

# Veco User Guides – Document Management

## **Introduction**

“Veco-onesystem” includes a powerful “Document Management” facility to search for documents and e-mails in your system.

“Documents” are typically letters and spreadsheets created manually by your members of staff; letters, reports, and statements created automatically by the “Veco” software; and also paper letters and invoices (etc) scanned into your system.

“E-Mails” are messages sent to any of your “Veco” contacts, messages received from any “Veco” contact, and also e-mail messages sent automatically by the “Veco” software. They can reside either in your own personal Microsoft Outlook e-mail folders or in public folders of a central Exchange Server.

## Overview

A “Document Management System” (DMS) is a set of programs used to track and store electronic documents and/or scanned images of paper documents.

Most methods for managing documents address the following three main areas:

- Location

Where will documents be stored? Where will people need to go to access documents?

“Veco” has a specific folder called “Documents” into which reports and letters are stored automatically, but also allows documents to be stored in any folder or subfolder within your system. For e-mail messages, any Microsoft Exchange Server public folder can be used to store central copies of incoming and outgoing messages.

- Filing

How will documents be filed? What methods will be used to organise or index the documents to assist in later retrieval? Document management systems will typically use a database to store filing information.

“Veco” requires that the documents are stored in their original format. Microsoft provides a facility called “Windows Desktop Search” that automatically “indexes” the documents making later retrieval possible. Documents can be any format, but typically they would be:

- Word documents
- Excel spreadsheets
- PDF documents
- Scanned images
- E-mail messages

Any documents (letters, statements, invoices, etc) created automatically by “Veco” or “TaskCentre” are automatically stored in the correct location and indexed by Windows Desktop Search.

- Retrieval

How will the documents be found? Typically, retrieval encompasses both browsing through documents and searching for specific information.

“Veco” provides a comprehensive facility to quickly search and locate documents and e-mails based on keywords. Keywords can exist actually within the text of a document, or within the “properties” of a document.

## Components

Document management systems commonly provide the following components:

- Metadata

Metadata is typically stored for each document and may include the date the document was stored, the author of the document and certain keywords which could be extracted from the document automatically or added by the user.

Some systems also use optical character recognition (OCR) on scanned images, or perform text extraction on electronic documents to assist user in locating documents by identifying keywords or providing full text search capability.

- Integration

Many Document Management Systems attempt to integrate document management into other applications.

“Veco” automatically provides direct integration with “Windows Desktop Search” for quick retrieval of documents based on keywords specified by the user. From a list of results the user can directly open a document without knowing where the document is actually stored within on the PC or server.

- Capture

Images of paper documents can be made using scanners or multi-function printers. OCR software is often used in order to convert digital images into machine readable text.

- Indexing

Indexing is used to track electronic documents. Windows Desktop Search will index the names of documents, full text within a document, and the keyword properties of each document. “Veco” uses this information in order to find documents.

- Storage

Storage of documents for retrieval by “Veco” is generally in a central server folder or series of sub-folders. E-mails are stored within Outlook and Exchange Server.

“Veco” provides a central folder called “Documents”, but it is also possible to create separate sub-folders (for example, each property or estate may have its own sub-folder).

- Retrieval

Documents need a quick method of retrieval.

“Veco” provides a general facility from the main menu called “Document Finder” into which the user can enter specific keywords used to find documents. Also, when looking at specific details such as a contact, property, or tenancy, etc, the “Document Finder” will automatically select keywords such as references, names, and postcodes to be used in the searching.

## Installing Windows Search 4.0

Windows Search 4.0 needs to be installed on every workstation where each copy of Veco has been installed.

Also, Windows Search 4.0 needs to be installed on any server where centralised documents will be stored. This allows the user to search for documents held centrally.

Download Windows Search 4.0 from the Microsoft website.

(Windows Search 4.0 does not need installing on PCs running Windows Vista)

## Configuring Windows Search 4.0

Once installed, the server version of Windows Search 4.0 needs to be configured to index the central Veco document path. This path is the “Start In” path on the Veco shortcut.

1. Right-Click on the “Search” icon in the Task Bar
2. Click “Windows Desktop Search Options”
3. Click “Modify”
4. Select and tick the required folder.
5. Click “OK”
6. Alternatively, click “Advanced”
7. Choose the tab “Add UNC Location”
8. Enter the UNC Path where documents are located.
9. Click “Add”
10. Click “Ok”
11. WDS will start indexing the chosen folders. This may take some time on a server (or PC) where there are a large number of files to be indexed.
12. In Veco

Please note that the above should only be completed for the Windows Search 4.0 install on the server. Each PC does not need to be configured to index the same central document path.

## Configuring Veco

“Veco” itself needs to be configured to read the Windows Search 4.0 indexes directly from the server rather than from the individual PCs.

1. Choose the option “Admin : Templates : Desktop Search Settings”
2. Enter the name of your server (eg SERVER)
3. Enter the folder name of the shared folder containing the Veco documents (or other documents you wish to be searchable).
4. Note: there is no need to enter backslash characters – ie Do not enter [\\SERVER](#), etc
5. Click “Add”

6. Add any other folders
7. Click “Save”

### **E-Mail Searching**

In order for all users to search e-mails, it is necessary for each user to have access to a shared public folder or shared e-mail account.

If the customer has Exchange Server, it will be necessary to configure WDS to search a central public folder.

Find out which folder the customer wishes to use for storing Veco e-mail, and then configure this folder as above.

If it is not possible to select the public folder, the local Outlook will need to be configured to allow “Cached Exchange Mode”. This is done from “Tools : E-Mail Accounts” in Outlook.

Alternatively, it may be possible for the customer to set up a single IMAP e-mail account and this can then be configured in WDS. The customer would then need to copy/move any incoming e-mails from their personal e-mail box to the shared folder.

## Creating and Storing Documents with “Veco”

The “Veco” Document Management system allows for the retrieval of the following electronic documents:

- Word documents
- Excel spreadsheets
- PDF documents
- Scanned images

### Automatic Documents

The following documents are created and stored automatically by the “Veco” software:

- Owner Statements
- Tenant Demands
- Fee Invoices
- Mail Merge letters

Documents are automatically stored in the folder:

<root folder>\<your company name>\Documents

Where <root folder> can be determined by looking under the main menu option “Help : About Veco-onesystem”

### Manual Documents

Any document can be created manually by a user and retrieved later by using the “Veco” Document Finder facility.

Ensure that any manually created documents, such as Word or Excel documents are “Saved” in the folder:

<root folder>\<your company name>\Documents

Where <root folder> can be determined by looking under the main menu option “Help : About Veco-onesystem”

Your systems administrator may also have re-configured the “Windows Desktop Search” facility of your workstation to allow you to save documents in another central folder on your server.

Remember that if you store any documents in your own “My Documents” folder or anywhere on your C: drive, other users within your organisation will not be able to locate and retrieve them later.

### Keyword Properties

To ensure that unique documents are located quickly by the “Veco” Document Finder “keywords” and other “properties” such as a “title” and “author” can be assigned to most documents.

When creating a Word or Excel document:

1. Click “File : Properties”
2. Click the “Summary” tab
3. Enter any special words you wish to use to make later retrieval easier

4. Click “Ok”

For any other types of documents that cannot be “edited” directly, such as photographs, PDF files, scanned images, etc it is possible to add keywords as follows:

1. Locate the file in “My Computer”
2. Right-click on the document
3. Click “Properties”
4. Click the “Summary” tab
5. Enter any special keyword you wish to make later retrieval easier
6. Click “Ok”

## Creating and Storing e-mail messages with “Veco”

The “Veco” Document Management system allows for the retrieval of e-mail messages both sent and received from Microsoft Outlook.

### Automatic e-mails

Any e-mail created within “Veco” is actually sent via your own Outlook system.

“Veco” will automatically create e-mail messages where applicable for:

- Owner Payments
- Owner Statements (with PDF attachments)
- Mail Merge letters
- “Matching” property lists

### Manual e-mails

Manual e-mails can be sent in the normal way from Outlook. As long as the e-mail address used is stored against a “Veco” contact or user any sent or received e-mail messages will be found by the “Veco” Document Finder facility.

### Centralised e-mails

Please note that the “Veco” Document Finder will normally only search your own personal Outlook. So, you will not be able to find e-mails messages sent and received on a different computer.

To allow all messages, whether sent or received, to be located by the “Veco” Document Finder it is necessary to store them in a “public” folder which is accessible from all computers.

Your systems administrator should be able to create a public folder in Exchange Server, and re-configure your “Windows Desktop Search” to locate e-mails in this public folder.

(If your company does not use Exchange Server other software for centrally storing e-mail messages is available. Eurolink can advise your company on this, if required.)

It is recommended that the public folder consists of two sub-folders. These might typically be called:

- Veco Inbox
- Veco Outbox

As e-mail messages are sent or received in your Outlook, they can be moved to the relevant public folder by dragging and dropping from your Inbox.

## Document Finder

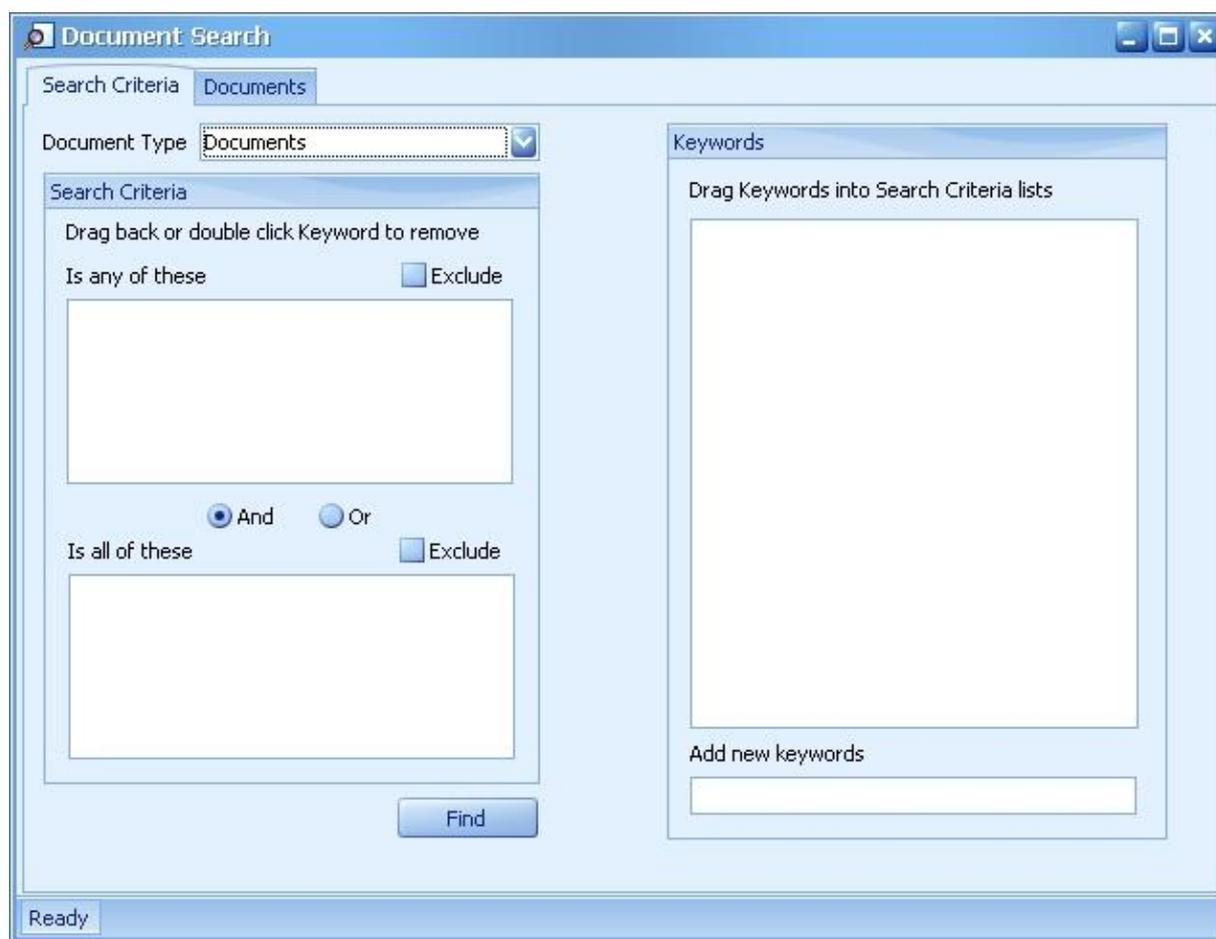
Any documents and e-mails can be searched and retrieved by using the “Veco” Document Finder. This is available in two areas:

- As a tab on Contact Details and Property Details
- From “Actions” menu on all Details forms

From the Contact and Property Details forms, a “Documents” tab allows quick access to all documents and e-mail messages that relate in some way to the Contact or Property.

Alternatively, more detailed document searching can be done from the “Document Finder”.

Document Finder can be accessed by clicking “Actions : Document Finder” on the main menu.



If opening this window from a particular contact, property, or tenancy, etc, the “Keywords” list will automatically show the reference, name, and postcode. Additional keywords can be added to this list by typing a phrase into the box “Add new keywords” and then pressing enter.

To use any of the keywords in the list for searching documents and e-mails, drag the words from the keywords list into the “Search Criteria” boxes.

It is possible to build up lists in two “criteria” boxes:

Document Finder will search for ANY keywords in the box labelled “Is any of these”. In other words, the document does not have to include all of the keywords somewhere in the text of the document in order to be included in the search results.

Document Finder will search for ALL keywords in the box labelled “Is all of these”. In other words, the document must include all of the keywords somewhere in the document in order to be included in the search results.

Choose a “Document Type” to search for: “Documents” or “E-mails”

When all keywords have been selected, click “Find”.

The display will change to show all documents that match or contain the keywords specified.

From the list of results, double-click a document name to open the full document or e-mail.