or include particular file or file types to the Sohodox DB. For e.g. If the folder that you have selected contains pdf, doc, tiff, jpeg files and if you only want to add .DOC files to the DB, then you can use an exception which will add the .DOC files and exclude the remaining files.

▼ Follow these steps to use Exceptions

- a) Click the *Exceptions* button to add exceptions. The *Exceptions* window will be launched.
 - b) Select the *Do not add these files* tab to specify the file or file type you want to exclude and then click the *Add* button. For e.g. if you do not want to add .PDF files, then type *.PDF in the text box and click the *Add* button to add it to the list.
 - c) Select the *Add only these files* tab to specify the file or file type you want to include and then click the *Add* button. For e.g. if you only want to add .DOC files, then type *.DOC in the text box and click the *Add* button to add it to the list.
 - d) To remove an *Exception* from the list, select it and click the *Remove* button.
 - e) Click *OK* button to close the *Exceptions* window.
6. Click the *Preview* button to view the folder structure and the files that are going to be imported to the Sohodox DB.
 7. Click the *Add* button to add the folder structure and the files to the Sohodox DB.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

8. Click the *Close* button to close the *Add Folders from disk* window. Now, navigate to the *Folders* node in the [Navigation](#)^[26] pane to view the folders along with the documents.
9. You can now set the [Document Type](#)^[173], of these documents.

- You will be the Owner of the documents that you have added.
- By default documents added to Sohodox can only be viewed and modified by the owner/creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- You can add only the folder structure (without the documents) that you use to organize your documents, to the Sohodox DB. For more info see, [Add existing folder structure to Sohodox DB](#)^[198]
- If you are a Paperport user, then see [Import data from Paperport](#)^[323], to import your documents from Paperport to Sohodox.

Related Topics

[Edit a document](#)^[120]

[Find and Add a document](#)^[55]

[Drag and Drop a Folder](#)^[190]

5.6 Find and Add documents

You can search for documents on your disk and add them to Sohodox by using the *Find and Add* option.

To Find Documents and Add them to Sohodox:

1. In Sohodox, click the *Add from disk* drop down and select the *Find and Add* option on the *Ribbon* bar. The *Find and Add Files* window will be launched.



2. Click this button besides the *Look in* box of the *Find and Add Files* window, to select the folder in which you want to search the documents. This will bring up the *Browse for folder* window. You can also type in the location of the folder in the *Look in* box.
3. Select the folder and click *OK*. The folders location will be displayed in the *Look in* box.
4. Type all or part of the file name in the *Search for* box to search that file in the selected folder. The name can contain wildcard characters (* and ?).
▼ [Click here to know more about using wildcard characters](#)

A wildcard character is a keyboard character such as an asterisk (*) or a question mark (?) that you can use to represent one or more real characters when you are searching for files or folders. Wildcard characters are often used in place of one or more characters when you don't know what the real character is or you don't want to type the entire name.

Asterisk (*)

You can use the asterisk as a substitute for zero or more characters. If you're looking for a file that you know starts with gloss but you can't remember the rest of the file name, type the following:

*gloss**

The *Find and Add* window will locate all files of any file type that begin with the word gloss including Glossary.txt, Glossary.doc, and Glossy.doc.

To narrow the search to a specific type of file, type:

gloss.doc*

In this case, the *Find and Add* window will find all files that begin with gloss but have the file extension .doc, such as Glossary.doc and Glossy.doc.

Question Mark (?)

You can use the question mark as a substitute for a single character in a name. For example, if you typed *gloss?.doc*, the *Find and Add* window would locate the file Glossy.doc or Gloss1.doc but not Glossary.doc.

5. Check the *Include Sub-Folders* option to search for files within sub- folders (if any), of the selected folder.
6. Now, click the *Search* button. The files that match your search criteria will be listed in the *List of files to be added* pane.
7. Uncheck the *Clear previous search results* option if you want the list of files returned by the new search to be added to the list of the files returned by a previous search.
8. Click the *Browse and Add* button to select any additional files that were not found in the search(optional). The selected files will be listed in the *List of files to be added* pane.
9. In the *List of files to be added* pane check the files that you want to add and uncheck those files that you do not want to add to the Sohodox DB.
 - a) Click the *Select All* button to select all the files in the *List of files to be added* pane.
 - b) Click the *Select None* option to uncheck all the files in the *List of files to be added* pane.
10. Check the *Use exceptions* option to use exceptions (optional).

You can use Exceptions to exclude or include particular file or file types to the Sohodox DB. For e.g. If the folder that you have selected contains pdf, doc, tiff and jpeg files. However, if you only want to add .DOC files, then you can use an exception which will add the .DOC files and exclude the remaining files.

▼ **Click here to learn to use Exceptions**

- a) Click the *Exceptions* button to add exceptions. The *Exceptions* window will be launched.
- b) Select the *Do not add these files* tab to specify the file or file type you want to exclude and then click the *Add* button. For e.g. if you do not want to add .PDF files to the *List of files to be added* pane, then type *.PDF in the text box and click the *Add* button to add it to the list.


c) Select the *Add only these files* tab to specify the file or file type you want to include and then click the *Add* button. For e.g. if you only want to add .DOC files to the *List of files to be added* pane, then type *.DOC in the text box and click the *Add* button to add it to the list.

d) To remove an *Exception* from the list, select it and click the *Remove* button.

e) Click *OK* button to close the *Exceptions* window.

11. Specify the location to add the selected files in the *Destination* tab (optional). You can also use a [Destination Profile](#)^[279] from the *Select a Destination Profile* drop down to specify the location to add the selected files.

▼ Follow these steps to specify the Destination for the selected files

a) Click this  button besides the *Choose a Folder* box to select a folder to add the selected files.

▼ The Folder Selection window will be launched.

i. Select a folder from the list. You can use the *Search* box to search a folder.


ii. Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.

b) You can add [Tags](#)^[204] (keywords) to the selected files in the *Attach Tags* option. You can type as many tags you want by using a semi-colon to separate them.

c) Set the [Document Type](#)^[174] of the document, from the *Set a Document Type* drop down. For e.g. Set the Document Type to 'Invoice' if the selected files are invoices.

12. You can also link the selected files with other documents by using the *Links* tab.

▼ Use the Link to existing Documents box to link the selected files to existing documents


a) Click this  button besides the *Link to existing documents* box. The *Look Up* window will be launched.

b) Select *Documents* option from the *Look in* box and type all or part of the file name in the *Look for* box.

c) Now, click the *Find* button. The documents that contain the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.

d) Select the document that you want to link with the selected files and add it to the *Selected Files* list.

e) Click the *OK* button to link these documents.

Note: You can add more links by clicking this  button and you can break a link by

clicking this  button.

Also see, [Link one Document with another Document](#)^[127]

13. Now, click the *Add* button to add the selected documents to the Sohodox DB.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

14. Click the *Close* button to close the *Find and Add* window.

- You can add your entire folders structure along with the documents on your disk that you use to organize your documents. For more info see, [Add the existing folder structure along with files from disk](#)^[52]
- By default 50 documents will be displayed in the List View pane. If you have added more than 50 documents they will be moved to the next page. To view the documents displayed on the next page use the *Next* button below the List View pane.
- By default documents added to Sohodox can only be viewed and modified by the owner/creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- You will be the Owner of the documents that you have added.

Related Topics

[Find document quickly](#)^[224]

[Share documents](#)^[123]

[Enter Indexing Information for a Document](#)^[166]

[Drag and drop text from a document](#)^[59]

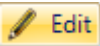
5.7 Drag and drop text from a document

You can also drag and drop text from a document and add that text as a document in Sohodox

To Create a New Document by Dragging and Dropping Text:

1. In Sohodox, select *Workspace > All Documents* in the [Navigation](#)^[26] pane.
2. Select the text from a file for e.g. MS Word (.DOC) files, Web Pages (HTML) files or email messages
3. Drag this text and drop it in the *List View* pane. A new document will be created containing the text you selected.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

- You will be set as the Owner of the documents, that you have added.
- You can click the *Edit* button  to edit the scanned document in the Image Editor . Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
- By default documents added to Sohodox can only be viewed and modified by the owner/ creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- You can also drag & drop text to a folder, tag or document type node in Sohodox.

Related Topics

[Drag and Drop a document](#)^[48]

[Drag and drop image from a web page](#)^[60]

[Share documents](#)^[123]

5.8 Drag and drop image from a web page

You can also drag and drop text from a document and add that text as a document in Sohodox


To Create a New Document by Dragging and Dropping an image from a web page:

1. In Sohodox, select *Workspace > All Documents* in the [Navigation](#)^[26] pane.
2. Drag any image from a web page opened in a web browser and drop it in the *List View* pane. The image will be added to Sohodox.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

This feature works with Internet Explorer and Google Chrome. It may not work with all browsers.

Due to the way some web pages are built you may not be able to drag and drop all images from a web page.

- You will be set as the Owner of the documents, that you have added.
- You can click the *Edit* button  to edit the scanned document in the Image Editor. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
- By default documents added to Sohodox can only be viewed and modified by the owner/creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- You can also drag & drop text to a folder, tag or document type node in Sohodox.

Related Topics

[Drag and Drop a document](#)^[48]

[Drag and drop text from a document](#)^[59]

[Share documents](#)^[123]

5.9 Replace document from disk

You can replace a document from the Sohodox DB with another file on the disk by using the *Replace from disk* option.

To Replace Document from Disk:

1. In Sohodox, select the document to be replaced from the [List View](#)^[29] pane.
2. Right click that document and select the *Replace from disk...* option.
3. The standard *Windows File Open* dialog will be launched.
4. Select the file you want to use to replace the document.
5. Now, click the *Open* button to replace the document.
6. The replacement file will be displayed (previewed) in the display pane.

- You can create a new document by dragging and dropping text from an RTF file to Sohodox. For info see [Create a New Document](#)^[116].

Related Topics









[Drag and Drop a document](#)^[48]

[Drag and drop text from a document](#)^[59]

6 Scanning Documents

Topics Covered

1. [For Users upgrading from version 7.6 or earlier](#)^[63]
2. [Scanners & TWAIN compliance](#)^[64]
3. [Scan Window](#)^[65]
4. [Image editor Window](#)^[72]
5. [Scan and add a single document](#)^[77]
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7. [Scan All pages as One Document](#) 
8. [Scan documents with fixed number of pages](#) 
9. [Scan document with variable number of pages](#) 
10. [Scan a color document](#) 
11. [Insert a page to a multi-paged document](#) 
12. [Save the frequently used Scan settings as Scan Profile](#) 
13. [Replace Document by Scanning](#) 
14. [Automate the Scan Process](#) 

6.1 For Users upgrading from version 7.6 or earlier

If you have upgraded from version 7.6 or earlier, you will see the following changes in the scanning features in Sohodox:

Current Scan Settings Summary

A summary of the current scan settings is displayed below the Scan Profile drop-down. So when you choose a profile, you can see a quick summary of the scan settings stored in the selected profile. If after you select a profile, you make some changes to any of the scan settings, then the summary will be updated to show the changed settings.

You can now automatically despeckle scanned images during the scanning process

A new option has been added to automatically despeckle the scanned image during the scanning process. When you select this option before scanning a document, it will remove noise (tiny black spots) from the scanned image.

Virtual Duplex Scanning mode

Sohodox can handle duplex scanning even if your scanner does not have built-in support for duplex scanning.

DPI settings are now adjusted depending on the scanner

Prior to version 7.6, Sohodox used to support a fixed set of DPIs (150, 200, 300) for all types of scanners. Now the DPI will be shown depending on the scanner. If your scanner supports 600 dpi, you can scan the document using this DPI.

Better quality Black and White scanning

The quality of Black and White scanned images is now better than in the previous versions.


Scan Preview window offers 2 view options

The Scan Preview window now allows you to select a Page view (each scanned page displayed as a single thumbnail) or Document view (each scanned multi-page document displayed as single thumbnail) of the scanned documents.

Separator pages (Blank page or Barcode) now made clearly visible in the Scan Preview window

Separator pages (Blank page or Barcode) are now displayed in the Scan Preview window so you can see if a non-separator page has been wrongly detected as a separator page.

Reverse of scanned documents now made identifiable

When documents are duplex scanned, the Scan Preview window makes it easy to differentiate between the front and reverse of the document. It displays the reverse of the page with this  icon at the bottom left of the page preview.

Some scan settings can now be changed after pages have been scanned

You can now choose the file format in which to save scanned documents even after you have scanned your documents. Based on the file format you choose you can also specify if you wanted the documents to be saved as single page document or multi-page documents.

Example:

If you have scanned 4 pages and selected the format as JPEG then Sohodox will create 4 different documents of one page each. But if you choose PDF or TIFF, you choose to save all 4 pages as a single multi-page file. When you change file format settings (or single/multi-page settings), Sohodox will rearrange the documents in the preview pane so it is easy to see how the pages will be saved.

Scanned documents now added based on last set file type settings

In previous versions of Sohodox, you could scan multiple documents each with a different file format in the same scan session. From version 8, however, the scanned documents are added to Sohodox based on the last set file type settings.

Example:


If you have scanned 2 pages of different file formats (first a PDF and then a JPG) in the same scan session and now want to add them, Sohodox will add the documents as 2 different JPG files because the last selected file type was JPG. In the previous versions, it would have added the documents as one PDF and one JPG file.

6.2 Scanners & TWAIN compliance

Is Sohodox TWAIN complaint?

Sohodox is TWAIN compliant. That means it lets you scan documents directly in to the application. For this feature to work properly you must have a TWAIN compliant scanner (most scanners are TWAIN compliant). The scanner drivers must be correctly installed on your machine. You must also ensure that the scanner is connected to your PC and switched on before you attempt to scan documents in to Sohodox.

Sohodox also support scanners with an ADF (Automatic Document Feeder) attachment. Such scanners allow users to place a stack of documents on the scanner/ADF tray. These documents are then automatically picked up by the ADF and fed to the scanner without requiring manual intervention. ADF scanners are extremely convenient if you need to scan a lot of documents.

Sohodox also supports duplex scanning (if your scanner supports it). Even if your scanner does not support duplex scanning, you can scan both sides of the document using Sohodox's [Virtual Duplex Scanning mode](#) .

6.3 Scan Window

Use this window to scan and add paper documents to the Sohodox DB. The Scan Window also allows you to modify the scanned image before it is saved to the Sohodox DB.

Scan Tab:

Use the *Scan* tab to start the Scan process. The *Scan* tab contains the following options.

Select a Scan Profile

Sohodox uses *Scan Profile* to simplify the process of scanning and saving paper documents. *Scan Profile* is a collection of frequently used settings which can be saved and reused to scan a document. Instead of specifying these settings every time you scan and save a document, you can specify these settings once and save them as a *Scan Profile*.

- Click the drop down to select a Scan Profile.
- To save the frequently used scan settings click the *Save* button.
- Click the *Delete* button to delete a Scan Profile

By default the following Scan Profiles are available...

Black & White Document (Single Sided): This option should be selected if you want to scan a single sided document to a black and white image.

Black & White Document (Double Sided): This option should be selected if you want to scan a double sided document to a black and white image.

Grayscale Document (Single Sided): This option should be selected if you want to scan a single sided document to a grayscale image.

Grayscale Document (Double Sided): This option should be selected if you want to scan a double sided document to a grayscale image.

Color Document (Single Sided): This option should be selected if you want to scan a single sided document to a color image.

Color Document (Double Sided): This option should be selected if you want to scan a double sided document to a color image

The following profiles from older versions have been discontinued from version 8 onwards...

Black & White - A4 - Tiff - 150 DPI: Use this Scan Profile to scan a single page document as a black & white Tiff document at 150 DPI.

Black & White - A4 - Tiff - 150 DPI - Multi-Page: Use this Scan Profile to scan a multi-page document as a single black & white Tiff document at 150 DPI.

Black & White - A4 - PDF - 150 DPI: Use this Scan Profile to scan a single page document as a black & white PDF document at 150 DPI.

Black & White - A4 - PDF - 150 DPI - Multi-Page: Use this Scan Profile to scan a multi-page document as a single black & white PDF document at 150 DPI.

OCR Friendly: Use this scan profile if you want to OCR the document after the scan.

Grayscale - PNG - 200 DPI: Use this Scan Profile to scan a single page document as a grayscale PNG document at 200 DPI.

Color Photograph - JPEG: Use this scan profile to scan a document as color JPEG photograph.

Select a Scanner

The name of the currently selected scanner (or other imaging device) is displayed in this box. To change the selected scanner click the drop down to select the scanner (TWAIN compatible) you would like to use for scanning.

Show scanner interface before scanning

Check this option if you want the user interface of your scanner driver to be displayed while scanning.

Start Scan

Click this button to scan your document.

Once the scanning is completed successfully the document image will be displayed.

Settings tab:

Use the settings tab to set the scan settings. The *Settings* tab contains the following options.

Select a Scan Profile

Sohodox uses Scan Profile to simplify the process of scanning and saving paper documents. Scan Profile is a collections of frequently used settings which can be saved and reused to scan a document. Instead of specifying these settings every time you scan and save a document, you can specify these settings once and save them as a Scan Profile.

- Click the drop down to select an existing Scan Profile.
- To save the frequently used scan settings click the *Save* button.
- Click the *Delete* button to delete a Scan Profile

Select a Scanner

The name of the currently selected scanner (or other imaging device) is displayed in this box. To change the selected scanner click the drop down to select the scanner (TWAIN compatible) you would like to use for scanning. Instead of a scanner you can also choose the [Import Scanned Files](#)^[94] from *Folder* option. Choosing this option will allow you to directly import existing scanned images to the Scan Window.

Select Scan Area

From the drop-down list, choose the size of the page you are scanning. If you want to specify co-ordinates to scan only a part of the page, then click the *Options...* button. Clicking the *Options...* button will launch the *Scan Area* window.

If you do not wish to select a specific page size then select the *Scanner Default* option.

Use Document Feeder

Check this option if you want to scan documents placed in the ADF (Automatic Document Feeder) tray of your scanner. This option only has effect if your scanner has an ADF attachment.

Scan Both sides

Check this option if you want to scan both the sides of the document.

Please note that duplex scanning is a scanner dependent feature. If your scanner supports duplex scanning then Sohodox will support it.

If your scanner is not a duplex scanner, then you can still perform a duplex scan using the [Virtual Duplex Scanning](#)^[94] feature.

Automatically deskew scanned image

Check this option to auto-straighten scanned documents that are tilted.

***Automatically
despeckle
scanned
image***

Check this option to remove noise (tiny black spots) from the scanned documents. The despeckle option can remove the tiny black spots from the scanned image that are usually caused by the dust particles on the paper or scanner's glass.

Select a File Type

Use this option to select a file type, to save the scanned document. For e.g. If you want to save the scanned document as pdf select the PDF option from the drop down. In Sohodox, you can scan and save a documents as TIFF, JPG, PNG, BMP, PDF. The Documents and Pages options are shown only if the file type selected is either TIFF or PDF. That is because you can save multi-page documents only in these file types from among those supported by Sohodox.

Settings: Click this button to view the settings available for the selected File type. The following options are available based on the File type you have selected...

Compression

Controls the compression level (if supported by the Image Type) to be used when saving the scanned image. Higher the value chosen, smaller the saved file will be. Choosing a higher compression level may adversely affect the quality of the scanned image.

Quality

If you selected JPEG file type then you can control the quality of the scanned documents. If you want a good scanned image to be of a good quality then increase its quality percentage. Higher the value chosen, larger the saved file will be.

***Select color
depth***

This setting controls the amount of color that must be captured during the scanning process.

***Set scan DPI
(Dots per
inch)***

This setting controls the amount of dots which must be captured per inch of the document being scanned. Generally the higher this value is, more will be the detail captured. However the quality of the scanned image mainly depends on the quality of the document being scanned and in some cases choosing a higher dots per inch value may not have any effect of the quality of the image. DPI settings in Sohodox are adjusted dependent on the scanner.

Normally a value of 300 is good enough to scan a color photograph, while a value of 150 should provide a good quality scan of a text document.

The dots per inch value plays a big part in determining the file size when the scanned image is saved as a file. The higher this value is the larger will be the size of the saved file.

**Scan single
page
documents**

Not all scanners can support very high dots per inch values.

This option is only available if *Use document feeder* option is checked. Select this option if you want to scan multiple single page documents.

**Scan multi-
page
documents**

This option is only available if *Use document feeder* option is checked. Select this option if you want to scan multi paged documents. If you select this option the options below will get enabled...

Scan all pages to one documents

Select this option if you want scan all the pages as a single document

Number of Pages per document

Select or enter the number of pages for each document. For example if you will be scanning 10 documents and you specify the number of pages per document as 2, then Sohodox will create a total of five documents with two pages each.

Documents are Separated by

Select this option if you will be separating documents by placing a **Blank white page** or a **Document Separator** between them. Sohodox will separate a document every time it encounters a blank white page or a Document Separator. You can print a separator page by clicking the Click here to print Document Separator Page link.

The blank white page detection feature depends on the quality of the scanner and the quality of the blank white page used and therefore in some cases may not work correctly.

**Blank page
threshold**

If you have specified that pages for each document are separated by a blank white page, then specify the threshold value Sohodox should use while detecting blank white pages. You can enter any value from 0 to 10.

When a blank white page is scanned, it may not scan as pure white because of dust particles etc... To accommodate for this Sohodox will disregard a certain amount of non-white pixels while trying to determine that the scanned page was a blank white page. The tolerance for non-white pixels is controlled by the threshold value. The higher the threshold value, greater the tolerance for non-white pixels will be.

If you set this value too low then Sohodox may classify some blank white pages as non-blank pages. If you set this value too high then non-blank pages (for e.g. a page with a single line of text) may get detected as blank pages. Since a wrong detection at any stage of the batch scan means that all subsequent pages will be saved incorrectly, we recommend that you do a

test run to find out the best value for your scanner. You must choose the lowest value which works correctly for you.

Image Toolbar:

The *Image* toolbar has the following buttons...



Click the *Edit* button to edit the scanned document in the Image Editor . Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document. You can save the modifications made to a document from the Image Editor



Click the *Delete* button to delete the selected scanned document.



Click the *Merge* button to merge two or more scanned pages



Use this button to select the type of preview you want to see - per page or per document.



Use this button to view the thumbnails of the scanned document.

Destination tab:

Use the destination tab to set the location to save the scanned documents in the Sohodox DB. The *Destination* tab has the following options.

Document Title Use this option to enter the Document title of the scanned document.

Select a Destination Profile Use this option to select or create a [Destination Profile](#)^[279].

Choose a Folder Use this option to select a folder to save the scanned documents.

Attach Tags Use this option to [Tag](#)^[205] the scanned documents.

Set a Document Type Use this option to the [Document type](#)^[174] of the scanned documents.

Links tab:

Use this tab to link the scanned images with other documents

Link to existing documents Use this option to link the scanned documents with the existing documents.

Security tab:

Use this tab to secure the scanned document. The Security tab has the following options:

Assign to Use this option to [Assign](#)¹²⁴ the scanned document to another user.

Related Topics

[Scan and add single document](#)⁷⁷

[Scan documents with fixed number of pages](#)⁸⁶

[Scan documents with variable number of pages](#)⁸⁹

6.4 Image Editor Window

Use this window to edit image files. The Image Editor Window allows you to modify the displayed files and save it back to the Sohodox DB.

Toolbar:



Use this button to Save the modifications made to the document and save it back to Sohodox.



Click the changes to revert the modifications made to the document.

Image Toolbar:



Click the *Scroll Mode* button to activate the scroll mode.

In the scroll mode you can scroll the displayed image in any direction if the size of the document exceeds the size of the display area. To scroll the image press the left mouse button and then move the mouse in the direction you want to scroll keeping the left mouse button pressed.



Click the *Zoom* button to activate the zoom mode.

In the zoom mode you can...

Zoom Out (shrink the image) by pressing the left mouse button and moving it in the upward direction.

Zoom In (enlarge the image) by pressing the left mouse button and moving it in the downward direction.



Click the *Select* button to activate the select mode.

In the select mode you can select any area of the displayed image by pressing the left mouse button and then moving the mouse keeping the left mouse button pressed.



Click the *Magnify* button to activate the magnify mode.

In the magnify mode you can magnify any area of the displayed image by moving the mouse pointer to that area and pressing the left mouse button. The area remains magnified only till the left mouse button is pressed. You can move the mouse while the left mouse button is pressed to magnify other parts of the displayed image.

Using the magnify mode is very similar to using a magnifying glass to read a paper document.



Click the *Zoom In* button to enlarge the displayed image.



Click the *Zoom Out* button to shrink the displayed image.



Select the Zoom from this drop down.



Click the *Actual Size* button to reset the image to its original size.



Click The *Fit Width* button to resize the width of the image to fit the width of the Display pane.



Click *Fit to Window* button to resize the image to fit entirely in the Display area.



Click *Rotate Clockwise* button to rotate the selected scanned document clockwise.



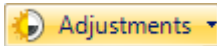
Click *Rotate Anticlockwise* button to rotate the selected scanned document anti-clockwise.



Click the *Flip Vertical* button to flip the selected document vertically.



Click the *Flip Horizontal* button to flip the selected document horizontally.



The adjustment drop-down has the following options.

Brightness: Click this option to adjust the brightness of the currently displayed image

Contrast: Click this option to adjust the contrast of the currently displayed image.

Hue: Click this option to change the hue of colors of the currently displayed image.

Saturation: Click this option to change the saturation of colors of the currently displayed image.

Gamma: Click this option to adjust the intensity of colors in the currently displayed image by changing the gamma constant that is used to map the intensity values.

Grayscale: Click this option to change the currently displayed image to a 8-bit grayscale image.

Halftone: Click this option to display the Halftone sub-menu. The Halftone method changes the currently displayed image to a halftone image. A halftone image is a 1-bit image which has been dithered for black and white printing or display. If the image is originally 1-bit but is not blank & white then this method changes it to a black and white image.

Sharpen: Click this option to increase or decrease the sharpness of the currently displayed image.

De-skew: Click this option to de-skew a scanned document. The De-skew option can be used to auto-straighten a tilted scanned image.

De-speckle: Click this option to de-speckle a scanned document. The De-speckle option can remove the tiny black spots from the scanned image that are usually caused by the dust particle on the paper or scanner's glass.



Click the *Eraser Tool* button to erase areas of the scanned image.



Click the *Crop* button to crop the current image to the shape and size of the selection. This option is only available when a part of the image has been selected using the selection tool



Click *Resize* button to resize the current image. This is not the same as zooming in and out of the image. The image will be re-sized permanently.



Click the *Copy* button to copy the selected area on the document.



Click the *Print* button to print the selected document

Annotation Toolbar:

The annotation toolbar is located on the extreme right of the [Document Details](#)^[30] pane.



Use this button to [draw lines or underline](#)^[260] text.



Use this button to [draw rectangles](#)^[261].



Use this button to draw [ellipses or circles](#)^[261].



Use this button to [highlight](#)^[261] texts.



Use this button to [add notes](#)^[262] to the document.



Use this button to insert a [bookmark](#)^[263] on the document.



Use this button to [insert stamps](#)^[265] on the document.



Use this button to [insert signature](#)^[265] on the document.



Delete all annotations on this page: Use this option to delete all the annotations on the currently displayed page.

Delete all annotations on the document: Use this option to delete all the annotations the document.



Use this button to toggle the annotation's User Information.

Pages pane:

The pages only appears for a multi-page tiff and PDF file (created by Sohodox). In this pane you can view the thumbnail of each page of the multi-paged document. You can also add additional pages to this multi-paged document, delete pages or change the order of the pages of this multi-paged document. The following options are available on the Pages pane.



Use this button to insert a page to an existing multi-page file



Use this button to move a page.





Use this button to delete a page.

6.5 Quickly Scan and Add documents

You can use the Scan button to quickly scan documents to the Sohodox DB.

Scan and add a single page document:





1. In Sohodox, select the *Home* tab and click the *Scan* button . The [Scan Window](#)  will now be launched.
2. Place the document in the Flatbed/ADF of the scanner.
3. Select a Scan Profile (E.g. *Grayscale document (Single Sided)*) from the *Select a scan profile* drop-down.
4. Select a scanner from the *Select a Scanner* drop down.
5. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the Scan window.
6. Click the *Add and Close* button. The single page document will be displayed in the *All Documents* node in Sohodox.

You can use the *Scan* button to quickly batch scan multiple single paged documents to the Sohodox DB.

Scan and add a multi-page document:



1. In Sohodox, select the *Home* tab and click the *Scan* button . The [Scan Window](#)  will now be launched.
2. Place a stack of documents in the ADF of the scanner.
3. You can select a Scan Profile (E.g. *Grayscale document (Single Sided)*) from the *Select a scan profile* drop-down.
4. Select a scanner from the *Select a Scanner* drop down.




5. Click the *Start Scan* button to scan the document. The scanned documents will now be displayed in the *Preview* pane of the Scan window.
6. Click on the Add and Close button. The multi-page document will be displayed in the *All Documents* node in Sohodox

6.6 Scanning (Detailed Step by Step Instructions)

6.6.1 Scan and add a single document

You can use steps below to scan, edit and index single page documents.

To Scan, Edit and Index single page Document:

1. In Sohodox, select the *Home* tab and click the *Scan* button . The [Scan Window](#)^[65] will now be launched.
2. You can select a Scan Profile from the *Select a scan profile* drop-down.
3. Select a scanner from the *Select a Scanner* drop down.
4. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the Scan window.
5. You can click the Edit button  to edit the scanned document in the [Image Editor](#)^[72]. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
6. You can specify the location to add the scanned document in the *Destination* tab (optional). You can also use a [Destination Profile](#)^[279] from the *Select a Destination Profile* drop down to specify the location to add the selected files.
 - ▼ Follow these steps to specify the Destination of the scanned document
 - a) Enter a name for the scanned document in the *Document Title* box. If you leave the *Document Title* blank then the system will generate a title for the scanned document.
 - b) Click this  button besides the *Choose a Folder* box to select a folder to add the scanned document.


▼ The Folder Selection window will be launched.

- i. Select a folder from the list. You can use the *Search* box to search a folder.
- ii. Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.



- c) You can add [Tags](#)^[204] (keywords) to the scanned documents in the *Attach Tags* option. You can type as many tags you want by using a semi-colon to separate them.
- d) Set the [Document Type](#)^[174] of the scanned document, from the *Set a Document Type* drop down. For e.g. Set the Document Type to 'Invoice' if the scanned document is a invoice.

7. You can also link the scanned document with other documents by using the *Links* tab.


▼ Use the *Link to existing Documents* box to link the scanned document to existing documents

- a) Click this  button besides the *Link to existing documents* box. The *Look Up* window will be launched.
- b) Select *Documents* option from the *Look in* box and type all or part of the file name in the *Look for* box
- c) Now, click the *Find* button. The documents that contains the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
- d) Select the document that you want to link with the scanned document and add it to the *Selected Files* list.
- e) Click the *OK* button to link these documents.

Note:

You can add more links by clicking this  button and you can break a link by clicking this  button.

Also see, [Link one Document with another Document](#)^[127]

8. Click the *Security* tab if you want to assign the document to another user as soon as it is scanned. You can search for the user by clicking this  button in the *Assign to:* field.
9. Now, click the *Add* button to add the scanned document to the Sohodox DB. The scanned document will now be added to the location that you have specified in the *Destination* tab.

9. Click the *Close* button to close the Scan window.

- Check the *Show scanner interface before scanning* option if you want the user interface of your scanner driver to be displayed while scanning.
- You can create a [Scan Profile](#)^[276] to save the frequently used scan settings. Also see, [Destination Profiles](#)^[279]
- You can use the [Settings tab](#)^[67] to change or set the scan setting.

Related Topics

[Scan document with variable number of pages](#)^[89]


[Scan documents with fixed number of pages](#)^[86]



6.6.2 Scan multiple single paged Documents

You can use the *Scan* button to batch scan multiple single paged documents to the Sohodox DB.

To Scan, Edit and Index multiple Single paged Documents:




1. In Sohodox, select the *Home* tab and click the *Scan* button . The [Scan Window](#)^[65] will now be launched.
2. Select a scanner from the *Select a Scanner* drop down.
3. Click the *Settings* tab to set the scan settings.
4. Select the scan area from the *Select scan area* drop-down to choose the size of the page you are scanning. If you want to specify co-ordinates to scan only a part of the page, then click the *Options...* button. Clicking the *Options...* button will launch the *Scan Area* window.
5. Check the *Use document feeder* option to scan documents placed in the ADF (Automatic Document Feeder) tray of your scanner. This option only has effect if your scanner has an ADF attachment.



6. Select the file type from *Select the file type* option to save the scanned document. For example, if you want to save the scanned document as pdf select the PDF option from the drop down.
7. Select the color you want to scan in, from the *Select color depth* drop-down.
8. Set the scan DPI (Dots Per Inch) from the *Set scan DPI* option. The [Dots Per Inch](#)^[68] option controls the amount of dots which must be captured per inch of the document being scanned.
9. Select the *Scan multi-page documents* option and then select the *Scan single page documents* option to scan multiple single paged documents.
10. Click the *Start Scan* button to scan the documents. The scanned documents will now be displayed in the *Preview* pane of the Scan window.
11. You can click the Edit button  to edit the scanned document in the [Image Editor](#)^[72]. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
12. You can specify the location to add the scanned documents in the *Destination* tab (optional). You can also use a [Destination Profile](#)^[279] from the *Select a Destination Profile* drop down to specify the location to add the selected files.
 - ▼ Follow these steps to specify the Destination of the scanned document
 - a) Enter a name for the scanned documents in the *Document Title* box. The documents will have same name followed by a suffix. For e.g. if you entered Acme Invoice, then the scanned document will be named as Acme Invoice1, Acme Invoice2, Acme Invoice3 and so on.
If you leave the *Document Title* blank then the system will generate a title for the scanned document.
 - b) Click this  button besides the Choose a Folder box to select a folder to add the scanned document.
 - ▼ The Folder Selection window will be launched.
 - i. Select a folder from the list. You can use the *Search* box to search a folder.
 - ii. Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.
 - c) You can add [Tags](#)^[204] (keywords) to the scanned documents in the *Attach Tags* option. You can type as many tags you want by using a semi-colon to separate them.
 - d) Set the [Document Type](#)^[174] of the scanned document, from the *Set a Document Type* drop down. For e.g. Set the Document Type to 'Invoice' if the scanned document is a invoice.

13. You can also link the scanned documents with other documents by using the *Links* tab.


▼ Use the *Link to existing Documents* box to link the scanned documents to existing documents

- a) Click this  button besides the *Link to existing documents* box. The *Look Up* window will be launched.
- b) Select *Documents* option from the *Look in* box and type all or part of the file name in the *Look for* box
- c) Now, click the *Find* button. The documents that contains the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
- d) Select the document that you want to link with the scanned documents and add it to the *Selected Files* list.
- e) Click the *OK* button to link these documents.

Note:

You can add more links by clicking this  button and you can break a link by clicking this  button.

Also see, [Link one Document with another Document](#)^[127]

14. Click the *Security* tab if you want to assign the document to another user as soon as it is scanned. You can search for the user by clicking this  button in the *Assign to:* field.

15. Now, click the *Add* button to add the scanned documents to the Sohodox DB. The scanned documents will now be added to the location that you have specified in the *Destination* tab.

16. Click the *Close* button to close the Scan window.

- Check the *Show scanner interface before scanning* option if you want the user interface of your scanner driver to be displayed while scanning.
- You can create a [Scan Profile](#)^[276] to save the frequently used scan settings. Also see, [Destination Profiles](#)^[279]
- You can use the [Settings tab](#)^[67] to change or set the scan setting.
- In the *Settings* tab, the display of options upon checking the *Use document feeder* checkbox depends on the file type selected and not upon checking the *document feeder* checkbox. This means you can scan multiple single pages even with a flatbed scanner, if

the file type supports it (e.g. TIFF or PDF).


Related Topics



[Scan documents with fixed number of pages](#) ⁹³
[Scan document with variable number of pages](#) ⁸⁹


6.6.3 Scan all pages as One Document

You can use the *Scan* button to batch scan documents to the Sohodox DB.



To Scan all Pages as One Document:

1. In Sohodox, select the *Home* tab and click the *Scan* button . The [Scan Window](#) ⁶⁵ will now be launched.
 2. Select a scanner from the *Select a Scanner* drop down.
 3. Click the *Settings* tab to set the scan settings.
 4. Select the scan area from the *Select scan area* drop-down to choose the size of the page you are scanning. If you want to specify co-ordinates to scan only a part of the page, then click the *Options...* button. Clicking the *Options...* button will launch the *Scan Area* window.
 5. Check the *Use document feeder* option to scan documents placed in the ADF (Automatic Document Feeder) tray of your scanner. This option only has effect if your scanner has an ADF attachment.
- Note:**
 If you have a flatbed scanner, you can still scan single pages, queue them up and then add them to make *one* multi-page document.
6. Check the *Scan both sides* option to scan both the sides of the document. Please note that duplex scanning is a scanner dependent feature. If your scanner supports duplex scanning then Sohodox will support it. If your scanner does not support duplex scanning, then you can use scan using Sohodox's [Virtual Duplex Scanning mode](#) ⁹⁴.
 7. Select the file type from *Select the file type* option to save the scanned document. For example, if you want to save the scanned document as pdf select the PDF option from the drop down.


8. Select the color you want to scan in, from the *Select color depth* drop-down.
9. Set the scan DPI (Dots Per Inch) from the *Set scan DPI* option. The [Dots Per Inch](#)^[68] option controls the amount of dots which must be captured per inch of the document being scanned.
10. Select the *Scan multi-page documents* option and then select the Scan all pages to one document option to scan multiple pages as a single multi-page document.
11. Click the *Start Scan* button to scan the documents. The scanned documents will now be displayed in the *Preview* pane of the *Scan* window.
12. You can click the Edit button  to edit the scanned document in the [Image Editor](#)^[72]. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
13. You can specify the location to add the scanned documents in the *Destination* tab (optional). You can also use a [Destination Profile](#)^[279] from the *Select a Destination Profile* drop down to specify the location to add the selected files.
 - ▼ Follow these steps to specify the Destination of the scanned document
 - a) Enter a name for the scanned document in the *Document Title* box. If you leave the *Document Title* blank then the system will generate a title for the scanned document.
 - b) Click this  button besides the Choose a Folder box to select a folder to add the scanned document.
 - ▼ The Folder Selection window will be launched.
 - i. Select a folder from the list. You can use the *Search* box to search a folder.
 - ii. Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.
 - c) You can add [Tags](#)^[204] (keywords) to the scanned documents in the *Attach Tags* option. You can type as many tags you want by using a semi-colon to separate them.
 - d) Set the [Document Type](#)^[174] of the scanned document, from the *Set a Document Type* drop down. For e.g. Set the Document Type to 'Invoice' if the scanned document is a invoice.
14. You can also link the scanned documents with other documents by using the *Links* tab.
 - ▼ Use the Link to existing Documents box to link the scanned documents to existing documents

- a) Click this  button besides the *Link to existing documents* box. The *Look Up* window will be launched.
- b) Select *Documents* option from the *Look in* box and type all or part of the file name in the *Look for* box.
- c) Now, click the *Find* button. The documents that contains the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
- d) Select the document that you want to link with the scanned documents and add it to the *Selected Files* list.
- e) Click the *OK* button to link these documents.

Note:

You can add more links by clicking this  button and you can break a link by clicking this  button.


Also see, [Link one Document with another Document](#)^[127]

15. Click the *Security* tab if you want to assign the document to another user as soon as it is scanned. You can search for the user by clicking this  button in the *Assign to:* field
16. Now, click the *Add* button to add the scanned documents to the Sohodox DB. The scanned documents will now be added to the location that you have specified in the *Destination* tab.
17. Click the *Close* button to close the *Scan* window.

- Check the *Show scanner interface before scanning* option if you want the user interface of your scanner driver to be displayed while scanning. Select the documents that you want to create as one document in the *Preview* pane of the *Scan* window.
- You can also select documents in the *Preview* pane of the *Scan* window and click the *Merge* button to merge documents as one single document.
- You can create a [Scan Profile](#)^[98] to save the frequently used scan settings. Also see, [Destination Profiles](#)^[279]
- You can use the [Settings tab](#)^[67] to change or set the scan setting.
- In the *Settings* tab, the display of options upon checking the *Use document feeder*

checkbox depends on the file type selected and not upon checking the *document feeder* checkbox. This means you can scan multiple single pages even with a flatbed scanner, if the file type supports it (e.g. TIFF or PDF).

Related Topics

[Scan documents with fixed number of pages](#)  86


[Scan document with variable number of pages](#)  89

6.6.4 Scan documents with fixed number of pages



Sohodox separates various documents automatically while scanning, all you need to do is specify the number of pages each document contains and Sohodox separates them based on this information. For e.g. If you are scanning 15 pages comprising of 5 documents (each document contains 3 pages), all you need to do is specify that each documents contains 3 pages so that Sohodox can separate them.


To Scan Documents with Fixed number of Pages:





1. In Sohodox, select the *Home* tab and click the *Scan* button . This will bring up the [Scan Window](#)⁶⁵.
 2. Select a scanner from the *Select a Scanner* drop down.
 3. Click the *Settings* tab to set the scan settings.
 4. Select the scan area from the *Select scan area* drop-down to choose the size of the page you are scanning. If you want to specify co-ordinates to scan only a part of the page, then click the *Options...* button. Clicking the *Options...* button will launch the *Scan Area* window.
 5. Check the *Use document feeder* option to scan documents placed in the ADF (Automatic Document Feeder) tray of your scanner. This option only has effect if your scanner has an ADF attachment.
- Note:**
If you have a flatbed scanner, you can still scan single pages, queue them up and then add them to make *one* multi-page document.
6. Check the *Scan both sides* option to scan both the sides of the document. Please note that duplex scanning is a scanner dependent feature. If your scanner supports duplex scanning then Sohodox will support it. If your scanner does not support duplex scanning, then you can use scan using Sohodox's [Virtual Duplex Scanning mode](#)⁹⁴.
 7. Select the file type from *Select the file type* option to save the scanned document. For example, if you want to save the scanned document as pdf select the PDF option from the drop down.
 8. Select the color you want to scan in, from the *Select color depth* drop-down.
 9. Set the scan DPI (Dots Per Inch) from the *Set scan DPI* option. The [Dots Per Inch](#)⁶⁸

option controls the amount of dots which must be captured per inch of the document being scanned.


10. Select the *Scan multi-page documents* option and then the *Number of Pages per document* option.
11. Specify the number of pages the document has, in the *Specify Number of Pages per document* option. For example, you would choose 2 from this option if you were scanning 10 documents and each document had two pages (a total of 20 pages).
12. Click the *Start Scan* button to start scanning the document. The scanned document will be displayed in the *Preview* pane of the *Scan* window.
13. You can click the Edit button  to edit the scanned document in the [Image Editor](#)^[72]. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
14. Specify the location to add the scanned documents in the *Destination* tab (optional). You can also use a [Destination Profile](#)^[279] from the *Select a Destination Profile* drop down to specify the location to add the selected files.
 - ▼ Follow these steps to specify the Destination of the scanned document
 - a) Enter a name for the scanned documents in the Document Title box. The documents will have same name followed by a suffix. For e.g. if you entered Acme Invoice, then the scanned document will be named as Acme Invoice1, Acme Invoice2, Acme Invoice3 and so on.
If you leave the Document Title blank then the system will generate a title for the scanned document.
 - b) Click this  button besides the *Choose a Folder* box to select a folder to add the scanned document.
 - ▼ The Folder Selection window will be launched.
 - i. Select a folder from the list. You can use the *Search* box to search a folder.
 - ii. Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.
 - c) You can add [Tags](#)^[204] (keywords) to the scanned documents in the *Attach Tags* option. You can type as many tags you want by using a semi-colon to separate them.
 - d) Set the [Document Type](#)^[174] of the scanned document, from the *Set a Document Type* drop down. For e.g. Set the Document Type to 'Invoice' if the scanned document is a invoice.
15. You can also link the scanned documents with other documents by using the *Links* tab.
 - ▼ Use the Link to existing Documents box to link the scanned documents to existing documents

- a) Click this  button besides the *Link to existing documents* box. The *Look Up* window will be launched.
- b) Select *Documents* option from the *Look in* box and type all or part of the file name in the *Look for* box
- c) Now, click the *Find* button. The documents that contains the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
- d) Select the document that you want to link with the scanned documents and add it to the *Selected Files* list.
- e) Click the *OK* button to link these documents.

Note:

You can add more links by clicking this  button and you can break a link by clicking this  button.

Also see, [Link one Document with another Document](#)^[127].

16. Click the *Security* tab if you want to assign the document to another user as soon as it is scanned. You can search for the user by clicking this  button in the *Assign to:* field.
17. Now, click the *Add* button to add the scanned documents to the Sohodox DB. The scanned documents will now be added to the location that you have specified in the *Destination* tab.
18. Click the *Close* button to close the *Scan* window.

- Check the *Show scanner interface before scanning* option if you want the user interface of your scanner driver to be displayed while scanning.
- You can create a [Scan Profile](#)^[276] to save the frequently used scan settings. Also see, [Destination Profiles](#)^[279]
- You can also scan documents with variable number of pages, for more info see, [Scan document with variable number of pages](#)^[89].
- In the *Settings* tab, the display of options upon checking the *Use document feeder* checkbox depends on the file type selected and not upon checking the *document feeder* checkbox. This means you can scan multiple single pages even with a flatbed scanner, if the file type supports it (e.g. TIFF or PDF).

Related Topics


[Automate the Scan Process](#)^[10]



6.6.5 Scan document with variable number of pages

You can scan documents that does not have fixed number of pages by using blank pages or by using a Document Separator Page on it. For e.g. lets say you want to scan around 10 pages comprising of 4 documents (each document contains 2, 4, 1, 3 pages respectively), to separate these documents all you need to do is place a blank page or a page with barcode(s) on it after every document (For this example you will need to place it after the 2nd, 6th and 7th page).


To Scan Documents with Variable number of Pages:






1. In Sohodox, select the *Home* tab and click the *Scan* button . This will bring up the [Scan Window](#)^[65].
 2. Select a scanner from the *Select a Scanner* drop down.
 3. Click the *Settings* tab to set the scan settings.
 4. Select the scan area from the *Select scan area* drop-down to choose the size of the page you are scanning. If you want to specify co-ordinates to scan only a part of the page, then click the *Options...* button. Clicking the *Options...* button will launch the *Scan Area* window.
 5. Check the *Use document feeder* option to scan documents placed in the ADF (Automatic Document Feeder) tray of your scanner. This option only has effect if your scanner has an ADF attachment.
- Note:**
If you have a flatbed scanner, you can still scan single pages, queue them up and then add them to make one multi-page document.
6. Check the *Scan both sides* option to scan both the sides of the document. Please note that duplex scanning is a scanner dependent feature. If your scanner supports duplex scanning then Sohodox will support it. If your scanner does not support duplex scanning, then you can use scan using Sohodox's [Virtual Duplex Scanning mode](#)^[94].
 7. Select a file type from *Select the file type* option. For example, if you want to save the scanned document as pdf file, then select the PDF option from the drop down.

8. Select the color you want to scan in, from the *Select color* depth drop-down.
9. Set the scan DPI (Dots Per Inch) from the *Set scan DPI* option. The [Dots Per Inch](#)^[68] option controls the amount of dots which must be captured per inch of the document being scanned.
10. Select the *Scan multi-page documents* option and then the *Documents are separated by* option as the documents are multi page and each document has variable number of pages.
11. From the *Documents are separate by* drop-down select if your separator page is a *Blank Page* or a *Document Separator Page* (Document with Barcode).
 - a) If you have used Blank White Page as separators, then specify the [Threshold](#)^[69] value Sohodox should use while detecting blank white pages in the *Blank Page Threshold* option. You can enter any value from 0 to 10.
 - b) If you want to create a new Document Separator Page then click the *Click here to print Document Separator Page* link.
12. Click the *Security* tab if you want to assign the document to another user as soon as it is scanned. You can search for the user by clicking this  button in the *Assign to:* field.
13. Click the *Start Scan* button to start scanning the document. The scanned documents will be displayed in the *Preview* pane of the *Scan* window.
14. You can click the Edit button  to edit the scanned document in the [Image Editor](#)^[72]. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
15. Specify the location to add the scanned documents in the *Destination* tab (optional). You can also use a [Destination Profile](#)^[279] from the *Select a Destination Profile* drop down to specify the location to add the selected files.

▼ Follow these steps to specify the Destination of the scanned document

 - a) Enter a name for the scanned documents in the *Document Title* box. The documents will have same name followed by a suffix. For e.g. if you entered Acme Invoice, then the scanned document will be named as Acme Invoice1, Acme Invoice2, Acme Invoice3 and so on.
If you leave the *Document Title* blank then the system will generate a title for the scanned document.
 - b) Click this  button besides the *Choose a Folder* box to select a folder to add the scanned document.
▼ The Folder Selection window will be launched.

- i. Select a folder from the list. You can use the *Search* box to search a folder.
 - ii. Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.
 - c) You can add [Tags](#)^[204] (keywords) to the scanned documents in the *Attach Tags* option. You can type as many tags you want by using a semi-colon to separate them.
 - d) Set the [Document Type](#)^[174] of the scanned document, from the *Set a Document Type* drop down. For e.g. Set the Document Type to '*Invoice*' if the scanned document is a invoice.
15. You can also link the scanned documents with other documents by using the *Links* tab.
- ▼ Use the *Link to existing Documents* box to link the scanned documents to existing documents
- a) Click this  button besides the *Link to existing documents* box. The *Look Up* window will be launched.
 - a) Select *All Documents* option from the *Look in* box and type all or part of the file name in the *Look for* box
 - b) Now, click the *Find*. The documents that contains the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
 - c) Select the document that you want to link with the scanned documents and add it to the *Selected Files* list.
 - d) Click the *OK* button to link these documents.
- Note:* You can add more links by clicking this  button and you can break a link by clicking this  button.
- Also see, [Link one Document with another Document](#)^[127].
16. Now, click the *Add* button to add the scanned documents to the Sohodox DB. The scanned documents will now be added to the location that you have specified in the *Destination* tab.
17. Click the *Close* button to close the *Scan* window.

- Check the *Show scanner interface before scanning* option if you want the user interface of your scanner driver to be displayed while scanning.
- You can create a [Scan Profile](#)^[276] to save the frequently used scan settings. Also see, [Destination Profiles](#)^[279].

- You can also automate your scanning process, for more info see, [Automate the Scan Process](#)^[10].
- In the *Settings* tab, the display of options upon checking the *Use document feeder* checkbox depends on the file type selected and not upon checking the *document feeder* checkbox. This means you can scan multiple single pages even with a flatbed scanner, if the file type supports it (e.g. TIFF or PDF).

Related Topics


[Scan documents with fixed number of pages](#)^[86]


6.6.6 Scan a color document

You can scan color documents by selecting the *Color* option in the *Select scan color* option.

To Scan a Color Document:



1. In Sohodox, select the *Home* tab and click the *Scan* button . This will bring up the [Scan Window](#)^[65].
 2. Select a scanner from the *Select a Scanner* drop down.
 3. Click the *Settings* tab to set the scan settings.
 4. Select the file type from *Select the file type* option to save the scanned document. For example, if you want to save the scanned document as pdf select the PDF option from the drop down.
 5. Select the *Color* option from the *Select color depth* drop-down.
 6. Set the scan DPI (Dots Per Inch) from the *Set scan DPI* option. The [Dots Per Inch](#)^[68] option controls the amount of dots which must be captured per inch of the document being scanned.
 7. Click the *Start Scan* button to start scanning the document. The scanned document will be displayed in the *Preview* pane of the *Scan* window.
- Check the *Show scanner interface before scanning* option if you want the user interface of your scanner driver to be displayed while scanning.
 - You can create a [Scan Profile](#)^[276] to save the frequently used scan settings. Also see, [Destination Profiles](#)^[279].
 - In the *Settings* tab, the display of options upon checking the *Use document feeder* checkbox depends on the file type selected and not upon checking the *document feeder* checkbox. This means you can scan multiple single pages even with a flatbed scanner, if the file type supports it (e.g. TIFF or PDF).

Related Topics[Scan and add single document](#) [Scan multiple single paged document](#) 

6.7 Virtual Duplex Scanning mode

Sohodox has always supported duplex scanning i.e. scanning both sides of a page and storing them in the correct order in a PDF or TIFF file. However this required your scanning to have built-in support for duplex scanning. With the new Virtual Duplex scanning mode, Sohodox can now handle duplex scanning even with scanners which do not have built-in support for duplex scanning.

This is how it works...

Put a stack of documents in to your scanner's ADF (Automatic Document Feeder). Sohodox will scan the front side of each document. Now simply flip the stack of documents and place them in your scanner's ADF. Sohodox will now scan the back side of all the documents in the stack. After this Sohodox will automatically re-arrange the scanned pages so that the reverse side of each scanned page comes immediately after the front side of that page in the PDF or TIFF file. The virtual duplex mode also works if your scanner does not have an ADF (i.e. you scan using the flatbed of your scanner). However in this case, you have to individually flip each document after their front side is scanned.

6.8 Import Scanned Files from Folder

When trying to scan and add documents, instead of choosing a scanner, you can choose to import pre-scanned images for further processing and then addition to Sohodox.

Currently you can only use this feature if your scanner can save scanned images as single page TIFF files. You must scan and save as single page TIFF files, even when scanning multi-page documents. If you have scanned multi-page documents Sohodox will combine these image files into multi-page TIFF or PDF files when you import them into Sohodox via the Import Scanned Files from Folder option.

You may want to use this option for any of the following reasons...

- 1) Your scanner does not support TWAIN but can save images of scanned pages as TIFF files in a folder
- 2) Your scanner supports TWAIN but its TWAIN driver is slow or buggy
- 3) Your scanner performs much faster when directly saving scanned images to a folder (as compared to scanning via TWAIN)

4) Your scanner offers a lot of advanced features which are not available via TWAIN.



To use this feature...

- Click on the Scan button on the ribbon bar to launch the Scan Window
- From the Select a scanner drop-down, choose the Import Scanned Files from Folder option
- Click on the Start Scan button
- You will be prompted to select the folder which contains the scanned images (single page TIFF files only)
- Change settings via the Settings tab if required
- Click the Add button to add the documents

6.9 Specify Document Title of the scanned document

You can specify the Document title of the scanned document from Destination pane.

To specify Document Title from the Scan window:

1. In Sohodox, select the *Home* tab and click the *Scan* button . This will bring up the [Scan Window](#) .
2. You can select a Scan Profile from the *Select a scan profile* drop-down.
3. Select a scanner from the *Select a Scanner* drop down.
4. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the Scan window.
5. In the Destination pane, enter the name for the scanned document in the Document

title box.

6. Now, click the *Add* button to add the scanned document to Sohodox. The scanned document will now be added to the location that you have specified in the *Destination* tab.
7. Click the *Close* button to close the Scan window.

- If you have scanned multiple documents then all the documents will have same name followed by a suffix. For e.g. if you entered Acme Invoice, then the scanned document will be named as Acme Invoice1, Acme Invoice2, Acme Invoice3 and so on.
- If you leave the Document Title blank then the system will generate a title for the scanned document.

Related Topics


[Scan and add single document](#)⁷⁷

[Scan multiple single paged document](#)⁷⁹

6.10 Insert a page to a PDF or TIFF document

You can insert a page to a PDF (created using Sohodox) and Tiff file by using the [Image Editor window](#)⁷².



To Insert a Page to a PDF or Tiff Document:

1. Select the document to which you want to add the page.
2. Click the *Pages* tab on the left bar of the *Document Details* pane. The *Pages* panel will now be displayed.
3. In the *Pages* pane click the *Insert Page(s)* button . The *Insert Pages* dialog will now be launched.
4. Select the position at which you want to insert the page(s) from the drop-down.
5. Select *Insert pages from disk* option if you want to add a document from disk or select the *Scan and insert pages* option if you want to insert a scanned document.

Note: You can also insert a page (from disk) by dragging and dropping it to the position you want.



6. Click the *OK* button. A window will be launched depending on the option you have selected.
7. Now, select the document and add it to the multi-paged document. The page(s) will now be inserted to the position you have selected.
8. Click the *Add and Close* button to save the changes and close the dialog.


To Insert a Page to a PDF or TIFF Document from the Image Editor window:

1. Select the document to which you want to add the page.
2. In the *Details* pane of the document click the *Edit* button . The document will now be opened in the *Image Editor* window.
3. In the *Pages* pane click the *Insert Page(s)* button . The *Insert Pages* dialog will now be launched.
4. Select the position at which you want to insert the page(s) from the drop-down.
5. Select *Insert pages from disk* option if you want to add a document from disk or select the *Scan and insert pages* option if you want to insert a scanned document.

Note: You can also insert a page (from disk) by dragging and dropping it to the position you want.

6. Click the *OK* button. A window will be launched depending on the option you have selected.
7. Now, select the document and add it to the multi-paged document. The page(s) will now be inserted to the position you have selected.
8. Click the *Save and Close* button to save the changes and close the dialog.

- From the Image editor window, you can change the position of the pages by using the *Move Page(s)...* button .
- From the Image editor window, you can delete a page(s) by using the *Delete* button .

Related Topics[Scan and add single document](#)  77[Scan multiple single paged document](#)  79





6.11 Save the frequently used Scan Settings as a Scan Profile

Sohodox uses *Scan Profile* to simplify the process of scanning documents. *Scan Profile* is a collections of frequently used settings which can be saved and reused to scan a document. Instead of specifying these settings every time you scan and save a document, you can specify these settings once and save them as a *Scan Profile*. Documents can be of several types (for e. g. Color photographs, Black & White text etc.). The settings required to scan and save a black & white text document are very different from the settings required to scan and save a color photograph. Therefore different *Scan Profiles* are required to correctly scan and save different types of documents.


For e.g. Lets say on a daily basis you scan all the Invoices you receive, as *Black & White PDF* and all the Agreements as *Color Tiff*. You can create two *Scan Profiles* one for scanning your *Invoices* and other for scanning the *Agreements*. Now, all you need to do is select the appropriate *Scan Profile* and click the *Start Scan* button to begin the scan process.

You can create as many *Scan Profiles* as you want.

To Save the Frequently used Scan Settings as Scan Profile:

1. In Sohodox, select the *Home* tab and click the *Scan* button . This will bring up the [Scan Window](#) .
2. Click the *Settings* tab to create a Scan Profile.
3. Click the *New* button  besides the *Select a scan profile* box. Now, enter a name for the new profile in the *Select a scan profile* box.
4. Select a scanner from the *Select a Scanner* drop down.
5. Once you have specified the scan settings then click the *Save* button  besides the *Select a scan profile* box to save the Scan Profile.

The Scan Profile will now be listed in the Select a scan profile drop-down.

- To delete a Scan Profile, click the *Delete* button  besides the *Select a scan profile* box.
- By default the following Scan Profiles are available...

Black & White Document (Single Sided): This option should be selected if you want to scan a single sided document to a black and white image.

Black & White Document (Double Sided): This option should be selected if you want to scan a double sided document to a black and white image.

Grayscale Document (Single Sided): This option should be selected if you want to scan a single sided document to a grayscale image.

Grayscale Document (Double Sided): This option should be selected if you want to scan a double sided document to a grayscale image.

Color Document (Single Sided): This option should be selected if you want to scan a single sided document to a color image.

Color Document (Double Sided): This option should be selected if you want to scan a double sided document to a color image

- You can also create profiles which stores information about the document like its [Document Type](#)^[173] its folder which can be saved and reused. These profiles are called as [Destination Profiles](#)^[279]. Thus by using Scan Profiles and Destination Profiles you can [automate your scanning process](#)^[101].

Related Topics

[Scan multiple single paged document](#)^[79]

[Edit a document](#)^[120]

6.12 Merge two or more scanned documents

You can merge two or more scanned pages as a single document by using the Merge button on the Scan window. This option is only available from the scan window.

To Merge two or more Scanned documents:

1. In Sohodox, select the Home tab and click the Scan button . The Scan Window will now

be launched.

2. You can select a Scan Profile from the Select a scan profile drop-down.
3. Select a scanner from the Select a Scanner drop down.
4. Click the Start Scan button to scan the documents. The thumbnails scanned documents will now be displayed in
the Preview pane of the Scan window.
5. From the preview pane select the documents that you want to merge.
6. Now, click the Merge button .
7. You can specify the location to add the merged document in the Destination tab (optional).
8. Now, click the Add button to add the merged document to the Sohodox DB. The merged document will now be
added.
9. Click the Close button to close the Scan window.

- If you have a flat bed scanner then you can use the Merge feature to save single page scanned documents as multi-page documents.
- Check the Show scanner interface before scanning option if you want the user interface of your scanner driver to be displayed while scanning.
- You can create a [Scan Profile](#)^[276] to save the frequently used scan settings. Also see, [Destination Profiles](#)^[279]
- You can use the Settings tab to change or set the scan setting.

Related Topics

[Insert a page to a multi-paged document](#)^[96]
[Scan document with variable number of pages](#)^[89]

[Scan documents with fixed number of pages](#)^[86]

6.13 Replace Document by Scanning

You can replace a file from Sohodox with another file in the scanner by using the Replace by Scanning option.

To Replace a Document by Scanning:

1. In Sohodox, select the document to be replaced from the List View pane.
2. Right-click and select the *Replace by Scanning* option.
3. The *Scan* window will be launched. Now, use the *Scan* window to scan the document and replace it with the selected document. For more information, see [Scan and add a single document](#)^[77].

Related Topics

[Replace document from disk](#)^[61]

[Scan multiple single paged document](#)^[79]







6.14 Automate the Scan Process

You can use a [Scan Profile](#)^[98] along with a [Destination Profiles](#)^[279] to automate your scanning process. *Scan Profile* is a collections of frequently used settings which can be saved and reused to scan a document and *Destination Profile* is a collections of information about the document like its [Document Type](#)^[173], and its folder which can be saved and reused. Instead of specifying the scan settings and location every time you scan save a document, you can specify these settings once and save them as a *Scan Profile* and *Destination Profile* respectively. Then all you need to do is select appropriate profiles and hit the *Scan* button. Your documents will be scanned as per the settings specified in the Scan Profile and the Document Type and folder will be set as per the information specified in the Destination Profile


For e.g. Lets say that you scan, all the Invoices from Acme Corp. as *Black & White PDF* and then you set their Document Type to Invoice, add them to the Acme folder. You can make your job much easier by creating a *Scan Profile* and *Destination Profile*. Now, all you just need to do is select the *Scan Profile* then the *Destination Profile* and click the *Start Scan* button to begin the

scan process.

To Automate the Scan Process:


1. In Sohodox, select the *Home* tab and click the *Scan* button . This will bring up the [Scan Window](#)^[65].
2. Click the *Settings* tab to create a Scan Profile.
3. Click the *New* button  besides the *Select a scan profile* box. Now, enter a name for the new profile in the *Select a scan profile* box.
4. Select a scanner from the *Select a Scanner* drop down.
5. Once you have specified the scan settings then click the *Save* button  besides the *Select a scan profile* box to save the Scan Profile.
The Scan Profile will now be listed in the *Select a scan profile* drop-down. Now, that you have created a Scan profile, you can go ahead and create a *Destination Profile*.
6. In the *Destination* tab, click the *New* button  besides the *Select a Destination profile* box.
7. Enter a name for the new profile in the *Select a destination profile* box.
8. Click this  button besides the *Choose a Folder* box to select a folder to add the scanned document. The *Folder Selection* window will be launched.
 - a) Select a folder from the list. You can use the *Search* box to search a folder.
 - b) Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.
9. You can add [Tags](#)^[204] (keywords) to the scanned documents in the *Attach Tags* option. You can type as many tags you want by using a comma to separate them
10. Select a [Document Type](#)^[174] for the document, from the *Set a Document Type* drop down. For e.g. Set the Document Type to 'Invoice' if the document is a invoice.
11. Once you have specified the information in the *Settings* section then click the *Save* button  besides the *Select a Destination profile* box to save the *Destination Profile*. The *Destination Profile* will now be listed in the *Select a Destination profile* drop-down.

12. Now, that you have created a *Scan Profile* and a *Destination Profile* all you just need to do is select the *Scan Profile* then the *Destination Profile* and click the *Start Scan* button to scan documents.

- To delete a Scan Profile, click the Delete  button besides the *Select a scan profile* box.

Related Topics




[Scan multiple single paged document](#) 

[Separate various documents while scanning](#) 

6.15 Enhance Scanned Documents

- ▼ When I scan my documents they come appear to be very light. Is there a way to make the document darker?

You can try the following to make the text appear darker.

1. In Sohodox, double click the scanned document to open it in the Image Viewer. Or click the Edit button  Edit on the Image toolbar. The scanned document will now open in the Image editor window.
2. Click Adjustments drop down  Adjustments and select the Brightness option. Decrease the brightness percentage to -10.
3. Click Ok to apply the settings. The image will appear dark.
4. Now, again click the Adjustments drop down  Adjustments and select the Contrast option. Increase the contrast percentage till it appears bright.
5. Click Ok to apply the settings. The image content should now appear darker.


- ▼ How to auto-straighten scanned documents


You can auto-straighten documents that were tilted during scanning process. To do this follow the steps below...

In the Scan window, click the Settings tab. The Settings pane will now be displayed.

Check the Automatically deskew scanned image option to auto-straighten the scanned image. Now, whenever a document is scanned, each and every page of that document will be checked, if the scanned document is tilted, then the image will be auto-straightened and will then be added to Sohodox.

You can also manually auto-straighten the document. To do this...

Click the Edit button  Edit on the Image toolbar. The scanned document will now open in the Image editor window.



Click Adjustments drop down  Adjustments and select the Deskew option. The

document will now be straightened

▼ How to remove noise (tiny black spots) from the documents

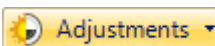
Check the Automatically despeckle scanned image option to remove noise from the scanned image. Now, whenever a document is scanned, each and every page of that document will be checked, if the scanned document is speckled (has tiny black spots), then the image will be despeckled and will then be added to Sohodox.

To manually remove or reduce noise (tiny black spots) from the scanned document, follow the steps below...

1. Click the Edit button  on the Image toolbar. The scanned document will now open in the Image editor window.
2. Click the Eraser button . Now hold left button of the mouse and drag it over the black spots to erase it.

Please make sure not to drag the Eraser tool over the scanned text as it may erase it too. In case you accidentally erased a text area then please make sure you do not save the changes, this will retain the erased text area.

Another method to do this is as follows...

1. Click Adjustments drop down  and select the Despeckle option.
2. Specify 1 pixel in the Dot size box. Now, click the Ok button.
3. All the dots that are around one pixel in size will be automatically erased from the document.

This method is not recommended for scanned documents that have text with small font sizes, as it may remove full stops (period), decimals etc.

You can remove noise from the document even during the scan process.


You can avoid the tiny black spots by...

Cleaning the paper documents before scanning (wipe it with a dry cloth).

Cleaning the scanner's glass and making sure that there are no dust particles on it (for cleaning instructions see scanner's manual).

- ▼ How to remove punch hole marks (two big black spots) and stapler or pin marks from the documents

You can remove the punch hole marks or the stapler (pin) marks from the scanned document by using the Eraser tool. To use the eraser tool...

1. Click the Edit button  on the Image toolbar. The scanned document will now open in the Image editor window.
2. Click the Eraser button . Now hold left button of the mouse and drag it over the big black spots and on the stapler marks to erase them.

Please make not to drag the Eraser tool over the scanned text as it may erase it too. Incase you accidentally erased a text area then please make sure you do not save the changes, this will retain the erased text area.

7 Documents

Topics Covered

1. [Document Details Window](#) ^[108]
2. [Create a New Document](#) ^[116]
3. [Update Common Information for Multiple Documents](#) ^[117]
4. [Open a Document](#) ^[118]
5. [Edit a Document](#) ^[120]
6. [View Document as Thumbnails](#) ^[121]
7. [Share documents](#) ^[123]
8. [Assign documents to another user](#) ^[124]
9. [Delete a Document](#) ^[125]
10. [Email a Document](#) ^[126]
11. [Link one Document with another Document](#) ^[127]
12. [Break Links of a Document](#) ^[129]

13. [Enter Comments or Notes for Documents](#) ¹³¹
14. [Burn documents on a CD](#) ¹³²
15. [Print a Document](#) ¹³²
16. [Export Documents](#) ¹³³
17. [Drag and drop documents from Sohodox to a folder](#) ¹³⁴
18. [Print the indexed information of a Document](#) ¹³⁵
19. [Fax a Document](#) ¹³⁷
20. How to access your Sohodox documents on Dropbox online

7.1 Document Details Window

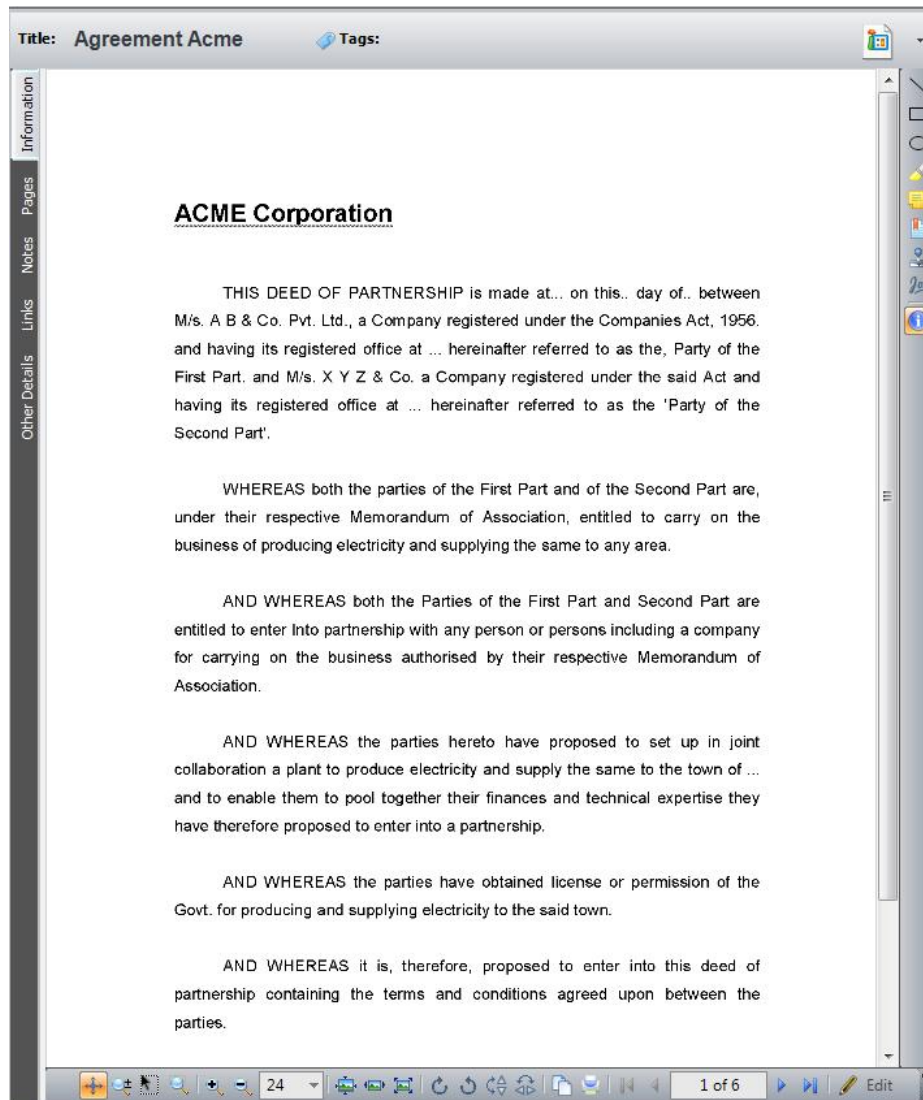
The *Document Details* pane displays the selected document along with all its details. The *Document Details* pane can be used to add indexing information, notes, annotation etc. The *Document Details* pane can also be opened in a new window by double clicking the document in the *List View* pane.

In the Document details window the icon of the associated file type of the document is displayed on the right hand side of the window. You can click this icon to open the document in its associated application.

The *Document Details window* has the *Forward* and *Back* navigation button on the top right corner of the window which can be used to navigate through the entire list of documents displayed in the *List View* pane.

Tags: You can enter tags for the selected document in the *Tags* box. After entering the tags, hit the Enter key on the keyboard to apply the tags.

Document Title: The *Document Title* box displays the document name. You can rename the document from here.



The Document Details pane is divided into two sections the *Details* pane and the *Display* pane.

Details Pane:

The *Details* pane displays all the details of the document. The *Details* pane consists of panels.

To view the panels you will need to click its corresponding tab on the left bar of the Document Details pane. You can use the *Up* and *Down* buttons at the bottom of the left bar to navigate between the tabs.

Information Panel:

The *Information* panel displays the indexed data along with its associated [Document Type](#)^[174], [Folder](#)^[187]. The *Information* panel is divided into two sections *Information* and *Other Information*

Information: Click the *Information* tab on the left bar of the Document Details pane to view the *Information* panel. The *Information* section displays the Document Type along with its [Data Fields](#)^[143]. If the Document Type not set for the document then no Data Fields will be displayed. You can add or modify the descriptive/indexing information of the document in its respective data fields. The *Information* section also has a toolbar, which has the following options...



Click this button to save the changes made



Click this button to undo the changes made

Other information: The *Other Information* section displays *Folder* that the document is associated with.

Related Folder: The folder that the document is associated with will be displayed in the *Related Folder* box. If the document is not associated with any folder or if you want to change its associated folder then click the *Change...* button to set a folder.

Pages Panel:

Click the *Pages* tab on the left bar of the *Document Details* pane to view the *Pages* panel. The *Pages* panel displays the pages of a multi-page document as thumbnail and also the [Bookmarks](#)^[263] on the document. The pages panel is divided into two section *Pages* and *Bookmark*.

Pages: All the pages of a multi-page document are displayed as thumbnails in this section. You can click a thumbnail to view it as a large image in the *Display* pane.

Bookmarks: All the Bookmarks that are inserted on the document will be listed in this section. By double clicking a *Bookmark*, the place that is bookmarked on the document will be displayed in the *Display* pane. The *Bookmarks* section also has a toolbar, which has the following options...



Click this button to delete a *Bookmark* from the list.



Click this button to edit a *Bookmark* from the list

Notes Panel:

Click the *Notes* tab on the left bar of the *Document Details* pane to view the *Notes* panel. The *Notes* panel can be used to enter notes, information or comments about the documents. The notes that you enter for a document can be viewed by any user who has privilege to view that document. The *Notes* panel has a toolbar with the following options...



Click this button to create a new note.



Click this button to edit a note.



Click this button to delete a note.



Click this button to refresh the *Notes* panel.



Click this button for more options. The following options will be displayed...

Print Data

Click this option to print the notes that is displayed in the list

Export Data

Click this option to export the notes that is displayed in the list

Links Panel:

Click the *Links* tab on the left bar of the *Document Details* pane to view the *Links* panel. The *Links* panel can be used to link the selected documents with other documents. You can also break an existing link from this panel.

Linked Documents: Use the *Linked Documents* section to link the selected document with other document(s) in the Sohodox DB. The *Linked Documents* section has a toolbar with the following options...



Click the Link button to link the selected documents with other documents. The Link button also has a drop-down portion with the following options...

Link existing document(s)

Click this option to link the selected document with document(s) stored in the Sohodox DB.

Add files from disk and link

Click this option to add files from disk to the Sohodox DB and link it with the selected document.

Scan document and link

Click this option to scan a document and link it with the selected document



Click this button to break a link between the selected document and the linked document



Click this button for more options. The following options will be displayed...

Print Click this option to print the document(s) that is displayed in the Document(s) list

Export Click this option to export the document(s) that is displayed in the Document(s) list

Email Click this button to e-mail the document(s) that is displayed in the Document(s) list

Fax Click this button to fax the document(s) that is displayed in the Document(s) list

Export to CD/DVD Click this button to export the data that is displayed in the list to a CD/DVD

Other Details:

Click the *Other Details* tab on the left bar of the *Document Details* pane to view the *Other Details* panel. The *Other Details* panel displays the properties and other descriptive information of the selected. The properties of the selected document is divided into two groups: *Document Details* and *File Details*.

Display Pane:

The *Display* pane displays the selected document. The *Display* pane has two toolbars The [Annotation toolbar](#)^[258] on the right and the *Image* toolbar at the bottom.

Annotation Toolbar: Use this toolbar to annotate the document. The *Annotation* toolbar has the following options.



Use this button to [draw lines or underline](#)^[260] text.



Use this button to [draw rectangles](#)^[261].



Use this button to draw [ellipses or circles](#)^[261].



Use this button to [highlight](#)^[261] texts.



Use this button to [add notes](#)^[262] to the document.



Use this button to insert a [bookmark](#)^[263] on the document.



Use this button to [insert stamps](#) ²⁶⁵ on the document.



Use this button to [insert signature](#) ²⁶⁵ on the document.



Use this button to toggle the annotation's User Information.

Image toolbar: The *Image* toolbar has the following buttons...



Click the *Scroll Mode* button to activate the scroll mode.

In the scroll mode you can scroll the displayed image in any direction if the size of the document exceeds the size of the display area. To scroll the image press the left mouse button and then move the mouse in the direction you want to scroll keeping the left mouse button pressed.



Click the *Zoom* button to activate the zoom mode.

In the zoom mode you can...

Zoom Out (shrink the image) by pressing the left mouse button and moving it in the upward direction.

Zoom In (enlarge the image) by pressing the left mouse button and moving it in the downward direction.



Click the *Magnify* button to activate the magnify mode.

In the magnify mode you can magnify any area of the displayed image by moving the mouse pointer to that area and pressing the left mouse button. The area remains magnified only till the left mouse button is pressed. You can move the mouse while the left mouse button is pressed to magnify other parts of the displayed image.

Using the magnify mode is very similar to using a magnifying glass to read a paper document.



Click the *Zoom In* button to enlarge the displayed image.



Click the *Zoom Out* button to shrink the displayed image.



Select the Zoom from this drop down.



Click the *Actual Size* button to reset the image to its original size.



Click The *Fit Width* button to resize the width of the image to fit the width of the

Display pane.



Click *Fit to Window* button to resize the image to fit entirely in the Display area.



Click *Rotate Clockwise* button to rotate the selected scanned document clockwise.



Click *Rotate Anticlockwise* button to rotate the selected scanned document anti-clockwise.



Click the *Flip Vertical* button to flip the selected document vertically.



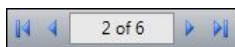
Click the *Flip Horizontal* button to flip the selected document horizontally.



Click the *Copy* button to copy the selected area on the document.



Click the *Print* button to print the selected document



Use these buttons to navigate between the pages of the selected document.

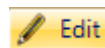
First: Click this button to navigate to the first page of a multi-page image file.

Previous: Click this button to navigate to the previous page of a multi-page image file.

Page Drop-down: Choose a page number from the drop down to jump to that page of the multi-page image file.

Next Click this button to navigate to the next page of a multi-page image file.

Last: Click this button to navigate to the last page of a multi-page image file.



Click the *Edit* button to edit the document in the Image Editor. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document. You can save the modifications made to a document from the Image Editor

Related Topics

[Create a New Document](#)^[116]

[Set a Document Type of a Document](#)^[184]

[Link one document with another Document](#)¹²⁷

7.2 Create a New Document

You can create a new document by clicking the *New* button of the *Home* tab.

To Create a New Document:

1. In Sohodox, select *Workspace > All Documents* in the [Navigation](#)^[26] pane.
2. Click the *New* button of the *Home* tab to add a document. The *New Document* window will now be launched.
3. Click the *Scan* button to [scan and add a document](#)^[61] or click the *Add a File* button to [add document from disk](#)^[49].
4. Click the *Information* tab on the left side of the *Documents Details* pane. Select a document type from the *Document Type* drop down. The data fields of the selected document type will now be displayed.
5. Click the *Save* button on the *Information* bar to save the information.

To Create a New Document by Dragging and Dropping Text:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane.
2. Select the text from a RTF (Rich Text Format) file for e.g. .DOC files, HTML files, .EML files.
3. Drag this text and drop it on the *All Documents* node. A new document will be created containing the text you selected.

Note: By default documents added to Sohodox can only be viewed and modified by the owner/creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].

- Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Drag & drop of attachments in email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is also supported. Sohodox also supports preview of .msg files imported from MS Outlook.
- You will be the Owner of the documents, that you have created.

- By default 50 documents are displayed in the List View pane. If you have added more than 50 documents they will be moved to the next page. To view the documents displayed on the next page use the navigation buttons below the List View pane.
- You can also add a document from the [Find and Add Files](#) ^[55] window.

Related Topics

[Edit a document](#) ^[120]

[Document Details Window](#) ^[108]

[Drag and Drop a document](#) ^[48]

[Drag and drop image from a web page](#) ^[60]

7.3 Update Common Information for Multiple Documents

If two or more documents have common indexing information, you can update them together.

To Update Common Information for Multiple Documents:

1. In Sohodox, select Workspace > Document Types in the [Navigation](#) ^[26] pane.
2. Select a Document Type from the *Document Type* node.
3. This will display all the documents under this document type in the [List](#) ^[29] pane.
4. Select all the documents for which you want to update common indexing information. Doing this will display the indexing fields as blank (empty/without any value entered).
5. Enter appropriate descriptive/indexing information for the documents in the respective data fields in the *Information* pane of the *Document Details* pane.

Note:

Whatever you enter in any field will apply to all the documents. If you want to retain the value of an indexing field of a particular document(s), then leave that field empty.

6. Click the **Save** button on the Information bar to save the information.

- There is no limit to the number of documents that can be selected for updating common information. However, by default, as the number of documents displayed in the List View pane is 50, you may want to change it if you need to update more documents together. To display more documents in the List View pane, see [Change the number of items being displayed in List View](#) ^[340]. Once updated, you can revert to the default display of 50

documents if you want.

Related Topics

[Update Common Indexing Information for Multiple Documents](#) 

[Change the number of items being displayed in List View](#) 

7.4 Merge Documents

You can now merge two Documents in SOHODOX. Documents being merged must have the same Document Type and only PDF files are supported for now. Meta data for the documents being merged can be combined in any way. In other words, meta data for the merged document can selectively contain data from either of the documents being merged.

To Merge documents:


1. In Sohodox, select any two PDF documents (that belong to the same Document Type or that do not belong to any Document Type).
2. Click *More >> Merge* on the *Ribbon* bar. The 'Sohodox - Merge Documents' window will be launched.
3. Select the necessary meta data that needs to be assigned to the document. (if the documents belong to a Document Type)
4. Click the Merge button to merge the document.

Note: Once the document is merged, you cannot undo this action.

7.5 Open a Document

You can select or double click a document in the List View pane to view or edit it using Sohodox Internal Viewer or You can open a document in its associated application. For e.g. Lets say that you want to open a .xls file, by selecting the Open in Associated Application option, the .xls files will open in MS Excel instead of Sohodox Internal Viewer.

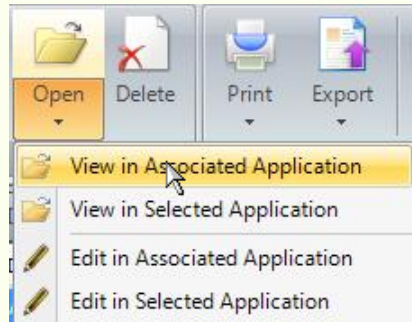
To Open a Document:

1. Select a document from the [List View](#)  pane.

2. A preview of the document along with its details will be displayed in the [Document Details](#) pane Or, double click a document from the list to open it in the Document Details window.

To Open a Document in its Associated Application:

1. Select a document from the List View pane. The document will now be displayed in the *Documents Details* pane.
2. Click the *Open* drop-down and select the *View in Associated Application* of the *Home* tab, Or right click the document in the *List View* pane and select the *Open > View in Associated Application* option from the popup menu.



- In the Document details window the icon of the associated file type of the document is displayed on the right hand side of the window. You can click this icon to open the document in its associated application.
- Sohodox supports the preview of most image file formats. You can manage files of any format using Sohodox. Files which have a format which Sohodox cannot display using it's internal viewer can be opened for viewing in their associated application (for e.g. .PPT files in MS Powerpoint) by clicking the *Click here to open the document in its associated application* link in the *Display* pane of the *Document Details* window.
- By default 50 documents are displayed in the List View pane. If you have added more than 50 documents they will be moved to the next page. To view the documents displayed on the next page use the navigation buttons below the List View pane
- You can also select an application to open a document, to do this select the *Open in Selected Application* option from the *Open* drop-down. For e.g. Lets say that you want to open .bmp files, by selecting the *View in Selected Application* option, you can choose an application for e.g. MS Paint to view the file, instead of using the default application.

Related Topics

[Edit a document](#)^[120]

[Set a Document Type of a Document](#)^[184]

[Link one document with another Document](#)^[127]


7.6 Edit a document

You can edit a document in its associated application by clicking the Open button in the Home tab. For e.g. Lets say that you want to edit .doc files, by selecting the Edit using Associated Application option, the .doc files will open in MS word.

To Edit a Document in its Associated Application:

1. Select a document from the List View pane.
2. On the Home tab click the *Open* drop-down and select the *Edit in Associated Application* option, or right click the document in the List View pane and select the *Open > Edit in Associated Application* option from the popup menu.



3. You can also click the Edit button  on the button on the Image Editor. Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document. You can save the modifications made to a document from the Image Editor.

- In the Document details window the icon of the associated file type of the document is displayed on the right hand side of the window. You can click this icon to open the document in its associated application.
- Sohodox supports the preview of most image file formats. You can manage files of any

format using Sohodox. Files which have a format which Sohodox cannot display using it's internal viewer can be opened for viewing in their associated application (for e.g. .PPT files in MS Powerpoint) by clicking the *Click here to open the document in its associated application* link in the *Display* pane of the *Document Details* window.

- If you double click a document in the Document List it will be opened in it's associated application if the built-in Sohodox viewers cannot display files of that type.
- You can also select an application to edit a document, to do this select the *Edit in Selected Application* option from the Open button. For e.g. Lets say that you want to edit .bmp files, by selecting the *Edit in Selected Application* option, you can choose an application for e.g. MS Paint to edit the file, instead of using the default application.

Related Topics

[Document Details Window](#) ¹⁰⁸

[Share documents](#) ¹²³


[Drag and Drop a document](#) ⁴⁸

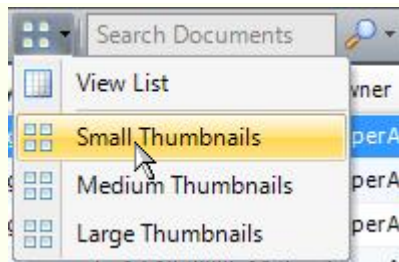
[Drag and drop image from a web page](#) ⁶⁰

7.7 View Documents as Thumbnails

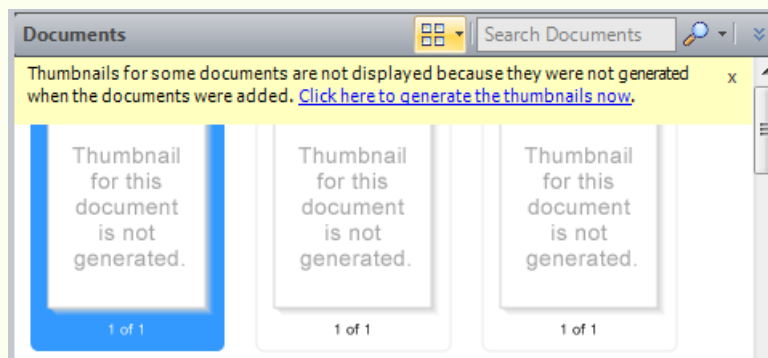
You can view documents as Thumbnails in the *List View* pane by using the *Views* button besides the *Search* bar.

To View Documents as a Thumbnails:

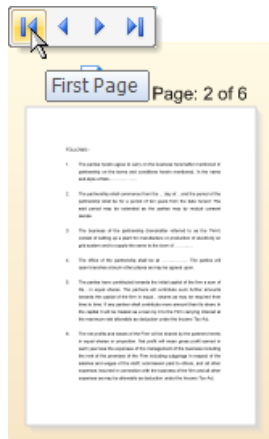
1. In Sohodox, select *Workspace > All Documents* in the Navigation pane. The documents will be now displayed as list in the *List View* pane.
2. Now, click the *Views* button  near the *Search* bar and select the *Small Thumbnails* option from the list to view small sized thumbnails of the documents. The documents will now be displayed as *Thumbnails* in the *List View* pane.



Note: If the *Create thumbnail on Check-in* option is disabled, and you select the option to view thumbnails of the documents in the *List View* pane, then you will be informed that the thumbnail of the documents have not been generated. To generate the thumbnails, in the *List View* pane click the *Click here to generate the thumbnails now* link on the yellow information bar. You can enable this option from the [Thumbnails section](#)^[338] in the *Options* dialog.



- Select the *View List* option to view the documents as list in the *List View* pane.
- By default 50 documents are displayed in the *List View* pane. If you have added more than 50 documents they will be moved to the next page. To view the documents displayed on the next page use the navigation buttons below the *List View* pane
- To display more thumbnails in the *Display* pane, click the *Load more...* button on the top right side of the *Display* pane.
- If a document has more than one page, on selection of that document a navigation bar will appear on its thumbnail to navigate its pages.



Related Topics

[Change Sohodox Main View layout](#) ^[339]

[Change the number of items being displayed in List View](#) ^[340]


[Advanced Search](#) ^[227]

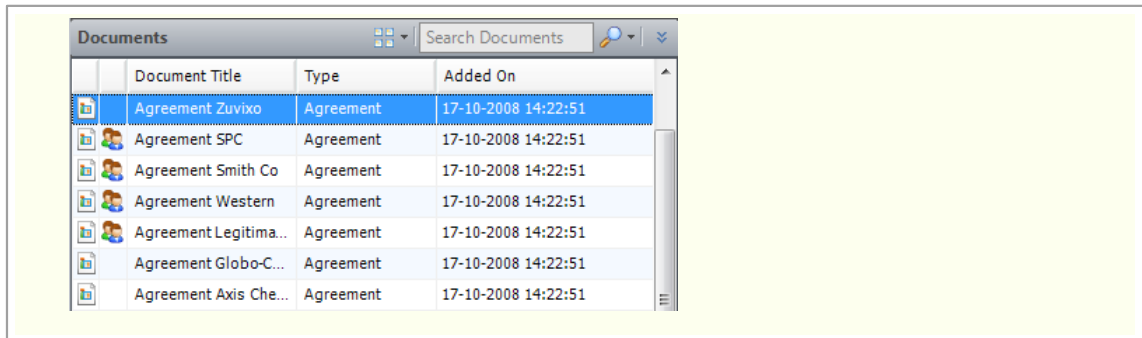
[Quick Search](#) ^[224]

7.8 Share documents

You can share a folder with other Sohodox users by adding the folder to the Public Folder.

To Share documents with other Users:

1. In Sohodox, select *Workspace* > [Folder](#) ^[187] in the Navigation pane.
2. Select a folder from the Public Folders node.
3. Now, add the documents to this folder.
4. The document will now be shared with other users. The documents that you have shared will be indicated by the Share icon  in the List View pane.



- You can view, modify or delete public documents that you own, while other users can only view or modify these documents.
- Move the shared documents to Private Folder to stop sharing.
- Documents added to a Public folder can be viewed by all the users. If you want only one user to view your document, then you can [assign that document to that user](#)^[124].
- By default documents added to Sohodox can only be viewed and modified by the owner/ creator i.e. other Sohodox users will not be able to view documents added by you unless you share that document.

Related Topics

[Drag and Drop a document](#)^[48]


[Drag and drop image from a web page](#)^[60]

[Drag and drop text from a document](#)^[59]

7.9 Assign documents to another user

Sohodox lets you to assign documents owned by you to another user. You can assign a document to only one user and not multiple users. You can assign a document by right clicking it and choosing the *Assign...* option.

To Assign Documents to another User:

1. In Sohodox, select the document to assign to another user, from the [List View](#)^[29] pane.
2. Click the *Assign button*  on the *Ribbon* bar. The *Assign* window will be launched.

3. Select a user from the *Users* list to assign the document.
4. Click the *OK* button to assign the document. Now, this user will be the owner of the document.

- You will not be able to unassign the document that you have assigned to a user. You will have to ask that user to assign the document back to you.
- By default documents added to Sohodox can only be viewed and modified by the owner/ creator i.e. other Sohodox users will not be able to view documents added by you unless you share that document.

Related Topics

[Share a document](#) 

[Email a Document](#) 

7.10 Delete a Document

You can delete a document clicking the *Delete* button on the *Home* tab.

To Delete a Document:

1. In the All Documents node, select the document you want to delete.
2. Click the *Delete* button of the *Home* tab, Or right click the document in the *List View* pane and select the *Delete* option from the popup menu.
3. The document will be deleted permanently.

Note: When you delete a document from a Folder, Document Type or from a Tag, the document will now be permanently deleted.

- Documents are deleted directly from the system and are not moved to the Recycle Bin.

Related Topics

[Create a New Document](#) 

[Burn documents on a CD](#) 

[Print a Document](#) 

7.11 Email a Document

You can mail a document from the Sohodox DB by clicking the *Mail* button.

To E-mail a Document:

1. Select the document you want to mail from the [List View](#)^[29] pane.



2. Click the *E-mail* button of the *Home* tab, Or right click the document and select the *Mail* option. The default email window will now be launched.

- Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Drag & drop of attachments in email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is also supported. Sohodox also supports preview of .msg files imported from MS Outlook.
- You can create a new document by dragging and dropping text from a RTF file to Sohodox. For more info see, [Create a New Document](#)^[116]

Related Topics

[Email a document along with indexing metadata](#)^[127]

[Print a document](#)^[132]

[Drag and Drop a document](#)^[48]

[Drag and drop image from a web page](#)^[60]

7.11.1 Email indexing data with document

You can email a document along with indexing meta data. You will need to enable this option from the Options dialog.

To enable this option:

1. Click the SOHODOX button (the round button on the top left) >> Options.
2. The Options dialog will be launched.
3. In User Options, scroll to the section Email.
4. Check the box 'Include Document Metadata in Email'
5. Click OK.

- Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Drag & drop of attachments in email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is also supported. Sohodox also supports preview of .msg files imported from MS Outlook.


Related Topics

[Email a document](#)^[126]



7.12 Link one Document with another Document

Links can be used when you want to maintain a link between two Documents belonging to the same Document Type or different Document Type, in other words you want them to be loosely linked and not strongly linked. You can link single document with multiple documents.


To Link a Document with Existing Documents:

1. Select a document from the [List View](#)^[29] pane. The document will now be displayed in the [Documents Details](#)^[108] pane.
2. Click the *Links* tab on the left bar of the *Document Details* pane. The *Links* panel will now be displayed.
3. In the *Linked Documents* section, click the *Link* button  and select the *Link existing Document(s)* option to link the document to an existing document. The *Look Up* window

will be launched.


4. Select the *Documents* option from the *Look in* box and type all or part of the file name in the *Look for* box and click the *Find* button.
5. The documents that contains the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
6. Select a document to link and add it to the *Selected Files* list. Use this  button to add the selected document from the *Search Result* list to the *Selected Files* list and use this  button to remove the document from the *Selected Files* list and move them back to the *Search Result* list.
7. Click the *OK* button to select the document. The selected document will now be displayed in the *Linked Documents* list.

To Add Documents from Disk and Link it with another Document:

1. Select a document from the List View pane. The document will now be displayed in the *Documents Details* pane.
2. Click the *Links* tab on the left bar of the *Document Details* pane. The *Links* panel will now be displayed.
3. In the *Linked Documents* section, click the *Link* button  and select the *Add File(s) from disk and link* option. The *Add Files* window will now be launched.
4. Select one or more files that you want to add and click the *Open* button. The selected document(s) will now be displayed in the *Linked Documents* list.
Also see, [Add documents from disk](#)^[49]

To Scan Document and Link it with another Document:

1. Select a document from the List View pane. The document will now be displayed in the *Documents Details* pane.
2. Click the *Links* tab on the left bar of the *Document Details* pane. The *Links* panel will now be displayed.

3. In the *Linked Documents* section, click the *Link* button  and select the *Scan document and link* option. The [Scan window](#)^[65] will now be launched.
4. Select a [Scan Profile](#)^[98] from the *Select a Scan Profile* drop-down to select the scan settings.
5. Select a scanner from the *Select a Scanner* drop down.
6. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the *Scan Window*.
7. Select the location to add the scanned files in the *Destination* tab.
8. Now, click the *Add* button to add the scanned document to the Sohodox DB. The scanned document will now be displayed in the *Linked Documents* list. Also see, [Scan and add a document](#)^[61]

- When you link a document with another document, a loose link is created between the two i.e. If you delete a document, its linked documents will not be deleted and vice versa.
- You can click the document displayed in the *Linked Documents* list to open it in the *Document Details* window.

Related Topics

[Edit a document](#)^[120]

[Break Link between linked Documents](#)^[129]


[Share documents](#)^[123]

7.13 Break Links of a Document

You can break a document's link from the *Links* panel of the *Document Details* pane.

To Break a Link between two Documents:

1. Select the document from the *List View* pane. The document will now be displayed in the *Documents Details* pane.
2. Click the *Links* tab on the left bar of the *Document Details* pane. The *Links* panel will now be displayed.

3. The documents that are linked to the selected document will be displayed in the *Linked Documents* list.
4. Now, select the document from the *Linked Documents* list and click the *Break Link* button  to break the link.

Related Topics

[Edit a document](#)^[120]


[Link one Document with another Document](#)^[127]




[Share documents](#)^[123]

7.14 Enter Comments for a Document

You can enter comments or notes regarding the documents in the *Notes* panel, so that other users can read it

To Enter Comments for a Document:

1. Select a document from the [List View](#)^[29] pane. The document will now be displayed in the [Documents Details](#)^[108] pane.
2. Click the *Notes* tab on the left bar of the *Document Details* pane. The *Notes* panel will now be displayed.
3. Click the *New* button  on the *Notes* panel toolbar or right click and select the *New* option to to enter notes or comments for the selected document. *Edit Note* window will now be launched.
4. Enter notes in the *Edit Note* window. Click the *OK* button to save the note.

- You can delete a note by right clicking it and selecting the *Delete* option, you can also click the *Delete*  button on the *Notes* panel toolbar.
- To edit a note right click that note and select the *Edit* option, you can also click the *Edit* button  on the *Notes* panel toolbar.
- For more options click this  button. The following options will be displayed...

Print Data

Click this option to print the notes that is displayed in the list

Export Data

Click this option to export the notes that is displayed in the list

Related Topics

[Edit a document](#)^[120]

[Email a Document](#)^[126]

[Fax a Document](#)^[137]

7.15 Burn documents on a CD

You can burn documents from within Sohodox to a CD/DVD by using the *Export to CD/DVD* option.

To Burn Documents on a CD/DVD:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.



2. Select the *Home* tab and click the *Export* drop down in the *Collaborate* group.
3. Click the *Export to CD/DVD* option. The *Burn to CD/DVD* window will be launched.
4. Select the burning device from the *Choose Device* drop down.
5. Select the burning speed from the *Choose speed* drop down.
6. Click the *Burn* button to start the burning process.

- To erase a disc before burning the data, select the *Erase disc before writing* option.
- Select *Verify disc after burning* option to verify the data that has been burnt on the CD/DVD correctly.

Related Topics

[Export data to a CSV file](#) ³⁰⁴

[Back up Sohodox DB](#) ³³²

7.16 Print a Document

You can print a document by clicking the *Print* button of the *Home* tab.

To Print a Document:

1. In Sohodox, select *Workspace > All Documents* in the [Navigation](#) ²⁶ pane. The documents will be displayed in the *List View* pane.

2. Select a document to print from the *List View* pane.
3. On the *Home* tab click the *Print* button. This will bring up the *Print Document* window.
4. Select a printer to print the document from the *Selected Printer* drop-down. Click the *Properties* button to view the printer's properties.
5. In the *Page Range* section specify the range of pages to be printed.
 - a) Select the *All Pages* option to print all the pages of the selected document.
 - b) Select the *Pages* option and type specific page numbers or a page ranges separated by commas counting from the start of the document. For e.g. Type 1, 3 if you want to print the first and the third page of the document or type 4-8 if you want to print pages starting from the fourth page to the eighth page.
6. Select the *Print with annotations* option to print the document along with the annotations.
7. Select the users whose annotations you want to print in the *User Name* section.
8. Click the *OK* button to print the document.

- You can also print the indexed information of a document, for more info see, [Print the indexed information of a document](#)^[135]

Related Topics

[Burn documents on a CD](#)^[132]

7.17 Export Documents

You can export documents from Sohodox, by clicking the *Export* button of the *Home* tab.

To Export Documents:

1. In Sohodox, select the documents that you want to export.
2. On the *Home* tab click the *Export* button. This will bring up the *Export Documents to Explorer* dialog.
3. Click the *Browse* button to specify the location to export the documents.
4. Click the *OK* button to export the documents.

- You can also export the documents along with its indexing data see, [Export data to a CSV file](#)^[304]

Related Topics

[Burn documents on a CD](#)^[132]

7.18 Drag and drop documents from Sohodox to a folder

You can drag and drop documents from Sohodox to a Windows folder.

To Drag and Drop documents from Sohodox to a folder:

1. In Sohodox, select the documents that you want to add to a Windows folder.
2. Press the Ctrl key on the keyboard and drag & drop the files to the folder. (do not release the Ctrl key until you dragged and dropped the files)

- You can also drag and drop documents from Sohodox to Microsoft Outlook and Microsoft Outlook Express. The document will be added as an attachment to the email message. Sohodox also supports preview of .msg files imported from MS Outlook.

Related Topics



[Drag and drop text from a document](#)^[59]

[Export a Folder](#)^[194]

7.19 Print the indexed information of a document

You can print the indexed information of the documents that is displayed in the [List View](#)^[29] pane by clicking the *Print* drop-down and selecting the *Print List* option.

To Print the Indexed Information of Documents:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane.
2. On the Home tab click the *Print* drop-down and select the *Print List* option. This will bring up the *Print* window.
3. Select a theme to format the data that you want to print from the [Themes](#)^[28] drop down.
4. Check the columns you want to print from the *Columns* pane. You can rearrange the columns order as per your wish by using the Up  and Down  button.
5. Select the data you want to print.
 - a) If you want to print the data displayed on the current page then select the *Print Current Page* option.
 - b) If you want to print all the data then select the *Print All Pages* option.
 - c) If you want to print only the selected data then select the *Print Selected* option.
6. Click the *Next* button to go to the next page.
7. Select the printer from the *Printers* drop down to print the data. Click the *Settings* button to select the printer's settings.
8. You can click the *Print Preview...* button to view the data that is going to be printed.
9. Select the line spacing for the data that is going to be printed from the *Line Spacing* drop down.
10. Click the *Custom Header* button to modify the header of the document.
 - ▼ This will bring up the Header dialog.

This dialog will allow you to insert additional information in the header. The Header is split into three sections, Left, Center and Right. You can enter text, page number, system date or time in any of these sections, which will be printed on the left, center or right side of the document.

 - To format the entered text, click the *Font* button.

- To insert the page number click the *Page number* button.
- To insert the date click the *Date* button.
- To insert the time click the *Time* button.

11. Click the *Custom Footer* button to enter information in the header of the document.

▼ This will bring up the Footer dialog.

This dialog will allow you to insert additional information in the footer. The Footer is split into three sections, Left, Center and Right. You can put in text, page number, system date or time in any of these sections, which will be printed on the left, center or right side of the document.

- To format the entered text, click the *Font* button.
- To insert the page number click the *Page number* button.
- To insert the date click the *Date* button.
- To insert the time click the *Time* button.

12. Select the *Span columns across* option to span the columns across the page. If you select this option, the columns that will not fit on a page will be printed on the next page.

13. Select the *Wrap text* option to wrap the text.

14. Click the *Print* button to print the data.

- Some file formats (e.g. MS Powerpoint files) cannot be printed by using the *Print Document* window. When you try to print such files, a Print Progress dialog will be displayed informing you that these files cannot be printed.

To print these files, in the Print Progress dialog click the Document Title of the file. The document will open in its associated application (e.g. .doc document will open in MS Powerpoint). Now, use the associated application to print the document.

- You can also export the indexed information along with the documents to a CSV file or a HTML file, for more info see, [Export Data](#)^[304]

Related Topics


[Print a document](#)^[132]

[Burn documents on a CD](#)^[132]

7.20 Fax a Document

You can fax a document from the Sohodox DB by right clicking it and selecting the *Fax* option.

To Fax a Document:

1. Select the document you want to fax from the [List View](#)  pane.
2. Click the *Fax* button of the *Home* tab, Or right click the document and select the *Fax* option. The *Fax* dialog box will now be launched.
3. Select a fax printer to the send the fax from the *Selected Fax printer* drop-down.
4. If you want to send multiple documents as a single fax then make sure that the *Merge all documents in a single fax* option is checked. Please note that this option is only available if you have selected multiple documents.
5. Check the *Set this printer as the default fax printer* option to make the selected fax printer as the default.
6. In the *Page Range* section specify the range of pages to be printed.
 - a) Select the *All Pages* option to print all the pages of the selected document.
 - b) Select the *Pages* option and type specific page numbers or a page ranges separated by commas counting from the start of the document. For e.g. Type 1, 3 if you want to print the first and the third page of the document or type 4-8 if you want to print pages starting from the fourth page to the eighth page.
7. Select the *Print with annotations* option to fax the document along with the annotations.
 - a) Select the users whose annotations you want to print in the *User Name* section.
 - b) Check the *Include User Information* option to include the .
8. Click the *OK* button to fax the document.

Note: You can only Fax PDF files and image files for e.g. Tiff files.

- Currently you can only fax PDF documents and image files. You can fax documents belonging to different file format by using their associated application.

- You can create a new document by dragging and dropping text from a RTF file to Sohodox info see, [Create a New Document](#)

Related Topics

[Print a document](#)
[Email a Document](#)

7.21 Enable/disable the automatic preview of a specific file type

You can use the Options dialog to select the file formats for which Sohodox must automatically display a preview.

How to to configure the built-in document viewer:

Click the Sohodox button at the top left of the window.

1. Click *Options*. This opens a dialog box
2. In the left panel, *User Options* should be highlighted; if not, click it
3. Scroll down to *File Type Viewer Options*
4. In the list of file types, make the files that you want Sohodox to preview automatically are checked and the ones which should not be previewed automatically are left unchecked.
5. Click *OK* to close the Options Dialog

Related Topics:

[Change the default viewer for a file type](#)^[139]

[Prevent users from changing file type viewer settings](#)^[140]

7.22 Change the default viewer for a file type

For file formats such as MS Word, MS Excel and PDF, you can also choose which viewer Sohodox must use to display the file (for e.g. for PDF files, you can choose between Sohodox's built-in viewer or Adobe Reader).

How to change the default viewer for a file type:

Click the Sohodox button at the top left of the window.

1. Click *Options*. This opens a dialog box
2. In the left panel, *User Options* should be highlighted; if not, click it

3. Scroll down to *File Type Viewer Options*
4. In the list of file types, double click .doc, .docx, .xls, .xlsx or .pdf
5. This opens a small dialog box.
6. From the drop down, select *Use Built-in Viewer* or *Use System Default* and click *OK*.
7. Click *OK* to close the Options Dialog
8. Click on the *Refresh* button on the Ribbon bar and the preview pane will now show the file format using the viewer you have specified

- MS Word and MS Excel are very complicated file formats. The built-in viewer cannot handle all types of MS Word and MS Excel files. For example files which contain drawing objects, shapes, flow charts, graphs etc., will not be displayed correctly. If you have a lot of such files, you could try using the alternate viewers for these file type that Sohodox supports.
- For MS Excel files, you can choose between the built-in viewer and the preview of XLS/XLSX files using MS Excel. To enable this select *Use System Default* option in Step 6 above. This option requires that MS Excel be installed on your machine.
- For MS Word files, you can choose between the built-in viewer, the preview of DOC/DOCX files using MS Word. To enable this select *Use System Default* option in Step 6 above. This option requires that MS Word be installed on your machine.
- When using the built-in viewer, you can annotate/stamp Word or Excel documents and print them with the annotation however you cannot burn the annotation to the documents (in other words, if you open the annotated document in Word or Excel. the annotations you added to that document using Sohodox will not be displayed).

Related Topics:

[Enable/disable the automatic preview of a specific file type](#)^[139]

[Prevent users from changing file type viewer settings](#)^[140]

7.23 Prevent users from changing file type viewer settings

In multi-user installations, some administrators prefer that non-admin users should no be able to change the file type viewer settings. You can do so via the Options dialog.

How to to configure the built-in document viewer:

Make sure you are logged into Sohodox as *superadmin*.

Click the Sohodox button at the top left of the window.

1. Click *Options*. This opens a dialog box
2. In the left panel, *User Options* should be highlighted; if not, click it
3. Scroll down to *File Type Viewer Options*
4. Check the *Apply and lock these settings for all users* box located below the list of file types.
5. Click *OK* to close the Options Dialog
6. Other users will now not be allowed to change the file type settings.

Related Topics:

[Enable/disable the automatic preview of a specific file type](#)^[139]

[Change the default viewer for a file type](#)^[139]

8 Index Documents

Topics Covered

1. [What are Data Fields](#)^[143]
2. [Data Fields - FAQ](#)^[145]
3. [Fields Tab](#)^[148]
4. [Create Data Fields for Document Types](#)^[161]
 - i. [Example](#)^[163]
5. [Enter Indexing Information of a Document](#)^[166]
6. [Update Common Indexing Information for Multiple Documents](#)^[169]

7. [Delete Fields](#) 
8. [Block Indexing](#) 

8.1 What are Data Fields

What are Data Fields?

When you add documents to a Sohodox DB you would also want to add descriptive/indexing information along with each document. This information could include data items like Author Name, Title, Subject etc.. Each of these items of data is known as a data field.

You can create data fields for [Document Types](#)^[173]

Whenever you add a Data Field to a *Document Type* you will need to specify the Data Type for that field. A field's Data Type specifies the type of data that can be stored in that field.

Below is the list of Data Types available in Sohodox and the type of data that can be stored in fields of these Data Types.

Data Type	Description
<i>Text</i>	Use this to enter text or combinations of text and numbers, as well as numbers that don't require calculations, such as phone numbers.
<i>Memo</i>	Use this to enter lengthy text or combination of text and numbers
<i>Email</i>	Use this to enter email address
<i>URL</i>	Use this to enter web links
<i>Integer</i>	Use this to enter numeric data used in mathematical calculations
<i>Decimal</i>	Use this to enter Decimal values
<i>Currency</i>	Use this to enter Currency values
<i>Date</i>	Use this to enter Date values for the years through 1601 to 9999
<i>Time</i>	Use this to enter Time values
<i>DateTime</i>	Use this to enter both Date and Time value
<i>Yes/No</i>	Yes or No values, fields that contain only one of the two values
<i>PickListSingle</i>	Use this to create single item from a list.
<i>PickListMultiple</i>	Use this to be able to select multiple items from a list.

<i>Lookup</i>	Use this to be able to store a link to a Document
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Related Topics[Data Fields - FAQ](#) ¹⁴⁵[Create Data Fields for Document Types](#)

8.2 Data Fields - FAQ

▼ What are data fields?

When you add documents to a Sohodox DB you would also want to add descriptive/indexing information along with each document. This information would include data items like Author Name, Title, Subject etc.. Each of these items of data is known as a data field.

You can create data fields for Document Types

▼ How do I create data fields?

If you want to add a data field to a Document Type then select *Settings > Document Type* in the *Navigation* pane.

Click the *New* button. Enter the information in the *Information* tab

Click the *Fields* tab to add fields. Use this pane to add fields.

You can add, modify or delete data fields from a Sohodox DB at any time.

For more info see:

[Creating Data Fields for Document Types](#)

▼ How many data fields can I create in a Sohodox DB?

The actual number of fields you can create in a Sohodox DB depends on the type of DB you create. However normally you can create up to 200 fields. Please note that you cannot create data fields with the following names...

ID, File Icon, Document Title, File Name, Type, Version, Version Comment, Status, Position, Owner, Added On, Created By, Last Modified On, Last Modified by, Checked out by, Checked Out Date, In Workflow, Document Text, Tags.

▼ What are the types of data fields that I can create?

The type of a data field determines the type of data you can store inside it. The types of data fields you can create are...

<i>Text</i>	Stores up to 255 characters of text	You can use the <i>Text</i> data type to enter values such as Names, Telephone numbers etc.
<i>Memo</i>	Stores up to 65536 amount of text	You can use the <i>Memo</i> data type to enter Address, Description, Comments etc.
<i>Email</i>	Stores Email address	You can use the <i>Email</i> data type to enter email address

<i>URL</i>	Stores Web links	You can use the <i>URL</i> data type to enter Web Sites addresses for e.g. www.itaz.com
<i>Integer</i>	Stores numeric values	You can use the <i>Integer</i> data type to enter Telephone numbers, Age, Invoice number, etc.
<i>Decimal</i>	Stores Decimal values	You can use the <i>Decimal</i> data type to enter values such as Weight, Height, Length, etc.
<i>Currency</i>	Stores Currency values	You can use the <i>Currency</i> data type to enter values such as Price, Amount etc.
<i>Date</i>	Stores Date values	You can use the <i>Date</i> data type to enter values such as Date of Birth, Payment Date, Order Date, Shipment Date etc.
<i>Time</i>	Stores time values	You can use the <i>Time</i> data type to enter values such as Shipment Time, Arrival and Departure time etc.
<i>DateTime</i>	Stores both Date and Time values	You can use the <i>DateTime</i> data type to enter values such as Shipment date and time, Arrival date and time, Departure date and time etc.
<i>Yes/No</i>	Stores Yes/No values	You can use the <i>Yes/No</i> data type to enter Boolean values such as Invoice Paid (Yes), Loan Approved (No),
<i>PickListSingle</i>	Stores data in the form of a List.	You can select only one item from this data field. You can use the <i>PickListSingle</i> data type to enter values such as Gender (Male, Female), Country (India, USA, UK, Brazil, China, Canada),
<i>PickListMultiple</i>	Stores data in the form of a List.	You can select only multiple item from this data field. You can use the <i>PickListMultiple</i> data type to enter values such as Items Purchased (Monitor, Mouse, Keyboard, wireless Keyboard), Items Owned (House, Car, Telephone, Credit Card) etc.
<i>Lookup</i>	Stores values of document	You can use the <i>Lookup</i> data type to look for values from a Document Type. Lookup data type is somewhat similar to <i>PickList</i> data type. The only difference is the values of a Lookup data type are ' <i>Dynamic</i> ' and the values of a PickList data type are ' <i>Static</i> '.

Related Topics

[Create Data Fields for Document Types](#) 

8.3 Fields tab

Fields Tab

All the data fields of the *Document Type* are displayed in the *Fields* pane. You can also add new data fields to the *Document Type* from this panel. You can also modify or delete existing data fields. The order of the fields can also be changed from here.

If you want to add a data field to a Document Type then select *Settings > Document Type* in the *Navigation* pane.

Double click an existing Document Type to open it. If you want to create a new Document Type then click the *New* button on the *Home* tab.

On the Document Type window click the **Fields tab** to add fields.

The *Fields* panel is divided into three sections, *Field List* pane, *Field Properties* pane and the *Field Template* pane.

Field List: The *Field List* pane displays the list of data fields. You can add or modify a data field from this pane. The *Field List* pane has three column, they are:

Field Name: Enter the name for the field in the *Field Name* box. The field name cannot be more than 25 characters long. You can use any combination of alphabets and numbers for the field name. Field names can also contain spaces, though a field name cannot begin or end with a space. The following characters are not allowed in a field name...

- ` - **Accent Grave**
- ! - **Exclamation Mark**
- [- **Open Box Bracket**
-] - **Close Box Bracket**
- | - **Pipe**
- # - **Hash**

Please note that you cannot create data fields with the following names...

ID, File Icon, Document Title, File Name, Type, Version, Version Comment, Status, Position, Owner, Added On, Created By, Last Modified On, Last Modified by, Checked out by, Checked Out Date, In Workflow, Document Text, Tags.

Field Type: Select the type of data the field will hold from this drop-down.

The data field can be of the following types

Text Data Type:

Use the *Text* data type to enter text or combinations of text and numbers, as well as numbers that don't require calculations, such as phone numbers. You can use the Text data type to enter values such as Names, Telephone numbers etc. The *Text* data type has the following field properties...

Auto-generate values for this field This option is only available for fields of the *Text* or *Integer* data type. Check this option if you want values to be auto-generated for the field you are creating. If this option is checked, a new value will be auto-generated for this field every time you add a new document.

Options to control the format of the auto-generated values are available in the *Auto Generate Options* tab.

▼ The following options are available in the Auto Generate Options tab.

Format

Enter the format using which Sohodox will auto-generate the value for this field. You must use the @ sign for alphabets and the # sign for numbers. For example if the format entered is Doc. No. @### then the values generated will be...

Doc. No. A001, Doc. No. A002,....., Doc. No. Z001,....., Doc. No. Z100,.....

Instead of typing in a format you can also select a format from the drop-down list

A number (0-9) will be generated for every # you enter and a alphabet (A-Z) will be generated for every @ you enter. Any other characters included in the format will appear in the generated value without change.

For example the format @/## will generate the following values...

A/01, A/02,....., Z/99,.....

To generate a simple list of numbers just enter a single # character as the format. This will generate values...

1,2,3,....., 9, 10, 11,.....

If you enter the format as ##, then the values generated will be...

11, 12, 13,....., 19, 20, 21,.....

Similarly, if the format entered is @#, then the values generated will be...

A1, A2, A3,....., A9, B0, B1,.....

If you enter the format as @##, then the values generated will be...

A01, A02, A03,....., A09, A10, A11,....., A99, B01, B02,.....

Any new format you enter is automatically added to the drop-down list. To delete a format from the drop-down list, select the format and press the Delete key on your keyboard.

Start Value

The value you enter here will become the first value which is generated by Sohodox. For example if the format entered is # and Start Value entered is 5 then the values generated will be...

5, 6, 7, 8,.....

A valid start value must satisfy the following conditions...

- 1) It must have the same number of characters as the Format
- 2) All characters except the # and the @ character must be the same.
- 3) For every # character in the format a numeric character [0-9] must occur in the Start Value
- 4) For every @ character in the format an upper-case alphabet [A-Z] must occur in the Start Value.

For example...

Valid start values for the format Doc. No. @### would be Doc. No. A001, Doc. No. Y999

Increment

Enter a numeric value using which Sohodox will increment the auto-generated value every time a document is added. For example, if the increment value is 1, the values generated will be 1, 2, 3,..... 9, 10, 11,.....

If the increment value is entered as 100, the values generated will be...

1, 101, 201,.....,1001, 1101, 1201,.....

Minimum Length Specify the minimum number of characters that can be entered in this field.

Maximum Specify the maximum number of characters that can be entered in this field.

<i>Length</i>	By default you can enter upto 255 characters in the Text data type
<i>Default Value</i>	Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required
<i>Input Value</i>	Specify whether the field can have an empty value or not from this drop-down.
<i>Required</i>	Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.
<i>Recommended</i>	Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.
<i>Can be blank</i>	Select this option if the field can be left empty.
<i>Allow Duplicates</i>	Specify whether a field value should be unique or whether it can have duplicate values.

Memo Data Type:

Use the *Memo* data type to enter lengthy text or combination of text and numbers. You can use the Memo data type to enter Address, Description, Comments etc. The *Memo* data type has the following field properties...

<i>Minimum Length</i>	Specify the minimum number of characters that can be entered in this field.
<i>Maximum Length</i>	Specify the maximum number of characters that can be entered in this field. By default you can enter upto 65536 characters in the Text data type
<i>Default Value</i>	Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.
<i>Input Value</i>	Specify whether the field can have an empty value or not from this drop-down.
<i>Required</i>	Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.
<i>Recommended</i>	Select this option to mark the field as recommended. The

ded recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Email Data Type:

Use the *Email* data type to enter email address. The e-mail address entered in this field will turn into a hyperlink. The *Email* data type has the following field properties...

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Allow Duplicates Specify whether a field value should be unique or whether it can have duplicate values.

URL Data Type:

Use the *URL* data type to enter type URL. The URL entered in this data type will turn into a hyperlink. The *URL* data type has the following field properties...

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Allow Duplicates Specify whether a field value should be unique or whether it can have duplicate values.

Integer Data Type:

Use the *Integer* data type to enter numeric data that are used in mathematical calculations. You can use the *Integer* data type to enter Telephone numbers, Age, Invoice number, etc. The *Integer* data type has the following field properties...

Auto-generate values for this field This option is only available for fields of the Text or Integer data type. Check this option if you want values to be auto-generated for the field you are creating. If this option is checked, a new value will be auto-generated for this field every time you add a new document.

Options to control the format of the auto-generated values are available in the *Auto Generate Options* tab. The following options are available in the [Auto Generate Options tab](#).^[148]

Minimum Length Specify the minimum number of characters that can be entered in this field.

Maximum Length Specify the maximum number of characters that can be entered in this field. By default you can enter upto 255 characters.

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

blank

Allow Duplicates Specify whether a field value should be unique or whether it can have duplicate values.

Decimal Data Type:

Use the *Decimal* data type to enter decimal values. You can use the *Decimal* data type to enter values such as Weight, Height, Length, etc. The *Decimal* data type has the following field properties...

Decimal Places Specify the place at which the decimal should be applied. For e.g. If the value is 2, then the decimal place will be 0.00

Minimum Length Specify the minimum number of characters that can be entered in this field.

Maximum Length Specify the maximum number of characters that can be entered in this field. By default you can enter upto 255 characters.

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Allow Duplicates Specify whether a field value should be unique or whether it can have duplicate values.

Currency Data Type:

Use the *Currency* data type to enter currency values. You can use the *Currency* data type to enter values such as Amount, etc. The *Currency* data type has the following field properties...

<i>Minimum Length</i>	Specify the minimum number of characters that can be entered in this field.
<i>Maximum Length</i>	Specify the maximum number of characters that can be entered in this field. By default you can enter upto 255 characters.
<i>Decimal Places</i>	Specify the place at which the decimal should be applied. For e.g. If the value is 2, then the decimal place will be 0.00
<i>Default Value</i>	Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.
<i>Input Value</i>	Specify whether the field can have an empty value or not from this drop-down.
<i>Required</i>	Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.
<i>Recommended</i>	Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.
<i>Can be blank</i>	Select this option if the field can be left empty.
<i>Allow Duplicates</i>	Specify whether a field value should be unique or whether it can have duplicate values.

Date Data Type:

Use the *Date* data type to enter date values for the years through 1601 to 9999. You can use the *Date* data type to enter values such as Date of Birth, Order Date, Shipment Date etc. The *Date* data type has the following field properties...

<i>Minimum Length</i>	Specify the minimum number of characters that can be entered in this field.
<i>Maximum Length</i>	Specify the maximum number of characters that can be entered in this field. By default you can enter upto 255 characters.
<i>Use system date as default value</i>	Check this option to set the system date as the default value for this field

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field name will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field name will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Time Data Type:

Use the *Time* data type to enter time values. You can use the *Time* data type to enter values such as Shipment Time, Arrival and Departure time etc. The *Time* data type has the following field properties...

Minimum Length Specify the minimum number of characters that can be entered in this field.

Maximum Length Specify the maximum number of characters that can be entered in this field. By default you can enter upto 255 characters.

Use system time as default value Check this option to set the system time as the default value for this field

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field name

will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Date/Time Data Type:

Use the *Date/Time* data type to enter both the date and time. You can use the *Date/Time* data type to enter values such as Shipment date and time, Arrival date and time, Departure date and time etc. The *Date/Time* data type has the following field properties...

Minimum Length Specify the minimum number of characters that can be entered in this field.

Maximum Length Specify the maximum number of characters that can be entered in this field. By default you can enter upto 255 characters.

Use system date/time as default value Check this option to set the system date time as the default value for this field

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Yes/No Data Type:

Use the *Yes/No* data type to enter Boolean values Yes or No. You can use the *Yes/No* data

type to enter values such as Invoice Paid (Yes), Loan Approved (No), etc.. The *YesNo* data type has the following field properties...

<i>Default Value</i>	Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.
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PickListSingle Data Type:

Use the *PickListSingle* data type to create a field to list a fixed set of values. You will be able to select only one item from the list of this data field. For a example you can use this to create a data field to store the names of all your customers as list. This data field will have a drop down with the list of all your customers name. You can select your customers name from the list, instead of typing it. A *PickListSingle* data type can thus help in faster data entry and also avoid errors while entering data. The *PickListSingle* data type has the following field properties...

List Source Specify the list of items for this field. Click this [...] button to add values for this fields. The List Source window will be launched. The List Source Window has the following buttons...

Add: Enter a value in the text box and click the *Add* button on this window to enter values for this field.

Paste: Copy list values from Excel (from a column) or other spread sheet program and click the *Paste* button to add these values to this data field. For e.g. instead of entering a list 100 values one by one you can just copy these values from a column and click the *Paste* button on the List Source button to instantly import these values to the data field.

Close: Click the *Close* button to close this window.

<i>Default Value</i>	Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.
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Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

PickListMultiple Data Type:

Use the *PickListMultiple* data type to create a field to list a fixed set of values. You will be able to select multiple items from the list of this data field. For a example you can create a data field to store the names of all the products as list. This data field will have a drop down with the list of all the products. You can then check multiple products from the list. A *PickListSingle* data type can thus help in faster data entry and also avoid errors while entering data. The *PickListSingle* data type has the following field properties...

List Source Specify the list of items for this field. Click this [...] button to add values for this fields. The List Source window will be launched. The List Source Window has the following buttons...

Add: Enter a value in the text box and click the *Add* button on this window to enter values for this field.

Paste: Copy list values from Excel (from a column) or other spread sheet program and click the *Paste* button to add these values to this data field. For e.g. instead of entering a list 100 values one by one you can just copy these values from a column and click the *Paste* button on the List Source button to instantly import these values to the data field.

Close: Click the *Close* button to close this window.

Default Value Specify a default value for this field. The value entered here becomes the default value for this field. You can change this value if required.

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field. The required data field will be displayed in red colored text.

Recommended Select this option to mark the field as recommended. The recommended data field will be displayed in blue colored text.

Can be blank Select this option if the field can be left empty.

Lookup Data Type:

Use the *LookUp* data type to look for values from a [Document Type](#)^[173]. *LookUp* data type is somewhat similar to *PickList* data type. The only difference is the values of a *LookUp* data type are '*Dynamic*' and the values of a *PickList* data type are '*Static*'. The *Lookup* data type has the following field properties...

List Source Specify the Document Type that you want listed in Lookup

Input Value Specify whether the field can have an empty value or not from this drop-down.

Required Select this option to mark the field as required. If this option is selected you will not be allowed to save the information until some value is entered for this field.

Recommended Select this option to mark the field as recommended.

Can be blank Select this option if the field can be left empty.

Description: Enter short description about the data field in the this box.

Field Properties: The Field properties panel displays the properties of the selected data type. You can set or modify a fields property in this pane.

Related Topics

[Create Data Fields for Document Types](#)^[161]

8.4 Create Data Fields for Document Types

You can create a new [Document Type](#)^[174] and add Data Fields to it by using the [Data Field Manger](#)^[148].

To Create Data Fields for a Document Type:

1. In Sohodox, select *Settings > DB Settings > Document Types* in the [Navigation](#)^[26] pane. The already existing Document types will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab. The [Data Field Manager](#)^[148] will now be launched.
3. By default the *Information* panel of the Data Field Manager will be displayed. You can enter information, like the Document Type name in this panel. You can also modify information of an existing Document Type from this panel.
 - ▼ The Information panel contains the following options.
 - Name:* Enter or modify the name of the Document type in this box.
 - Plural Name:* Enter or modify the plural name of the Document type in this box. For e.g. If the name of the Document Type is 'Invoice' its *Plural name* will be 'Invoices'.
 - Alias* Enter a alias name for the Document type in this box. By default the system creates a alias name. You can change the default alias name with the name of your choice. For e.g. if your Document Type is named 'Invoice' its *Alias* could be 'Inv'.
 - Description:* Enter a short description about this Document type in this box.
4. Click the *Fields* tab to add data fields for the Document type. The *Fields* panel will now be displayed.
5. Click the *Click here to add a new field* in the *Field List* pane to add a new field or right click in the *Field List* pane and select the *Add field* option. A field will now be created.
6. Select the *Field Name* cell to enter a name for the field.

The field name cannot be more than 25 characters long. You can use any combination of alphabets and numbers for the field name. Field names can also contain spaces, though a field name cannot begin or end with a space. The following characters are not allowed in a field name...

 - ` - Accent Grave
 - ! - Exclamation Mark

[- *Open Box Bracket*
] - *Close Box Bracket*
| - *Pipe*
- *Hash*

7. Select a Data Type for the data field from the Field Type drop down. By default *Text* data type is selected.

[The data field can be of the following types](#)^[148]

8. Depending on the *Data Type* you have selected its field properties will be displayed in the *Field Properties* pane. Enter the field properties as per your requirements.

9. Enter shot description about the data field in the *Description* cell.

10. Click the *Save* button to save the changes and create the Data Field.

Also see, [Example](#)^[163]

- You can create as many Document Type you want. Each Document Type can have upto 200 data fields. Please note that you cannot create data fields with the following names... ID, File Icon, Document Title, File Name, Type, Version, Version Comment, Status, Position, Owner, Added On, Created By, Last Modified On, Last Modified by, Checked out by, Checked Out Date, In Workflow, Document Text, Tags.
- The recommended data field will be displayed in blue colored text and the required data field will be displayed in red colored text.
- To delete a data field, right click that data field in the *Field List* pane and select the *Delete* option.
- You can change the order of data fields by using the navigation options available on the right click menu. To move a data field one position upwards in the list, right click it and select the *Move Up* option. To move a data field one position down in the list, right click it and select the *Move Down* option.

Related Topics

[Create a Document Type](#)

[Delete Fields](#)

8.4.1 Example

In this example we will create a Document Type for invoices. This document contains information such as the company name, invoice number, invoice amount, invoice paid and invoice date. We will first list down the fields that we need to create and the data type that should be used for it.

Data Field Name	Data Type
Company Name	PickListSingle
Invoice Number	Text
Invoice amount	Currency
Invoice Paid	Yes/No
Invoice Date	Date

To Create Data Fields for a Document Type:

1. In Sohodox, select *Settings > DB Settings > Document Types* in the [Navigation](#) ²⁶ pane. The already existing Document types will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab. The [Data Field Manager](#) ¹⁴⁸ will now be launched.
3. By default the *Information* panel of the Data Field Manager will be displayed.
4. Enter a name for the Document Type in the *Name* box. We will enter '*Invoice*'.
5. Enter the plural name of the Document type in the *Plural name* box. We will enter '*Invoices*'.
6. Enter the alias name for the Document type in the *Alias* box. We will enter '*Inv*'.
7. Enter a short description about this Document type in the *Description* box.
8. Click the *Fields* tab to add data fields for the Document type. The *Fields* panel will now be displayed.
9. Click the *Click here to add a new field* in the *Field List* pane to add a new field or right

click in the *Field List* pane and select the *Add field* option. A field will now be created.

10. Select the *Field Name* cell to enter a name for the field. We will enter '*Company Name*'.

Note: The field name cannot be more than 25 characters long. You can use any combination of alphabets and numbers for the field name. Field names can also contain spaces, though a field name cannot begin or end with a space. The following characters are not allowed in a field name...

- ` - *Accent Grave*
- ! - *Exclamation Mark*
- [- *Open Box Bracket*
-] - *Close Box Bracket*
- | - *Pipe*
- # - *Hash*

11. Select the *PickListSingle* Data Type for this field from the *Field Type* drop down. The properties of *PickListSingle* data type will now be displayed in the *Field Properties* section.

12. In the *Field Properties* section select the *List Source* box. Click this [...] button to add values for this fields. A new window will be launched. Click the *Add* button in this window to enter values for this field. We will enter ABC corp., XYZ inc., MNO Ltd., Once you have entered the value, click the *Close* button to close the window.

13. Specify a default value for this field in the *Default Value* box.

14. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down

15. Click the *Click here to add a new field* bar in the *Field List* pane to add a new field. Select the *Field Name* cell and enter *Invoice Number* a name for the field.

16. Select the *Text* Data Type for this field from the *Field Type* drop down. The properties of *Text* data type will now be displayed in the *Field Properties* section.

17. In the *Maximum Length* and *Minimum Length* box specify the maximum and minimum number of characters that can be entered in this field.

18. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down

19. Specify that *Invoice Number* should not have any duplicate values in the *Allow Duplicates* option.

20. We will now create the fields for *Invoice Amount*, *Invoice Paid* and *Invoice Date*.

21. Once you have created all the fields click the *Save* button to save the changes and

create the Data Field.

Now, that you have created a Document Type you can add a document to the Sohodox DB and [Set its Document Type](#)^[184]

- You can create as many Document Type you want. Each Document Type can have upto 200 data fields. Please note that you cannot create data fields with the following names... ID, File Icon, Document Title, File Name, Type, Version, Version Comment, Status, Position, Owner, Added On, Created By, Last Modified On, Last Modified by, Checked out by, Checked Out Date, In Workflow, Document Text, Tags.
- The recommended data field will be displayed in blue colored text and the required data field will be displayed in red colored text.
- To delete a data field, right click that data field in the *Field List* pane and select the *Delete* option.
- You can change the order of data fields by using the navigation options available on the right click menu. To move a data field one position upwards in the list, right click it and select the *Move Up* option. To move a data field one position down in the list, right click it and select the *Move Down* option.

Related Topics

[Create a Document Type](#)^[176]

[Delete Fields](#)^[170]

8.5 Enter Indexing Information of a Document

You can index a document by either tagging it or by using data fields to store the documents indexing information.

To Enter Indexing Information or Description of a Document:

1. Select a document from the [List View](#)^[29] pane, to enter its information or description. The document will now be displayed in the [Documents Details](#)^[108] pane. If you double click the document it will open in the *Document Details* window.
2. By default the *Information* panel will be displayed on the left side of the *Documents Details* pane. Select a Document Type from the *Document Type* drop down if not selected. The Data Fields of the selected Document Type will now be displayed.
3. Enter appropriate descriptive/indexing information of the document in the respective data fields.
4. Click the *Save* button on the *Information* bar.

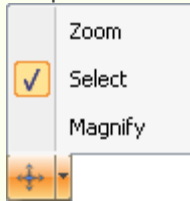
Notes:

- The Data Fields displayed in the *Information* panel depends on the Document Type that is selected for the document. You can create your own Document Types and Data Fields as per your requirements. for more info see, [Document types](#)^[173].
- You can also choose to Auto Save the indexing information. For steps, see Auto Save option in [Options Window](#)^[336].

Copy/Paste text from a scanned document into an indexing field:

1. Select a document from the *List View* pane. The document will be displayed in the preview pane.
2. Expand the *Information* tab in the *Document Details* pane.
3. Select the Document Type you wish to assign the document. The fields for the Document Type will be displayed.
4. To copy text from a scanned document, in the *Image Toolbar* (toolbar displayed below

the preview of the image) click the Select option as displayed in the image below...



This will enable the selection mode.

5. Drag and select the area you want to copy text from. Once the area is selected, press CTRL + C.
6. Now select the field in which you want to paste the text and press CTRL + V. The copied text will now be pasted into this field.

Notes:

- The accuracy of the text detection depends on the print quality of the document which was scanned and also the quality of the scan itself.

To Enter Information about a Document by Tagging it:

1. Select the document from the *List View* pane. The document will now be displayed in the *Documents Details* pane.
2. Enter tags for this document in the *Tag* box of the *Documents Details* pane. You can add as many relevant tags as you want to a document by separating them with a semi-colon.
3. Click anywhere outside the *Tag* box to apply the tags.

Points to remember while tagging a document...

- Enter words that describe the document. For e.g. email, fax, invoice, acme corp, etc.
- Use words that a user would use to search a document.

- Use the *Undo* button on the *Information* bar to undo the changes you made, in the *Information* panel.
- You can use the *Forward* and *Back* navigation button on the top right corner of the *Document Details* window which can be used to navigate through the entire list of

documents displayed in the List View pane.

- You can also modify the Document Type of multiple documents to a different (but common) document type. To do this, first select the documents. Then go to Document Details pane --> Information pane --> Document Type drop-down --> select the relevant document type from the drop-down. This will update all the documents with the new, common document type.

Related Topics

[Edit a document](#) ^[120]

[Create Data Fields for Document Types](#) ^[161]

[Annotation](#) ^[257]

8.6 Update Common Indexing Information for Multiple Documents

You can index a document by either tagging it or by using data fields to store the documents indexing information.

To Update Common Indexing Information for Multiple Documents:

1. In Sohodox, select *Workspace > Document Types* in the Navigation pane.
2. Select a Document Type from the *Document Type* node.
3. This will display all the documents under this document type in the List pane.
4. Select all the documents for which you want to update common indexing information. Doing this will display the indexing fields as blank (empty/without any value entered).
5. Enter appropriate descriptive/indexing information for the documents in the respective data fields in the *Information* pane of the *Document Details* pane.

Note:

Whatever you enter in any field will apply to all the documents. So if you want to retain the value of an indexing field for a particular document(s), then leave that field empty.

6. Click the *Save* button on the *Information* bar to save the information.

- There is no limit to the number of documents that can be selected for updating common indexing information. However, if the number of documents to be updated together is greater than 50, it will be easier to change the number of documents being displayed in the List View pane. Then update the information and revert to the earlier limit of 50 if desired. See [Change the number of items being displayed in List View](#)^[340].

Related Topics

[Edit a document](#)^[120]

[Create Data Fields for Document Types](#)^[161]

[Annotation](#)^[257]

8.7 Delete Fields

You can delete a data field by right clicking that data field in the *Field List* pane and selecting the *Delete* option in the [Data Field Manger](#)^[148].

To Delete a Data Field of a Document Type:

1. In Sohodox, select *Settings > DB Settings > Document Types* in the [Navigation](#)^[26] pane. The existing Document Types will now be displayed in the right pane.
 2. Select the [Document type](#)^[174] whose data field you want to delete from the the right pane. Now, double click this Document Type to open it in its window.
 3. Click the *Fields* tab to view the data fields of the selected Document Type. The data fields will be listed in the *Field List* pane of the *Fields* panel.
 4. Select the data field that you want to delete, right click this data field and select the *Delete* option to delete it.
 5. Click the *Save* button to save the changes.
- You can change the order of data fields by using the navigation options available on the right click menu. To move a data field one position upwards in the list, right click it and select the *Move Up* option. To move a data field one position down in the list , right click it and select the *Move Down* option.

Related Topics

[Create Data Fields for Document Types](#)^[161]

8.8 Block Indexing

By default, Sohodox automatically begins to index a newly added/modified document in the background. Sometimes the documents can be very large (taking up too much processing time to index) or just unindexable (for e.g. photos which have no text that can be recognized or extracted). Sometimes Sohodox can have trouble indexing a particular document. With this version, Sohodox lets you block the indexing process for such documents.

To Block Indexing of a Document:

1. In Sohodox *Workspace*, in the *List View* pane, right-click the document for which you want to block indexing.
2. Select *Block Indexing* from the right-click options. This will prevent that document from being indexed.

To Manually Choose to Index a Document:

1. In Sohodox *Workspace*, in the *List View* pane, right-click the document which you want to manually choose to get indexed.
2. Select *Extract and Index* from the right-click options. The document will be taken up for indexing.

To Manually Reset Indexing Status of a Document:

1. In Sohodox *Workspace*, in the *List View* pane, right-click the document of which you want to manually reset the indexing status.
2. Select *Reset Indexing Status* from the right-click options. Sohodox will now consider that document as not indexed, until you manually choose to index it as explained in the section above.
3. You can also use this option to unblock the *Block Indexing* option for the document that was marked for *Block Indexing*.

- When you manually choose to index a document, Sohodox will begin indexing the document immediately if currently there are no other documents to be indexed. If there are other documents to be indexed, Sohodox will pick up the documents randomly for indexing.

Related Topics

[Create Data Fields for Document Types](#) 

9 Document Types

Topics Covered

1. [What are Document Types](#) ^[174]
2. [Document Type - FAQ](#) ^[174]
3. [Create Document Type](#) ^[176]
 - i. [Example](#) ^[178]
4. [Modify a Document Type](#) ^[181]
5. [Add Documents to a Document Type](#) ^[182]
6. [Drag and Drop documents to a Document Type](#) ^[183]
7. [Set a Document Type of a document](#) ^[184]
8. [Delete a Document Type](#) ^[185]

9.1 What are Document Types

What are Document Types?

Document Types allows you to use a more structured approach to manage your documents. Using Document Types, you can store specific indexing information with each document (for e.g. store Invoice Number, Invoice Date, Invoice Amount with each stored Invoice and store Sender Name, Date with each stored Letter). For more info see [Data Fields](#)^[143].

The main advantage of this approach is that detailed information about each type of added document can be captured by creating very specific data fields. Doing this also increases the number of ways you can look for documents.

Related Topics

[View Document Types - FAQ](#)^[174]

[Create a Document Type](#)^[176]

9.2 Document Types - FAQ

▼ What are document types?

Document Types allow you to use a more structured approach to manage your documents. Using Document Types, you can store specific indexing information with each document (for e.g. store Invoice Number, Invoice Date, Invoice Amount with each stored Invoice and store Sender Name, Date with each stored Letter). For more info see [Data Fields](#)^[143].

▼ How is it useful?

The main advantage of this approach is that detailed information about each type of added document can be captured by creating very specific data fields. Doing this also increases the number of ways you can look for documents

▼ Do I have to create Document Types?

Sohodox by default ships with some common *Document Types* such as Invoice, Checks,

Letters and Email. You can modify these *Document Types* by adding or removing data fields. You can delete any of these *Document Types* and create a new set of *Document Types* more suited for your organization.

Related Topics

[Create a Document Type](#) ¹⁷⁶

[Set a Document Type of a Document](#) ¹⁸⁴

[Create Data Fields for Document Types](#) ¹⁶¹

9.3 Create a Document Type

You can create a new [Document Type](#)^[174] and add Data Fields to it from the *Settings* pane.

To Create a Document Type:

1. In Sohodox, select *Settings > DB Settings > Document Types* in the [Navigation](#)^[26] pane. The already existing Document types will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab. The [Data Field Manager](#)^[148] will now be launched.
3. By default the *Information* panel of the Data Field Manager will be displayed. You can enter information, like the Document Type name in this panel. You can also modify information of an existing Document Type from this pane.
 - ▼ The Information panel contains the following options.

<i>Name:</i>	Enter or modify the name of the Document type in this box.
<i>Plural Name:</i>	Enter or modify the plural name of the Document type in this box. For e.g. If the name of the Document Type is ' <i>Invoice</i> ' its <i>Plural name</i> will be ' <i>Invoices</i> '.
<i>Alias</i>	Enter a alias name for the Document type in this box. By default the system creates a alias name. You can change the default alias name with the name of your choice. For e.g. if your Document Type is named ' <i>Invoice</i> ' its <i>Alias</i> could be ' <i>Inv</i> '.
<i>Description:</i> Enter a short description about this Document type in this box.	
4. Click the *Fields* tab to add data fields for the Document type. The *Fields* panel will now be displayed.
5. Click the *Click here to add a new field* in the *Field List* pane to add a new field or right click in the *Field List* pane and select the *Add field* option. A field will now be created.
6. Select the *Field Name* cell to enter a name for the field.
The field name cannot be more than 25 characters long. You can use any combination of alphabets and numbers for the field name. Field names can also contain spaces, though a field name cannot begin or end with a space. The following characters are not allowed in a field name...

- ` - Accent Grave
- ! - Exclamation Mark
- [- Open Box Bracket

] - Close Box Bracket

| - Pipe

- Hash

7. Select a Data Type for the data field from the Field Type drop down. By default *Text* data type is selected.

[The data field can be of the following types](#)^[148]

8. Depending on the *Data Type* you have selected its field properties will be displayed in the *Field Properties* pane. Enter the field properties as per your requirements.
9. Enter shot description about the data field in the *Description* cell.
10. Click the Save button to save the changes and create the Data Field.

Also see, [Example](#)^[178]

- You can create as many Document Type you want. Each Document Type can have upto 200 data fields. Please note that you cannot create data fields with the following names... ID, File Icon, Document Title, File Name, Type, Version, Version Comment, Status, Position, Owner, Added On, Created By, Last Modified On, Last Modified by, Checked out by, Checked Out Date, In Workflow, Document Text, Tags.
- The recommended data field will be displayed in blue colored text and the required data field will be displayed in red colored text.
- To delete a data field, right click that data field in the *Field List* pane and select the *Delete* option.
- You can change the order of data fields by using the navigation options available on the right click menu. To move a data field one position upwards in the list, right click it and select the *Move Up* option. To move a data field one position down in the list, right click it and select the *Move Down* option.

Related Topics

[Set a Document Type of a Document](#)^[184]

[Delete a Document Type](#)^[185]

9.3.1 Example

In this example we will create a Document Type for invoices. This document contains information such as the company name, invoice number, invoice amount, invoice paid and invoice date. We will first list down the fields that we need to create and the data type that should be used for it.

Data Field Name	Data Type
Company Name	PickListSingle
Invoice Number	Text
Invoice amount	Currency
Invoice Paid	Yes/No
Invoice Date	Date

To Create Data Fields for a Document Type:

1. In Sohodox, select *Settings > DB Settings > Document Types* in the [Navigation](#) ²⁶ pane. The already existing Document types will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab. The [Data Field Manager](#) ¹⁴⁸ will now be launched.
3. By default the *Information* panel of the Data Field Manager will be displayed.
4. Enter a name for the Document Type in the *Name* box. We will enter '*Invoice*'.
5. Enter the plural name of the Document type in the *Plural name* box. We will enter '*Invoices*'.
6. Enter the alias name for the Document type in the *Alias* box. We will enter '*Inv*'.
7. Enter a short description about this Document type in the *Description* box.
8. Click the *Fields* tab to add data fields for the Document type. The *Fields* panel will now be displayed.
9. Click the *Click here to add a new field* in the *Field List* pane to add a new field or right

click in the *Field List* pane and select the *Add field* option. A field will now be created.

10. Select the *Field Name* cell to enter a name for the field. We will enter '*Company Name*'.

Note: The field name cannot be more than 25 characters long. You can use any combination of alphabets and numbers for the field name. Field names can also contain spaces, though a field name cannot begin or end with a space. The following characters are not allowed in a field name...

- ` - *Accent Grave*
- ! - *Exclamation Mark*
- [- *Open Box Bracket*
-] - *Close Box Bracket*
- | - *Pipe*
- # - *Hash*

11. Select the *PickListSingle* Data Type for this field from the *Field Type* drop down. The properties of *PickListSingle* data type will now be displayed in the *Field Properties* section.

12. In the *Field Properties* section select the *List Source* box. Click this [...] button to add values for this fields. A new window will be launched. Click the *Add* button in this window to enter values for this field. We will enter ABC corp., XYZ inc., MNO ltd., Once you have entered the value, click the *Close* button to close the window.

13. Specify a default value for this field in the *Default Value* box.

14. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down

15. Click the *Click here to add a new field* bar in the *Field List* pane to add a new field. Select the *Field Name* cell and enter *Invoice Number* a name for the field.

16. Select the *Text* Data Type for this field from the *Field Type* drop down. The properties of *Text* data type will now be displayed in the *Field Properties* section.

17. In the *Maximum Length* and *Minimum Length* box specify the maximum and minimum number of characters that can be entered in this field.

18. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down

19. Specify that *Invoice Number* should not have any duplicate values in the *Allow Duplicates* option.

20. We will now create the fields for *Invoice Amount*, *Invoice Paid* and *Invoice Date*.

21. Once you have created all the fields click the *Save* button to save the changes and

create the Data Field.

Now, that you have created a Document Type you can add a document to the Sohodox DB and [Set its Document Type](#)^[184]

- You can create as many Document Type you want. Each Document Type can have upto 200 data fields. Please note that you cannot create data fields with the following names... ID, File Icon, Document Title, File Name, Type, Version, Version Comment, Status, Position, Owner, Added On, Created By, Last Modified On, Last Modified by, Checked out by, Checked Out Date, In Workflow, Document Text, Tags.
- The recommended data field will be displayed in blue colored text and the required data field will be displayed in red colored text.
- To delete a data field, right click that data field in the *Field List* pane and select the *Delete* option.
- You can change the order of data fields by using the navigation options available on the right click menu. To move a data field one position upwards in the list, right click it and select the *Move Up* option. To move a data field one position down in the list, right click it and select the *Move Down* option.

Related Topics

[Create a Document Type](#)^[176]

[Delete Fields](#)^[170]

9.4 Modify a Document Type

You can modify an existing Document Type from the *Settings* pane.

To Modify a Document Type:

1. In Sohodox, select *Settings > DB Settings > Document Types* in the [Navigation](#)^[26] pane. The existing document types will now be displayed in the right pane i.e. the *Document Type* list.
 2. Double click the Document Type that you want to modify from the right pane. The document type will now be opened in its window.
 3. By default the *Information* panel will be displayed. Modify the required data.
 4. Click the *Fields* tab to modify data fields of the Document type. The *Fields* panel will now be displayed. Modify the required fields.
 5. Click the *Save* button to save the changes.
- To delete a data field, right click that data field in the *Field List* pane and select the *Delete* option.
 - You can change the order of data fields by using the navigation options available on the right click menu. To move a data field one position upwards in the list, right click it and select the *Move Up* option. To move a data field one position down in the list, right click it and select the *Move Down* option.

Related Topics

[Create Data Fields for Document Types](#)^[16]

[Set a Document Type of a Document](#)^[184]

[Delete a Document Type](#)^[185]

9.5 Add documents to a Document Type

You can add a document to a Document Type by dragging a document and adding it to that Document Type.

To Add a Document to a Document Type:

1. In Sohodox, select *Workspace > Document Types* in the [Navigation](#) ^[26] pane.
2. Select a Document Type from the *Document Types* node to add a document to it.
3. Click the *New* button of the *Home* tab to add a document. The *New Document* window will now be launched.
4. Click the *Scan* button to [scan and add a document](#) ^[61] or click the *Add a File* button to [add document from disk](#) ^[49].
5. The *Information* panel will now be displayed on the left side. Enter appropriate descriptive/indexing information of the document in the respective data fields.
6. Click the *Save* button on the *Information* bar to save the information.

- You can also add a document to its Document Type from the [Find and Add Files](#) ^[55] window.
- To view documents based on their types, in Sohodox main window expand the Document Types node in the Navigation pane and select a document type (e.g. Invoice). All the document that have their Document Type set to Invoice will now be displayed in the List View pane.
- By default documents added to Sohodox can only be viewed and modified by the owner/creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#) ^[123].
- You can also drag and drop text from a RTF file to a document Type for more info see, [Drag and Drop Documents to a Document Type](#) ^[183]

Related Topics

[Edit a document](#) ^[120]

[Document Details Window](#) ^[108]

[Create a New Document](#) ^[116]

[Add documents to a Folder](#) ^[196]

9.6 Drag and Drop Documents to a Document Type

You can add documents to a Document Type by dragging and dropping.

To Add Documents by Dragging & Dropping:

1. In Sohodox, select the *Document Types* node in the [Navigation](#)^[26] pane.
2. Select the Document Type to which you want to add the documents.
3. Using Windows Explorer select the files you want to add and drag & drop them in the List View pane.

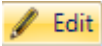
You can also drag and drop documents to a Document Type from *All Documents*, *Folders and Tags* node

To Create a New Document by Dragging and Dropping Text:

1. In Sohodox, select *Workspace > Document Types* in the *Navigation* pane.
2. Select text from a RTF file (Rich Text Format) for e.g. .DOC files, HTML files, .EML files PDF files etc.
3. Drag this text and drop it in the List View pane. A new document will be created containing the text you selected.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

- You will be the Owner of the documents, that you have added.
- By default documents added to Sohodox can only be viewed and modified by the owner/creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- To view documents based on their types, in Sohodox main window expand the Document Types node in the Navigation pane and select a document type (e.g. Invoice). All the document that have their Document Type set to Invoice will now be displayed in the List View pane.

- You can click the *Edit* button  to edit the scanned document in the Image Editor . Using the [Image Editor window](#)^[72] you can resize, crop and rotate a document.
- Dragging & dropping email messages and email attachments from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Sohodox also supports preview of .msg files imported from MS Outlook.

Related Topics[Create Data Fields for Document Types](#)^[161][Set a Document Type of a Document](#)^[184][Delete a Document Type](#)^[185]

9.7 Set a Document Type of a Document

You can set a Document Type of a document by dragging and dropping the document to that Document Type.

To Set a Document Type of a Document:

1. Select a document from the List View pane, to set its Document type. The document will now be displayed in the [Documents Details](#)^[108] pane.
 2. By default the *Information* panel will be displayed on the left side of the *Documents Details* pane. Select a Document Type from the *Document Type* drop down. The Data Fields of the selected Document Type will now be displayed.
 3. Enter appropriate descriptive/indexing information of the document in the respective data fields.
 4. Click the *Save* button on the *Information* bar.
- To view documents based on their types, in Sohodox main window expand the Document Types node in the Navigation pane and select a document type (e.g. Invoice). All the document that have their Document Type set to Invoice will now be displayed in the List View pane.
 - Use the Undo button on the *Information* bar to undo the changes you made, in the *Information* panel.
-

Related Topics[Find and Add a document](#) ⁵⁵[Edit a document](#) ¹²⁰

9.8 Delete a Document Type

You can right click a Document Type and select the *Delete* option to delete it.

To Delete a Document Type:

1. In Sohodox, select *Workspace > Document Types* in the [Navigation](#) ²⁴ pane.
2. Select the Document Type you want to delete and click the *Delete* button of the *Home* tab to delete the Document Type.

- You can also delete a Document Type by hitting the *Delete* key on the keyboard.

Related Topics[Delete Fields of a Document Type](#) ¹⁷⁰[Create a new Document Type](#) ¹⁷⁶[Delete a Document](#) ¹²⁵

10 Folders

Topics Covered

1. [What are Folders](#) ^[187]
2. [Folders - FAQ](#) ^[188]
3. [Create a New Folder](#) ^[189]
4. [Create a Sub-Folder](#) ^[190]
5. [Drag and Drop a Folder](#) ^[190]
6. [Clone a Sohodox folder structure](#) ^[191]
7. [Drag and Drop documents to a Folder](#) ^[192]
8. [Search a Folder](#) ^[193]
9. [Restrict Users form viewing your Folders](#) ^[195]
10. [Add documents to a Folder](#) ^[196]
11. [Add existing Folder structure to Sohodox DB](#) ^[198]
12. [Add Folder structure along with files from disk](#) ^[199]
13. [Change the Folder of a Document](#) ^[201]
14. [Delete a Folder](#) ^[202]
15. [Rename a Folder](#) ^[203]

10.1 What are Folders

What are Sohodox Folders?

Sohodox folders can be used to categorize documents in a hierarchical manner. Folders are simple and easy to use and work the same way folders work in Windows Explorer. To retrieve a document all you need to do is navigate to the folder and find your document.

Folders in Sohodox are backed by a database and can manage a large number of documents with ease. You can also find your documents without any problem from a Sohodox Folder by using the [Quick Search](#)^[224] box or the [Advanced Search](#)^[227].

The folder approach becomes cumbersome to use when you have lots of folders or a very deeply nested folders. This approach also does not work when a document needs to belong to several categories (a document can belong to only one folder).

Please note that when you create a Sohodox folder no folder is being created on your system. Sohodox folders is just used to categorize your documents and not store them. All your documents are stored in the DB's [File Store](#)^[290].

Types of Folders

There are two types of folders in the *Folders* node of Sohodox they are Private Folder and Public Folder.

Private Folder

Any folders and sub-folders a user creates under the *Private Folders* node are termed as that user's private folders. Each user has her own set of Private Folders which are not visible to any other user (except the superadmin). Any documents you add to a private folder are considered private documents. Private documents are not visible to other users (except the superadmin). Also you are set as the owner of any documents you add. An owner of a document can modify or delete that document.

You can change ownership of a document, by assigning the document to another user. In this case the document becomes the other user's private document and is no more visible to you.

Public Folder

You can make a document public by moving it from your private folder to a public folder. Any folders and sub-folders a user creates under the *Public Folders* node are termed public folders. Public folders are visible to all users. Any documents you add to a public folder are considered public documents. Public documents can be viewed and modified by any user. Public documents can only be deleted by the owner of the document (or by the superadmin).

Any public document that you own, can be made private again by moving it to any of your private folders.

Related Topics[View Folders - FAQ](#)¹⁸⁸[Create a New Folder](#)¹⁸⁹[Where does Sohodox store my data](#)⁴²

10.2 Folders - FAQ

▼ How many Folders can I create

You can create as many folders you want as per your requirements.

▼ Can I create sub-folders

Yes, you can create sub-folders based on a hierarchy

▼ How many documents can I store in a Folder

You can store as many documents you want in a Folder.

▼ Can I move documents from one folder to another

Yes, you can move a document from one folder to another.

▼ Can I delete a Folder

Yes, you can delete a folder

Related Topics[Create a New Folder](#)¹⁸⁹[Add existing Folder structure along with files from disk](#)¹⁹⁸

10.3 Create a new Folder

You can create a Folder by clicking the *Create New* button in the *Folders* node.

To Create a Folder:

1. In Sohodox, select *Workspace > Public Folders* or *Private Folders* in the [Navigation](#) ^[26] pane (depending upon whether you want to make the documents visible to all or keep them private to yourself).
2. Now, click the *Create New* to create a new Folder.
3. Enter a name for the Folder and hit the *Enter* key.

Please note that when you create a Sohodox folder no folder is being created on your system. Sohodox folders is just used to categorize your documents and not store them. All your documents are stored in the DB's [File Store](#) ^[290].

- You can also right click a Folder and click the New Folder option to create a sibling folder. This option is very helpful when you have a long list of folders, as it becomes unmanageable to scroll every now and then to click the Create new button, to create a new folder. This option also helpful when you have a long list of sub folders, as you have scroll above to select the parent folder and then right click it to create a sub-folder.
- You will be the Owner of the folders, that you have created.
- You can also create sub folders for the parent folder.
- You can move one folder to another folder by drag and drop.

Related Topics

[Add documents to a Folder](#) ^[196]

[Add existing folder structure to Sohodox DB](#)

10.4 Create a Sub-Folder

You can create a hierarchy for folders by creating sub-folders.

To Create a Sub-Folder:

1. In Sohodox, select *Workspace > Public Folders* or *Private Folders* in the [Navigation](#)^[26] pane (depending upon whether you want to make the sub-folder and its documents visible to all or keep them private to yourself).
2. Select the folder, for which you want to create a sub-folder.
3. Now, right click this folder and select *Create Sub-Folder* option.
4. Enter a name for the Folder and hit the *Enter* key. The folder will now be created.

Please note that when you create a Sohodox folder no folder is being created on your system. Sohodox folders is just used to categorize your documents and not store them. All your documents are stored in the DB's [File Store](#)^[290].

- You can right click a sub-folder and click the New Folder option to create a sibling folder. This option is very helpful when you have a long list of sub folders, as you have scroll above to select the parent folder and then right click it to create a sub-folder.
- You will be the Owner of the folders, that you have created.
- You can move one folder to another folder by dragging and dropping them.

Related Topics

[Add documents to a Folder](#)^[196]

[Delete a Folder](#)^[202]

10.5 Drag and Drop a Folder

You can add a folder to the Folders node by dragging and dropping.

To Add a Folder by Dragging & Dropping:

1. In Sohodox, select *Workspace > Public Folders* or *Private Folders* in the [Navigation](#)^[26]

pane (depending upon whether you want to make the folder and its documents visible to all or keep them private to yourself).

2. Using Windows Explorer select the folder you want to add and drag & drop it on the selected Folder.

- You can drag and drop your entire folder structure from the disk that you use to organize your documents.
- You can also drag and drop text from a RTF file to a Folder for more info see, [Drag and Drop Documents to a Folder](#)^[192].

Related Topics

[Add documents from disk](#)^[49]

[Find and Add a document](#)^[55]

10.6 Clone a Sohodox Folder structure

You can now create the same folder structure that you frequently use in Sohodox by right clicking that folder structure and selecting the *Clone...* option. For e.g. Let say to you create a same set folders for each customer. It will be tedious to create these folders if you have a hundred's of customers. By using the Clone feature you will have to create the folder structure just once and then clone/copy this structure whenever you want.

To Clone a Sohodox Folder Structure:

1. In Sohodox, select *Workspace > Public Folders* or *Private Folders* in the [Navigation](#)^[26] pane (depending upon the type of folder you want to clone).
2. Now, select the folder that you want to clone/copy.
3. Right-click that folder and select the *Clone...* option. A dialog will pop-up
4. Enter a name for the cloned/copied folder in the dialog and click the *OK* key.

Please note that when you create a Sohodox folder no folder is being created on your system. Sohodox folders are just used to categorize your documents and not store them. All your documents are stored in the DB's [File Store](#)^[290].

- You will be the Owner of the folders, that you have created.

- You can also create sub folders for the parent folder.
- You can move one folder to another folder by drag and drop.

Related Topics[Add documents to a Folder](#)^[196][Search a Folder](#)^[193]

10.7 Drag and Drop Documents to a Folder

You can add documents by dragging and dropping to a Folder.

To Add Documents by Dragging & Dropping:

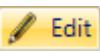
1. In Sohodox, select the Sohodox folder to which you want to add the documents.
2. Using Windows Explorer select the files you want to add and drag & drop them in the folder.

You can also drag and drop documents to a Sohodox folder from *All Documents*, *Documents Types and Tags* node

To Drag and Drop Text:

1. In Sohodox, select *Workspace > Public Folders* or *Private Folders* in the [Navigation](#)^[26] pane (depending upon whether you want to make the text to be added visible to all or keep it private to yourself).
2. Select the folder to which you want to add the text.
3. Select the text from a RTF (Rich Text Format) file for e.g. .DOC files, HTML files, .EML files, PDF files etc.
4. Drag this text and drop it in the folder. A new document will be created containing the text you selected.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button; if not, then click *No*.

- You will be the Owner of the documents, that you have added.
- By default documents added to Sohodox can only be viewed and modified by the owner/ creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#) ¹²³.
- You can click the *Edit* button  to edit the scanned document in the Image Editor. Using the [Image Editor window](#) ⁷² you can resize, crop and rotate a document.
- Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Drag & drop of attachments in email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is also supported. Sohodox also supports preview of .msg files imported from MS Outlook.

Related Topics

[Add documents from disk](#) ⁴⁹
[Find and Add a document](#) ⁵⁵

10.8 Search a Folder

You can quickly search a Sohodox folder by holding the *Ctrl+J* buttons on the keyboard.

To Search a Sohodox Folder:

1. In Sohodox, select *Public Folders* or *Private Folders* in the [Navigation](#) ²⁶ pane (depending upon the type of folder you are searching).
2. Right-click a Folder and select the *Jump to...* option. The Jump to... dialog will now be launched.
3. Select the *Folders* option to search folders.
4. Enter the name of the folder or the first few characters of the folder name in the text box.
5. The folder or a list of folder that matches or contains the word you have entered will be displayed in the drop-down list.
6. Select the Folder that you want to go to, and hit the *Enter* key
7. The selected folder will now be displayed.

- For every document in Sohodox, you can see the folder to which it is related (stored in). It can be seen under *Information panel --> Information tab --> Other Information --> Related Folder*. The **folder name is linked to the folder**. Sohodox automatically creates a **hyperlink** to the folder so that when you click the link, it jumps to that folder, where you can see the list of documents under that folder.

Related Topics

[Find document quickly](#) ^[224]

[Document Full Text Search](#) ^[231]

[Search a Tag](#) ^[214]

10.9 Export a Folder

You can export Sohodox folders along with all the sub folders and documents to any destination on your local disk (retaining the folder hierarchy).

To Export Sohodox folder structure:

1. In Sohodox, select *Public Folders* or *Private Folders* in the [Navigation](#) ^[26] pane (depending upon the type of folder you want to export).
2. Right-click a Folder and select the *Export Folder* option. The *Export Folder* dialog will now be launched.
3. In the *Select a folder to export to* box, click the *Folder* icon to select the location to export the Sohodox folders.
4. Check the *Include sub-folders* option to export the sub-folders of the selected folder.
5. Click the *Export* button to export the selected folder. The selected folder will now be exported.

- Click the Double Arrow button to view the following advanced options.

Merge Folders: Check this option to merge the sub-folders of the selected folder. In this case only the documents of the selected folders and its sub-folders will be exported.

Export only folder structure: Check this option to import only the folder structures and not the documents.

Related Topics[Find document quickly](#)^[224][Document Full Text Search](#)^[231][Search a Tag](#)^[214]

10.10 Restrict Users form viewing your Folders

You can restrict Sohodox users from viewing your documents by moving those documents from the public folder containing them, to a private folder.

To Restrict users from viewing your Folders:

1. In Sohodox, select *Workspace* > [Public Folders](#)^[187] in the Navigation pane and then select the folder or sub-folder containing the document you want to move.
2. From the *List pane*, select the document that you do not want other users to view.
3. Open *Private Folders*, then the Private Folder to which you want to move the document.
4. Now drag and drop the document you have selected, to this folder. You can also create a folder in the private folder.
5. This documents under the private folder will now not be available to other Sohodox users.

- By default, documents added to Sohodox can only be viewed and modified by the owner/ creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- Folders and documents added to the Private folder can only be viewed and modified by their owners. Usually the user who has added the documents or created the folder is the owner of the same (unless another user has assigned the folder or document to him/her). Each user can have their set of private folders.
- You can drag and drop your entire folder structure from the disk that you use to organize your documents to the Private Folder.

Related Topics[Drag and Drop a Folder](#)^[190][Drag and Drop Documents to a Folder](#)^[192]

10.11 Add documents to a Folder

You can add documents to a Sohodox Folder by dragging and dropping them.

To Add Documents to a Folder:

1. In Sohodox, select the appropriate folder from *Public Folders* or *Private Folders* in the [Navigation](#) ^[26] pane, to add the document(s).
2. Click the *Add From Disk* button of the *Home* tab. The *Add Files* window will now be launched.
3. Select one or more files that you want to add and click the *Open* button. The selected files will now be added to the Folder.

Note:

Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

- Once you have added the documents to a folder, you can then set the [Document Type](#) ^[174] of these documents. To set a Document Type see, [Set a Document Type of a Document](#) ^[184]
- You can also drag & drop documents from your disk to the Sohodox Folder. Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Drag & drop of attachments in email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is also supported. Sohodox also supports preview of .msg files imported from MS Outlook.

Related Topics

[Edit a document](#) ^[120]

[Find and Add a document](#) ^[55]

[Add existing folder structure to Sohodox DB](#) ^[198]

10.12 Add a document to multiple folders

You can add a document to multiple Sohodox Folders.

To Add a Document to multiple Folders:

1. In Sohodox, select a document in any folder
2. Now press the ALT key and then drag and drop the document to the folder to which you wish to add it
3. The document will now be available in both folders

Note:

Multiple copies of the document are NOT made. The same document is displayed in multiple folders. So if the document is deleted it will be removed from all folders.

This feature has been introduced in beta in version 10. This means the behaviour of this feature might change in future updates based on feedback received from customers.

Related Topics

[Edit a document](#) 120


[Find and Add a document](#) 55

[Add existing folder structure to Sohodox DB](#) 198

10.13 Add existing folder structure to Sohodox

You can add your existing folders structure (on your local machine) that you use to organize your documents, to the Sohodox DB.

To Add existing Folder Structure to the Sohodox DB:

1. In Sohodox, click the *Add from disk* drop down and select the *Add Folders from disk* option on the Ribbon bar. The *Add Folders from disk* window will be launched.
2. Check the folder or folder structure that you want to import to Sohodox from the *Choose folders from disk* pane.
3. Select *Import only folder structure* option to import only the folder structure and not the files.
4. Select an existing Sohodox folder to add the selected folders from the *Destination* tab.
▼ Follow these steps to specify the Destination of the selected folder
 - a) Click this  button besides the *Choose a Folder* box to select a folder to add the files. The *Folder Selection* window will be launched.
 - b) Now, select a folder from the list. You can also use the *Search* box to quickly locate the folder you are looking for.
 - c) Click the *OK* button to select the folder. The selected folder will now be displayed in the *Choose a Folder* box.
5. Click the *Preview* button to view the folder structure that will be imported to the Sohodox DB.
6. Now, click the *Add* button to add the folder structure to the Sohodox DB.
7. Now, click the *Close* button to close the *Add Folders from disk* window.

- If you only want to import the files and not the folder then select the *Import only files* option.

Related Topics

[Add documents from disk](#) ⁴⁹

[Create a new Folder](#) ¹⁸⁹

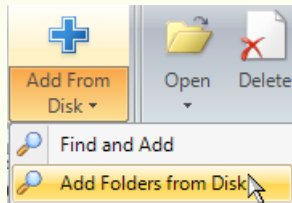
[Add folder structure along with files from disk](#) ¹⁹⁹

10.14 Add folder structure along with files from disk

You can add the entire folder structure (on your local machine), that you use to organize your documents to the Sohodox DB.

To Add Existing Folder Structure along with Files to the Sohodox DB:

1. In Sohodox, click the *Add from disk* drop down and select the *Add Folders from disk* option on the *Ribbon* bar. The *Add Folders from disk* window will be launched.



2. Check the folder or folder structure that you want to import to Sohodox from the *Choose folders from disk* pane.
3. Select the *Import files and folder tree* option to import both the files and the folder structure to Sohodox.
4. Check the *Use exceptions* option to use exceptions (optional).

You can use *Exceptions* to exclude or include particular file or file types to the Sohodox DB. For e.g. If the folder that you have selected contains pdf, doc, tiff, jpeg files and if you only want to add .DOC files to the DB, then you can use an exception which will add the .DOC files and exclude the remaining files.

▼ Follow these steps to use Exceptions

- a) Click the *Exceptions* button to add exceptions. The *Exceptions* window will be launched.
- b) Select the *Do not add these files* tab to specify the file or file type you want to exclude and then click the *Add* button. For e.g. if you do not want to add .PDF files, then type *.PDF in the text box and click the *Add* button to add it to the list.
- c) Select the *Add only these files* tab to specify the file or file type you want to include and then click the *Add* button. For e.g. if you only want to add .DOC files, then type

*.DOC in the text box and click the *Add* button to add it to the list.

d) To remove an *Exception* from the list, select it and click the *Remove* button.

e) Click *OK* button to close the *Exceptions* window.

6. Click the *Preview* button to view the folder structure and the files that are going to be imported to the Sohodox DB.

7. Click the *Add* button to add the folder structure and the files to the Sohodox DB.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

8. Click the *Close* button to close the *Add Folders from disk* window. Now, navigate to the *Folders* node in the [Navigation](#)^[26] pane to view the folders along with the documents.

9. You can now set the [Document Type](#)^[173], of these documents.

- You will be the Owner of the documents that you have added.
- By default documents added to Sohodox can only be viewed and modified by the owner/ creator i.e. other Sohodox users will not be able to view documents added by you unless you [share that document](#)^[123].
- You can add only the folder structure (without the documents) that you use to organize your documents, to the Sohodox DB. For more info see, [Add existing folder structure to Sohodox DB](#)^[198]
- If you are a Paperport user, then see [Import data from Paperport](#)^[323], to import your documents from Paperport to Sohodox.

Related Topics

[Edit a document](#)^[120]

[Find and Add a document](#)^[55]

[Drag and Drop a Folder](#)^[190]

10.15 Change the Folder of a Document

You can change (or set) the Folder of a document by dragging and dropping it to the folder you want.

To Change the Folder of a Document:

1. In Sohodox, select the document whose folder you want to change from the [List View](#)^[29] pane. The document will now be displayed in the [Documents Details](#)^[108] pane.
2. Click the *Information* tab on the left side of the *Documents Details* pane. The current folder of the selected document is displayed in the *Related Folder* box.
3. Click the *Change...* button besides the *Related Folder* box to select a different folder. The *Folder Selection* window will be launched.
4. Select a folder from the list. You can also use the *Search* box to quickly find the folder you are looking for.
5. Click the *OK* button to select the folder. The selected folder will now be displayed in the *Related Folder* box.

- You can choose to save multiple documents to a common folder together. To do this, first select the documents. Then go to *Documents Details* pane --> *Information* pane --> *Other Information* --> *Related Folder* --> click the *Change* button. This will bring up the *Folder Selection* window. Select the folder to which you want to add these documents together. All the selected documents will now be stored in the selected folder.

Related Topics

[Set a Document Type of a Document](#)^[184]

[Add documents to a Folder](#)^[196]

10.16 Delete a Folder

You can right click a Folder and select the *Delete* option to delete it.

To Delete a Folder:

1. In Sohodox, select *Workspace > Public Folders* or *Private Folders* in the [Navigation](#) ^[26] pane (depending upon the kind of folder you want to delete).
2. Select the Folder you want to delete.
3. Right click that Folder and select the *Delete* option or hit the *Delete* button on the keyboard to delete the Folder.

If you delete a folder the documents in it will not be deleted. They will be displayed in the All Documents node. If you want to delete a folder along with all its documents then right click that Folder and select the *Delete* option and hit the Shift key on the keyboard.

- If you delete a parent folder its sub folders will also be deleted.

Related Topics

[Create a new Folder](#) ^[189]

[Add existing folder structure to Sohodox DB](#) ^[198]

[Delete a Document](#) ^[125]

10.17 Rename a Folder

You can rename a folder at any time after you have created or imported it. You can rename a folder even if you have already created sub-folders under it.

To Rename a Folder:

1. In the Navigation pane, from the *Folders* node, select the folder you want to rename.
2. Right-click the folder and then click *Rename*.
3. Type the new name and press Enter to save it.

Related Topics

[Create a new Folder](#)  189

11 Tags

Topics Covered

1. [What are Tags](#) ^[205]
2. [Tags - FAQ](#) ^[205]
3. [Create a Tag](#) ^[207]
4. [Tag a Document](#) ^[207]
5. [Tag Multiple Documents Together](#) ^[208]
6. [Drag and Drop Documents to a Tag](#) ^[209]
7. [Add Documents to a Tag](#) ^[210]
8. [Remove Tag from a Document](#) ^[211]
9. [Remove Tag from Multiple Documents](#) ^[213]
10. [Search a Tag](#) ^[214]
11. [Delete a Tag](#) ^[214]
12. [Merge Tags](#) ^[216]
13. [Rename a Tag](#) ^[216]

11.1 What are Tags

What are Tags?

Tags are basically keywords that can be attached to any document. Tagging is a quick way of indexing your documents. Documents can be searched, sorted or grouped based on their tags. Multiple tags can be attached to the same document. Each tag must be single word and cannot contain spaces.

Points to remember while tagging a document...

- Enter words that describe the document. For e.g. email, fax, invoice, etc.
- Use words that a user would use to locate a document.
- Use words that mean the same. For e.g. You can use both invoice and bill to tag a document that is an *Invoice*.

For e.g. Lets say you have scanned invoice received from Acme corp for the month of January. To tag this document you should use words like invoice, bill, January, acme corp.

Related Topics

[Tags - FAQ](#) ^[205]

[Tag a Document](#) ^[207]

[Delete a Tag](#) ^[214]

11.2 Tags - FAQ

▼ What are Tags?

Tags are keywords that you can attach to documents. Tags should be the most likely words that a person would type to find a document. For e.g. Lets you have scanned Invoice received from Acme corp for the month of January. To tag this document you should use words like invoice, AcmeCorp.

▼ Why do I need Tags?

You can use tags to categorize documents and make them easier to find. You can also use folders to group/categorize documents but a document can only be part of one folder. Sometimes a document can have multiple categories and this is where tags come in handy because multiple tags can be attached to the same document.

A combination of folders and tags is a powerful way of managing your documents.

▼ **How many Tags can I attach to a Document?**

You can attach as many tags as you like. Just use a semicolon to separate them. Each tag must be a single word and cannot contain a space.

▼ **Do I have to attach Tags to Documents?**

Its not mandatory to attach tags. Tagging is the quickest and the easiest way of indexing your documents.

Related Topics

[What are Tags](#) ^[205]

[Tag a Document](#) ^[207]

[Delete a Tag](#) ^[214]

11.3 Create a Tag

You can create a Tag by clicking the *Create New* button in the *Tags* node.

To Create a Tag:

1. In Sohodox, select *Workspace > Tags* in the *Navigation* pane.
2. Now, click the *Create New* button to create a new Tag.
3. Enter a name for the Tag and hit the *Enter* key.

- All tags are listed in the *Tags* node of the [Navigation](#)^[26] pane.
- You can also drag & drop documents from your disk to a Tag. You can also drag and drop text from a RTF file to a tag for more info see, [Drag and Drop Documents to a Tag](#)^[209]
- You can select a tag from the *Tags* node, to view the the documents attached to it.

Related Topics

[Tag a Document](#)^[207]
[Delete a Tag](#)^[214]

11.4 Tag a Document

You can create a Tag by entering keywords in the *Tag* box of the *Document Details* window.

To Tag a Document:

1. In Sohodox, select the document from the [List View](#)^[29] pane. The document will now be displayed in the [Documents Details](#)^[108] pane.
2. Enter tags for this document in the *Tags* box of the *Documents Details* pane. You can add as many relevant tags as you want by separating each tag with a semi-colon or a space.
3. Click outside the *Tag* box to apply the tag

- All tags are listed in the *Tags* node of the [Navigation](#)^[24] pane.
- You can select a tag from the *Tags* node, to view the the documents attached to it.
- You can also drag & drop documents from your disk to the Tag. You can also drag and drop text from a RTF file to a tag for more info see, [Drag and Drop Documents to a Tag](#)^[209]
- Points to remember while tagging a document...
Enter words that describe the document. For e.g. email, fax, invoice, etc.
Use words that a user would use to search a document.

Related Topics[Create a Tag](#)^[207][Delete a Tag](#)^[214][Edit a document](#)^[120]

11.5 Tag Multiple Documents Together

You can Tag multiple documents together by selecting them and entering keywords in the Tag box of the Document Details window.

To Tag Multiple Documents:


1. In Sohodox, select the document from the [List View](#)^[29] pane.
2. Enter the common tags for these document in the *Tags* box of the *Documents Details* pane. You can add as many relevant tags as you want by separating each tag with a semi-colon or a space.

Note:

Alternatively, you can drag and drop these documents onto the relevant tag in the *Tags* node. If you want to add more than one tag together, you will need to drag and drop the documents to each tag separately.

3. Click outside the *Tags* box or press Enter to apply the tags. If the tags added are new, they will get listed in the *Tags* node along with the other tags.

- All tags are listed in the *Tags* node of the [Navigation](#)^[24] pane.
- You can select a tag from the *Tags* node, to view the the documents attached to it.

- You can also drag & drop documents from your disk to the Tag. You can also drag and drop text from a RTF file to a tag for more info see, [Drag and Drop Documents to a Tag](#)^[209]
- When you add tags for multiple documents together, the existing tags of those documents are retained. In case you want to delete all the existing tags of those documents together, delete them **before** adding the new, common tags. To do this, first select all the documents. Then click the 'Delete' button  next to the *Tags* box. This will delete all existing tags of those documents. Now you can add the new tags. Deleting existing tags *after* adding the new tags will cause even the new ones to be deleted.
- Points to remember while tagging a document...
Enter words that describe the document. For e.g. email, fax, invoice, etc.
Use words that a user would use to search a document.
- To modify a common tag for multiple documents together, first create the correct tag in the *Tags* node. Then click the old tag which you wanted to modify. Now select the relevant documents together and drag and drop them onto the new tag in the *Tags* node. The documents will now no longer be visible under the old tag from the *Tags* node, neither will any of them have the old tag when previewed in the [Documents Details](#)^[30] pane.

Related Topics

[Create a Tag](#)^[207]

[Delete a Tag](#)^[214]

11.6 Drag and Drop Documents to a Tag

You can add documents by dragging and dropping on a Tag.

To Add Documents by Dragging & Dropping:

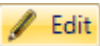
1. In Sohodox, select the Tag to which you want to add the documents.
2. Using Windows Explorer select the files you want to add and drag & drop them on that Tag.

You can also drag and drop documents to a Tag from *All Documents*, *Documents Types* and *Folders* node

To Drag and Drop Text:

1. In Sohodox, select *Workspace > Tags* in the [Navigation](#) ²⁶ pane.
2. Select the tag to which you want to add the text.
3. Select the text from a RTF (Rich Text Format) file for e.g. .DOC files, HTML files, .EML files PDF files etc.
4. Drag this text and drop it on the tag. A new document will be created containing the text you selected.

Note: By default 50 documents are displayed in the List View pane. If you have added more than 50 documents they will be moved to the next page. To view the documents displayed on the next page use the navigation buttons below the List View pane.

- You will be the Owner of the documents, that you have added.
- You can click the *Edit* button  to edit the scanned document in the Image Editor . Using the [Image Editor window](#) ⁷² you can resize, crop and rotate a document.
- Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Drag & drop of attachments in email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is also supported. Sohodox also supports preview of .msg files imported from MS Outlook.

Related Topics

[Create a New Document](#) ¹¹⁶

[Add documents from disk](#) ⁴⁹

[Find and Add a document](#) ⁵⁵

11.7 Add Documents to a Tag

You can add documents to a Tag by using the *Add from disk* button.

To Add Documents to a Tag:

1. In Sohodox, select the Tag in the *Navigation* pane, to add the document(s).
2. Click the *Add From Disk* button of the *Home* tab. The *Add Files* window will now be

launched.

3. Select one or more files that you want to add and click the *Open* button. The selected files will now be added to the Tag.

Note: Once the documents are added, you will get a confirmation message box asking you whether you want to delete the added files from the original location (on the disk). If you want to delete the added documents then click the *Yes* button if not then click *No*.

- By default documents added to the Tags are added to the [Private folder](#)^[186].
- Once you have added the documents to a Tag, you can then set the Document Type of these documents. To set a Document Type see, [Set a Document Type of a Document](#)^[184].
- You can also drag and drop text from a RTF file to a tag for more info see, [Drag and Drop Documents to a Tag](#)^[209].
- You can also drag & drop documents from your disk to the Tag. Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported. Drag & drop of attachments in email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is also supported. Sohodox also supports preview of .msg files imported from MS Outlook.

Related Topics

[Create a Tag](#)^[207]

[Delete a Tag](#)^[214]

[Edit a document](#)^[120]

11.8 Remove Tag from a Document

You can remove a tag of a document from the *Tags* box..

To Remove a Tag from a Document:

1. In the List View pane, select a document to remove its tag. The document will be displayed in its Details pane.
2. In the *Tags* box, select the tag that you want to remove and hit the *Backspace* button on the keyboard to remove the tag.

- A tag does not get deleted from the *Tags* node if you remove it from the *Tags* box.

Related Topics

[Create a new Tag](#) ^[207]


[Delete a Tag](#) ^[214]

11.9 Remove Tag from Multiple Documents

You can remove a common tag from multiple documents together, using the *Tags* node.

To Remove a Tag from Multiple Documents:

1. In the *Tags* node, select the tag to be removed from the documents.
2. Select the documents from which you want to remove the tag. None of the documents will be displayed in the [Documents Details](#)^[30] pane. Instead, a batch update note will be displayed.
3. Press the *Shift* key on the keyboard and click on the *Delete* button or right-click over the selected documents and click *Delete*. This will bring up a dialog asking you to confirm if you want to remove the tag from the selected documents.
4. Click *Yes* to remove. Repeat the process for every tag that you want to delete from multiple documents together.

- A tag does not get deleted from the *Tags* node if you remove it from the *Tags* box.
- Selecting multiple documents and then clicking the *Delete*  button next to the *Tags* box in the [Documents Details](#)^[30] pane will remove all the existing tags from the selected documents.
- To modify a common tag for multiple documents together, first create the correct tag in the *Tags* node. Then click the old tag which you wanted to modify. Now select the relevant documents together and drag and drop them onto the new tag in the *Tags* node. The documents will now no longer be visible under the old tag from the *Tags* node, neither will any of them have the old tag when previewed in the [Documents Details](#)^[30] pane.

Related Topics

[Create a new Tag](#)^[207]

[Delete a Tag](#)^[214]

[Tag Multiple Documents Together](#)^[208]

11.10 Search a Tag

You can quickly search for a Tag by holding the *Ctrl+J* buttons on the keyboard.

To Search a Tag:

1. In Sohodox, select *Tags* node in the [Navigation](#) ^[24] pane.
2. Right click a *Tag* and select the *Jump to...* option. The *Jump to...* dialog will now be launched.
3. Select the *Tags* option to search tags.
4. Enter the name of the tag or the first few characters (above 3 characters) of the tag in the text box.
5. The tag or a list of tags that matches or contains the word you have entered will be displayed in the drop-down list.
6. Select the Tag that you want to view, and hit the *Enter* key.
7. The selected tag will now be displayed.

Related Topics

[Find document quickly](#) ^[224]

[Document Full Text Search](#) ^[231]

[Search a Folder](#) ^[193]

11.11 Delete a Tag

You can right click a Tag and select the *Delete* option to delete it.

To Delete a Tag:

1. In Sohodox, select *Workspace > Tags* in the *Navigation* pane.
2. Select the Tag that you want to delete.
3. Right click that Tag and select the *Delete* option or hit the *Delete* button on the keyboard to delete the tag.

- You can remove a tag from the Tag box. A tag does not get deleted if you remove it from the *Tags* box.

Related Topics

[Remove Tag from a Document](#) ^[21]

[Create a new Tag](#) ^[20]

[Delete a Document](#) ^[125]

11.12 Merge Tags

You can merge a tag with another tag in the Navigation pane...

To Merge a Tag with another Tag:

1. In the Navigation pane, select the tag you want to merge.
2. Drag it and drop it onto the tag into which you want to merge it. This will delete the merged tag from the *Tags* node and add its documents to the other tag.

Example:

While adding the tag 'Approved' to a set of documents, if you misspelled it as 'Aprov d' in some of the documents, you can merge the latter tag into the former by using drag and drop as outlined above. The 'Aprov d' tag will get deleted and all documents bearing it will get added to the 'Approved' tag. Now every document under this tag will bear the tag with the correct spelling.

Note:

- Merging of tags also helps in rectifying situations where multiple users accidentally create similar tags. Only one correct tag needs to be retained. The other similar tags can be merged into this one.

Related Topics

[Create a new Tag](#) 

11.13 Rename a Tag

You can rename a tag just like you rename folders.

To Rename a Tag:

1. In the Navigation pane, from the *Tags* node, select the tag you want to rename.
2. Press F2 or right-click the tag and then click *Rename*.
3. Type the new name and press Enter to save the tag.

Related Topics[Create a new Tag](#) ^[207]

12 Dropbox Integration

Topics Covered

1. [Basics](#) ^[218]
2. [Enable Dropbox Integration](#)
3. [Add Sohodox documents to Dropbox](#)
4. [Remove Sohodox documents from Dropbox](#) ^[220]
5. [Add documents to Sohodox via Dropbox](#) ^[221]
6. [Update Dropbox with a file modified in Sohodox](#) ^[221]
7. [Update Sohodox with a file modified in Dropbox](#)
8. [Sync the Dropbox tag in Sohodox](#) ^[222]
9. [Sohodox & Dropbox in a multi-user scenario](#) ^[223]

12.1 Basics

With Dropbox integration, any selected document in Sohodox can be made accessible from anywhere using devices like smartphones, tablets and even your web browser!

Dropbox is a free service that lets you access your important files anywhere. Any file you save to your Dropbox will automatically save to all your computers, phones and even the Dropbox website.

To start using this feature, you must have a Dropbox account and the Dropbox client software must be installed on the machine on which Sohodox is installed. Sohodox now has a new special tag called *Dropbox*. Once you enable Dropbox integration, you can drag and drop documents to the *Dropbox* tag to make that document available in your Dropbox.

A folder called *Sohodox* is created inside your Dropbox folder. Any document in Sohodox tagged as *Dropbox*, will be copied to this folder. Once this is done, you can access this document on your phone/tablet (via the Dropbox apps for iOS and Android), on another machine or via the Internet using the Dropbox web site. In Dropbox you can also share this document with others.

Example:

If you have a document called *letter.docx* in Sohodox. Once you tag this document as *Dropbox* in Sohodox, you can view this document from your phone, tablet or web browser using Dropbox. In addition to this you can make changes to the document in Sohodox or any other machine (for e.g. your home machine which may not have Sohodox installed). At any time, you can right-click the *Dropbox* tag in Sohodox and select the *Sync* option. Sohodox will then check if *letter.docx* has been modified after you tagged it as *Dropbox*. If it was modified in Sohodox, then the copy of the file in Dropbox will be automatically updated. If the file is modified on some other machine Sohodox will update itself with the latest copy of the file from Dropbox!

You can also add new documents to Sohodox, via Dropbox. During the sync if Sohodox finds any new documents, it will add them to Sohodox.

Example:

If you are out on the road and need a copy of a receipt in Sohodox. You can simply use your mobile phone camera to capture an image of the receipt. Then use the Dropbox app on your phone to save the photo of the receipt inside the *Sohodox* folder in Dropbox. When you are back at the office, simply do a Sync on the *Dropbox* tag and the image of the receipt will appear in Sohodox where you can index and organize it!

For users upgrading from version 7.6 and older: If you had created a tag called *Dropbox* in Sohodox then upon updating your Sohodox installation, that tag will automatically be converted to the special *Dropbox* tag. The documents you had added to that tag will stay as they were, but the icon for the *Dropbox* tag will change to a 'cloud' icon. If you want to remove your existing

documents from that tag (or not sync them), you need to create a new tag and move your existing documents to it.

12.2 Enable Dropbox Integration

To Enable Dropbox Integration

If Dropbox was already installed on your machine before Sohodox v8 or later was installed

If this is a new installation of Sohodox...

When Sohodox starts for the first time, it will automatically look for the Dropbox folder on your machine and create a Sohodox sub-folder within the Dropbox folder. It will also automatically enable Dropbox integration for you.

If you have upgraded an existing installation of Sohodox...

In Sohodox go to *Options --> User Options --> Dropbox* and check the *Enable Dropbox* option. Sohodox will automatically detect the path of your Dropbox folder..

If you installed Dropbox on a machine after installing Sohodox v8 or later

- In Sohodox go to *Options --> User Options --> Dropbox* and check the *Enable Dropbox* option. Sohodox will automatically detect the path of your Dropbox folder..
- Sohodox will create a sub-folder called *Sohodox* within the Dropbox folder on your machine.

Note:

In case Sohodox is unable to automatically detect the location of the Dropbox folder, you can specify the location manually. To specify the location manually, go to *Options --> User Options --> Dropbox* and click the *Browse* button to browse to locate the *Dropbox* folder. Select the folder and click OK..

12.3 Add Sohodox documents to Dropbox

Simply drag and drop any document in Sohodox to the *Dropbox* tag.

To Add documents to Dropbox:

1. Drag and drop any document in Sohodox to the *Dropbox* tag, OR
2. Select one or more documents in Sohodox and type Dropbox as a tag for them, OR
3. Drag and drop any document from Windows Explorer onto the Dropbox tag

The documents will be immediately copied to the Sohodox sub-folder in Dropbox (so there will be a copy of the document in Sohodox as well as in your Dropbox folder), If you make a change to any of the documents in the future, you can ensure that the latest copies of the document are available in both places by occasionally [Syncing the Dropbox tag](#)^[222] in Sohodox.

The Dropbox tag works like any other tag in Sohodox. The only difference is that unlike other tags you cannot delete the *Dropbox* tag.

See Also

[Tag a Document](#)^[207]

[Tag Multiple Documents Together](#)^[208]

[Drag and Drop Documents to a Tag](#)^[209]

[Add Documents to a Tag](#)^[210]

12.4 Remove Sohodox documents from Dropbox

To remove documents from Dropbox, remove the *Dropbox* tag from the documents. The documents will be removed from Dropbox the next time you [Sync the Dropbox tag](#)^[222] in Sohodox.

See Also

[Remove Tag from a Document](#)^[211]

[Remove Tag from multiple Documents](#)^[213]

12.5 Add documents to Sohodox via Dropbox

To add new documents to Sohodox via Dropbox, simply add those documents to the *Sohodox* sub-folder in Dropbox. The documents will be added to Sohodox, the next time you Sync the *Dropbox* tag in Sohodox.

To Add documents to Sohodox via Dropbox:

1. Upload the document to the Sohodox sub-folder via the Dropbox web site, OR
Copy the file to the Sohodox sub-folder of your Dropbox installation, OR
Use the Dropbox app on your phone/tablet to add a document to the Sohodox sub-folder
2. [Sync the Dropbox tag](#) ^[222] in Sohodox
3. The newly added files will now be available in Sohodox

12.6 Update Dropbox with a file modified in Sohodox

If you modify a file in Sohodox after tagging it as Dropbox, you must Sync the *Dropbox* tag in Sohodox so that the file's copy in Dropbox is updated with the latest version from Sohodox.

To Update Dropbox with a file modified in Sohodox

1. Open the file from Sohodox and make changes to it (for example rotate a scanned image to correct it's orientation)
2. [Sync the Dropbox tag](#) ^[222] in Sohodox
3. The older copy of the file in Dropbox will now be replaced with the latest modified version

12.7 Update Sohodox with a file modified in Dropbox

If you modify any file in *Sohodox* sub-folder in Dropbox, you must Sync the *Dropbox* tag in Sohodox so that the file's copy in Sohodox is updated with the latest version from Dropbox.

Update Sohodox with a file modified in Dropbpox

1. Open the file from the *Sohodox* sub-folder in Dropbox and make changes to it (for example, edit a MS Word file)
2. [Sync the Dropbox tag](#)^[222] in Sohodox
3. The older copy of the file in Sohodox will now be replaced with the latest modified version from Dropbox

12.8 Sync the Dropbox tag in Sohodox

You must sync the *Dropbox* tag in Sohodox at regular intervals to ensure that the most recently updated copy of each document is available in both Sohodox and Dropbox. At the end of the Sync, both the *Dropbox* tag in Sohodox and the *Sohodox* sub-folder Dropbox will have the same documents.

To Sync the Dropbox tag in Sohodox:

1. Right-click the *Dropbox* tag in Sohodox and select the *Sync* option. Sohodox will then perform the following actions...
 - Generate a list of all files in the *Sohodox* sub-folder in Dropbox, which are not available in Sohodox. It will then add these files to Sohodox and tag them as *Dropbox*.
 - Compare each file in the in the *Sohodox* sub-folder in Dropbox with it's copy in Sohodox to determine which copy is newer. It will then replace the older copy with the newer copy.

Note:

You must never rename a file in the *Sohodox* sub-folder in Dropbox. This may prevent this file from Syncing correctly. It may get added to Sohodox as a new document.

12.9 Sohodox & Dropbox in a multi-user scenario

Note about using Dropbox integration in a multi-user installation of Sohodox

- If a user logs-in to Sohodox on a machine that has another user's Dropbox account configured on it, then adding documents to the Dropbox tag will copy them to that Dropbox account.

Example:

John logs-in to Sohodox on Mary's machine that has her Dropbox account configured on it. John adds documents to the *Dropbox* tag. Now these documents will get synced with Mary's Dropbox account even though they have been added by John, because on any given machine, Sohodox integrates with only one Dropbox account. Please also note that this document will not be added to John's Dropbox account as it was added from a machine on which John's Dropbox account was not configured.

13 Search for a document

Topics Covered

1. [Find Document Quickly](#) ^[224]
2. [Select fields to include in the Quick Search](#) ^[226]
3. [Narrow down the Search Result](#) ^[227]
4. [Document Full Text Search](#) ^[231]
5. [Save a Search criteria](#) ^[244]
6. [Export the Search Result](#) ^[250]
7. [Import the Exported Search Result](#) ^[251]

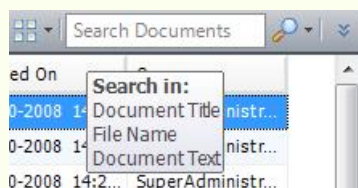
13.1 Find document quickly

Use the [Quick Search box](#) ^[24] (in the upper-right corner of the Sohodox window) to quickly locate the items you are looking for.

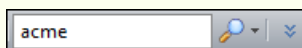
To Search for a Document using Quick Search:


1. In Sohodox, select *Workspace > All Documents* in the [Navigation](#) ^[26] pane. The documents will now be displayed in the *List View* pane.
2. When you move your mouse arrow on the *Quick Search* box, it will show you the fields that are going to be searched.


Note: You can select the fields that you want to be searched by customizing the Quick Search



3. Click in the *Quick Search* box and type a word which best describes the document you are looking for.



4. Click the *Search* button  or hit the *Enter* key to begin the search.
5. The search results will be displayed in the *List View* pane.

- Search from the quick search is only possible for columns that you can see in the grid below it. To search for a document for which you know the document type, you will need to go that Document Type and then search in the fields of the same.
- To search for text in a document you will need to ensure that text has been extracted from that document and stored in the DB.
- To clear the Search Results, click the *Clear* button .

- Please note that you will not get an optimum search result by using the *Quick Search*, as it will return all the possible documents containing the keyword you have used. To narrow down your search use the [Advanced Search](#)

Related Topics

[Save Search](#)

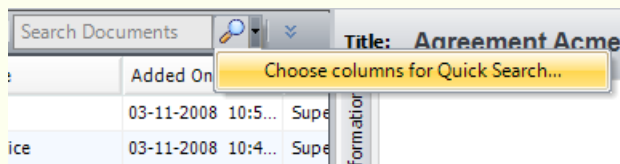
[Document Full Text Search](#)

13.2 Select fields to include in the Quick Search

You can select the fields that you want to include in the Quick Search by using the Customize Quick Search dialog. The Quick Search searches in fields like the Document Title, File Name and the Document Text. You can change this and select only the fields (displayed in the List View) that you want to search in.

To Search for a Document using Quick Search:

1. In Sohodox, click the Quick Search drop -down.
2. Now, select the *Choose columns for Quick Search...* option. The *Customize Quick Search* dialog will be launched.



3. All the columns (fields) that can be searched will now be listed. Select the columns you want to include in the Quick Search box.
4. Click the OK button to save the settings. You will now be able to search the selected fields using the Quick Search.

- Please note that currently Quick Search does not support Pick List Multiple field and Lookup field. So these fields will not be listed in the Customize Quick Search dialog.
- Search from the quick search is only possible for columns that you can see in the grid below it. To search for a document for which you know the document type, you will need to go that Document Type and then search in the fields of the same.
- To search for text in a document you will need to ensure that text has been extracted from that document and stored in the DB.
- Please note that you will not get an optimum search result by using the *Quick Search*, as it will return all the possible documents containing the keyword you have used. To narrow down your search use the [Advanced Search](#) ^[227]

Related Topics


[Save Search](#) [Document Full Text Search](#) 

13.3 Narrow down the Search Result

You can use the Advanced Search to narrow down your search results and to make it more specific. For e.g. Lets say you want to view all documents created by John on December 10 2007. By using the query below you will get all the documents created by John on December 10 2007...

*User Equals to John
Added On 12/10/2007*



To Search a document using Advanced Search:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.
2. Click the *Double Arrow* button  to bring up the *Advanced Search* pane.
3. Select a column name (indexing field) from the *Field Name* drop down, to search in a particular column (indexing field).
4. Select the appropriate comparison operator (i.e. contains, begins with, equal to etc.) from the *Comparison* drop down. For e.g. To search for field values beginning with specific alphabets use the "*begins with*" operator in your query condition.
▼ The following Comparison Operators are available

Comparison Operator	Description	Example
<i>Equal To</i>	Use this operator to exactly match the value you are looking for	Document Name " <i>equal to</i> " AcmeInvoice
<i>Not Equal To</i>	Use this operator when you do not want the value to match the text you are looking for	Document Name " <i>not equal to</i> " AcmeInvoice
<i>Less Than</i>	Use this operator to find values that are less than	Invoice Amount " <i>less than</i> " 1000


	the value you are looking for	
<i>Greater Than</i>	Use this operator to find values that are greater than the value you are looking for	Invoice Amount <i>"greater than"</i> 1000
<i>Less Than equal than</i>	Use this operator to find values that are less than and equal to the value you are looking for	Invoice Amount <i>"less than equal to"</i> 1000
<i>Greater Than</i>	Use this operator to find values that are greater than and equal to the value you are looking for	Invoice Amount <i>"greater than equal to"</i> 1000
<i>Begins With</i>	Use this operator to find values that begins with the text that you are looking for.	Document Name <i>"begins with"</i> Acme
<i>Ends With</i>	Use this operator to find values that ends with the text that you are looking for.	Document Name <i>"ends with"</i> Invoice
<i>Contains</i>	Use this operator to find values that contains the text that you are looking for.	Document Name <i>"contains"</i> Acme
<i>Does Not Begin With</i>	Use this operator to find values that does not begin with the text that you are looking for.	Document Name <i>"does not begin with"</i> Acme
<i>Does Not End With</i>	Use this operator to find values that does not end with the text that you are looking for.	Document Name <i>"does not end with"</i> Invoice
<i>Does Not Contain</i>	Use this operator to find	Document

	values that does not contain the text that you are looking for.	Name "does not contain" Acme
<i>Is Empty</i>	Use this operator to match empty values.	Invoice Date "Is Empty"
<i>Is Not Empty</i>	Use this operator to match non-empty values.	Invoice Date "Is Not Empty"

- Enter the value which will be used for the comparison in the *Compare To* box.
- You can add more criteria to your search by clicking this  button. To remove a criteria click this  button.
- To get a result which matches all the criteria's specified by you, select the *Match all conditions* option from the Conditions drop down. To get a result which matches any criteria, select the *Match any conditions* option from the Conditions drop down
- Click the *Search* button to begin the search.

Document Title	contains	invoice	-	+
Owner	equal to	harold	-	+
Save as...		Match all conditions	Search	

- The search results will be displayed in the *List View* pane.

- Search from the advanced search is only possible for columns that you can see in the grid below it. To search for a document for which you know the document type, you will need to go that Document Type and then search in the fields of the same.
- To see all your documents again, click the *Clear* button .
- To view the saved queries click the *Saved Searches > Custom Search* node in *Workspace*.

Related Topics

[Quick Search](#) ²²⁴

[Save Search](#) [Document Full Text Search](#) 

13.4 Document Full Text Search

- 3.1. [Learn about Document Full Text Search](#) ^[231]
- 3.2. [Document Full Text Search - FAQ](#) ^[231]
- 3.3. [Extract Text from document](#) ^[237]
- 3.4. [View the Extracted text of the Document](#) ^[238]
- 3.5. [Save the Extracted Text](#) ^[239]
- 3.6. [Search for text in Document](#) ^[240]
- 3.7. [OCR document that contains text in a different language](#) ^[243]

13.4.1 Learn about Document Full Text Search

What is Document Full Text Search?

The Document Full Text search feature allows you to search for documents in a Sohodox DB based on their content. The Full Text Search feature works by extracting text from documents that you add to a Sohodox DB and then indexing the text. The text can be automatically extracted in the background after you add a document. The text extraction only happens on the machine on which Sohodox is installed in server mode (a single user installation of Sohodox is always installed in server mode). If you have turned off automatic text extraction, then text extraction and indexing can be performed manually later.

Since text extraction happens in the background, the process continues even when you close Sohodox. To stop text extraction...

Explore *Control Panel > Administrative Tools > Services*. Select *ITAZ Sohodox Indexing Services* under the *Name* column. Right click the entry and select the *Stop* option.

Related Topics

[Frequently asked questions - Document Full Text Search](#) ^[232]

13.4.2 Document Full Text Search - FAQ

▼ What does the document full text search feature do?

The Document Full Text search feature allows you to search for documents in a Sohodox DB based on their content. The Full Text Search feature works by extracting text from documents that you add to a Sohodox DB and then indexing the text. The text can be automatically extracted in the background after you add a document. Otherwise the text extraction and indexing can be performed manually later.

Since text extraction happens in the background, the process continues even when you close Sohodox. To stop text extraction...

Explore *Control Panel >Administrative Tools >Services*. Select *ITAZ Sohodox Indexing Services* under the *Name* column. Right click the entry and select the *Stop* option.

▼ Why is it useful?

Without the full text search feature you can find documents either...

- using the indexing information that you have stored along with each document, or...
- using the properties of the document (for e.g. file name, file size, file type etc.)

Enabling the full text search provides you with a third method for quickly finding documents.

▼ For what file types does the document full text search feature work?

Depending on the file type (i.e. file format) text extraction from documents is now done using OCR, built-in text extractors and IFilters installed on the user's machine.

For example for TIFF, JPG, PNG and other image file types Sohodox uses its built-in OCR engine to extract text. You can configure Sohodox to use the faster Microsoft Office OCR engine if it is installed (this is available if you have MS Office Document Imaging installed on the machine). **Note:** Starting with MS Office 2010, Microsoft no more ships MS Office Document Imaging with MS Office.

Sohodox uses it's built-in text extractor for MS Word (DOC, DOCX), MS Excel (XLS, XLSX) and PDF files (PDF files which contain text and not only scanned images).

For other file types, Sohodox uses IFilters installed on your machine to extract text

PDF files are handled a little differently. PDF files created by Sohodox contain scanned images. So Sohodox extracts text from them using OCR. For all other PDF files, Sohodox

first uses its built-in text extractor and if that does not return any text, Sohodox tries OCR to extract text from the PDF file.

IFilters act as plug-ins and are a part of Microsoft Indexing Service (they are also used by Windows Desktop Search). Using the IFilter mechanism improves the accuracy and performance of text extraction in Sohodox.

For Sohodox to be able to extract text from a file of a particular format, an IFilter for that file format must be installed on the user's machine.

IFilters for the following file formats are installed by default on Windows 2000/XP/2003/Vista machines...

- PPT (Microsoft PowerPoint presentation)
- DOC (Microsoft Word document) - By default Sohodox does not use this because it uses its built-in extractor for MS Word files.
- XLS (Microsoft Excel spreadsheet) - By default Sohodox does not use this because it uses its built-in extractor for MS Excel files.
- HTML documents
- TXT documents

You can also install third party filters to enable Sohodox to extract text from other file types, e.g.:

- [Microsoft XML IFilter](#)
- [Microsoft RTF IFilter](#)
- [Microsoft Visio IFilter](#)

More information and downloads links for various IFilters (both free and commercial) are available at...

- [IFilter.org](#)
- [Desktop Search IFilters](#)

▼ Why aren't all IFilters automatically installed along with Sohodox?

Although some IFilters are available for free, we cannot ship them with Sohodox as they are published by different companies. You will find download links for available IFilters (both free and commercial) at...

<http://www.ifilter.org/Links.htm>

▼ Is OCR available in Sohodox?

Yes, OCR is available in Sohodox. You can use the built-in OCR engine to extract text from TIFF, JPG, PNG and other image file types. You can configure Sohodox to use the faster Microsoft Office OCR engine if it is installed (this is available if you have MS Office 2007 or earlier with MS Office Document Imaging installed on the machine)..

▼ **What is the Use built-in OCR engine setting?**

The *Use built-in OCR engine* option allows you to use the built-in engine to OCR your documents.

▼ **What is the Microsoft OCR engine setting?**

The *Use Microsoft OCR engine* option allows you to use the Microsoft OCR engine to OCR your documents. You will need to have MS OFFICE Document Imaging installed on the system, to use the *Microsoft Office OCR Engine* (this is available if you have MS Office 2007 or earlier installed - not available with MS Office 2010).

▶ **How can I stop background text extraction on a machine?**

Background text extraction only happens on the machine on which Sohodox has been installed in server mode (a single user installation of Sohodox is always installed in server mode). On this machine, the extraction of text from newly added documents continues in the background even when Sohodox itself is not running. To stop background text extraction...

Explore *Control Panel >Administrative Tools >Services*. Select *ITAZ Sohodox Indexing Service* under the *Name* column. Right click the entry and select the *Stop* option.

▼ **Sohodox does not extract text from my document?**

Sohodox uses two different methods depending on the file type (i.e. file format) to extract text from documents.

For example for TIFF, JPG, PNG and other image file types, Sohodox uses its built-in OCR engine to extract text. You can configure Sohodox to use the faster Microsoft Office OCR engine if it is installed (this is available if you have MS Office Document Imaging installed on the machine).

For file types such as .Doc, .XLS, .TXT, .HTM Sohodox uses IFilters installed on your machine to extract text

PDF files are handled a little differently. PDF files created by Sohodox contain scanned

images. So Sohodox extracts text from them using OCR. For all other PDF files, Sohodox first uses its built-in text extractor and if that does not return any text, Sohodox tries OCR to extract text from the PDF file.

▼ **When I search for some text, documents (which I am sure contain that text) are not listed in the search results.**

For the Full text feature to work, the text from the document should be extracted. Depending on the file type (i.e. file format) text extraction from documents is done using OCR and IFilters installed on the user's machine.

The reason for this could be that the IFilter for that particular file format is not installed on the machine. For Sohodox to be able to extract text from a file of a particular format, the IFilter for that file format must be installed on the machine.

It could also be that the file for which text extraction is failing, is password protected.

Another reason could be that the size of the document may be larger than the size specified in the *Maximum size of documents to extract text from* option.

▼ **Will Sohodox complain if it cannot extract text from a particular document?**

No. Sohodox attempts to find the ifilter for a document and proceeds without complaining (and without extracting text) if the IFilter for a particular file cannot be found on the machine.

▼ **What is the Maximum size of documents to extract text from option?**

Specify the file size that should be indexed in this box. By default the limit of the file size is set to 1 mb. This means that files larger than 1 mb will not be indexed. For slower machines it is recommended to choose a lower value. A larger value affects the performance of MS Access DB. This option is useful in a multi-user scenario where you can disable extracting and indexing of text on slow machines for large files without disabling full text search.

▼ **How do I use the document full text search feature to search for documents?**

To search for documents using the document full text search feature...

In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.



Click the *Double Arrow* button  to bring up the *Advanced Search* pane.

Select the *Document Text* option from the *Field Name* drop down, to search for text in the document.

Select the appropriate comparison operator (i.e. contains, begins with, equal to etc.) from the

Comparison drop down. For e.g. To search for text beginning with specific alphabets use the "begins with" operator in your query condition.

Enter the value which will be used for comparison in the *Compare To* box.

You can add more criteria to your search by clicking this  button. To remove a criteria by click this  button.


To get a result which matches all the criteria's specified by you, select the *Match all conditions* option from the *Conditions* drop down. To get a result which matches any criteria, select the *Match any conditions* option from the *Conditions* drop down


Click the *Search* button to begin the search. The search results will be displayed in the *List View* pane.

If from the *Comparison* drop-down list you had chosen does not contain then the search would have returned all documents which do not contain the text you have specified.

Related Topics

[Extract Text from Document](#)  ²³⁷

[Search for text in a document](#)  ²⁴⁰

[View the Extracted Text of the Document](#)  ²³⁸

13.4.3 Extract Text from Document

The Full Text Search feature works by extracting (OCR) text from documents and then indexing the text. You can use the *Extract and Index* option to manually extract and index a document (if you have turned off automatic indexing or wish to re-index the document).

To Extract text (OCR) from Document:

1. Select the document that you want to extract from the List View pane.
2. Right-click the document and select the *Extract and Index* option of the *Home* tab.
3. The text from the document will now be extracted and indexed.
4. Select the document and click the *More* drop down arrow and select the *Show Extracted Text* option of the *Home* tab to view the extracted text.
5. You can modify the extracted text being displayed. Click the *Save* button to save the extracted text.

To Extract text (OCR) from Document using Microsoft Office OCR engine:

1. In Sohodox, click the [Sohodox button](#) ²⁶.
2. Click the *Options* button. The *Options* window will be launched.
3. Select *Use Microsoft Office OCR Engine*, from *Extract and Index*, to make it your default OCR Engine.
4. Click the *OK* button to apply the changes
5. Select the document that you want to extract from the List View pane.
6. Click the *More* drop down arrow and select the *Extract and Index* option of the *Home* tab.
7. The text from the document will now be extracted and indexed.
8. Select the document and click the *More* drop down arrow and select the *Show Extracted Text* option of the *Home* tab to view the extracted text.
9. You can modify the extracted text being displayed. Click the *Save* button to save the extracted text.

Note: You will need to have MS Office Document Imaging installed on the system, to use the *Microsoft Office OCR Engine*. MS Office Document Imaging has been discontinued with the launch of MS Office 2010. So text extraction using MS Office OCR Engine, only works if the version of MS Office installed on your machine is older than MS Office 2010.

- Sohodox uses its built-in text extractor for MS Word (DOC, DOCX), MS Excel (XLS, XLSX) and PDF files (PDF files which contain text and not only scanned images). In case of any other file formats, for Sohodox to be able to extract text from a file of that particular format, an IFilter for that file format must be installed on the user's machine.

IFilters for the following file formats are installed by default on Windows 2000/XP/2003/2008/Vista/7 machines...

- PPT (Microsoft PowerPoint presentation)
- HTML documents
- TXT documents

Related Topics

[Search for text in a document](#)^[240]

[Document Full Text Search - FAQ](#)^[232]

13.4.4 View the Extracted Text of a Document

You can view the extracted text of the document by using the *Show Extracted Text* option.

To View Extracted text of the Document:

1. Select the document whose extracted text you want to view from the List View pane.
2. Click the *More* drop down arrow and select the *Show Extracted Text* option of the *Home* tab.
3. The extracted text will now be displayed in a window.

- You can also switch from Sohodox OCR engine to Microsoft Office OCR engine to extract text from documents. For more info see [Extract Text from Document](#)^[237]

Related Topics

[Search for text in a document](#)^[240]
[Document Full Text Search - FAQ](#)^[232]

13.4.5 Save the Extracted Text

You can save the changes you have made to the extracted text of a document.

To Save the Extracted text from Document:

1. Select the document that you want to extract from the List View pane.
 2. Click the *More* drop down arrow and select the *Extract and Index* option of the *Home* tab.
 3. The text from the document will now be extracted and indexed.
 4. Click the *More* drop down arrow and select the *Show Extracted Text* option of the *Home* tab.
 5. The extracted text will now be displayed in a window. Make changes or correction to the text.
 6. Click the Save button to save the extracted text
- Sohodox uses it's built-in text extractor for MS Word (DOC, DOCX), MS Excel (XLS, XLSX) and PDF files (PDF files which contain text and not only scanned images). In case of any other file formats, for Sohodox to be able to extract text from a file of that particular format, an IFilter for that file format must be installed on the user's machine.

IFilters for the following file formats are installed by default on Windows 2000/XP/2003/2008/Vista/7 machines...

- PPT (Microsoft PowerPoint presentation)
- HTML documents
- TXT documents

Related Topics


[Search for text in a document](#)^[240]
[Document Full Text Search - FAQ](#)^[232]

13.4.6 Search for text in a document

The Document Full text search and OCR feature searches for documents based on their content by extracting and indexing the text from documents. You will not be able to search for text in a document if the text is not extracted from the document, for more info see [Extract Text from document](#)^[237]



You can search for text in a document by using the *Advanced Search*.

To Search for Text in a Document:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.
2. Click the *Double Arrow* button  to bring up the *Advanced Search* pane.
3. Select the *Document Text* option from the *Field Name* drop down, to search for text in the document.
4. Select the appropriate comparison operator (i.e. contains, begins with, equal to etc.) from the *Comparison* drop down. For e.g. To search for text beginning with specific alphabets use the "*begins with*" operator in your query condition.

▼ The following Comparison Operators are available

Comparison Operator	Description	Example
<i>Contains</i>	Use this operator to find values that contains the text that you are looking for.	Document Text " <i>contains</i> " Acme
<i>Does Not Contain</i>	Use this operator to find values that does not contain the text that you are looking for.	Document Text " <i>does not contain</i> " Acme
<i>Is Empty</i>	Use this operator to match empty values.	Document Text " <i>Is Empty</i> "
<i>Is Not Empty</i>	Use this operator to match non-empty values.	Document Text " <i>Is Not Empty</i> "

5. Enter the value which will be used for comparison in the *Compare To* box.
6. You can add more criteria to your search by clicking this  button. To remove a criteria click this  button.
7. To get a result which matches all the criteria's specified by you, select the *Match all conditions* option from the Conditions drop down. To get a result which matches any criteria, select the *Match any conditions* option from the Conditions drop down.
8. Click the *Search* button to begin the search.

Document Text	contains	acme	-	+
File Name	contains	invoice	-	+
Save as...		Match all conditions	Search	

9. The search results will be displayed in the *List View* pane.

- For Sohodox to be able to extract text from a file of a particular format, an IFilter for that file format must be installed on the user's machine. IFilters for the following file formats are installed by default on Windows 2000/XP/2003/ Vista machines...
 - PPT (Microsoft PowerPoint presentation)
 - DOC (Microsoft Word document)
 - XLS (Microsoft Excel spreadsheet)
 - HTML documents
 - TXT documents

Related Topics

[Extract Text from Document](#)^[237]

[View the Extracted Text of the Document](#)^[238]

13.4.7 Automatically Extract text from documents

You can automatically extract text from documents on adding by selecting the *Automatically extract text from documents while adding* option from the *Options* window.

To Automatically Extract text (OCR) from the Document:

1. In Sohodox, click the [Sohodox button](#)^[26].
2. Click the *Options* button. The *Options* window will be launched.
3. Select the *DB options* node in the left pane. The DB options will now be displayed in the right pane.
4. Check the *Automatically extract text from documents on check-in* option.
5. Click the *OK* button to apply the changes.

- You can also switch from Sohodox OCR engine to Microsoft Office OCR engine to extract text from documents. For more info see [Extract Text from Document](#)^[237]
- Sometimes for slower machines you may want to turn off the automatic extraction and indexing of documents.
- Sohodox uses its built-in text extractor for MS Word (DOC, DOCX), MS Excel (XLS, XLSX) and PDF files (PDF files which contain text and not only scanned images). In case of any other file formats, for Sohodox to be able to extract text from a file of that particular format, an IFilter for that file format must be installed on the user's machine.

IFilters for the following file formats are installed by default on Windows 2000/XP/2003/2008/Vista/7 machines...

- PPT (Microsoft PowerPoint presentation)
- HTML documents
- TXT documents

Related Topics

[Search for text in a document](#)^[240]

[Document Full Text Search - FAQ](#)^[232]

13.4.8 OCR document that contains text in a different language

You can now OCR a document that contains text in language other than English. For e.g. if you have a document that contains text in the Danish language then you can configure the OCR engine to recognize the Danish language text. This option will only work if you are using the Microsoft Office OCR engine and only recognizes the languages supported by the MS Office OCR engine.

To OCR document that contains text in a different language:

1. In Sohodox, click the [Sohodox button](#) ^[26].
2. Click the *Options* button. The *Options* window will be launched.
3. From the *Extract and Index* section, select the *Use Microsoft Office OCR Engine* option to make it your default OCR Engine.
4. In *Select the language to use* drop-down, select the language to use to OCR the document. By default the System language is used for text recognition.
5. Click the *OK* button to apply the changes.

Related Topics

[Search for text in a document](#) ^[240]

[View the Extracted Text of a Document](#) ^[238]

13.4.9 Change the preferred indexing method

You can change the preferred indexing method for Text Extraction & OCR. The default method is Text Extraction then OCR

To change the method:

1. In Sohodox, click the Sohodox button (the round button on the top left) >> Options.
2. Click on the 'Advanced..' button.
3. Select the option PDF Indexing method on the left. Click the Edit button on the right.

The 'Advanced Settings Editor' dialog will be launched.




4. In the drop down, select the preferred option.
5. Click OK.
6. Click Close on the 'Advanced Settings Editor' dialog.
7. Click OK to close the Options dialog.

Note: The preferred indexing method will change for both Background indexing (Automatic) and Manual Extract & Index.

13.5 Save a Search criteria

You can save the frequently used query for later use from the *Advanced Search* Panel.


To Save a Query:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the [List View](#) ²⁹ pane.
2. Click the *Double Arrow* button  to bring up the *Advanced Search* pane.
3. Select a column name (indexing field) from the *Field Name* drop down, to search in a particular column (indexing field).
4. Select the appropriate comparison operator (i.e. contains, begins with, equal to etc.) from the *Comparison* drop down.
5. Enter the value which will be used for the comparison in the *Compare To* box.
6. You can add more criteria to your search by clicking this  button. To remove a criteria click this  button.
7. To get a result which matches all the criteria's specified by you, select the *Match all conditions* option from the *Conditions* drop down. To get a result which matches any criteria, select the *Match any conditions* option from the *Conditions* drop down.
8. Click the *Save As...* button to save this query. The *Save Search* window will be launched.

9. Enter a name for the query in the *Name* box, enter a short description about the query in the *Description* box.

10. Click the *OK* button to save the query.

To view the saved query click the *Saved Searches > Custom Search* node in Workspace.

- To apply a saved query click the *Saved Searches > Custom Search* node and select the Saved Search in the list. The search result will be displayed in the List View pane.
- To clear the Query Result, click the *Clear* button .

Related Topics





[Advanced Search](#) ²²⁷


[Export the Search Result](#) ²⁵⁰

13.6 Prompt user for the condition value when applying a saved search

You can create a saved search that prompts you to enter the condition value everytime you apply that saved search.

To Prompt the user for Condition Values when applying a Saved search:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the [List View](#)  pane.
2. Click the *Double Arrow* button  to bring up the *Advanced Search* pane.
3. Select a column name (indexing field) from the *Field Name* drop down, to search in a particular column (indexing field).
4. Select the appropriate comparison operator (i.e. contains, begins with, equal to etc.) from the *Comparison* drop down.
5. Enter the value which will be used for the comparison in the *Compare To* box.
6. You can add more criteria to your search by clicking this  button. To remove a criteria click this  button.
7. To get a result which matches all the criteria's specified by you, select the *Match all conditions* option from the *Conditions* drop down. To get a result which matches any criteria, select the *Match any conditions* option from the *Conditions* drop down.
8. Click the *Save As...* button to save this query. The *Save Search* window will be launched.
9. Enter a name for the query in the *Name* box, enter a short description about the query in the *Description* box.
10. Check the *Prompt for condition values before searching* option to prompt the user to enter the values for the search condition.
11. Click the *OK* button to save the query.
12. Now when you will apply the saved search, a box will pop-up, asking you to enter the conditions value to perform the search.

- To apply a saved query click the *Saved Searches > Custom Search* node and select the Saved Search in the list. The search result will be displayed in the List View pane.
- To clear the Query Result, click the *Clear* button .

Related Topics



[Advanced Search](#)  227

[Export the Search Result](#)  250

13.7 Print the Search Results along with the Query Conditions

When you print search results that are displayed in the List View pane, you can now choose to print the conditions used in that search at the top of the search results. This feature helps in quickly identifying the conditions used to generate the search results.

To Print the Search results along with the Query conditions:

1. Use Quick Search/Advanced Search to find the documents. The search result will be displayed in the List View pane.
2. On the *Home* tab click the *Print* drop-down and select the *Print List* option. This will bring up the *Print* window.
3. Check the columns you want to print from the *Columns* pane. You can rearrange the columns order as per your wish by using the Up  and Down  button.
4. Select the *Print All Pages* option to print the search result.
 - If you want to print the search result displayed on the current page then select the *Print Current Page* option.
 - If you want to print only the selected search result then select the *Print Selected* option.
5. Check the *Print Columns Names* option to print the column.
6. Click the *Next* button to go to the next page.
7. Select the printer from the *Printers* drop down to print the data. Click the *Settings* button to select the printer's settings.
8. You can click the *Print Preview...* button to view the data that is going to be printed.
9. Select the line spacing for the data that is going to be printed from the *Line Spacing* drop down.
10. Click the *Custom Header* button to insert the Query Condition in the header.

The Header is split into three sections, Left, Center and Right. You can enter the Query Condition in any of these sections, the Query Condition will be printed on the left, center or right side of the document.

To insert the advanced search conditions click the Search Conditions button. Click the Ok button to save the settings

11. Click the *Custom Footer* button to enter information in the footer of the document.

▼ This will bring up the Footer dialog.

This dialog will allow you to insert additional information in the footer. The Footer is split into three sections, Left, Center and Right. You can enter text, page number, system date, time as well the search conditions, in any of these sections. This information will then be printed on the left, center or right side of the document.

- To format the entered text, click the *Font* button.
- To insert the page number click the *Page number* button.
- To insert the date click the *Date* button.
- To insert the time click the *Time* button.

12. Select the *Span columns across* option to span the columns across the page. If you select this option, the columns that will not fit on a page will be printed on the next page.

13. Select the *Wrap text* option to wrap the text.

14. Click the *Print* button to print the data.

- You can also export the indexed information along with the documents to a CSV file or a HTML file, for more info see, [Export Data](#)^[304]

Related Topics

[Print a document](#)^[132]




[Burn documents on a CD](#)^[132]

13.8 Export the Search Result

Sohodox Export can be used to export the search results to a CSV (Comma Separated Values) file. This export file can be used as a backup or can be used to import these documents along with its indexed information in other Databases or programs.

You can export the search result by clicking the *Export* button on the *Home* tab.

To Export Search Result to a CSV file:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will now be displayed in the [List View](#)^[29] pane.
2. Search the documents that you want to export by using the [Quick Search](#)^[224] or the [Advanced Search](#)^[227] option. The search result will now be displayed in the List View pane.
-  3. Select the *Home* tab and click the *Export* button in the *Collaborate* group. The *Data Export* window will now be launched.
4. The data (search result) that is going to be exported will be displayed on left pane of the *Data Export* window.
5. Select a theme to format the data from the [Themes](#)^[282] drop down.
6. Select the columns you want to export from the *Columns* pane. You can rearrange the columns order as per your wish by using the Up  and Down  button.
7. You can click the *Preview* button to view the data that's going to be exported.
8. Select the item you want to export.
 - a) If you want to export all the items from the list then select the *Export All* option.
 - b) If you want to export only the selected items from the list then select the *Export Selected* option.
9. Select the *Export Documents* option to export the documents.
10. Select the *Export Column Names* option to export the column names (column headers).
11. Click the *Next* button to go to the next page.

12. Select the *CSV* option from the *File Type* drop down to export the data as a CSV file.
13. Click the *Options* button to select a separator for the CSV file.
14. Click the *Browse* button besides the *Destination* box to select the destination to save the exported file. Or type the location to save the file in the *Destination* box.
15. Click the *Export* button to begin exporting the data. If you want to view the exported CSV file then click the *Open* folder button.
16. Once the data is exported click the *Close* button to close the wizard.

- To start a new export click the *Export More...* button.
- Go to the previous page click the *Previous* button located on the top left corner of the wizard.

Related Topics

[Export data to a HTML file](#)^[307]

[Export data to a Excel file](#)^[310]

[Export data to a XML file](#)^[312]

[Back up Sohodox DB](#)^[332]

13.9 Import the Exported Search Result

The Import Data Wizard lets you quickly populate your Sohodox DB by importing data and documents from a CSV file. Most database and spreadsheet programs can export their data as CSV files. You can therefore use the Import Data Wizard to move data from any database program or spreadsheet into a Sohodox DB. This is the fastest way to add a large data to a Sohodox DB.

You can import your data from a file by clicking the *Import* button of the *Tools* tab.

To Import Data from a CSV file:

1. In Sohodox, open the DB to which you want to import the data from the CSV file.



2. Select the *Tools* tab and click the *Import* button. The *Data Import* window will now

be launched.

3. Click the *Browse...* button besides the *Specify the file to import the data from* box, to select the CSV file you want to import.

Note: If you want to import documents along with the indexing data then add a extra column to the CSV file from which you are importing the data. In this column, enter the name of the file that you want to import along with the indexing data. If more than one file is to be imported then enter the names of all the files separated by a pipe (|).

4. Click the *Next* button to go to the next page.
5. Specify the content (data) of the import file in the *Import File contains columns with the following information* section.

- a) Select the *Documents and Document Type Info* option if the CSV file contains indexing information along with the type of document.

If you select the *Documents and Document Type Info* option then the *Choose existing document type* drop-down option will be available. Select an existing document type from this drop-down to import the documents and document types information to it.

- b) Select the *Documents and Document Type Name* option if the CSV file contains the names of documents and document types.
- c) Select the *Documents* option if the CSV file contains information of only documents.

6. Click the *Next* button to go to the next page. View the contents of the selected text file displayed in the Data Preview and enter the information required on this page

7. Choose the delimiter that separates the fields(columns) in the data. You can choose more than one delimiter.

- a) Check the *Tab* option if the fields (columns) in the data are separated by a Tab character.
- b) Check the *Semicolon* option if the fields (columns) in the data are separated by a semicolon.
- c) Check the *Comma* option If the fields (columns) in the data are separated by a comma.
- d) Check the *Space* option if the fields (columns) in the data are separated by a single space.
- e) If the fields (columns) in the data are separated by a character other than tab,

semicolon, comma or space then check the *Other* option and enter that character in the box. You can only enter a single character in this box.

8. Check the *Treat consecutive delimiters as one* option if you want consecutive delimiters to be treated as a single delimiter. This causes all the consecutive delimiters after the first one to be ignored during the import. If this option is unchecked consecutive delimiters will be treated as empty values during the import.
9. Check the *First row contains field names* option if the first row of the text file contains the names of the fields (column headings).
10. Select the character that is used as the text qualifier in the data. Text values which contain spaces (or any other character specified as a delimiter) must be delimited by a text qualifier. The double-quote or the single-quote character can be selected as a text qualifier.
11. Enter the number of the row from which you want the import to start. Use the *Start import at row no.* option if you want to skip the first few lines of the text file during the import. This option does not affect the behaviour of the *First row contains field names* option which always uses the actual first row of the file and not the start row.
12. Click the *Next* button to go to the next page. Use this page to map fields (columns) of the CSV file to the source fields (columns) of the document type that you have selected to import the data. The data from CSV fields (columns) will be imported to the source fields (columns) of the document type.
13. The *Choose columns* pane displays the columns (data fields) that are in the selected CSV file and the *Selected column contains* pane displays the columns (data field) of the document type that you have selected to import the data.
14. Select a column in the *Choose columns* pane and map it by selecting a data field in the *Selected column contains* pane. By mapping a column to a data field, you are telling the system to import the data from the selected column to the selected data field.

If a column in the *Choose columns* pane contains the name and location of documents then map that column with the *Document List* option of the *Selected column contains* pane. The *Document List* option is only available if you have specified on the first page that the CSV file contains documents.

If a column in the *Choose columns* pane contains tags of the documents then map that column with the *Tags* option of the *Selected column contains* pane. The *Tags* option is only available if you have specified on the first page that the CSV file contains documents.

If you do not wish to import a column from the *Choose columns* pane then map that

column with the *Do not import* option of the *Selected column contains* pane.

15. Depending on the data type of the selected data field their respective options will be displayed in the *Options* pane.

▼ The following options will be displayed for certain data type

Integer Data Type

Thousands Separator: If the numeric data contains thousands separators select or enter the character which is used as the thousands separator in the data.

Decimal Separator: If the numeric data contains decimal separators select or enter the character which is used as the decimal separator in the data.

Date Data Type

Any two digit year should be interpreted as a year between: Control how Sohodox interprets date values which contain two digit years (for e.g. 03 instead of 2003). The default time span used by Sohodox is 1930 to 2029. Therefore by default Sohodox will consider...

Two digit years between (and including) 30 and 99 as preceded with 19, and

Two digit years between (and including) 00 and 29 as preceded with 20.

For example...

By default Sohodox will treat a two digit year such as 30 as 1930 and a two digit year such 29 as 2029.

You can change the default time span, type in a new ending year.

Date Separator: Select or enter the character which separates the day, month and year parts in the date value.

Format: Select the sequence in which day, month and year appear in the date value i.e. the format of the date.

Time Data Type

Time Separator: Select or enter the character which separates the hours, minutes and seconds parts of the time value.

24 Hour Format: Select this option if you want the time to be shown in 24 hour format

12 hour Format: Select this option if you want the time to be shown in 12 hour format

AM Symbol: Select or enter the text which indicates the hours before noon when the

time value is in a 12-hour format.

PM Symbol: Select or enter the text which indicates the hours after noon when the time value is in a 12-hour format.

Yes/No Data Type

Text to import as 'Yes': While importing data, any value which matches the value selected or entered here will be considered by Sohodox as a Yes value. You can also specify a comma separated list of values and any values matching a value in this list will be treated a Yes value. If the special value {Any Other Value} is selected then any value except the values specified for Text to import as 'No' will be treated as a Yes value.

Text to import as 'No': While importing data, any value which matches the value selected or entered here will be considered by Sohodox as a No value. You can also specify a comma separated list of values and any values matching a value in this list will be treated as a No value. If the special value {Any Other Value} is selected then any value except the values specified for Text to import as 'No' will be treated as a No value.

Document List

Location: Specify the folder path where the documents to be imported are located. By default Sohodox selects the folder path containing the text file from which you are importing the data.

Click the *Browse* button to change this folder path.

File names are separated by: Select the separator which is used to separate the names of the documents in *Document List* field. The default separator selected is pipe (|).

16. Click the *Next* button to go to the next page. Use this page to specify actions Sohodox should take if it encounters invalid or empty values for any field. You can specify different actions for each field. By default Sohodox will import empty or invalid values as empty values wherever possible (if the Sohodox DB field cannot accept empty values then by default Sohodox will not import the row containing that value).

17. Select the action Sohodox should take if it encounters a row in which the value for the selected field is empty or invalid. You can select different action for each field.

Import as empty value

If this option is selected the value will be imported as an empty value. This option is not available if the Sohodox DB field does not support storing of empty values.

Use default value


If this option is selected the specified default value will be used instead of the empty value while importing. Enter a default value in the Enter Default Value box. This value will be used for the import if an empty value is encountered for the selected field. If a default value is available for Sohodox DB field in the Sohodox DB then that value will be displayed in this box.

Do not import

If this option is selected then the row containing an empty value for this field will not be imported i.e. it will be skipped.

18. Click the *Next* button to go to the next page. Use this page to start and view the progress of the data import process.

19. You can save the import setting that was used to import the file for later re-use by

clicking this  besides the *Save import Profile* box.

20. Click the *Start Import* button to begin exporting the data. The *Status* bar will show the status of the import process

21. Click the *Show skipped records* button to view any rows that were skipped during the import process. Once the data is imported click the *Close* button to close the wizard.

- Go to the previous page click the *Previous* button located on the top left corner of the wizard.

Related Topics

[Export data to a CSV file](#)^[304]

[Export data to a HTML file](#)^[307]

[Export data to a Excel file](#)^[310]

[Export data to a XML file](#)^[312]

14 Annotation

Topics Covered

1. [What is Annotation](#) ^[258]
2. [Underline Words or sentence on a document](#) ^[260]
3. [Highlight words on a document](#) ^[261]
4. [Mark Area using Rectangles and Circles](#) ^[261]
5. [Add sticky notes on a document](#) ^[262]
6. [Insert a Bookmark on a Document](#) ^[263]
7. [Place Stamp on a Document](#) ^[265]
8. [Place Signature on a document](#) ^[265]
9. [Annotate the document permanently](#) ^[266]
10. [Print documents along with the Annotations](#) ^[267]

14.1 What is Annotation?

What is Annotation?

Annotation is the process of marking words or writing short notes or definitions on a document while reading it. Annotation makes a document more interactive. Once the document is annotated you know exactly what to look for in it therefore you will not waste any time in going through the whole document again. Also, if you have passed on the document to your colleague, even they will know what to look for in it.

Sohodox allows you to annotate electronic documents in the same ways that you would annotate documents in real life (paper based documents). Using annotation you can highlight and mark important text in your documents. You can add sticky notes and stamps to your documents.

You can do the following using the Annotation toolbar in Sohodox...

- Underline or circle important text
- Draw a rectangle
- Highlight certain text in the document
- Add sticky notes to the documents.
- Insert stamps on the documents.
- Bookmark the document.
- Place a watermark on the document.

Annotation Toolbar:

The annotation toolbar is located on the extreme right of the [Document Details](#) ^[30] pane.



Use this button to [draw lines or underline](#) ^[260] text.



Use this button to [draw rectangles](#) ^[261].



Use this button to draw [ellipses or circles](#) ^[261].



Use this button to [highlight](#) ^[261] texts.



Use this button to [add notes](#)^[262] to the document.



Use this button to insert a [bookmark](#)^[263] on the document.



Use this button to insert a [watermark](#)^[264] on the document



Use this button to [insert stamps](#)^[265] on the document.



Use this button to [insert signature](#)^[266] on the document.



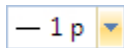
Use this button to toggle the annotation's User Information.

Annotation's Mini Toolbar:

When you select an annotation object and hover around it a small toolbar appears called the Mini toolbar. The Mini toolbar can be used to edit the selected annotation. The Mini toolbar disappears when you move away from the object and appears when you come near it. You may not get all the option that are listed below, on the toolbar. The option changes according to the object that is selected.



Use this button to change the color of the selected object.



Use this button to change the border's thickness of the selected object.



Use this button to edit the text that has been entered in the selected object.



Use this button to bring the selected object in front. If there are two or more objects overlapping each other, you can use this button to bring the selected object above the other object.



Use this button to put the selected object back. If there are two or more objects overlapping each other, you can use this button to put the selected object below the other object.



Use this button to burn the selected object on the document.

The annotated objects are not permanently imprinted on the document, it can be deleted or moved. To make it permanent use this button.





Use this button to delete the selected object.

14.2 Underline Words or Sentences on a document

You can use the Line button on the [Annotation toolbar](#)^[258] to draw straight lines or underline important texts or strike out texts on the documents.

To Underline Words or Sentences:

1. Select the document that you want to annotate. The document will now be displayed in the [Document Details](#)^[108] pane.
2. Click the *Line* button  on the *Annotation toolbar*.
3. Drag the pointer to draw the line. That's it.
4. You can also format the line that you have drawn on the document i.e. change its color or its border thickness. To do this...
 - a) Select the image drawn and move your mouse over it. You will now get a [Mini](#)^[259] toolbar.
 - b) Select a color by clicking the *Color* button .
 - c) Select a value for the thickness of the line from the *Border Thickness* drop down.

- Please note the lines that are drawn by you on a document are not imprinted on it, it can be deleted or moved. To delete the drawn image, select it and hit the *Delete* button on the keyboard or click the *Delete* button on the [Mini](#)^[259] toolbar.
- You can make the lines permanent by burning it on the document. To do this, refer to [Annotate the Document permanently](#)^[266]. Please note if you burn a colored annotated object on a Black & White document, the annotated object will be burned in black color.

Related Topics



[Hilight Words on a document](#)^[261]


[Insert a Bookmark on a document](#)^[263]

14.3 Highlight Words on a document

Sohodox allows you to highlight important words or sentences on a document just as you would use a Highlighter marker on your paper documents. Use the *Highlight* button on the [Annotation toolbar](#)^[258] to highlight texts.

To Highlight Words or Sentences:

1. Select the document that you want to annotate. The document will now be displayed in the [Document Details](#)^[108] pane.
2. Click the *Highlight* button  on the *Annotation* toolbar.
3. Drag the pointer on that part of document that you want to highlight. That's it.
4. You can also change the *Highlight* area's color. To do this...
 - a) Select the highlighted area and move your mouse over it. You will now get a [Mini](#)^[259] toolbar.
 - b) Select a color by clicking the *Color* button .

- Please note the words or sentences highlighted by you on the document are not permanently imprinted on it, it can be deleted or moved. To delete the drawn image, select it and hit the *Delete* button on the keyboard or click the *Delete* button on the Mini toolbar.
- You can make the [lines permanent by burning it on the documents](#)^[266]. To do this click the *Burn* button  on the *Mini* toolbar. Please note if you burn a colored annotated object on a Black & White document, the annotated object will be burnt in black color.




Related Topics


[Mark Words using Rectangles and Circles](#)^[261]
[Insert a Bookmark on a document](#)^[263]

14.4 Mark Area using Rectangles and Circles

You can mark important words or sentences by drawing a rectangle or circle around them by using the *Circle* or *Rectangle* button on the [Annotation toolbar](#)^[258].

To Mark Area using a Rectangle or a Circle:

1. Select the document that you want to annotate. The document will now be displayed in the [Document Details](#)^[108] pane.
2. Click the *Rectangle*  or *Circle*  button on the *Annotation* toolbar.
3. Drag the pointer on that part of document that you want to mark. That's it.
4. You can also change the *Rectangle's* or *Circle's* color. To do this...
 - a) Select the image drawn and move your mouse over it. You will now get a [Mini](#)^[259] toolbar.
 - b) Select a color by clicking the *Color* button .
 - c) Select a value for the thickness of the line from the *Border Thickness* drop down.

- You can make the [lines permanent by burning it on the documents](#)^[266]. To do this click the *Burn* button  on the *Mini* toolbar. Please note if you burn a colored annotated object on a Black & White document, the annotated object will be burnt in black color.
- Please note the words or lines marked by you on the document are not permanently imprinted on it, it can be deleted or moved. To delete the drawn image, select it and hit the *Delete* button on the keyboard or click the *Delete* button on the *Mini* toolbar.

Related Topics



[Hilight Words on a document](#)^[261]

[Insert a Bookmark on a document](#)^[263]

14.5 Add Sticky Notes on a documents

You can add notes or short description about the document on the document itself by using the *Notes* button on the *Annotation* toolbar. The notes that are added by you can also be viewed by other users.

To Add Sticky Notes on a Document:

1. Select the document to add a note. The document will now be displayed in the [Document Details](#)^[30] pane.
2. Click the *Notes* button  on the [Annotation toolbar](#)^[258].
3. Drag the pointer on the document to add a note. The *Notes* icon  will be placed on the document
4. Enter the note in the *Text* box and click the *OK* button.

- Double click the *Notes* icon to view the added notes.
- Notes are not permanently imprinted on the document, it can be deleted or moved. To delete a note, select it and hit the *Delete* button on the keyboard or click the *Delete* button on the [Mini](#)^[259] toolbar.

Related Topics

[Enter Comments for a Document](#)^[13]

[Underline Words or Sentences on a document](#)^[260]



[Hilight Words on a document](#)^[261]

[Insert a Bookmark on a document](#)^[263]


14.6 Place a Bookmark on a document

You can add a bookmark to a document by using the *Bookmark* button on the [Annotation toolbar](#)^[258]. You can use Bookmarks to mark a document and also add a short note to it so that you can easily locate it in the Documents [List View Pane](#)^[29].

To Place a Bookmark on a Document:

1. Select a document to insert a Bookmark. The document will now be displayed in the [Document Details](#)^[30] pane.
2. Click the *Bookmark*  button on the *Annotation* toolbar.
3. Drag the pointer on that part of the document that you want to bookmark.
4. The *Bookmark* icon  will be placed on the document.

5. To add a short note to the bookmark click the *Edit* button on the [Mini](#)^[259] toolbar.

- To view the bookmarks on a document, select the document and click the *Pages* tab on the left side of the *Document Details* pane.
- Please note that bookmarks are not permanently imprinted on the document, it can be deleted or moved. To delete a bookmark, select it and hit the *Delete* button on the keyboard or click the *Delete* button on the *Mini* toolbar.
- In the Documents *List View* Pane the documents that has a bookmark are denoted with the *Bookmark* icon . If you double click on this icon it will directly open the document and display the content that has been bookmarked.

Related Topics

[Enter Comments for a Document](#)^[131]

[Add Sticky Notes on a documents](#)^[262]

[Place Stamp on a document](#)^[263]

14.7 Place a watermark on a document

Sohodox lets you place a Watermark on your documents (for example confidential documents can have a watermark with the text "CONFIDENTIAL")

To Place a Watermark on a Document:


1. Select the document. The document will now be displayed in the [Document Details](#)^[30] pane.
2. Click on the Watermark button on the on the [Annotation toolbar](#)^[258]. The Watermark dialog will be launched..
3. Select the option Text watermark. In the text box, enter the text for the watermark.
4. Choose the color and layout for the Watermark being placed on the document.
5. Click on the OK button.


- A watermark once added on the document cannot be removed by any other user. Only the owner of the watermark can modify or remove it.

14.8 Place a Stamp on a document

Sohodox now lets you to put a stamp on your documents. Currently there are only 2 stamps available in Sohodox i.e. *Approve* and *Reject* which can be used for approval and rejection of documents. More stamps will added to the existing list in the near future.

To Place a Stamp on a Document:

1. Select the document to insert a stamp. The document will now be displayed in the [Document Details](#)^[30] pane.
2. Click the *Stamp*  button on the [Annotation toolbar](#)^[258]. The *Stamp Type* box will now be launched.
3. Select a stamp from the list and click the *OK* button.
4. Drag the pointer on the document to insert the stamp. You can resize the size of the stamp by dragging it.

- Please note that stamps are not permanently imprinted on the document, it can be deleted or moved. To delete a stamp, select it and hit the *Delete* button on the keyboard or click the *Delete* button on the [Mini](#)^[259] toolbar.
- You can make a [stamp permanent by burning it on the documents](#)^[266]. To do this click the *Burn* button  on the *Mini* toolbar. Please note if you burn a colored annotated object on a Black & White document, the annotated object will be burnt in black color.
- You can create a stamp as per your requirement, for more info see, [Create a Stamp](#)^[272]

Related Topics

[Enter Comments for a Document](#)^[131]


[Add Sticky Notes on a documents](#)^[262]


[Insert a Bookmark on a document](#)^[263]

14.9 Place a Signature on a document

Sohodox now lets you to put a insert signature on your documents. To insert a signature, you will need to create a signature. For more info, see

To Place a Signature on a Document:

1. Select the document to insert a signature. The document will now be displayed in the [Document Details](#)^[30] pane.
2. Click the *Signature* button  on the [Annotation toolbar](#)^[258].
3. Drag the pointer on the document to insert the signature. You can resize the size of the signature by dragging it.

- A user can be assigned only one Signature.
- You can make a [signature permanent by burning it on the documents](#)^[266]. To do this click the *Burn* button  on the *Mini* toolbar. Please note if you burn a colored annotated object on a Black & White document, the annotated object will be burnt in black color.
- Please note that signatures are not permanently imprinted on the document, it can be deleted or moved. To delete a signature, select it and hit the *Delete* button on the keyboard or click the *Delete* button on the [Mini](#)^[259] toolbar.

Related Topics


- [Enter Comments for a Document](#)^[131]
- [Add Sticky Notes on a documents](#)^[262]
- [Insert a Bookmark on a document](#)^[263]

14.10 Annotate the Document permanently


The annotation that are made on a document are not permanent, they can be moved around or deleted. However if you want to permanently etch the annotation on the document, you will need to burn it on the document. Once the annotation is burned on the document it will not be possible to undo the change.

You can burn a annotation on a document by clicking the *Burn* button on the Mini toolbar.

To Burn Annotation on a Document:

1. Click the *Edit* button  on the Image Toolbar. The document will be launched in the [Image editor window](#)^[72].

2. Select the annotation and move your mouse over it. You will now get a [Mini](#)²⁵⁹ toolbar.

3. Click the Burn button  on the *Mini* toolbar. The annotation will now be burnt on the document

- Please note if you burn a colored annotated object on a Black & White document, the annotated object will be burnt in black color.

Related Topics

Print Document along with the Annotations

14.11 Print Document along with the Annotations

You can print the documents along with the annotations by clicking the *Print* button of the *Home* tab.

To Print a Document along with the annotation:

1. In Sohodox, select *Workspace > All Documents* in the [Navigation](#)²⁶ pane. The documents will be displayed in the *List View* pane.
2. Select a document to print from the *List View* pane.
3. Click the *Print* drop-down and select the *Print Documents* option of the *Home* tab. This will bring up the *Print Document* window.
4. Select a printer to print the document from the *Selected Printer* drop-down. Click the *Properties* button to view the printer's properties.
5. In the *Page Range* section specify the range of pages to be printed.
 - a) Select the *All Pages* option to print all the pages of the selected document.
 - b) Select the *Pages* option and type specific page numbers or a page ranges separated by commas counting from the start of the document. For e.g. Type 1, 3 if you want to print the first and the third page of the document or type 4-8 if you want to print pages starting from the fourth page to the eighth page.

6. Select the *Print with annotations* option to print the document along with the annotations.
7. Select the users whose annotations you want to print in the *User Name* section.
8. Click the *OK* button to print the document.

- You can also print the indexed information of a document, for more info see, [Print the indexed information of a document](#)^[135]

Related Topics

[Annotate the Document permanently](#)^[266]

[Burn documents on a CD](#)^[132]

15 Templates, Themes, Profiles

Topics Covered

1. [Templates](#) ^[270]
2. [Profiles](#) ^[276]
3. [Create Theme](#) ^[282]

15.1 Templates

1.1 [Create a Document Template](#) ^[270]

1.2 [Create a Stamp](#) ^[272]

1.3 [Create a Signature](#) ^[274]

15.1.1 Create a Document Template

If you create a lot of similar documents, then you can save time by adding a copy of the document to Sohodox as a *Document Template*. Files of any type can be added as a Document Template. You can then create new documents based on the Document Template.

To Create a Document Template:

1. In Sohodox, click the *Tools* tab.
2. Click the *Template Manager* button. The *Template Manager* window be launched.
3. Click the *File* option in the left pane. The *File Template* pane will be displayed.
4. Click the *New* button on the *Template Manager* window to create a new *Document Template*. The *New Document Template* window will be launched.
5. Click this *Browse...* button to select a file, to add as a template.
6. Enter a name for this template in the *Template Name* box.
7. Now, click the *Save and Close* button to save the changes and close the window. The template will now be displayed on the right pane i.e. *File Template* list.



- You can click the *Save and New* button to save the changes and open the *New Document Template* window.
- To modify an existing template, select a *Document Template* from the list and click the *Edit* button on the *Template Manager* window.
- To delete a template, select a *Document Template* from the list and click the *Delete* button on the *Template Manager* window

Related Topics[Create a Stamp Template](#)²⁷²

15.1.2 Create a Stamp Template

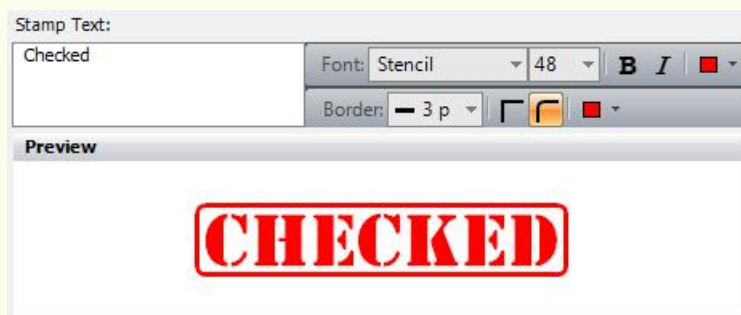
Sohodox is shipped with default stamps for e.g. the Approved and Reject, that are used to [Annotate](#)^[257] documents. However, you can also create stamps using Sohodox Template Manager.

To Create a Stamp Template:

1. In Sohodox, click the *Tools* tab.
2. Click the *Template Manager* button. The *Template Manager* window be launched.
3. Click the *Stamp* option in the left pane. The *Stamp Template* pane will be displayed.
4. Click the *New* button on the *Template Manager* window to create a new *Stamp Template*. The *New Stamp Template* window will be launched.
5. Enter a name for this template in the *Template Name* box.
6. From the *Stamp Type* drop-down select the *General* option (selected by default).
7. From the *Stamp Source* drop down select the *Image File* option if you want to use an image as a stamp. Now, click the *Browse...* button to select an image for the stamp from the *Select an image file to use as a stamp* option.
For e.g. If you already have images for Approved, Rejected stamps then you can use these images instead of the default stamps that are shipped with Sohodox.
8. If you want to manually create a stamp then select the *Custom Text* option from the *Stamp Source* drop down.
 - ▼ The tools to create the stamp will now be displayed below the Stamp Source drop down.
 - a) Enter the text for the stamp in the *Stamp Text* box. For e.g. *Paid*, *Canceled* etc.
 - b) Select a font and a size for the stamp from the *Font* drop down.
 - c) Select a color for the font from the *Text Color* drop down.
 - d) Select a width for the stamp's border from the *Border* drop down. If you do not want a border select the *None* option.
 - e) Select a shape for the stamp's border by clicking *Rectangle*  or *Rounded Rectangle*  button.

f) Select a color for the stamp's border from the *Border Color* drop down.

g) The stamp will be displayed in the *Preview* pane.



9. Now, click the *Save and Close* button to save the changes and close the window.

10. The stamp will now be displayed on the right pane i.e. *Stamps* list.

- You can click the *Save and New* button to save the changes and open the *New Stamp Template* window.
- To modify an existing template, select a *Stamp Template* from the list and click the *Edit* button on the *Template Manager* window.
- To delete a stamp, select a *Stamp Template* from the list and click the *Delete* button on the *Template Manager* window.

Related Topics



[Place Stamp on a document](#) ²⁶⁵

[Create a Document Template](#) ²⁷⁰

15.1.3 Create a Signature Template

You can create a signature by using Sohodox Template Manager.

To Create a Signature Template:

1. In Sohodox, click the *Tools* tab.
2. Click the *Template Manager* button. The *Template Manager* window be launched.
3. Click the *Stamp* option in the left pane. The *Stamp Template* pane will be displayed.
4. Click the *New* button on the *Template Manager* window to create a new Signature. The *New Stamp Template* window will be launched.
5. Enter a name for this template in the *Template Name* box.
6. Enter a short description about this template in the *Description* box.
7. From the *Stamp Type* drop-down select the *Signature* option.
8. From the *Stamp Source* drop down select the *Image File* option if your signature saved as an image. Now, click the *Browse...* button to select the image (signature) from the *Select an image file to use as a stamp* option.
9. If you want to manually create a signature then select the *Custom Text* option from the *Stamp Source* drop down.
 - ▼ The tools to create the signature will now be displayed below the Stamp Source drop down.
 - a) Enter the text for the stamp in the *Stamp Text* box. For e.g. *Paid, Canceled* etc.
 - b) Select a font and a size for the stamp from the *Font* drop down.
 - c) Select a color for the font from the *Text Color* drop down.
 - d) Select a width for the stamp's border from the *Border* drop down. If you do not want a border select the *None* option.
 - e) Select a shape for the stamp's border by clicking *Rectangle*  or *Rounded Rectangle*  button.
 - f) Select a color for the stamp's border from the *Border Color* drop down.
 - g) The stamp will be displayed in the *Preview* pane.



10. Now, click the *Save and Close* button to save the changes and close the window.

11. The signature will now be displayed on the right pane i.e. *Stamps* list.

- A user can be assigned only one Signature.
- You can click the *Save and New* button to save the changes and open the *New Stamp Template* window.
- To delete a signature, select a *Signature* from the list and click the *Delete* button on the *Template Manager* window.

Related Topics

[Insert Signature on a document](#) ²⁶⁵

[Create a Document Template](#) ²⁷⁰

15.2 Profiles

2.1 [Create a Scan Profile](#) ^[276]

2.2 [Create a Export Profile](#) ^[277]

2.3 [Create a Destination Profile](#) ^[279]



15.2.1 Create Scan Profiles

Sohodox uses *Scan Profile* to simplify the process of scanning documents. *Scan Profile* is a collections of frequently used settings which can be saved and reused to scan a document. Instead of specifying these settings every time you scan and save a document, you can specify these settings once and save them as a *Scan Profile*. Documents can be of several types (for e. g. Color photographs, Black & White text etc.). The settings required to scan and save a black & white text document are very different from the settings required to scan and save a color photograph. Therefore different *Scan Profiles* are required to correctly scan and save different types of documents.


For e.g. Lets say on a daily basis you scan all the Invoices you receive, as *Black & White PDF* and all the Agreements as *Color Tiff*. You can create two *Scan Profiles* one for scanning your *Invoices* and other for scanning the *Agreements*. Now, all you need to do is select the appropriate *Scan Profile* and click the *Start Scan* button to begin the scan process.


You can create as many *Scan Profiles* as you want.

To Save the Frequently used Scan Settings as Scan Profile:

1. In Sohodox, select the *Home* tab and click the *Scan* button . This will bring up the [Scan Window](#) ^[65].
2. Click the *Settings* tab to create a Scan Profile.
3. Click the *New* button  besides the *Select a scan profile* box. Now, enter a name for the new profile in the *Select a scan profile* box.

4. Select a scanner from the *Select a Scanner* drop down.

5. Once you have specified the scan settings then click the Save button  besides the *Select a scan profile* box to save the Scan Profile.
The Scan Profile will now be listed in the Select a scan profile drop-down.

- To delete a Scan Profile, click the *Delete* button  besides the *Select a scan profile* box.
- By default the following Scan Profiles are available...

Black & White Document (Single Sided): This option should be selected if you want to scan a single sided document to a black and white image.

Black & White Document (Double Sided): This option should be selected if you want to scan a double sided document to a black and white image.

Grayscale Document (Single Sided): This option should be selected if you want to scan a single sided document to a grayscale image.

Grayscale Document (Double Sided): This option should be selected if you want to scan a double sided document to a grayscale image.

Color Document (Single Sided): This option should be selected if you want to scan a single sided document to a color image.

Color Document (Double Sided): This option should be selected if you want to scan a double sided document to a color image

- You can also create profiles which stores information about the document like its [Document Type](#)^[173] its folder which can be saved and reused. These profiles are called as [Destination Profiles](#)^[279]. Thus by using Scan Profiles and Destination Profiles you can [automate your scanning process](#)^[101].

Related Topics

[Scan multiple single paged document](#)^[79]

[Edit a document](#)^[120]

15.2.2 Create an Export Profile

Sohodox uses *Export Profile* to simplify the process of exporting documents. *Export Profile* is a collections of frequently used settings which can be saved and reused to export documents.

Instead of specifying these settings every time you export documents, you can specify these settings once and save them as a *Export Profile*.

You can create as many *Export Profiles* as you want.

To Save the Frequently used Export Settings as Export Profile:

1. In Sohodox, open the DB whose data you want to export.
2. Once the DB is opened, select *Workspace > All Documents* in the *Navigation* pane.



3. Select the *Home* tab and click the *Export* button in the *Collaborate* group. The *Data Export* window will now be launched.


4. Specify the export settings and go to the last page.

5. Enter a name for the Export Profile in the *Save Settings To* box. Click the *Save* button



to save the profile.

The Export Profile will now be listed in the *Saved Profile* drop-down.

- To delete a *Export Profile*, click the *Delete* button  besides the *Saved Profile* box.
- You can use the Export Profile to export data, for more info see [Use a Export Profile to Export Data](#)^[315]

Related Topics

[Export data to a CSV file](#)^[304]

[Export data to a HTML file](#)^[307]

[Export data to a Excel file](#)^[310]

[Export data to a XML file](#)^[312]

15.2.3 Create Destination Profiles

Sohodox uses Destination Profiles to simplify the process of categorizing added documents.

Destination Profile is a collection of information about the document like its [Document Type](#)^[173] and its folder which can be saved and reused. Instead of specifying these settings every time you add a document, you can specify these settings once and save them as Destination Profiles. Then while adding a document simply choose the destination profile for it.

You can create as many *Destination Profiles* as you want.

You can create Destination Profiles using the...


[Destination Profiles Manager](#)^[279]

[Scan window](#)^[279]

[Find and Add window](#)^[280]


[Add Folders from disk window](#)^[281]

To Create a Destination Profile using the Destination Profiles Manager

1. In Sohodox, select the *Tools* tab and click the *Destination Profiles* button. This will bring up the *Destination Profiles Manager Window*.
2. In the *Destination* tab, enter a name for the new profile in the *Select a destination profile* box.
3. Enter the required information in the *Settings* pane.
4. You can specify information to link the added documents with other documents by using the *Links* tab.
5. Use the *Security* tab to automatically assign the added documents to a specific user
6. Once you have specified this information then click the *Save* button  besides the *Select a Destination profile* box to save these information as a *Destination Profile*. The *Destination Profile* will now be listed in the *Select a Destination profile* drop-down.

To Create a Destination Profile from the Scan Window:




7. In Sohodox, select the *Home* tab and click the *Scan* button. This will bring up the *Scan* Window.
8. In the *Destination* tab, enter a name for the new profile in the *Select a destination profile* box.
9. Enter the required information in the *Settings* pane.
10. You can also specify information to link the scanned documents with other documents by using the *Links* tab.
11. Once you have specified this information then click the *Save* button  besides the *Select a Destination profile* box to save these information as a *Destination Profile*. The *Destination Profile* will now be listed in the *Select a Destination profile* drop-down.

To Create a Destination Profile from the Find and Add Window:

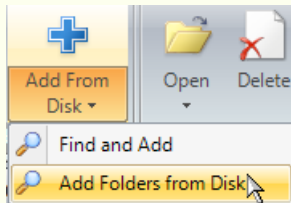
1. In Sohodox, click the *Add from disk* drop down and select the *Find and Add* option on the *Ribbon* bar. The *Find and Add Files* window will be launched.





2. In the *Destination* tab, enter a name for the new profile in the *Select a destination profile* box.
3. Enter the required information in the *Settings* pane.
4. You can also specify information to link the scanned documents with other documents by using the *Links* tab.
5. Once you have specified this information then click the *Save* button  besides the *Select a Destination profile* box to save these information as a *Destination Profile*. The *Destination Profile* will now be listed in the *Select a Destination profile* drop-down.

To Create a Destination Profile from the Add Folders from Disk Window:

1. In Sohodox, click the *Add from disk* drop down and select the *Add Folders from disk* option on the *Ribbon* bar. The *Add Folders from disk* window will be launched.



2. In the *Destination* tab, enter a name for the new profile in the *Select a destination profile* box.
3. Enter the required information in the *Settings* pane.
4. You can also specify information to link the scanned documents with other documents by using the *Links* tab.
5. Once you have specified this information then click the *Save* button  besides the *Select a Destination profile* box to save these information as a *Destination Profile*. The *Destination Profile* will now be listed in the *Select a Destination profile* drop-down.

- To delete a Destination Profile, click the *Delete*  button besides the *Select a destination profile* box.
- You can use *Scan Profiles* and *Destination Profiles* to [automate your scanning process](#) ¹⁰¹

Related Topics

[Scan multiple single paged document](#) ⁷⁹

[Find and Add a document](#) ⁵⁵


[Add the existing folder structure along with files from disk](#) ⁵²

15.3 Create a theme

When exporting or printing documents, Sohodox allows you to format the data that is going to be exported or printed. The frequently used format settings can be saved as a Theme for re-use. The same Theme can be used for exporting as well as printing data.

A Theme can be created either from the *Print* window or *Data Export* window.

To Create a Theme:

1. Click the *Customize...* button on the *Print List* window from the *Print* drop down. This will bring up the *Themes Editor* window.
2. Enter a name for the theme in the *Themes* box. Click the Save button  to save the theme name.
3. Select the background color for the column header from the *Column Header Color* drop-down.
4. Select the font type for the column header from the *Column Header Font* drop-down.
5. Select the font color for the column header from the *Column Header Font Color* drop-down.
6. Select the *Single Color* option from the *Data Row Color Style* drop-down, if you want to use the same color for the rows. If you want to differentiate two rows by using two different colors then select the *Alternate Color* option from the *Data Row Color Style* drop-down.
7. Select the color of the first row from the from the *Data Row Color* drop-down.
8. Select the color of the second row from the from the *Data Row Color (Alternate)* drop-down. This option is only available if the *Alternate Color* option in the *Data Row Color Style* drop-down.
9. Select the color of the data in the row from the *Data Row Font Color* drop-down.
10. Select the font of the data in the row from the *Data Row Font* drop-down.
11. Check *Show Column lines* option, if you want to differentiate two columns by separating them by a line.
12. Check *Show Row Lines* option, if you want to differentiate two rows by separating them by a line.

13. Select the color for the lines separating the rows and columns from the *Line Color* drop-down.
14. Click the *Save* button to save the theme.
15. Click the *Close* button to close the *Themes Editor* window.

- To delete a theme click the *Delete* button.

Related Topics

[Export Data](#)^[304]

[Print the indexed information of a document](#)^[135]

16 Sohodox DB

Topics Covered

1. [What is Sohodox DB](#) ^[283]
2. [Sohodox Multi-User Config File](#) ^[285]
3. [Sohodox DB - FAQ](#) ^[286]
4. [File Stores](#) ^[290]
5. [Configure Sohodox DB for multi-user environment](#) ^[295]

16.1 What is a Sohodox DB?

What is a Sohodox DB?

Sohodox DB is a database which stores all the data you enter and also stores references to all the documents that you add to the database. Apart from your indexing data it also holds security information about Users.

File Store

A Sohodox DB is always linked to a local or network folder in which any documents you add to that DB are stored. Sohodox refers to this folder as the DB's File Store. [Learn More...](#)

You can create multiple file stores but this is normally not required. One reason to create a new file store would be if the disk on which your current file store is located is running out of disk space. In this case you can create a new file store for the DB in a different location and mark it as the *Default File Store*. Though a DB can have multiple file stores, any documents you add are always added to the DB's *Default File Store* (the file store currently marked as default).

Related Topics

[Sohodox DB](#)

[Frequently asked questions - Sohodox DB](#)

16.2 Multi-User Config File

What is Multi-User Config File?

The multi-user.gdx file stores information about the type of and location of the Main DB. This file is very important as it is required for multi-user setup.

When you do a server installation of Sohodox the multi-user.gdx is also created at this time.

When you do a client installation of Sohodox, it will ask you for the multi-user.gdx file. The multi-user.gdx file is stored in the *ITAZ\Sohodox* folder created under the folder designated as the *Common Application Data* folder in your Windows installation.

For Windows Vista/Windows 2008/Windows 7/Windows 8/Windows 2012/Windows 10, this will be the *C:\ProgramData\ITAZ\Sohodox* folder.

For Windows 2000/XP/2003 this will be *C:\Documents and Settings\All Users\Application Data\ITAZ\Sohodox*

Note:

You can export the 'multi-user.gdx'. To do this, click the *Tools* tab >> *Export Configuration* button. The 'multi-user.gdx' file will be exported to the *Documents* folder on your machine. You

16.3 Sohodox DB- FAQ

▼ What is a Sohodox DB?

The database that Sohodox uses to store information about documents that you have added is known as a Sohodox DB.

▼ Do I have to create a Sohodox DB?

When you do a fresh installation of Sohodox, it installs a basic Sohodox DB (MS Access based). We highly recommend that you upgrade your SOHODOX DB to use a more advanced engine (MS SQL Server Express 2014). When you launch SOHODOX, it will provide you with simple instructions for this.

In case you need to create more DBs , you will need to purchase the 'Sohodox Additional DB module'.

▼ Does Sohodox support multiple DBs?

Prior to v11, Sohodox supported only a single DB.

Version 11 onwards SOHODOX allows you to create additional DBs. For this you will need to purchase the 'Sohodox Additional DB module'.

▼ Which databases are supported by Sohodox?

We recommend using Sohodox with MS SQL Server Express 2014. We provide an automated installer for this. Sohodox can also be configured to work with an existing installation of MS SQL Server Express 2008, 2012 and 2017. Prior to v11, Sohodox only worked with the Express Edition of MS SQL Server (and not the Standard and other editions).

Version 11 onwards SOHODOX supports SQL Server Standard. You will need to have an existing installation of SQL Standard or SQL Enterprise installed for this feature to work. If you do not have an existing installation of SQL Standard or SQL Enterprise , you will need to purchase this separately from Microsoft.

Support for SQL Server Standard or Enterprise based Sohodox DB is available as an optional paid module.

▼ **What is the file extension of a MS SQL Express based Sohodox DB?**

A MS SQL Express based Sohodox DB has the .MDF and a .LDF extension.

▼ **Are the documents I add to a Sohodox DB, stored inside the Sohodox DB?**

No the documents you add to a Sohodox DB are copied and stored in a normal Windows folder linked to that Sohodox DB. Only the references to the documents are stored in the Sohodox DB. This ensures that your documents are safe and available to you even if you stop using Sohodox. The folder in which a Sohodox DB's documents are stored is known as the File Store. Each Sohodox DB has it's own File Store folder. A single Sohodox DB can be linked to one or more File Stores.

For more information about Sohodox DB, [click here](#) ^[285]

▼ **Is there a limit to the amount of data the system can handle using MS SQL Server Express 2014?**

Sohodox itself does not impose any limits. The only limits are those imposed by the database in use (e.g. MS SQL Express 2014) and your hardware (Processor, RAM etc.).

It is difficult to state the limits in terms of number of document types because it depends on the numbers and type of fields defined etc. For e.g. A MS SQL Express 2014 based Sohodox DB can be as large as 10 GB in size.

Please note that Sohodox does not store the added documents inside the database. Therefore the size of documents is not restricted by this. Sohodox only stores the indexing information about the documents in the database and even a 10 GB database would be able to store indexing information about a very large number of documents.

Related Topics

[File Stores](#) ^[290]

[Configure Sohodox DB for multi-user environment](#) ^[295]

16.4 Advantages of using SQL Server Standard over SQL Express

SOHODOX v11 can now work with SQL Standard or SQL Enterprise editions via an optional paid module that can be purchased on request.

You will need to have an existing installation of SQL Standard or SQL Enterprise installed for this feature to work. If you do not have an existing installation of SQL Standard or SQL Enterprise, you will need to purchase this separately from Microsoft.

Advantages of using SQL Server Standard over SQL Express

One of the primary advantage would be high performance. Below are a few listed advantages.

	SQL Express	SQL Standard/SQL Enterprise
Database Size	Limited to 10 GB	Upto 524 PB
RAM per instance	1 GB	64 GB/2 TB
Number of CPUs	1 Core	4 cores/8 cores

A detailed comparison of the Editions is available in the link below...

[https://docs.microsoft.com/en-us/previous-versions/sql/sql-server-2008-r2/cc645993\(v=sql.105\)](https://docs.microsoft.com/en-us/previous-versions/sql/sql-server-2008-r2/cc645993(v=sql.105))

16.5 Create a new DB

If you have purchased the 'Sohodox Additional DB module', you can now create a new DB.

To create a new DB:

1. Click on the SOHODOX button (the round button on the top left).
2. Select 'New DB'.
3. Select MS SQL Server in the DB Type dropdown.
4. The SQL credentials will be displayed (based on the credentials used to create or convert the MainDB).
5. Click OK on the 'MS SQL Server -Settings' dialog.
6. Enter the name of the DB in the DB Name textbox.
7. Enter a description.
8. Click the 'Create' button.

16.6 Convert your Sohodox DB to MS SQL Server Express based DB

To Convert your MS Access DB to SQL Server Express based DB:

1. Start Sohodox.
2. Login to Sohodox.
3. Click on the Tools tab on the Ribbon bar..
4. Click on the Convert DB button. The Convert DB dialog will be launched.
5. Select MS SQL Server Express Edition from the New DB Type dropdown. The MS SQL Server Express -Settings dialog will be launched.
6. Enter the connection information (please use SQL Server Authentication and not Windows Authentication)
7. Click the Test button to check if the Connection is successful.

8. Click Ok close the dialog.
9. Click the Convert button.

Note:

Once you convert your DB to SQL Server Express, you will not be able to convert it back to an MS Access based DB.

16.7 File Stores

- 8.1 [Learn about File Stores](#) 
- 8.2 [Add a new File Store](#) 
- 8.3 [Change the Default Store](#) 
- 8.4 [Move File Store to another location](#) 

16.7.1 Learn about File Stores

What are File Store?

Whenever you add a file from disk to a Sohodox DB or scan in a new document the files are saved in a folder which is called a File Store.

- A File Store is like any other Windows folder except for the fact that Sohodox treats these folders differently.
- Every Sohodox DB has it own set of File Store.
- A Sohodox DB can contain any number of File Store.
- Each Sohodox DB must always have one File Store designated as the Default File Store
- The Default File Store is the same as other File Store except for the fact that any new added documents (including scanned documents) are saved in this folder.
- A Sohodox DB cannot have more than one Default File Store at any time.

- You can set any File Store as the Default File Store at any time.

Some uses for File Store...

File Store enable storage of documents related to a Sohodox DB on removable devices like CDs, Zip Disks etc..

For example these would be the steps, if you wanted to move some of the documents to a CD...

Create a new File Store on the removable device

Move the required documents from other File Store to the new File Store


That's it!

If disk space is a problem on one machine File Store can also be used to move older or rarely used files to other machines on the network.

16.7.2 Add a new File Store

You can add a new file store by clicking the *New* drop-down of the *Home* tab and selecting the *File Store* option.

To Add a New File Store:

1. Open the DB to which you want to add the new File Store.
2. Click *Settings > DB Settings* in the [Navigation](#)  Pane.
3. Select the *File Store* node and click the *New* button of the *Home* tab. The File Store window will now be launched.
4. Enter a name for the File Store in the *File Store Name* box.
5. Select or enter the path of the folder where documents added to this File Store will be stored.
6. Check the *Set as default file store* option if you want the File Store to be set as the *Default File Store*.
7. Check the *Set as read-only* option to set the read-only attribute for the File-Store.
8. Check the *Automatically create sub-folders under the main folder* option if you want documents to be stored in sub-folders created automatically inside the File Store. This option is not available when the *Set as read only* option has been checked. If this option is unchecked documents are stored in the root of the File Store.

For example if the path of your File Store is C:\MyFileStore, then
If this option is checked then documents will first create a sub-folder called Location1 and then stores documents in that (C:\MyFileStore\Location1) folder.
When the maximum number of files (see File Count based) have been stored in the Location1 sub-folder, Sohodox will automatically create a new sub-folder called Location2. Documents will then be stored in the C:\MyFileStore\Location2 folder.
If this option is unchecked then documents will be stored directly in the C:\MyFileStore folder.

Time based

Enter the time (in minutes) in the box which specifies the time after which a new sub-folder will be created in the root of the File Store.

File count based

Enter a numeric value in the box which specifies the maximum number of files that Sohodox can store in each sub-folder. When the maximum number of files have been stored in a sub-folder, a new sub-folder will automatically be created in the root of the File Store.

When working with a very large number of documents creating sub-folders can improve the performance of Sohodox.

9. Click the *Save and close* button to create the new File Store.

- Documents added to the Sohodox DB are saved in the File Store.


Related Topics

[Change the Default File Store](#) 

16.7.3 Change the Default File Store

You can right click a File store in the *File Store* list and select the *Delete* option to delete it.

To Change the Default File Store:

1. Open the DB whose Default File Store you want to change.
2. Click *Settings > DB Settings* in the [Navigation](#)  Pane.
3. Select the *File Store* node. All the File Stores will be displayed in the right pane, i.e. the

File Stores list.

4. Double click the current Default File Store from the *File Stores* list. The *File Store* window will now be launched.
5. Uncheck the *Set as default file store* option.
6. Click the *Save* button to save the settings.
7. Now, open a File Store from the *File Stores* list to make it the Default File Store. The *File Store* window will now be launched.
8. Check the *Set as default file store* option.
9. Click the *Save and close* button to save the settings.

- You can only change the path of an existing File Store if...

You have manually copied or moved the File Store to another location, or
You have restored the File Store (from a Sohodox backup) to a new location

- You can have only one file store set as the default for a Sohodox DB.

Related Topics

[Add a New File Store](#) ²⁹¹

[Move File Store to another location](#) ²⁹⁴

16.7.4 Move File Store to another location

You can move a File store from one location to another and then point Sohodox to the new location.

To Move a File Store to another Location:

1. Move the File Store of the Database to the new location. Please make sure that this location is accessible on the network and the file store has all the necessary share and security permissions.
2. Start Sohodox and login as the *superadmin*.
3. Open the DB whose File Store is move to the new location. Please note that a "*File not found*" message will be displayed.
4. Click *Settings > DB Settings* in the [Navigation](#) ^[26] Pane.
5. Select the *File Store* node. The File Store will be displayed in the right pane, i.e. the *File Stores* list.
6. Double click the current *Default File Store* from the *File Stores* list. The *File Store* window will now be launched.
7. Click the *Browse...* button to specify the new location of the file store
8. Click the *OK* button to select the new location.
9. Click the *Save and close* button to save the settings.
10. Now, go to *Workspace*. The documents will now be displayed.

- You can only change the path of an existing File Store if...

You have manually copied or moved the File Store to another location, or
You have restored the File Store (from a Sohodox backup) to a new location.

Related Topics

[Add a New File Store](#) ^[291]

[Change the Default File Store for a Sohodox DB](#) ^[292]

16.8 Configure Sohodox DB for multi-machine environment

To Automatically Configure Sohodox DB for Multi-Machine Environment:

1. Make sure no users are logged on to Sohodox.
2. Make sure that the folder in which the Sohodox DB's *File Store* exists (usually the C: \Sohodox Databases folder) is shared and *all users who need access have read/write/modify permissions to this shared folder*.
3. Login as *superadmin*, from Sohodox desktop client.
4. Select the *Tools* tab and click the *Multi-user DB* button. A dialog will now pop up. Click the *Automatic* button on it.
5. The *Multi-User Configuration* window will be launched and will start configuring your DB automatically for multi-machine environment.
6. Once the DB is configured *Status* will display *Configuration Completed* on the *Multi-User Configuration* window. Click the Close button to close the window.

Related Topics

[Create a User Account](#)^[297]

[Import Data](#)^[316]

17 Users

- 2.1 [Learn about Users](#)^[296]
- 2.2 [Create a User account](#)^[297]
- 2.3 [Lock a User account](#)^[298]
- 2.4 [Deactivate a User Account](#)^[298]
- 2.5 [Disconnect an active user](#)^[299]

17.1 Learn about Users

Sohodox lets you create as many users as you want*. For each user you must provide at least a user name and an email id. The user name is used for logging in to Sohodox and is case-insensitive. E.g. If your user name is JOHN you can login in as john, John or JOHN. Ideally a password must be provided for each user though it is not compulsory to do so (i.e. you can leave the password blank).

*Though Sohodox lets you create as many users as you want, it controls how many users can be simultaneously logged in at any given time. The maximum number of users that can be simultaneously logged in at any given time is based on the number of licenses purchased by the user.

By default the following users are automatically created...

1. **SuperAdmin** - This is the most powerful user in Sohodox and cannot be deleted. *SuperAdmin* is by default allowed all system permissions and these permissions cannot be changed. In addition the *Superadmin* is also automatically allowed all permissions for all Sohodox DB, document types, tags and documents that are created by any user. Normally you should never have to log in as *SuperAdmin* except for initially configuring Sohodox.

Related Topics

[Create a User Account](#)^[297]

17.2 Create a User Account

You must create a user for every person that needs to log on to Sohodox. You can create a user by clicking the *New* drop-down and selecting the *User* option.

To Create a User Account:

1. In Sohodox, select *Settings > System Settings > Users* in the [Navigation](#) ^[26] pane. The default Users will be displayed in the right pane i.e. *Users* list.
2. Now, click the *New* button on the *Ribbon* bar to create a new user. The *New User* window will now be launched.
3. Enter the name the user must enter to logon to the system in the *User Name* box.
4. Click the *Set Password...* button to set the users password.
5. Check the *User must change password at next logon* option if you want to force the user to change his/her password, the next time the user logs on to the system. Use this option if you want users to choose their own passwords.
6. Check the *Account is locked* option if you want to disable the user's account. If a user's account is disabled then the user is not allowed to log in.
A user's account is automatically disabled when the user makes more consecutive failed logon attempts than the value specified in the *Maximum Logon attempts* password policy.
7. Enter the users general information in the *General Information* section and click the *Save* button.
8. Click the *Save and Close* button to create the user and close the *User* window. The user will now be displayed in the *Users* List.

- You can click the *Save and New* button to save a users account and to open a new user window to create a new user account.
- Please note that you cannot delete a user, however you can disable that user account.

Related Topics

[Disconnect an Active User](#) ^[299]

[Lock a User account](#) ^[298]

17.3 Lock a User account

You cannot delete a user account in Sohodox, you can only disable that user account.

To Lock a User Account:

1. In Sohodox, select *Settings > System Settings > Users* in the [Navigation](#) ^[26] pane.
2. Select a user from the right pane i.e. the *Users* list.
3. On the *Users* tab click the *Lock* button to lock the user. The user will now not be able to login to Sohodox.

To Unlock a User Account:

1. In Sohodox, select *Settings > System Settings > Users* in the [Navigation](#) ^[26] pane.
2. Select the locked user from the right pane i.e. the *Users* list.
3. On the *Users* tab click the *Unlock* button to lock the user. The user will now be able to login to Sohodox.

Related Topics

[Set Password Policies for Users](#) ^[30]

[Deactivate a User Account](#) ^[298]

[Disconnect an Active User](#) ^[299]

17.4 Deactivate a User Account

You cannot delete a user account in Sohodox, you can only deactivate that user account.

To Deactivate a User Account:

1. In Sohodox, select *Settings > System Settings > Users* in the [Navigation](#) ^[26] pane.
2. Select a user from the right pane i.e. the *Users* list.

3. On the *Users* tab click the *Deactivate* button to deactivate the user.

To Re-activate a User Account:

1. In Sohodox, select *Settings > System Settings > Users* in the [Navigation](#) ^[26] pane.
2. Select the deactivated user from the right pane i.e. the *Users* list.
3. On the *Users* tab click the *Activate* button to activate the user.

- To make a disabled user account active uncheck the *Account is disabled* option.
- Please note you cannot delete a user, you can only disable a user's account.

Related Topics

[Create a User Account](#) ^[297]

[Disconnect an Active User](#) ^[299]

17.5 Disconnect an Active User

The *Connected Users* node displays a list of all the users/applications currently logged in to Sohodox. The *Connected Users* node can also be used to forcefully log off any logged in user.

To Disconnect an Active User:

1. In Sohodox, select *Settings > System Settings > Connected Users* in the [Navigation](#) ^[26] pane.
2. Select a user from the right pane i.e. the *Connected Users* list and click the *Disconnect* button on the *Ribbon* bar to disconnect the user.
3. The user will now be disconnected.

To Find out any Inactive users and Disconnect them


Some times Sohodox displays a message saying that the *maximum number of users already logged into Sohodox*. However nobody has logged into Sohodox. This usually


happens when Sohodox is not shut down properly and the logging off process is not completed.

1. Click *Start > All Programs > Sohodox Desktop > Sohodox Connection Manager*. The *Sohodox Connection Manager* will now be launched.
2. Login to Connection Manager as a *superadmin*.
3. Select inactive users and click on the *Disconnect* button to disconnect the user.

- You can click the *Refresh* button on the *Ribbon* bar to refresh the contents of the connection list.

Related Topics

[Create a User Account](#) 

[Deactivate a User Account](#) 

17.6 Set Password Policies for Users

You can set policies for password and thus control some aspects of security.

Set Maximum Password age:

Use this policy to set the maximum number of days after which a user's password will expire and will have to be changed.

1. Select *Settings > Password Policies* in the [Navigation](#)^[26] pane.
2. Double click the *Maximum password age* policy in the left pane. The *Maximum password age* policy dialog will be launched.
3. Select the button besides the text box and specify the number of days after which the password should expire. If you want the password to never expire, then select the *Never expire* option.
4. Click the *Save and Close* button to apply this policy.

Set Minimum password length:

Use this policy to set the minimum number of characters that a password must contain. Sohodox will not allow any user to set a password that is shorter in length than this value.

1. Select *Settings > Password Policies* in the [Navigation](#)^[26] pane.
2. Double click the *Minimum password length* policy in the left pane. The *Minimum password length* policy dialog will be launched.
3. Select the button besides the text box and specify the number of characters that a password must contain. If you do not want to set a minimum value then select the *Unlimited Characters* option.
4. Click the *Save and Close* button to apply this policy.

Set Maximum Logon attempts:

Use this policy to set the maximum number of consecutive failed logon attempts before Sohodox locks the user account. A [locked account can be enabled](#)^[298] by the superadmin user.

1. Select *Settings > Password Policies* in the [Navigation](#) ^[26] pane.
2. Double click the *Maximum Logon attempts* policy in the left pane. The *Maximum Logon attempts* policy dialog will be launched.
3. Select the button besides the text box and specify the maximum number of consecutive failed logon attempts before Sohodox disables the user account. If you do not want to set a maximum logon attempts limit then select the *Unlimited attempts* option.
4. Click the *Save and Close* button to apply this policy.

Related Topics

[Create a User Account](#) ^[297]

[Deactivate a User Account](#) ^[298]

18 Export and Import data

Topics Covered

1. [Export Data](#) ³⁰⁴
2. [Import Data](#) ³¹⁶

18.1 Export Data

1. [Export data to a CSV file](#) ^[304]
2. [Export data to a HTML file](#) ^[307]
3. [Export data to a Excel file](#) ^[310]
4. [Export data to a XML file](#) ^[312]
5. [Save the frequently used Export Settings](#) ^[314]
6. [Use a Export Profile to Export data](#) ^[315]
7. [Export documents to CD/DVD](#) ^[316]

18.1.1 Export data to a CSV file

Sohodox Export can be used to export the documents along with its indexed information from the Sohodox DB to a CSV (Comma Separated Values) file. This export file can be used as a backup or can be used to import these documents along with its indexed information into other Databases or programs.

You can export your data to a CSV file by clicking the *Export* button.



To Export Data to a CSV file:

1. In Sohodox, open the DB whose data you want to export.
2. Once the DB is opened, select *Workspace > All Documents* in the *Navigation* pane. If you wish to export data from a Document Type then select that Document Type.



3. Select the *Home* tab and click the *Export* button of the *Collaborate* group. The *Export* wizard will now be launched.
4. The *Start a new Export* section displays the DB and the item that is going to be exported. Click the *Next* button to go the next page.
5. The data that is going to be exported will be displayed on left pane of the *Data Export*

window.

6. Select a theme to format the data from the *Themes* drop down. You can also [create a new theme](#) ^[282] by clicking the *Customize...* button.
 7. Check the columns you want to export from the right pane i.e. the *Columns* pane. You can rearrange the columns order as per your wish by using the *Up*  and *Down*  button.
 8. Select the item you want to export.
 - a) If you want to export the data displayed on the current page then select the *Export Current Page* option.
 - b) If you want to export all the data then select the *Export All Pages* option.
 - c) If you want to export only the selected data then select the *Export Selected* option.
 9. Check the *Export Column Names* option to export the column names (column headers).
 10. Check the *Export Documents* option to export the documents.
 11. Check the *Use full file path* option to export the entire path of the file for e.g. C:\Pictures\Acme.jpg. (This option is only available if the *Export Documents* option is checked)
 12. Check the *Use document title as file name* option to export the documents with the document title as the file name. By default this option is checked. (This option is only available if the *Export Documents* option is checked)
 13. Click the *Next* button to go to the next page.
 14. Select the *CSV* option from the *File Type* drop down to export the data as a CSV file.
 15. Click the *Options* button to select a separator for the CSV file.
 16. Click the *Browse* button besides the *Destination* box to select the destination to save the exported file. Or type the location to save the file in the *Destination* box.
 17. Click the *Export* button to begin exporting the data. If you want to view the exported CSV file then click the *Open folder* button.
 18. Once the data is exported click the *Close* button to close the wizard.
- To start a new export click the *Export More...* button.
 - Go to the previous page click the *Previous* button located on the top left corner of the

wizard.

Related Topics

[Export data to a HTML file](#)^[307]

[Export data to a Excel file](#)^[310]




[Export data to a XML file](#)^[312]

18.1.2 Export data to a HTML file

Sohodox Export can be used to export the documents along with its indexed information from the Sohodox DB to a HTML file. This file can be published on your website.

You can export your data to a HTML file by clicking the *Export* button.

To Export Data to a HTML file:


1. In Sohodox, open the DB whose data you want to export.
2. Once the DB is opened, select *Workspace > All Documents* in the *Navigation* pane. If you wish to export data from a Document Type then select that Document Type.
3. Select the *Home* tab and click the *Export* button  in the *Collaborate* group. The *Export* wizard will now be launched.
4. The *Start a new Export* section displays the DB and the item that is going to be exported. Click the *Next* button to go the next page.
5. The data that is going to be exported will be displayed on left pane of the *Data Export* window.
6. Select a theme to format the data from the *Themes* drop down. You can also [create a new theme](#) ^[282] by clicking the *Customize...* button.
7. Check the columns you want to export from the right pane i.e. the *Columns* pane. You can rearrange the columns order as per your wish by using the *Up*  and *Down*  button.
8. Select the item you want to export.
 - a) If you want to export the data displayed on the current page then select the *Export Current Page* option.
 - b) If you want to export all the data then select the *Export All Pages* option.
 - c) If you want to export only the selected data then select the *Export Selected* option.


9. Check the *Export Column Names* option to export the column names (column headers).
10. Check the *Export Documents* option to export the documents.
11. Check the *Use full file path* option to export the entire path of the file for e.g. C:\Pictures\Acme.jpg. (This option is only available if the *Export Documents* option is checked)
12. Check the *Use document title as file name* option to export the documents with the document title as the file name. By default this option is checked. (This option is only available if the *Export Documents* option is checked)
13. Click the *Next* button to go to the next page.
14. Select the *HTML* option from the *File Type* drop down to export the data as a HTML file.
15. Click the *Options* button to format the HTML file.
 - ▼ The HTML Options window will now be launched.
 - a) Check *Generate Multiple Pages* option to generate multiple pages in the HTML file. If you do not wish to check this option then all the data will be displayed on a single page.
 - b) Specify the number of items to be displayed on each page in the *Number of items per page* box. This option will only be available if *Generate Multiple Pages* option is checked.
 - c) Check *Generate Index Page* option to generate a index page for the HTML file.
 - d) Check *Generate Navigation Bar* option to insert a navigation bar in the HTML file.
 - e) Check *Use Custom CSS* option to enter your own code.
 - f) Click the *Data Page Options* tab to modify the header and footer of the Data Page by entering our own code.
 - g) Click the *Index Page Options* tab to modify the header and footer of the Index Page by entering our own code. This tab will only be available if *Generate Index Page* option is checked on the *HTML Options* tab.
 - h) Click the *OK* button to save the settings and close the *HTML Options* window.
16. Click the *Browse* button besides the *Destination* box to select the destination to save the exported file. Or type the location to save the file in the *Destination* box.
17. Click the *Export* button to begin exporting the data. If you want to view the exported HTML file then click the *Open folder* button.


18. Once the data is exported click the *Close* button to close the wizard.

- To start a new export click the *Export More...* button.
- Go to the previous page click the *Previous* button located on the top left corner of the wizard.

Related Topics

[Export data to a CSV file](#) 

[Export data to a Excel file](#) 

[Export data to a XML file](#) 

18.1.3 Export data to a Excel file

Sohodox Export can be used to export the documents along with its indexed information from the Sohodox DB to a Excel file. This export file can be used as a backup or can be used to import these documents along with its indexed information in other Databases or programs.

You can export your data to a Excel file by clicking the *Export* button.

To Export Data to a Excel file:

1. In Sohodox, open the DB whose data you want to export.
2. Once the DB is opened, select *Workspace > All Documents* in the *Navigation* pane. If you wish to export data from a Document Type then select that Document Type.



3. Select the *Home* tab and click the *Export* button in the *Collaborate* group. The *Export* wizard will now be launched.
4. The *Start a new Export* section displays the DB and the item that is going to be exported. Click the *Next* button to go the next page.
5. The data that is going to be exported will be displayed on left pane of the *Data Export* window.
6. Select a theme to format the data from the *Themes* drop down. You can also [create a new theme](#) by clicking the *Customize...* button.
7. Select the columns you want to export from the right pane i.e. the *Columns* pane.
8. You can rearrange the columns order as per your wish by using the *Up* button and *Down* button.
9. Select the item you want to export.
 - a) If you want to export the data displayed on the current page then select the *Export Current Page* option.
 - b) If you want to export all the data then select the *Export All Pages* option.
 - c) If you want to export only the selected data then select the *Export Selected* option.
10. Check the *Export Column Names* option to export the column names (column headers).

11. Check the *Export Documents* option to export the documents.
12. Check the *Use full file path* option to export the entire path of the file for e.g. C:\Pictures\Acme.jpg. (This option is only available if the *Export Documents* option is checked)
13. Check the *Use document title as file name* option to export the documents with the document title as the file name. By default this option is checked. (This option is only available if the *Export Documents* option is checked)
14. Click the *Next* button to go to the next page.
15. Select the *Excel* option from the *File Type* drop down to export the data as a MS Excel file.
16. Click the *Browse* button besides the *Destination* box to select the destination to save the exported file. Or type the location to save the file in the *Destination* box.
17. Click the *Export* button to begin exporting the data. If you want to view the exported Excel file then click the *Open folder* button.
18. Once the data is exported click the *Close* button to close the wizard.

- To start a new export click the *Export More...* button.
- Go to the previous page click the *Previous* button located on the top left corner of the wizard.

Related Topics




- [Export data to a CSV file](#) ³⁰⁴
- [Export data to a HTML file](#) ³⁰⁷
- [Export data to a XML file](#) ³¹²

18.1.4 Export data to a XML file

Sohodox Export can be used to export the documents along with its indexed information from the Sohodox DB to a XML file. This export file can be used as a backup or can be used to import these documents along with its indexed information in other Databases or programs.

You can export your data to a XML file by clicking the *Export* button.

To Export Data to a XML file:

1. In Sohodox, open the DB whose data you want to export.
2. Once the DB is opened, select *Workspace > All Documents* in the *Navigation* pane. If you wish to export data from a Document Type then select that Document Type.
3. Select the *Home* tab and click the *Export* button  in the *Collaborate* group. The *Data Export* wizard will now be launched.
4. The *Start a new Export* section displays the DB and the item that is going to be exported. Click the *Next* button to go the next page.
5. The data that is going to be exported will be displayed on left pane of the *Data Export* window.
6. Select a theme to format the data from the *Themes* drop down. You can also [create a new theme](#) ⁽²⁸²⁾ by clicking the *Customize...* button.
7. Select the columns you want to export from the right pane i.e. the *Columns* pane. You can rearrange the columns order as per your wish by using the *Up*  and *Down*  button.
8. Select the item you want to export.
 - a) If you want to export the data displayed on the current page then select the *Export Current Page* option.
 - b) If you want to export all the data then select the *Export All Pages* option.
 - c) If you want to export only the selected data then select the *Export Selected* option.
9. Check the *Export Column Names* option to export the column names (column headers).
10. Check the *Export Documents* option to export the documents.

11. Check the *Use full file path* option to export the entire path of the file for e.g. C:\Pictures\Acme.jpg. (This option is only available if the *Export Documents* option is checked)
12. Check the *Use document title as file name* option to export the documents with the document title as the file name. By default this option is checked. (This option is only available if the *Export Documents* option is checked)
13. Click the *Next* button to go to the next page.
14. Select the *XML* option from the *File Type* drop down to export the data as a XML file.
15. Click the *Browse* button besides the *Destination* box to select the destination to save the exported file. Or type the location to save the file in the *Destination* box.
16. Click the *Browse* button in the *Save Settings* box to select the destination to save the frequently used export settings for later re-use. Now, click the *Save Profile* button to save the *Export Profile*.
17. Click the *Export* button to begin exporting the data. If you want to view the exported XML file then click the *Open folder* button.
18. Once the data is exported click the *Close* button to close the wizard.

- To start a new export click the *Export More...* button.
- Go to the previous page click the *Previous* button located on the top left corner of the wizard.

Related Topics



- [Export data to a CSV file](#)^[304]
- [Export data to a HTML file](#)^[307]
- [Export data to a Excel file](#)^[310]


18.1.5 Save the frequently used Export settings

Sohodox uses *Export Profile* to simplify the process of exporting documents. *Export Profile* is a collections of frequently used settings which can be saved and reused to export documents. Instead of specifying these settings every time you export documents, you can specify these settings once and save them as a *Export Profile*.

You can create as many *Export Profiles* as you want.

To Save the Frequently used Export Settings as Export Profile:

1. In Sohodox, open the DB whose data you want to export.
2. Once the DB is opened, select *Workspace > All Documents* in the *Navigation* pane.
3. Select the *Home* tab and click the *Export* button  in the *Collaborate* group. The *Data Export* window will now be launched.
4. Specify the export settings and go to the last page.
5. Enter a name for the Export Profile in the *Save Settings To* box. Click the *Save* button  to save the profile.
The Export Profile will now be listed in the *Saved Profile* drop-down.

- To delete a *Export Profile*, click the *Delete* button  besides the *Saved Profile* box.
- You can use the Export Profile to export data, for more info see [Use a Export Profile to Export Data](#)^[315]

Related Topics

- [Export data to a CSV file](#)^[304]
- [Export data to a HTML file](#)^[307]
- [Export data to a Excel file](#)^[310]
- [Export data to a XML file](#)^[312]

18.1.6 Use a Export Profile to Export Data

Sohodox uses *Export Profile* to simplify the process of exporting documents. *Export Profile* is a collections of frequently used settings which can be saved and reused to export documents. Instead of specifying these settings every time you export documents, you can specify these settings once and save them as a *Export Profile*.

You can create as many *Export Profiles* as you want.

To use a Export Profile to Export Data:

1. In Sohodox, open the DB whose data you want to export.
2. Once the DB is opened, select *Workspace > All Documents* in the *Navigation* pane.



3. Select the *Home* tab and click the *Export* button in the *Collaborate* group. The *Data Export* window will now be launched.
4. Select the export profile from the *Saved Profile* drop-down.
5. Click the *Export Saved Profile* button to begin exporting.
6. Click the *Close* button to close the wizard.

- To delete a *Export Profile*, click the *Delete* button  besides the *Saved Profile* box.

Related Topics

[Save the frequently used Export settings](#) ³¹⁴

18.1.7 Export document to CD/DVD

You can burn documents from within Sohodox to a CD/DVD by using the *Export to CD/DVD* option.

To Burn Documents on a CD/DVD:

1. In Sohodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.



2. Select the *Home* tab and click the *Export* drop down in the *Collaborate* group.
3. Click the *Export to CD/DVD* option. The *Burn to CD/DVD* window will be launched.
4. Select the burning device from the *Choose Device* drop down.
5. Select the burning speed from the *Choose speed* drop down.
6. Click the *Burn* button to start the burning process.

- To erase a disc before burning the data, select the *Erase disc before writing* option.
- Select *Verify disc after burning* option to verify the data that has been burnt on the CD/DVD correctly.

Related Topics

[Export data to a CSV file](#)^[304]

[Back up Sohodox DB](#)^[332]

18.2 Import Data

2.1 [Import Data from a CSV file](#)^[317]

2.2 [Import Data from Paperport](#)^[323]

2.3 [Folder Monitor](#)^[325]

18.2.1 Import data from a CSV file

The Import Data Wizard lets you quickly populate your Sohodox DB by importing data and documents from a CSV file. Most database and spreadsheet programs can export their data as CSV files. You can therefore use the Import Data Wizard to move data from any database program or spreadsheet into a Sohodox DB. This is the fastest way to add a large data to a Sohodox DB.

You can import your data from a file by clicking the *Import* button of the *Tools* tab.

To Import Data from a CSV file:

1. In Sohodox, open the DB to which you want to import the data from the CSV file.



2. Select the *Tools* tab and click the *Import* button. The *Data Import* window will now be launched.
3. Click the *Browse...* button besides the *Specify the file to import the data from* box, to select the CSV file you want to import.

Note: If you want to import documents along with the indexing data then add a extra column to the CSV file from which you are importing the data. In this column, enter the name of the file that you want to import along with the indexing data. If more than one file is to be imported then enter the names of all the files separated by a pipe (|).

4. Click the *Next* button to go to the next page.
5. Specify the content (data) of the import file in the *Import File contains columns with the following information* section.

- a) Select the *Documents and Document Type Info* option if the CSV file contains indexing information along with the type of document.

If you select the *Documents and Document Type Info* option then the *Choose existing document type* drop-down option will be available. Select an existing document type from this drop-down to import the documents and document types information to it.

- b) Select the *Documents and Document Type Name* option if the CSV file contains the names of documents and document types.
- c) Select the *Documents* option if the CSV file contains information of only documents.

6. Click the *Next* button to go to the next page. View the contents of the selected text file displayed in the Data Preview and enter the information required on this page
7. Choose the delimiter that separates the fields(columns) in the data. You can choose more than one delimiter.
 - a) Check the *Tab* option if the fields (columns) in the data are separated by a Tab character.
 - b) Check the *Semicolon* option if the fields (columns) in the data are separated by a semicolon.
 - c) Check the *Comma* option If the fields (columns) in the data are separated by a comma.
 - d) Check the *Space* option if the fields (columns) in the data are separated by a single space.
 - e) If the fields (columns) in the data are separated by a character other than tab, semicolon, comma or space then check the *Other* option and enter that character in the box. You can only enter a single character in this box.
8. Check the *Treat consecutive delimiters as one* option if you want consecutive delimiters to be treated as a single delimiter. This causes all the consecutive delimiters after the first one to be ignored during the import. If this option is unchecked consecutive delimiters will be treated as empty values during the import.
9. Check the *First row contains field names* option if the first row of the text file contains the names of the fields (column headings).
10. Select the character that is used as the text qualifier in the data. Text values which contain spaces (or any other character specified as a delimiter) must be delimited by a text qualifier. The double-quote or the single-quote character can be selected as a text qualifier.
11. Enter the number of the row from which you want the import to start. Use the *Start import at row no.* option if you want to skip the first few lines of the text file during the import. This option does not affect the behaviour of the *First row contains field names* option which always uses the actual first row of the file and not the start row.
12. Click the *Next* button to go to the next page. Use this page to map fields (columns) of the CSV file to the source fields (columns) of the document type that you have selected to import the data. The data from CSV fields (columns) will be imported to the source fields (columns) of the document type.
13. The *Choose columns* pane displays the columns (data fields) that are in the selected CSV file and the *Selected column contains* pane displays the columns (data field) of the

document type that you have selected to import the data.

14. Select a column in the *Choose columns* pane and map it by selecting a data field in the *Selected column contains* pane. By mapping a column to a data field, you are telling the system to import the data from the selected column to the selected data field.

If a column in the *Choose columns* pane contains the name and location of documents then map that column with the *Document List* option of the *Selected column contains* pane. The *Document List* option is only available if you have specified on the first page that the CSV file contains documents.

If a column in the *Choose columns* pane contains tags of the documents then map that column with the *Tags* option of the *Selected column contains* pane. The *Tags* option is only available if you have specified on the first page that the CSV file contains documents.

If you do not wish to import a column from the *Choose columns* pane then map that column with the *Do not import* option of the *Selected column contains* pane.

15. Depending on the data type of the selected data field their respective options will be displayed in the *Options* pane.

▼ The following options will be displayed for certain data type

Integer Data Type

Thousands Separator: If the numeric data contains thousands separators select or enter the character which is used as the thousands separator in the data.

Decimal Separator: If the numeric data contains decimal separators select or enter the character which is used as the decimal separator in the data.

Date Data Type

Any two digit year should be interpreted as a year between: Control how Sohodox interprets date values which contain two digit years (for e.g. 03 instead of 2003). The default time span used by Sohodox is 1930 to 2029. Therefore by default Sohodox will consider...

Two digit years between (and including) 30 and 99 as preceded with 19, and

Two digit years between (and including) 00 and 29 as preceded with 20.

For example...

By default Sohodox will treat a two digit year such as 30 as 1930 and a two digit year such 29 as 2029.

You can change the default time span, type in a new ending year.

Date Separator: Select or enter the character which separates the day, month and year parts in the date value.

Format: Select the sequence in which day, month and year appear in the date value i.e. the format of the date.

Time Data Type

Time Separator: Select or enter the character which separates the hours, minutes and seconds parts of the time value.

24 Hour Format: Select this option if you want the time to be shown in 24 hour format

12 hour Format: Select this option if you want the time to be shown in 12 hour format

AM Symbol: Select or enter the text which indicates the hours before noon when the time value is in a 12-hour format.

PM Symbol: Select or enter the text which indicates the hours after noon when the time value is in a 12-hour format.

Yes/No Data Type

Text to import as 'Yes': While importing data, any value which matches the value selected or entered here will be considered by Sohodox as a Yes value. You can also specify a comma separated list of values and any values matching a value in this list will be treated a Yes value. If the special value {Any Other Value} is selected then any value except the values specified for Text to import as 'No' will be treated as a Yes value.

Text to import as 'No': While importing data, any value which matches the value selected or entered here will be considered by Sohodox as a No value. You can also specify a comma separated list of values and any values matching a value in this list will be treated as a No value. If the special value {Any Other Value} is selected then any value except the values specified for Text to import as 'No' will be treated as a No value.

Document List

Location: Specify the folder path where the documents to be imported are located. By default Sohodox selects the folder path containing the text file from which you are importing the data.

Click the *Browse* button to change this folder path.

File names are separated by: Select the separator which is used to separate the names of the documents in *Document List* field. The default separator selected is pipe (|).

16. Click the *Next* button to go to the next page. Use this page to specify actions Sohodox should take if it encounters invalid or empty values for any field. You can specify different actions for each field. By default Sohodox will import empty or invalid values as empty values wherever possible (if the Sohodox DB field cannot accept empty values then by default Sohodox will not import the row containing that value).

17. Select the action Sohodox should take if it encounters a row in which the value for the selected field is empty or invalid. You can select different action for each field.

Import as empty value

If this option is selected the value will be imported as an empty value. This option is not available if the Sohodox DB field does not support storing of empty values.


Use default value

If this option is selected the specified default value will be used instead of the empty value while importing. Enter a default value in the Enter Default Value box. This value will be used for the import if an empty value is encountered for the selected field. If a default value is available for Sohodox DB field in the Sohodox DB then that value will be displayed in this box.

Do not import

If this option is selected then the row containing an empty value for this field will not be imported i.e. it will be skipped.

18. Click the *Next* button to go to the next page. Use this page to start and view the progress of the data import process.

19. You can save the import setting that was used to import the file for later re-use by clicking this *Save* button  besides the *Save import Profile* box.

20. Click the *Start Import* button to begin exporting the data. The *Status* bar will show the status of the import process

21. Click the *Show skipped records* button to view any rows that were skipped during the import process. Once the data is imported click the *Close* button to close the wizard.

- Go to the previous page click the *Previous* button located on the top left corner of the wizard.

Related Topics

[Export data to a CSV file](#) [304]
[Export data to a HTML file](#) [307]
[Export data to a Excel file](#) [310]
[Export data to a XML file](#) [312]

18.2.2 Import data from Paperport

You can import data to Sohodox from other programs that uses folders to store your documents. This example shows how to import data from Paperport

To Import Data from Paperport:

1. In Sohodox, click the *Add from disk* drop down and select the *Add Folders from disk* option on the *Ribbon* bar. The *Add Folders from disk* window will be launched.
2. Check the folder structure in which your Paperport documents are stored (This usually the *My Documents > My Paperport Documents* folder) that you want to import to Sohodox from the *Choose folders from disk* pane.
3. Select the *Import files and folder tree* option to import both the files and the folder structure to Sohodox. If you only want to import the files from the selected folders, then *Select the Import only files from the selected folders* option.
4. Check the *Use exceptions* option to use exceptions (optional).
You can use *Exceptions* to exclude or include particular file or file types to the Sohodox DB. For e.g. The folder that you have selected contains pdf, doc, tiff and jpeg files. However, you only want to add the .DOC files to the List of files to be added pane, what you can do is use an exception which will add the .DOC files and exclude the remaining files.
▼ Follow these steps to use Exceptions
 - a) Click the Exceptions button to add exceptions. The Exceptions window will be launched.
 - b) Select the Do not add these files tab to specify the file or file type you want to exclude and then click the Add button. For e.g. if you do not want to add .PDF files to the List of files to be added pane, then type *.PDF in the text box and click the Add button to add it to the list.
 - c) Select the Add only these files tab to specify the file or file type you want to include and then click the Add button. For e.g. if you only want to add .DOC files to the List of files to be added pane, then type *.DOC in the text box and click the Add button to add it to the list.
 - d) To remove an Exception from the list, select it and click the Remove button.
 - e) Click on OK button to close the Exceptions window.
5. Click the Add button to add the folder structure or files to the Sohodox DB.

6. Click the Close button to close the Add Folders from disk window. Now, navigate to the Folders node in the [Navigation](#) ^[26] pane to view the folders along with the documents.

You can now create [Document Types](#) ^[173] for these documents.

- You can add only the folders structure (without the documents) that you use to organize your documents, to the Sohodox DB. For more info see, [Add existing folder structure to Sohodox DB](#) ^[198]
- You can also drag and drop folders in Sohodox

Related Topics

[Find and Add a document](#) ^[55]

[Scan multiple single paged document](#) ^[79]

18.2.3 Local Capture Folder

Introduction:

The Local Capture Folder watches one or more specified folders on your disk and adds any files added to those folders to Sohodox. You can use this feature to directly add files to Sohodox even when Sohodox is not running. All you need to do is, add the files to the monitored folder and Local Capture Folder will automatically add these files to Sohodox. This is also handy when working with Network Scanners which put the scanned documents in a folder.

You can also configure the Local Capture Folder to delete the files from the monitored folder, after they have been added to Sohodox.

Following are the main features of Sohodox Local Capture Folder...

1. Watch multiple folders at the same time
2. Select a [Destination Profile](#)^[279] to use, while adding a document to Sohodox
3. Specify *Include Filters* to only add files of a particular type (e.g. *.doc)
4. Specify *Exclude Filters* to exclude files of a particular type (e.g. *.txt)

When you select the folders to be watched, two sub-folders called AddedFiles and ExcludedFiles may be created inside each watched folder depending on the options you have chosen.

Files which are added to Sohodox can be automatically deleted from the folder or they can be moved to the AddedFiles sub-folder of the watched folder.

Files which are not added to Sohodox are automatically moved to the ExcludedFiles sub-folder of the watched folder. This will include files which did not meet the criteria of the Include Filters or files which met the criteria of the Exclude Filters.

How To's:

▼ How to launch Local Capture Folder

To launch the Local Capture Folder, click on the Tools tab on the Ribbon Bar and then click on the Capture Folders >Manage Local Capture Folders button. This will bring up the Local Capture Folder dialog.

▼ Specify a Local CaptureFolder to monitor

To specify a folder to be monitored...

1. To launch the Local Capture Folder, click on the Tools tab on the Ribbon Bar and then click on the Capture Folders >Manage Local Capture Folders button. This will bring up the Local Capture Folder dialog.
2. Click the *Add...* button to add a folder. This will bring up the *Folder Properties* dialog.
3. Specify the location of the folder in the *Folder path* box by clicking the [...] *Browse* button besides the *Folder path* box.
4. In the *Choose DB* drop-down MainDB will be selected by default.
5. From the Choose Profile drop-down, you can select a [Destination Profile](#)^[279] to be used while adding a document from this folder. Using the Destination Profile you can specify how the documents should be categorized in Sohodox. For example you can specify the Sohodox folder in which the document should be stored as well as the tags and document type for the folder. If you do not select a Destination profile all the documents added to Sohodox will be displayed in the All Documents node
6. Click the OK button to close the Folder Properties dialog.
7. Click the Close button to close the Local Capture folder dialog.

▼ Start monitoring the Folder(s)

Sohodox Local Capture Folder automatically starts monitoring folders as soon as you configure it and close the *Local Capture Folder* dialog. If you have manually stopped the service using the Windows Service Controller application, you can start the service using the steps below...

1. Press the Windows key+[R] key combination to launch the Windows Run dialog
2. Type *services.msc* in the Run dialog and hit *Enter* to launch the Service Controller application
3. Select and right-click the service named *ITAZ Sohodox Local Capture Folder Service* and click on *Start*

▼ Stop monitoring Folder(s)

To stop monitoring folders...

1. Press the Windows key+[R] key combination to launch the Windows Run dialog
2. Type *services.msc* in the Run dialog and hit *Enter* to launch the Service Controller application
3. Select and right-click the service named *ITAZ Sohodox Local Capture Folder Service* and click on *Stop*

▼ Modify the details of a folder being watched

Follow the steps below to modify the details of a folder being watched.

1. Click on the Tools tab on the Ribbon Bar and then click on the Capture Folders >Manage

Local Capture Folders button. This will bring up the *Local Capture Folder* dialog.

2. Select the Folder you want to modify.
3. Click on the *Modify...* button. The *Folder Properties* dialog will be displayed.
4. Make the required modifications and then click the *OK* button to close the *Folder Properties* dialog.
5. Click the *Close* button to close the Local Capture Folder dialog.

▼ Specify the files to be added to Sohodox

Use the steps below if you only want files of certain types (e.g. *.doc) to be added from the monitored folder (any files which do not meet the criteria you specify will not be added)...

1. Click on the Tools tab on the Ribbon Bar and then click on the Capture Folders >Manage Local Capture Folders button. This will bring up the *Local Capture Folder* dialog.
2. Select the folder you want to modify. Click the *Modify...* button. The *Folder Properties* dialog will be displayed.
3. Select the *Monitor files* tab.
4. In the text box enter the information about the file or files type you want to include and then click the *Add* button. For e.g. if you want to add only DOC files then enter *.doc
5. After entering all the file names or file types, click the *OK* button to close the *Folder Options* dialog.
6. Click the *Close* button to close the *Configure Local Capture Folder* dialog.

▼ Specify the files that should not be added to Sohodox

Use the steps below if you do not want files of certain types (e.g. *.pdf) to be added from the watched folder (any files which meet the criteria you specify will not be added)...

1. Click on the Tools tab on the Ribbon Bar and then click on the Capture Folders >Manage Local Capture Folders. This will bring up the *Local Capture Folder* dialog.
2. Select the folder you want to modify. Click the *Modify...* button. The *Folder Properties* dialog will be displayed.
3. Select the *Skip files* tab.
4. In the text box enter the information about the file or files type you want to exclude and then click on the *Add* button. For e.g. if you do not want to add PDF files then enter *.pdf
5. After entering all the file names or file types, click the *OK* button to close the *Folder Properties* dialog.
6. Click the *Close* button to close the *Configure Local Capture Folder* dialog.

Files which are excluded will be automatically moved to the ExcludedFiles sub-folder of the watched folder.

▼ Automatically delete files from the monitored folder after they are added to Sohodox

Use the steps below if you want files to be automatically deleted from the monitored folder after they are added to Sohodox...

1. Click on the Tools tab on the Ribbon Bar and then click on the Capture Folders >Manage Local Capture Folders *Folder* button. This will bring up the *Local Capture Folder* dialog.
2. Select the Folder you want to modify.
3. Click on the *Modify...* button. The *Folder Properties* dialog will be displayed.
4. Select the *Delete files from the monitored folder* option
5. Click the *OK* button to close the *Folder Properties* dialog.
6. Click the *Close* button to close the *Configure Local Capture Folder* dialog.

▼ Automatically move files to the Added Files sub-folder after they are added to Sohodox

Use the steps below if you want files to be automatically deleted from the monitored folder after they are added to Sohodox...

1. Click on the Tools tab on the Ribbon Bar and then click on the Capture Folders >Manage Local Capture Folders button. This will bring up the *Local Capture Folder* dialog.
2. Select the Folder you want to modify.
3. Click on the *Modify...* button. The *Folder Properties* dialog will be displayed.
4. Select the *Move the files to the 'AddedFiles' sub-folder* option
5. Click the *OK* button to close the *Folder Properties* dialog.
6. Click the *Close* button to close the *Configure Local Capture Folder* dialog.

▼ Save files from application such as Word and Excel, directly to Sohodox

You can save a MS Word file or any file, from any application, directly in Sohodox by using the Local Capture Folder module. To do this...

1. Create a Folder on your local disk.
2. Select this folder to be monitored.
3. Now, when you have finished working on a Word file save it in this folder.
4. Now, this file will be automatically added in Sohodox.

If you wish you can automatically delete the files from this folder by using the *Delete files from the monitored folder* option.

19 Backup and Restore

Topics Covered

1. [Automatic Backup and Restore Utility](#) ³³⁰
2. [Backup Sohodox DB](#) ³³²
3. [Restore a backed-up DB](#) ³³⁴

19.1 Backup and Restore Utility

The Sohodox Backup and Restore Utility provides an easy and convenient method to backup the Sohodox database and restore the Sohodox database from backup if required.

How to backup the Sohodox DB:

1. Click Start > All programs > Sohodox Desktop > Sohodox Backup & Restore.
2. The *Sohodox Backup And Restore Wizard* window will be launched.
3. Select Backup option and click the Next button.
4. In the 'Backup file path' section, click on the [...] button to browse to the location where the backup file must be saved.
5. Click on *Advanced..* button for more backup options:
 - Compression Level:** Set the compression level for the backup. You can choose a level which creates a smaller sized backup file but takes longer, a level which does the job quickly but creates a relatively large backup file or a level which balances both backup speed and backup file size.
 - Split to volumes:** This option is used for splitting large backup files into multiple smaller pieces.
For e.g. A CD can usually hold around 700 MB of data. So if you wanted to store the backup file on a CD, it would not be possible if the size of the backup file was greater than 700 MB. In that case, you can use this option to ensure that the backup file is split into multiple pieces each not more than 700 MB in size; so you can store the backup on a set of CDs.
 - Encryption Method:** The backup file that Sohodox creates is in ZIP format, so it can be opened by any program which lets you open ZIP files. If you want to make your backup more secure, then you can choose to encrypt the backup file using AES128 bit encryption or AES256 bit encryption. AES256 bit encryption is more secure but it would slow down the backup process.
 - Password:** In case you have chosen A128 and A256 encryption, then enter the password. When restoring the DB again you will be prompted for the password. If you do not know the password at the time of restoring, then it would be almost impossible to restore the Sohodox DB from that backup.

6. Check *Run in background* option if you wish to run the backup process in the background.
7. Click *Start* option for start the backup process.
8. Click *Close* once the backup process has been completed successfully.
9. The backup of the Sohodox DB will be stored as a file with '.sxbak' extension at the specified location.

How to Restore Sohodox DB:

1. Click Start > All programs > Sohodox Desktop > Sohodox Backup & Restore.
2. The *Sohodox Backup And Restore Wizard* window will be launched.
3. Select *Restore* option and click next.
4. In the 'Backup file path' option, click on [...] button browse to the location where the Sohodox backup file (a file with a .sxbak extension) is stored.
5. In "*Restore folder path*" box specify a folder where the contents from the backup file will be restored. Make sure that you specify an empty folder.
6. In Advanced options text box enter the password if you had set a password when taking a backup of the DB.
7. Click *Start* to start the restore process.
8. Click *Close* once the DB has been restored successfully.

Note: If you receive any errors during the backup or restore process, you will need to click on the 'Open error log file' link on the last page of the Backup/Restore Wizard to view the error details.

Related Topics

[Manually backup a Sohodox DB](#) ^[332]

[Manually restore a Sohodox DB](#) 

19.2 Manually backup a Sohodox DB

You will need to use the SQL Server Management Studio to manually backup your MS SQL Server based Sohodox DB.

You will need to take a backup of...

MainDB_sdx and its Cache file i.e the MainDB_sdx_cache

You must also backup the *File Store* (the linked folder) , by zipping it.

In the example below we are backing up the *MainDB*.

MainDB_sdx and the MainDB_sdx_cache

Note: To completely backup a MS SQL SERVER 2012 DB you will need to back the DB and also its Transaction logs.

AND

In the folder where Sohodox Databases are located (this is usually the *C:\Sohodox Databases folder*), we will back-up the *MainDB sub-folder*

To manually backup the Sohodox DB:

1. Make sure Sohodox is not running. Click Start > All Programs > MS SQL Server 2012 > SQL Server Management Studio. The SQL Server Management Studio will now be launched.
2. Enter your login details and connect to the server.
3. Select the Databases folder in the left pane, all the databases will now be displayed in the right pane.
4. Select *MainDB_sdx* from the list. Right-click this database and select *Tasks > Backup Database...* option.
5. The *Backup Database* window will be launched.
6. Select the *Database*. Select the Backup Type as *Full*.
7. Click the *Add* button to specify a destination for the backup.
8. Click the *Options* tab. The options will now be displayed.
9. Select the *Append to existing backup set* option to append the current backup to existing file or device.

10. Check the *Verify backup upon completion* option to verify the backup upon completion.
11. Click the *OK* button to begin the Backup. Once the backup is complete you will get a confirmation message, click *OK*.
12. Now, select *MainDB_sdx_cache* from the list and follow step 4-11 to backup this DB.
13. Once you have backed-up *MainDB_sdx* and *MainDB_sdx_cache*, close the SQL Server Management Studio.
14. Now, open the folder where Sohodox Databases are located. This is usually the C:\Sohodox Databases folder. (You can also backup the entire Sohodox Databases folder by zipping it)
15. Locate the *MainDB* folder in the Sohodox Databases folder. Now, zip this folder.
16. Open the the ITAZ\Sohodox folder created under the folder designated as the Common Application Data folder in your Windows installation.
For Windows Vista/Windows 2008/Windows 7, this will be the C:\ProgramData\ITAZ\Sohodox folder.
For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Sohodox
17. Locate the multi-user.gdx file and zip it.
18. Now, copy these two files to a device (Pen Drive) or burn them on a CD

- To restore a backed-up copy of the DB see, [Restore a backed-up DB](#)^[334]

Related Topics

[Backup and Restore Utility](#)^[330]

[Export data to a CSV file](#)^[304]

[Export data to a Excel file](#)^[310]

19.3 Manually restore a backed-up DB

You will require the latest Backup copy of the *MainDB_sdx* and the *MainDB_sdx_cache*, and their linked folder which contains the File Store. Also see, [Backup a Sohodox DB](#)^[332]

To manually restore a Backed-up Sohodox DB:

1. Make sure Sohodox is not running. Click Start > All Programs > MS SQL Server 2012 > SQL Server Management Studio. The SQL Server Management Studio will now be launched.
2. Enter your login details and connect to the server.
3. Select the Databases folder in the left pane, all the databases will now be displayed in the right pane.
4. Right-click any database from the list and select *Tasks > Restore > Database...* option. The *Restore Database* window will be launched.
5. Select the Device option. Click this [...] button to specify the location of the backed up file ie *MainDB_sdx*. The backed up file will have a .bak extension.
6. Click the *OK* button to begin the restore. Once the restore is complete you will get a confirmation message, click *OK*.
7. Now, restore *MainDB_sdx_cache* from the list and follow step 4-6 to restore this DB.
8. Once you have restored *MainDB_sdx* and *MainDB_sdx_cache*, close the SQL Server Management Studio.
9. Now that you have restored the DB, you will now have to restore the DB's File Store i.e. its linked folder which contains the File Store.
10. Now, unzip this backed up folder that contains the File Store i.e. the *MainDB* folder and add it to the folder where Sohodox databases are stored. This is usually the C:\Sohodox Databases folder.

- The restore process may take some time depending on the size of the backed-up Sohodox DB being restored.

Related Topics[Backup and Restore Utility](#) ^[330]

20 Customizing Sohodox

Topics Covered

1. [Options Window](#) ^[336]
2. [Change Sohodox Main View Layout](#) ^[339]
3. [Customize List View pane](#) ^[340]
4. [Hide Details pane](#) ^[342]
5. [Specify the node to be selected on startup](#) ^[343]

20.1 Options Window

Use this window to set the various options available in Sohodox. This window is divided into several pages which are listed in the left panel of the window. Selecting a page in the left panel, will display that page in the right window.

User options


List Pane

Items per page

Specify the number of documents to be displayed in the *List View* pane.

Details Pane

Show Details Pane on the main screen

Select this option if you want to view the [Details Pane](#)  on the main screen

Auto-show preview of documents in the Details Pane

Select this option to preview the documents in the Details Pane.

Extract & index

Use built-in OCR engine

Select this option to use the built-in OCR engine of Sohodox

Use Microsoft Office OCR engine

Select this option to use the OCR engine of Microsoft Office

Use built-in PDF Viewer for...

PDF files created using Sohodox

Choose this option if you only want the PDF documents that are scanned using Sohodox to be displayed in the built in PDF viewer. In this case the PDF documents that are not created using Sohodox will be displayed using Acrobat Reader.

All PDF files

Choose this option if you want all PDF documents (created using Sohodox or not) to be displayed in the built in PDF viewer.

None (show all PDF files in the associated viewer)

Choose this option if you want all PDF documents (created using Sohodox or not) to be displayed in Adobe Reader. This feature will only work if Adobe Reader is installed on your

machine. It is recommended to use Adobe Reader 8.

Other User Options

Auto Save

Sohodox gives you the option to automatically save the changes made to a document's indexing information field's value. If you have entered indexing information in a data field for a document in Sohodox, but clicked on another document without saving it, click the *Auto Save indexing information* checkbox. This will enable the Auto Save option.

Default scan device

This drop-down list displays all TWAIN devices (scanners) available on your machine. Select a TWAIN device from this list to be used as default when scanning. If you select the Last used device option then Sohodox will automatically select the device you last used to scan documents.

Select the file types you want to automatically preview

The list displays the file types that can be viewed in the display pane in Sohodox. Use this list to specifically turn on or turn off the preview for selected file types.

Check the file types for which you want to see the preview and uncheck those file types for which you do not want to see the preview.

DB Options

On startup select...

Last selected node

Select this option if you want the last used node of the [Workspace](#)^[27] to be displayed when a DB opens.

Specific node

Select this option if you want choose a node of the *Workspace* to be displayed when a DB opens.

Select the node from the list that you want to be displayed when a DB opens.

Document Text Extraction

Maximum size of documents to extract text from

Specify the file size that should be indexed in this box. By default the limit of the file size is set to 1 mb. This means that files larger than 1 mb will not be indexed. For slower machines it is recommended to choose a lower value. A larger value affects the performance of MS

Access DB . This option is useful in a multi-user scenario where you can disable extracting and indexing of text on slow machines for large files without disabling full text search.

No limit: Select this option if you want to extract and index all the files irrespective of their size.

Thumbnails

Create thumbnail on Check-in

Check this option to generate thumbnails of documents, as soon as they are added to Sohodox. With this option enabled, it will take slightly longer to add documents because of the time taken to generate the thumbnail. Enabling this option is recommended only if you often use the thumbnail view instead of the list in the List View pane.

Enabling this option ensures that the thumbnail view is loaded quickly. If this option is disabled then when you select the option to view thumbnails of the documents in the List View pane, you will be informed that the thumbnails for the documents have not been generated. To generate the thumbnails, in the List View pane click the [Click here to generate the thumbnails now](#) link on the yellow information bar which appears. Enabling the Create thumbnail on Check-in option may cause performance issues.

20.2 Change Sohodox Main View layout

You can change the layout of Sohodox Main View to horizontal or vertical by using the *Layout* button.

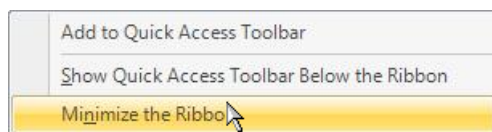
To Change the Layout:

1. In Sohodox, select *Home* tab.
2. Click the Layout drop-down arrow to change the layout.




3. Select the *Horizontal* option if you want a horizontal layout.
4. Select the *Vertical* option if you want a vertical layout.

- By default the *Horizontal* layout is displayed.
- The *Ribbon* bar can be minimized. To do this right click the *Ribbon* bar and select *Minimize the Ribbon* option. You can also double click the ribbon bar tabs to minimize it.




Related Topics

[View Documents as Thumbnails](#) 

20.3 Customize List View Pane

You can customize the List View Pane as per your requirement. The following customization is possible

To Change the number of Items being displayed in the List View pane:

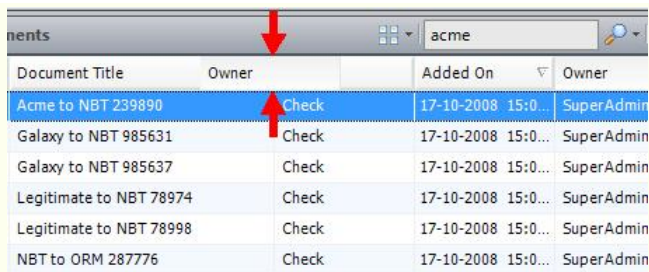
1. In Sohodox, click the [Sohodox button](#) .
2. Click the *Options* button. The *Options* window will now be launched.
3. From the *User Options* node select the *Specific node* option.
4. Specify the number of items to be displayed in the *Items per page* box.
5. Click the *OK* button to apply the settings.

To Sort the Items being displayed in the List View pane:

1. Click any column header to sort in the ascending or descending order of values in that column.
2. The column that is being sorted is represented with an arrow. If the column is sorted in ascending order then the arrow is pointed upwards, if the column is sorted in the descending order then the arrow will be pointed downwards.

To Change the order of the columns being displayed in the List View pane:

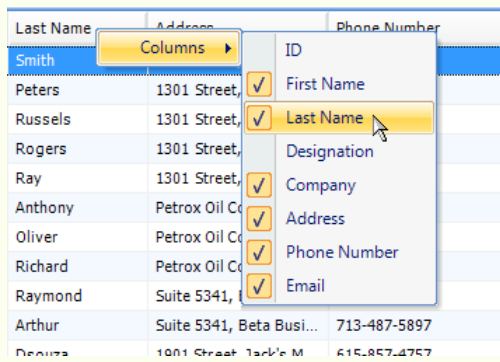
1. Click the column header that you want to move to another.
2. Drag this column header and drop it to the position that you want.



Document Title	Owner	Added On	Owner
Acme to NBT 239890	Check	17-10-2008 15:0...	SuperAdmin
Galaxy to NBT 985631	Check	17-10-2008 15:0...	SuperAdmin
Galaxy to NBT 985637	Check	17-10-2008 15:0...	SuperAdmin
Legitimate to NBT 78974	Check	17-10-2008 15:0...	SuperAdmin
Legitimate to NBT 78998	Check	17-10-2008 15:0...	SuperAdmin
NBT to ORM 287776	Check	17-10-2008 15:0...	SuperAdmin

To Hide columns being displayed in the List View pane:

1. Right click on any column header. The *Columns* menu will appear.
2. *From the* list of columns uncheck the column that you want to hide. The column will be hidden.
3. To display the column again check the column.



Last Name	Address	Phone Number
Smith		
Peters	1301 Street,	
Russels	1301 Street,	
Rogers	1301 Street,	
Ray	1301 Street,	
Anthony	Petrox Oil Co	
Oliver	Petrox Oil Co	
Richard	Petrox Oil Co	
Raymond	Suite 5341,	
Arthur	Suite 5341, Beta Busi...	713-487-5897
Deanna	1001 Street, Jack's M	615-857-4757

Related Topics


[View Documents as Thumbnails](#) ^[12]

[Hide Details pane](#) ^[342]

20.4 Hide Details pane

You can hide the *Details* pane which displays the details of documents by using the *Options* window.

To Hide the Details pane:

1. In Sohodox, click the [Sohodox button](#) .
2. Click the *Options* button. The *Options* window will now be launched.
3. In the *User Options* node, uncheck the *Show Details Pane on the main screen* option.
4. Click the *OK* button to apply the settings.

Related Topics

[Customize List View Pane](#) 

20.5 Specify the node to be selected on startup

You can hide the *Details* pane which displays the details of documents by using the *Options* window.

To specify the Node to be selected on Startup:

1. In Sohodox, click the [Sohodox button](#)^[342].
2. Click the *Options* button. The *Options* window will now be launched.
3. Select the *DB options* from the left pane. The DB options will now be displayed in the right pane.
4. From the *On startup select* section...
 - Select *Last selected node* option to display the last selected node on startup
 - Select the *Specific node* option to select a node to be displayed on startup. After selecting this option, select the node to be displayed on start up.
5. Click the *OK* button to apply the settings.

Related Topics

[Hide Details pane](#)^[342]

[Customize List View Pane](#)^[340]

21 Sohodox Companion Apps

What do you want to do?

[Sohodox Server](#)^[344]

[Sohodox Drive](#)^[347]

[Sohodox Mobile App](#)^[344]

[Sohodox Virtual Printer](#)^[347]

[Capture Folders](#)^[345]

[Sohodox Send To](#)^[348]

[Sohodox Login Manager](#)^[348]

21.1 Sohodox Server

The Sohodox Server gets installed when you install Sohodox in server mode on your machine. It must only be installed on one machine on the network and must always be running in order for any Sohodox application to work.

By default the Sohodox Server runs on port 7733. You must ensure that on the machine on which Sohodox Server is installed, the firewall is configured to allow connections on port 7733.

Sohodox Server can be configured to run on any other port. For this...

- On the Windows Start menu, click on Sohodox Admin Tools > Sohodox Server
- On your Windows System Tray, right click the icon for Sohodox Server
- Click on Settings...
- Sohodox Server Settings Dialog will be displayed
- In the text box labeled Port, enter the new port number and click on the Check button
- Sohodox will confirm if the new port can be used
- Now click on OK

The Sohodox Server will start listening for connections on the new port. Please ensure that you configure Windows Firewall on the server to allow incoming connections over the new port.

21.2 Sohodox Mobile App

The Sohodox Mobile App lets you access documents in your Sohodox DB via your mobile devices. iOS devices such as iPhone, iPad, iPod Touch as well as Android phones and tablets are supported.

The Sohodox Mobile App lets you search for and view documents, see their meta data and browse Folders. You can also delete documents.

More information about downloading and setting up the Sohodox Mobile is available at...

<http://www.sohodox.com/mobile-client-info>

21.3 Capture Folders

Capture Folders provide a quick and easy way to add documents to Sohodox while also categorizing/indexing them.

Capture Folders are folders which Sohodox monitors for new files. Each capture folder is linked to a Destination Profile in Sohodox. Whenever Sohodox finds a new file in a capture folder it is monitoring, it adds that file to the Sohodox DB specified in the Destination Profile along with any indexing information specified in the Destination Profile.

Capture Folders power a lot of the newer features in Sohodox and they will also be used by features planned for the future. The current features which use Capture Folders include Sohodox Printer, Sohodox Send To and Sohodox Drive.

Capture Folders are two types...

Local Capture Folders are provided largely for backward compatibility (they were part of the Folder Monitor feature) and for handling some special cases.

We recommend that unless you have a specific usage scenario which requires the use of Local Capture Folders you must always use Global Capture Folders. Local Capture Folders will not support some of the new features planned for future versions of Sohodox.

Here are some basic differences between Global and Local Capture Folders...

Global Capture Folders	Local Capture Folders
Need to be defined only at the server	Must be defined separately on each client machine
Monitored only at the server	Capture folders defined on a specific client machine are monitored on that client machine only
Available for use on any client machine. Each client machine can decide which Global Capture Folders should appear on them.	Available for use only on the client machine on which they are defined.
Depending on the load on the server it can take some time for documents to show up inside Sohodox. This is because any documents you add to a Global Capture Folder on a client machine are first stored in	Documents are added almost immediately to Sohodox.

a temp folder. The document is then uploaded from this temp folder to the appropriate Global capture folder on the server. From there it is picked up and added to Sohodox.	
-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

Default Capture Folder

On each client machine, you can mark a specific capture folder as the default capture folder. This can be either a Global or Local capture folder. Sohodox ships with one Global Capture Folder called MainDB which is set as the default capture folder. Any document you add to this Capture Folder gets added to the Sohodox MainDB.

If no Default Capture Folder has been set, then when needed Sohodox will display a list of all Global and Local Capture Folders from which you can choose the capture folder to which you can add documents.

Configuring Global Capture Folders on client machines

Though many Global Capture Folders may be defined on the server, each client machine may only be interested in using some of these. To configure which Global Capture Folders must appear on which machine...

Start Sohodox Desktop on the client machine

Click on Tools > Capture Folders > Manage Global Capture Folders...

Simple check the Global Capture Folders you wish to see

Click on Close to save the changes and close the window

21.4 Sohodox Drive

Note: When the text below uses the term Sohodox Document it is referring to any document that you have stored in Sohodox.

Sohodox Drive lets you access Sohodox documents via the familiar Windows Explorer interface. Sohodox Drive appears like any other drive under My Computer in Windows Explorer. Sohodox Drive also lets you add documents to Sohodox via drag and drop in Windows Explorer.

Apart from this, Sohodox Drive gives you access to any Public Capture Folders you have defined. This provides a very quick and easy way to add and categorize documents in Sohodox. You can also easily access all your checked out documents via Sohodox Drive.

Since Sohodox Drive integrates with Windows Explorer, it is also visible when you open the File Open Box from any Windows application. This means you can open a Sohodox Document for viewing from within any Windows application. This is especially useful when attaching documents to an email that you are sending (for e.g. via MS Outlook or Gmail running in your browser) or for viewing any documents from within its native application.

While you can open a Sohodox Document for viewing from any Windows application, editing the document and saving it back to Sohodox is not currently supported. Also creating a new document in an application and using the Save or Save As options in that application for adding the new document to Sohodox is not currently supported.

21.5 Sohodox Virtual Printer

The Sohodox Printer allows you to print a document from any Windows application and automatically add the printed document as a searchable PDF file in Sohodox. Example of some types of documents you may want to print via the Sohodox Printer include...

1. A web page you are viewing in any web browser
2. Receipts from online transactions
3. Reports from other software applications you use such as Accounting, CRM or ERP applications.

To use the Sohodox Printer, from any Windows application simply choose the menu option to Print (usually File > Print...) the document you are viewing. From the Print Dialog that is displayed select the printer named Sohodox and hit Print.

The document will be printed to the Sohodox Printer which will convert the printout into a searchable PDF file and add it to Sohodox.

If a Default Capture Folder* has been set for the machine, then the Sohodox Printer will add the PDF to that folder. If no capture folder has been set as default then Sohodox will display a list of all your Local and Global Capture Folders. You can then choose the capture folder you want.

*Note: Sohodox ships with one Global [Capture Folder](#) called MainDB which is set as default. Documents added to this capture folder are added to the SohodoxMainDB.

21.6 Sohodox Send To

The Send To feature in Sohodox allows you to quickly select one or more documents in Windows Explorer or your Windows Desktop and add them to Sohodox.

The Send To feature in Sohodox integrates with the Send To right-click menu option in Windows Explorer by adding Sohodox and Sohodox... as options to it.

To use this feature...

1. Select one or more files in Windows Explorer
2. Right-click and then select the Send To > Sohodox menu option
3. The selected documents will be added to the default Sohodox Capture Folder*
4. If no capture folder has been set as default then Sohodox will display a list of all your Local and Global Capture Folders.

If in step 2 above, if you chose the Send To > Sohodox... option instead of the Send To > Sohodox option, then Sohodox will display a list of all your Local and Global Capture Folders. Simply select the capture folder you want and the document will be added to Sohodox as per the Destination Profile linked to the selected Capture Folder.

*Note: Sohodox ships with one Global Capture Folder called MainDB which is set as default. Documents added to this capture folder are added to the SohodoxMainDB.

21.7 Sohodox Login Manager

Sohodox Login Manager lets you specify the location of the Sohodox server. It also lets you control when and how often Sohodox Desktop Client and other Sohodox Apps should ask you to login before allowing access. By default if after Windows startup you have logged in once to Sohodox Desktop client then Sohodox Drive will not prompt you to login.

Using the Login Manager you can configure Sohodox to...

- Automatically login as a specific user when Windows starts
- Prompt for login to Sohodox only once per Windows session
- Prompt for login every time access is required to a Sohodox application such as the Desktop Client, Sohodox Drive, Send To or Sohodox Printer.

22 Report Generator

Introduction:

Sohodox comes with built-in usage reports, letting you see documents added or modified by users on a daily, weekly or monthly basis. The reports can be exported as a PDF, HTML, MHT or XLS files. The following are the reports that are shipped with Sohodox.

Documents Added - Grouped by user

Use this to generate a report of all the documents added between two given dates grouped by user. By default documents added in the last 7 days are included in the report.

Documents Added - Daily report

Use this to generate a report of all the documents added between two given dates grouped by day. By default documents added in the last 7 days are included in the report.

Documents Added - Monthly report

Use this to generate a report of all the documents added between two given dates grouped by month. By default documents added in the last 3 months are included in the report.

To view the above reports select the *Workspace > Reports* node in the Navigation pane.

How To's

▼ Generate a Report

1. In *Workspace*, expand the *Reports* node and select the *Built-in Reports* node.
2. Double click the report that you want to generate in the left pane. The report will now open in its window.
3. The *Start Date* and *End Date* will be set as per the report default. If you wish you change the start date and end date. For example you can generate quarterly/half yearly/yearly reports.
4. Click the *Run* button to generate the report. The report will now be generated and displayed in the *Display* pane.

▼ Print a generated report

1. Generate the report that you want.
2. Click the *Print* button. The print dialog will be launched.
3. Select the printer to print the report.

▼ Export the generated report to a PDF file

1. Generate the report that you want.
2. Click the *Export* button and select *Export to PDF* option.
3. Save the PDF file on your disk.

The generated report can be also be exported as a HTML, MHT or XLS file.

23 Manage Email in Sohodox

Introduction:

Email Capture in Sohodox, downloads email messages from any POP3 mail server and adds them to Sohodox. This module will automatically extract fields (To:, From; Subject etc.) from the email message and enter them in Sohodox. This makes all email messages immediately

searchable.

Sohodox Email Capture runs as a Windows service and can download messages and add them to Sohodox even when Sohodox is not running.

In simple words you can automatically download and add to Sohodox, incoming messages from your Yahoo, Gmail, AOL, MSN or any other email account. Email capture can work with multiple email accounts. This means that you can archive emails from all your different emails accounts at a single place. So you do not need to login to your email account when you need to refer to an email. You can search and retrieve quickly from Sohodox.

To setup Email Capture, you will require the POP3 settings that are supplied by your email provider. You may also have to enable the POP3 feature for the email account. You can do this by logging into your email account (for e.g. Gmail) and enabling it in the Settings section.

If you have a Gmail account then click the link below for the POP3 settings...

<http://mail.google.com/support/bin/answer.py?hl=en&answer=13287>

If you have a AOL account then click the link below for the POP3 settings...

<http://help.aol.com/help/microsites/search.do?cmd=displayKC&docType=kc&externalId=217449>

If you have a Yahoo account, then the POP3 account settings are...

Incoming Mail (POP3) Server: pop.mail.yahoo.com (port 995 SSL[enabled])

How To's:

▼ How to launch Email Capture

To launch Email Capture, click on the Tools tab on the Ribbon Bar and then click on the *Email Capture* button.

▼ Add an email account to Email Capture

To add an email account...

1. Make sure the *Email Capture* window is being displayed
2. Click the *Add...* button. This will bring up the *Add New Server* dialog.
3. Specify a name for the email account in the *Server Name* box. This will be used as the display name (for e.g. *Work Email*).
4. In the *POP3 Server* box enter the POP3 server address. (e.g. for a GMail Account this would be pop.gmail.com)
5. Enter the port number in the port box. This is usually 110 but can be different. (e.g. for a GMail Account this would be 995)

6. Check the *SSL* box if your POP3 server requires a SSL connection.
7. In the *User Name* box enter your POP3 username, (in most cases this will be your email address)
Note: If your GMail account has a lot of messages, you may enter your username as recent:yourusername@gmail.com (replace yourusername@gmail.com with your actual email address). This way only messages from the last 30 days will be downloaded.
8. In the *Password* box enter the password that you use to login to this account.
9. Click the *Test* button to test the connection.
10. Click the *OK* button to save the settings.
11. Now, click the *Settings* button. The *Field Mapping* dialog will be launched.
12. Make sure *Email* is selected in the *Choose Target* drop-down.
13. Now map the source fields, to the fields of the *Email* Document Type. For e.g. Map the Subject field to the Document Title field, map the Send Date field to the Date field.
14. Click the *Ok* button to save the settings

▼ Start capturing email from your email account

Sohodox Email Capture automatically starts capturing email messages as soon as you add your POP3 email account and close the Window. If you have manually stopped the service using the Windows Service Controller application, you can start the service using the steps below...

1. Press the Windows key+[R] key combination to launch the Windows Run dialog
2. Type *services.msc* in the Run dialog and hit *Enter* to launch the Service Controller application
3. Select and right-click the service named *ITAZ Sohodox Email Capture Service* and click on *Start*

▼ Stop capturing email

To stop capturing email, you need to stop the Sohodox Email Capture service using the Windows Service Controller application. For this...

1. Press the Windows key+[R] key combination to launch the Windows Run dialog
2. Type *services.msc* in the Run dialog and hit *Enter* to launch the Service Controller application

3. Select and right-click the service named *ITAZ Sohodox Email Capture Service* and click on *Stop*

▼ Modify your email account settings

Follow the steps below to modify the details of your email account.

1. Launch Email Capture by clicking on the Tools tab on the Ribbon Bar and then clicking on the *Email Capture* button.
2. Select the email account whose settings you want to modify.
3. Click the Modify button. This will bring up the *Modify Server Details* dialog.
4. Make the required modifications and then click the *OK* button to close the dialog.
5. Click the *Close* button to close the *Email Capture* dialog.

▼ Import email attachments as separate documents

First setup Sohodox for Email Capture. Then follow the steps below to import attachments as separate documents....

1. Launch Email Capture by clicking on the Tools tab on the Ribbon Bar and then clicking on the *Email Capture* button.
2. Select an email account and click the *Settings* button. This will bring up the *Settings* dialog.
3. In the *Others* tab, check the box *Import email attachments as documents*.
4. In the *Field Mapping* tab, choose the target and map the fields. Then click the *OK* button to close the dialog.
5. Click the *Close* button to close the *Email Capture* dialog.

For example:

If an email message with a single attachment is captured, Sohodox will create two documents, the email message itself and the attached file. Both the documents will be linked to each other. The attached files will show up as links when you click the *Links* tab on the *Display Pane* of the email. You can select the document type which must be applied to the attached files.

▼ Specify a folder in which downloaded email messages will be temporarily stored

By default the downloaded email messages are temporarily stored in the *ITAZ\Sohodox*

Email Capture Data folder created under the folder designated as the Common Application Data folder in your Windows installation.

For Windows Vista/Windows 2008/Windows 7, this will be the C:\ProgramData\ITAZ\Sohodox Email Capture Data folder.

For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Sohodox Email Capture Data folder

These messages are removed from the folder as soon as they are processed and added to Sohodox. If you wish you can specify a different location for this folder. To do this...

1. Launch Email Capture by clicking on the Tools tab on the Ribbon Bar and then clicking on the *Email Capture* button.
2. Click the *Settings...* button. This will bring up the *Field Mapping* dialog.
3. Click the *Others* tab.
4. In the *Data folder* box, click the [...] to specify the new location of the *Sohodox Email Capture Data* folder.
5. Click the *Ok* button to apply the settings.

▼ Specify the time interval to capture email from your email account

You can specify a time interval to control how often Email Capture checks your email accounts for new messages. By default this time is set to 30 minutes. To change the time interval...

1. Launch Email Capture by clicking on the Tools tab on the Ribbon Bar and then clicking on the *Email Capture* button.
2. Click the *Settings...* button. This will bring up the *Field Mapping* dialog.
3. Click the *Others* tab.
4. In the Download interval box specify the time interval (in mins). You cannot set a time less than 30 mins.
5. Click the OK button to apply the settings.

24 Command line options

You can now run Sohodox in maintenance mode

Commands:

1. **/resetdbprofile /dbid=1**

This option resets the profile of the MainDB.

where, dbid is the ID of the DB.

2. **/resetuserdbprofile /dbid=1 /username=john**

This options resets the specified user's profile in the specified DB.

where, dbid is the ID of the DB.

and username is user name of the user whose profile you want to reset.

/resetuserdbprofile /dbid=1 /username=#all

This options resets all the users profile in the specified DB.

/resetuserdbprofile /dbid=1 /username=john,mike,mary

This options resets specified users profile in the specified DB.

3. **/resetuserprofile /dbid=1 /username=john**

This options resets the user profile itself.

4. **/resetcachedb /dbid=1/**

This options resets the cache of the specified DB.

5. **/reconfiguremaindb**

This option helps you change the connection details for the Main DB. This option does not let you change the DB type of the MainDB

6. **/reconfigureaccessmaindb /dbname=MainDB.gxdb or /reconfiguremssqlmaindb /dbname=MainDB_sdx**

As explained above the **/reconfiguremaindb** command is useful when connection details for

the MainDB change. But that command does not let you change the type of the MainDB (i.e. if it is MS Access based, then you cannot change it to MS SQL Server). To change the DB Type of the MainDB, use the `/reconfigureaccessmaindb` or `/reconfiguremssqlmaindb` commands for MS Access and MS SQL Server respectively. These commands are only useful in special situations and should only be used in consultation with our support team.

Usage:

You can use the commands in the following situation...

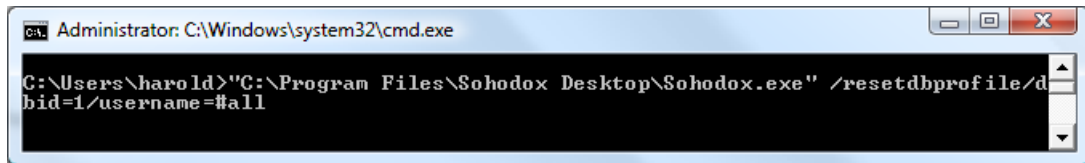
1. When you are navigating a Document type and you get the following error "The given key was not present in the dictionary". Then follow the steps below...

Close Sohodox and Open the Command Line Window.

In the Command Line window type the following at the cursor...

**"C:\Program Files\Sohodox Desktop\Sohodox.exe" /resetdbprofile/dbid=1/
username=#all**

(Assuming that Sohodox is installed in the default location.)



Now, hit the Enter key.

Sohodox should now launch and you should not get any errors.

If you still get the same error then follow the steps below...

Close Sohodox and Open the Command Line Window.

In the Command Line window type the following at the cursor...

"C:\Program Files\Sohodox Desktop\Sohodox.exe"/resetdbprofile/dbid=1

(Assuming that Sohodox is installed in the default location.)

Now, hit the Enter key.

Sohodox should now launch and you should not get error again.

2. When you have changed the location of the Main DB then you will have to use this command to reconfigure it otherwise you will get the following error "Failed to connect to the Main DB". To reconfigure the Main DB follow the steps below...

Close Sohodox and Open the Command Line Window on the machine on which Sohodox is installed in Server mode.

In the Command Line window type the following at the cursor...

"C:\Program Files\Sohodox Desktop\Sohodox.exe" /reconfiguremaindb

(Assuming that Sohodox is installed in the default location.)

Now, hit the Enter key.

Sohodox will now launch. A dialog will pop-up, in this dialog specify the location where the Main DB is located. (It is usually located in the C:\Sohodox Databases folder)

After this is configured, you will get a message confirming that Command Line action has been completed. Sohodox will now close.

****If Sohodox is installed on multiple machines**** Copy the multi-user.gdx file from the ITAZ\Sohodox folder located on the machine on which Sohodox is installed in the Server mode. Now paste the copied multi-user.gdx file in the ITAZ\Sohodox folder on all the machines on which Sohodox is installed.

3. When you want to reset the cache for the DB, follow the step below...

Close Sohodox and Open the Command Line window on the machine on which Sohodox is installed in Server mode.

In the Command Line window type the following at the cursor...

"C:\Program Files\Sohodox Desktop\Sohodox.exe" /resetcachedb /dbid=1

(Assuming that Sohodox is installed in the default location.)

Now, hit the Enter key.

Sohodox will now launch and automatically reset the cache for the specific DB.

After this is configured, you will get a message confirming that Command Line action has been completed. Sohodox will now close.

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