GLOBODOX

DOCUMENT MANAGEMENT SOFTWARE

Help Manual

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1 Introduction

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

Guidelines

- Read the topics in this section and then go through the Getting Started 31 section.
- Once you have familiarized yourself with the Globodox user interface, please consider reading the following sections...

  - ❖ Add a Document 50
  - ❖ Scan and Add a Document 61
  - ❖ Index Document 97
  - ❖ Folders 203
  - ❖ Tags 217
  - ❖ Search a Document 225

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

  - ❖ Stack Types 136
  - ❖ Document Types 125
  - ❖ Globodox DB 307
  - ❖ Globodox Security 356
  - ❖ Globodox Workflow 455

Note for users upgrading from Version 4.x

Globodox features a completely redesigned user interface and introduces some new concepts. We recommend that you read the Introduction to new concepts in Globodox 21 section, the FAQ's for users using Version 4.x 23 section and also the What's New section before reading other parts of this help file.

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1.1 What is Globodox

Globodox is a document management application. It provides you with all the tools and features you will need to create, manage, secure and query a database of all your paper and electronic documents. Globodox 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.

Benefits of using Globodox

Some of the benefits of using Globodox 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 Globodox by simply dragging and dropping them into Globodox. You can add your paper documents to Globodox by scanning them using a scanner and the built in scanning tools in Globodox.

Inside Globodox, 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.
- Group documents into different types of stacks. For e.g. you can create a stack type called Supplier and group documents into different stacks (one for each supplier).
- Link documents to each other

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

Globodox also features a comprehensive multi-level role based security framework which lets you control access on a per user basis.

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1.2 What's New in Globodox

Click here to view the *What's New* page on the Globodox web site.

1.3 System Requirements

Supported Windows Operating Systems

- Windows Server 2012 (64 bit)
- Windows 10 (32 bit/64 bit)
- Windows Server 2016
- Windows Server 2019

Globodox Server Requirements

Operating System: Globodox can be installed in Server mode on any of Supported Windows Operating system. We recommend you use Windows Server 2012**.**
Processor: 2 GHz Dual Core processor or better
Memory (RAM): 4GB server memory minimum. We would recommend 8GB or above for better performance.
Free hard disk space for software installation: 300MB
Hard Disk space to store documents: Depends on the total size of your documents.

Microsoft.Net Framework 2.0 and 4.0 (If not present, it will be automatically downloaded and installed.)
Web Server: IIS must be enabled on the server machine if browser based access via Globodox Web Client is required.

Globodox Desktop Client Requirements

Processor: 1GHz processor (2 GHz or more recommended)
Memory (RAM): 2GB recommended
Free hard disk space for software installation: 200MB
Microsoft.Net Framework 2.0 and 4.0 (If not present, it will be automatically downloaded and installed.)

Note: *In case you are using a MySQL DB, MySQL ODBC Client Driver 5.3.4 (32 bit) or higher must be installed on the Client machines.*

Globodox Web Client

Browser:
Mozilla Firefox 3.6 or above.
Internet Explorer 8 or above.

Supported Databases

- **MS SQL Server 2000 and higher:**
  One machine on the network running MS SQL Server is required if you want to create and use MS SQL Server based Globodox DBs.
- **MS SQL Express:**
  One machine on the network running MS SQL Server Express is required if you want to

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create and use MS SQL Server Express based Globodox DBs.

- **MySQL 5.0 and higher**:
  One machine on the network running MySQL Server is required if you want to create and use MySQL based Globodox DBs. MySQL ODBC Client Driver 5.1.4 or higher must be installed on the Client machines.
- **MS Access**:
  You do not need MS Access to be installed on your machine to create or use MS Access based Globodox DBs. Globodox installs all the files/drivers it needs to create MS Access based Globodox DBs.

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1.4 Bug Fixes

Click here to view the *Bug Fixes* page on the GLOBODOX 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...

https://www.globodox.com/globodox-support/upgrading-from-previous-versions-of-globodox/

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2.1 Introduction to changes in Globodox 9

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

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

   - Upgrading Globodox on the server machine
     By default the Globodox Server is configured to listen on port 5511. 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 Globodox on the client machine
     While installing the upgrade setup on the client machine, you must enter the URL of the machine on which Globodox Server is installed along with the port it is listening on. For example, if Globodox server is installed on a machine named MACHINE1 having IP address 192.168.0.2 and listening on port 5511 then you can enter the URL of the Server in the setup as…

     http://MACHINE1:5511

     OR

     http://192.168.0.2:5511

     Click here 565, to learn more...

2. **Login**

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

     Click here 569, to know more

   - Logout behavior has changed
     Starting from Globodox version 9, users will not be logged out of Globodox when they close the Globodox Desktop Client. This is done so that the Globodox Apps that are installed on the machine keep running even when Globodox Desktop Client closes.
     If you would like to change this behavior, you can do so in the Options dialog in the Globodox Desktop Client. You can configure Globodox 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 Globodox Login Manager

3. **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

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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 Globodox.

3 For Users Upgrading from Version 4.x or Earlier

This section has been specially written for the reference of users upgrading from Version 4.x or earlier versions. We discuss some limitations of Version 4.x 21 and how the current version overcomes these limitations. This is followed by the FAQ section 23. Finally, you can also learn about how to upgrade your Version 4.x databases 26.

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3.1 Introduction to New Features in Globodox

This topic is only intended for users upgrading from Globodox version 4.x or earlier

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

Limitations with Version 4.x

Earlier versions of Globodox, 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. Let us look at this using an example...

For example:
If you had to manage two types of documents (Checks and Photographs), and wanted to store *Photographer Name* and *Place Taken* with each photograph and *Check Date* and *Check Number* with each Check, you could take two approaches...

Approach 1: Single document per record

In this approach, you could choose from 2 options:

Option 1: Single Database
You could store a single document (either a photo or a check) in every record of the database. 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. This option 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.

Limitation: If you wanted to store specific information for each type of document, there was no easy way to do it in version 4.x.

Option 2: Multiple Databases
You could create different databases for Photographs and Checks, with each DB containing indexing fields specific to the type of document it was intended to hold. This option would enable you to manage documents of a single type using dedicated databases for each type.

Limitation: If you wanted to look for documents of different types, you would have to open and close different databases.

Approach 2: Multiple documents per record

In this approach, you had to manage groups of documents (Checks and Photographs), where each record could contain multiple related documents (Checks or Photographs or both) and the indexing information entered was for the entire group of documents.

Limitation: There was no way to specify additional indexing information for specific documents which were already part of a record. This made it harder to search for and locate a particular document.

New features in Globodox

Globodox significantly increases the number of ways you can index/classify a document. Let us look at the 3 major approaches to index/classify documents:

Approach 1: Folders and Tags
The simplest method offered is of arranging documents in a folder hierarchy. Users can create

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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.

Approach 2: Document Types and Stack Types
For a more structured indexing approach, you can use the concept of Document Types and Stack 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.

Now suppose these checks are from your customers. You want to be able to find a particular customer by their name, email id etc. and then be able to view checks received from them. For this you would use Stack Types. Simply create a Stack Type called Customer with indexing fields such as *Customer Name, Email, Telephone* etc. Now create a stack for each customer and add all their checks to their stack.

The big difference from the earlier version is that the documents (e.g. Checks) you add to the Stack, retain their indexing information. These documents can still be in a folder, still have text tags attached and still be of a particular Document Type. You can have as many Stack Types as you want.

Note:
A document can at anytime be part of only one stack. When a stack is deleted then all documents in the stack will also be deleted. If you do not want this, remove the documents from the stack before deleting the stack.

As you can see, the functionality of records in the earlier version has now been split between Document Types and Stack Types.

Approach 3: Links
Another powerful feature is the ability to link any document to another document or stack. You can have any number of links between documents and stacks.

The combination of all these features enable you to build an extremely flexible and useful document repository.

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3.2 FAQ for Users Using Version 4.x

This topic is only intended for users upgrading from Globodox version 4.x or earlier

What is Globodox? What happened to doQuments?

doQuments is now renamed to Globodox

Can I upgrade from doQuments to Globodox?

Yes you can easily upgrade from doQuments to Globodox. All your existing doQuments DBs will be automatically migrated to the latest version of Globodox. This can be done using the DB upgrade utility. If you wish to convert your DBs, please contact us at support@itaz.com.

Why does it look so different?

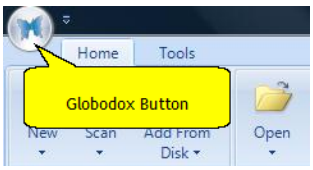
The Globodox user interface has been completely redesigned and is now similar to the familiar MS Outlook user interface.

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 Globodox 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 Globodox button. You will find this button at the top-left corner of the main window. There are fewer options available from the Globodox button compared to the options available from File menu of version 4.x. 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?

We no longer use the term *record.* Records are now called Stacks. You can now have different types of records (i.e. with different fields) and each type of record is known as a Stack Type. You can create as many Stack Types as you want and as mentioned earlier each stack Type can have its own set of indexing fields. This means that you don't need to create different DB's to maintain different type of data or documents. They all can be stored in one DB.

For example:
You can create one Stack Type to maintain your employees' details and another for your customers' details. For more info see, Stack Types 136

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 managing your documents as

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compared to using Folders and Tags.

Where is Security Manager? Where is Security DB?

To simplify deployment and configuration, we have incorporated the functionality of the Security Manager into Globodox itself. Also, there is no separate Security DB. All the security settings are stored in the Globodox Master DB called MainDB.gxdb. This DB contains the data as well as the security settings.

Where are User Manager and Connection Manager?

The User Manager and the Connection Manager are now available as Users and Connected Users node from the Settings pane.

What is Master DB?

Most reasons which required the creation of different DBs in earlier versions do not exist now. Though multiple DBs are still supported, we would highly recommend using a single DB to manage all your documents. We already ship with a DB called MainDB.gxdb ready for your use.

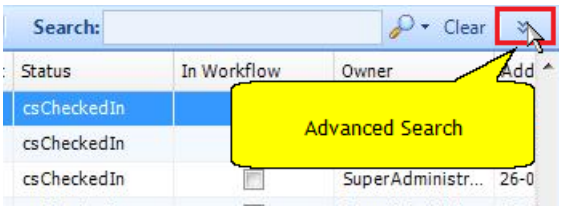
The MainDB.gxdb is also designated as the Master DB. This means that apart from your indexing data it also holds security information about Roles, Users and Groups. Any additional DBs you create can only hold indexing data and the Master DB will always be used for Security Data.

Where is Data Field Manager?

The Data Field Manager is available as the Fields tab while creating or modifying a Document Type or Stack Type. For more info see, Fields tab 102

I can't find the Advanced Query dialog?

The Advanced Query dialog has been replaced with the Advanced Search pane. This pane is available by clicking the double arrow button next to the Quick Search.



Where are System Folder, Temp Folder and Storage Folder?

The System Folder and the Temp Folder are no longer used in Globodox. The Storage Folder is now referred as the File Store 318.

Why does the MainDB open by default? Why doesn't the DB List show up when I start Globodox?

This is because the MainDB is set as the default DB, i.e. the DB which is opened by default when you start Globodox. You can change the default DB 326 if you wish.

Where is Event Log Manager?

The Event Log Manager is now available as the Event Log node from the Settings pane.

Can I use my existing DB with Globodox?

Yes, you can use your existing DB's (version 4) with Globodox but only after they have been converted to the new format. The Globodox DB structure is VERY different from the version 4 structure. The DBs in Globodox have a .gxdb extension. Also, if you use MySQL based DBs,

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please note that Globodox only supports MySQL 5 or higher. Earlier versions of MySQL are no longer supported.

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

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

I can't find the Backup and Restore tool?

A built-in Backup and Restore tool is currently not available as it will be far more efficient to backup the DB using the backup tools provided by your database. Click on the following link for instructions for easily backing up and restoring your DB: Backup and Restore 429

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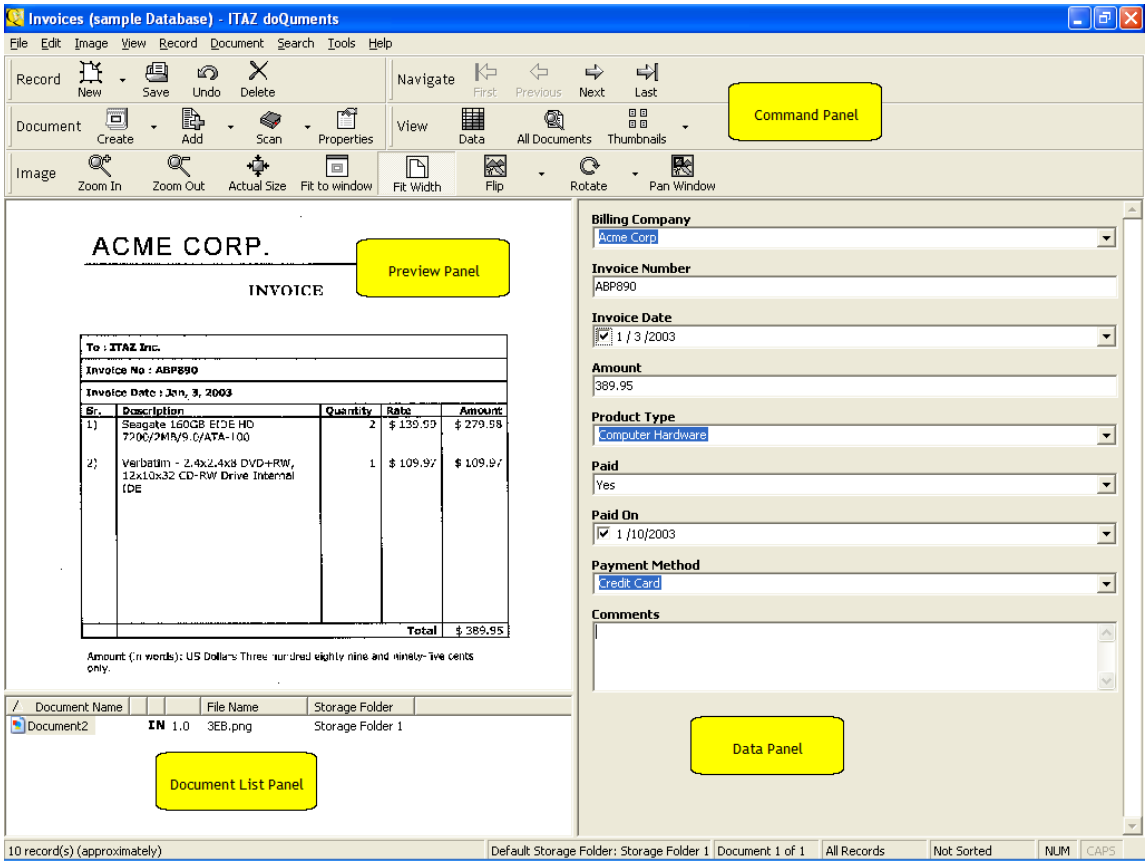
3.3 Upgraded doQuments 4.x DBs

This topic is only intended for users upgrading from Globodox version 4.x or earlier

Below is a screenshot of the Invoice DB, one of the two sample DBs available with the doQuments Enterprise Edition.



The doQuments Main Window consisted of the following sections:

- **The Command Panel:** It consisted of the menus as well as the toolbars. The toolbars contained buttons which gave you quick access to the commonly used features and commands of doQuments.
- **The Data Panel:** It displayed the data of every field defined in the currently open doQuments DB.
- **The Document List Panel:** It displayed the list of documents which were associated with the current record.
- **The Preview Panel:** It displayed the details or the preview of the currently selected document in the document list.

In doQuments, we saved every document and the indexing data in a record. The user-interface of a record contained the Preview Panel, the Documents List Panel and Indexing Data Panel where the indexing fields were located.

Once the Invoice DB has been upgraded using the DB upgrade utility, you can open it Invoice DB in Globodox. If you wish to convert your DB then contact us at support@itaz.com.

When you start Globodox, a login box will appear. The default username and password to login

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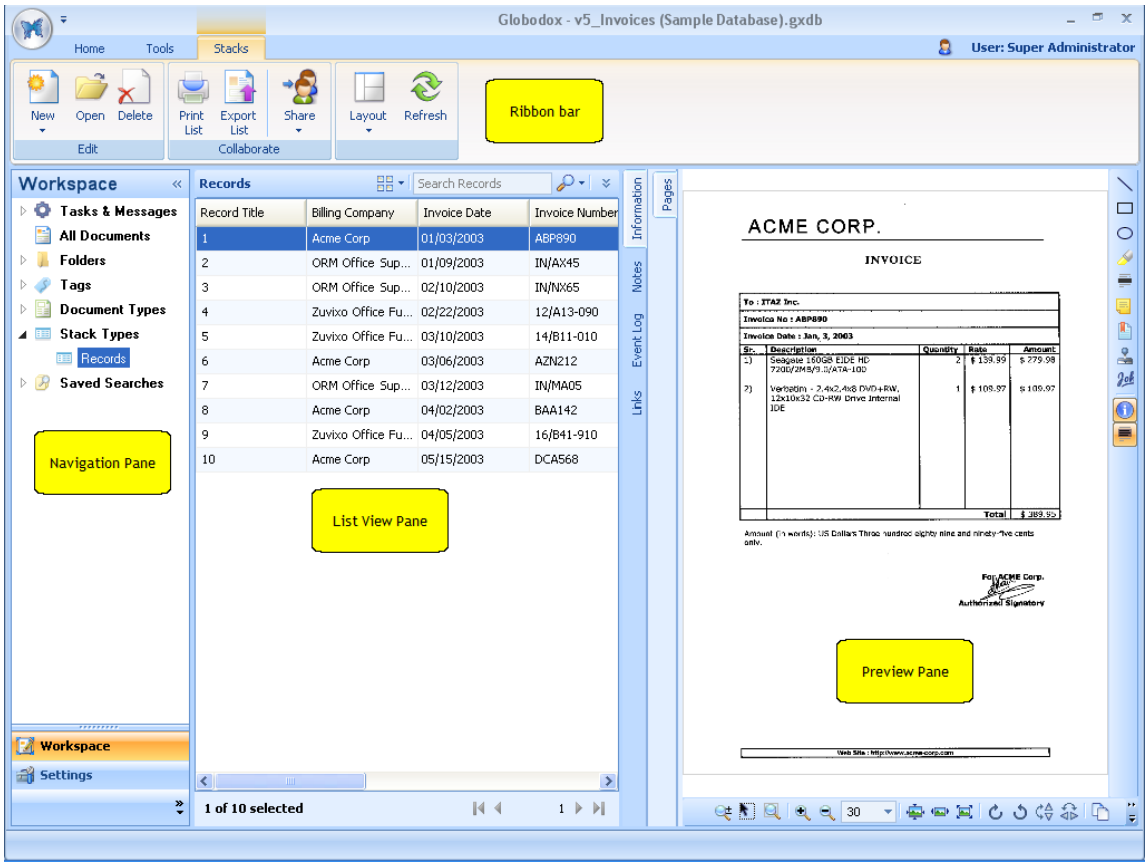
to Globodox is *superadmin.*

To open a DB...

1. In Globodox, click the *Globodox* button.
2. The Globodox DB List will be displayed.
3. Select the Invoice DB from the list to open it.



Globodox has a completely re-designed user interface. The Globodox Main Window consists of the following sections:

- **Ribbon bar:** 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. (It is similar to the Command Panel of doQuments)
- **Navigation Pane:** The Navigation pane appears on the left side of Globodox 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.
- **List View Pane:** This pane lists items related to the navigation item selected in the Navigation pane.
- **Preview Pane:** It displays the details or the preview of the currently selected document in the List View Pane.

In Globodox, records are now known as Stacks. When your upgrade your doQuments DB to Globodox DB, all the records of that DB will be converted to Stacks and will be displayed in the "Records" Stack Type. If you want to view your "Records" stacks, then click the Stack Types

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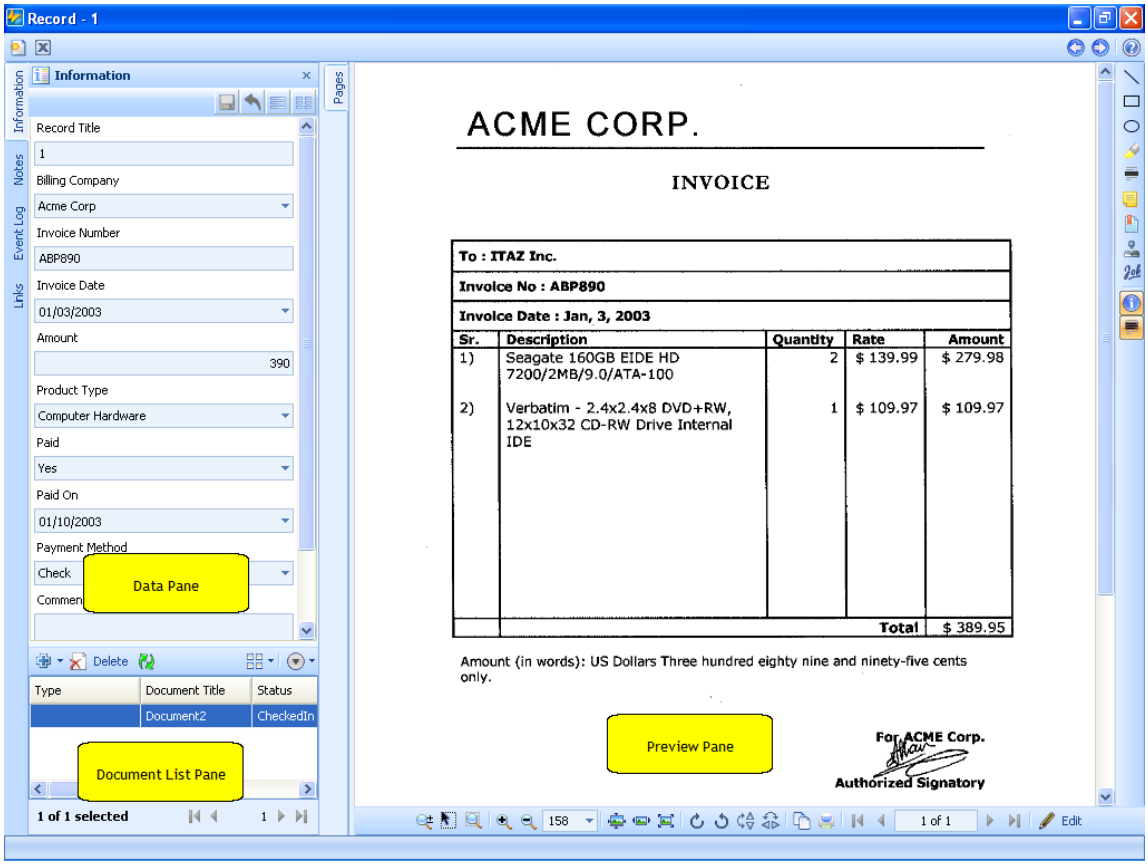
node in the navigation pane and select the "Records" Stack Type. All you records/stacks will now be displayed in the List View Pane.

You can double-click a Stack displayed in the List View Pane to open it in its own window.



The Stack Details Window is similar to the doQuments Main window.

You can navigate to the next record by using the Navigation buttons at the top right corner of the window.

Now, lets add a new record and then add documents to it...

To create a new Record/Stack:

1. Select the "Records" Stack Type.
2. Click the *New* button of the *Home* tab to create a record/stack. The *New Stack* window will now be launched.
3. Enter appropriate descriptive/indexing information of the Stack in the respective data fields.
4. Click the *Save* button on the Information bar to save the information.

To Add document to a Record/Stack:

1. In the Document List pane...

   Click the *Relate* button and select the *Relate to existing Document(s)* option to add an existing document to the Stack.
   Click the *Relate* button and select the *Add Document(s) from disk and Relate* option to add a document from disk to the Stack.

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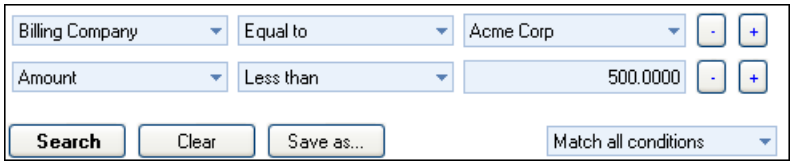
Click the *Relate* button and select the *Scan document and relate it* option to scan and add a document to the Stack.

2. Assuming that you have selected *Add Document(s) from disk and Relate* option. 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 document(s) will now be displayed in the Document List pane.

Search in Globodox is much quicker than doQuments. In Globodox, you can search for documents using the *Quick Search* or the *Advanced Search* (similar to doQuments Advanced Search).

To Search a Record/Stack:

1. Select the "Records" Stack Type.
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.
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 *Search* button to begin the search. The search results will be displayed in the *List View* pane.

All the documents that are added to the records can be accessed from the *All Documents* node. If you wish to search only documents then you will need to go this node.

To Search for Documents:

1. Select the *All Documents* node in the *Navigation* pane. The documents will now be displayed in the *List View* pane.
2. Click in the *Quick Search* box and type a word which best describes the document you are looking for. The Quick Search, looks for the text that you have entered in the Document Title, File Name and the Document Text. For the Full Text search to work the documents text must be extracted for more info see, Document Full Text Search - FAQ 233
3. Click the *Search* button or hit the *Enter* key to begin the search.
4. The search results will be displayed in the *List View* pane.

To Delete a Stack:

1. In Globodox, select Workspace > Stack Types in the Navigation pane.
2. Now, select a Stack Type from the Stack Types node.
3. Select the Stack you want to delete and click the Delete button of the Home tab.

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Now that you are familiarized with Globodox you can go ahead and explore it on your own.
It is recommended that you also go through the Getting Started 31 tutorial.

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4 Getting Started

This section introduces you to the basics of using Globodox. You begin by learning how to log-in to Globodox 32. Next, familiarize yourselves with the Globodox user interface 32. Once you get acquainted with the layout, you can start learning how to organize and manage documents using Globodox.

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4.1 Starting Globodox

This section outlines the steps to start the Globodox application and log-in to it.

Log-in to Globodox

1. Click on *Start* > *All Programs* > *Globodox* or double-click the *Globodox* desktop icon to run Globodox.
2. The default username and password to login to Globodox are:

   Username : *superadmin*
   Password : *superadmin*

3. By default, the Main DB will be opened and the *All Documents* node will be displayed.
4. To open the Sample DB. click the *Globodox* button and select the Sample DB from the DB List.

4.2 Globodox User Interface

The screenshot below is of the Globodox main window with a DB opened. The Globodox main window is divided into four main parts:

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

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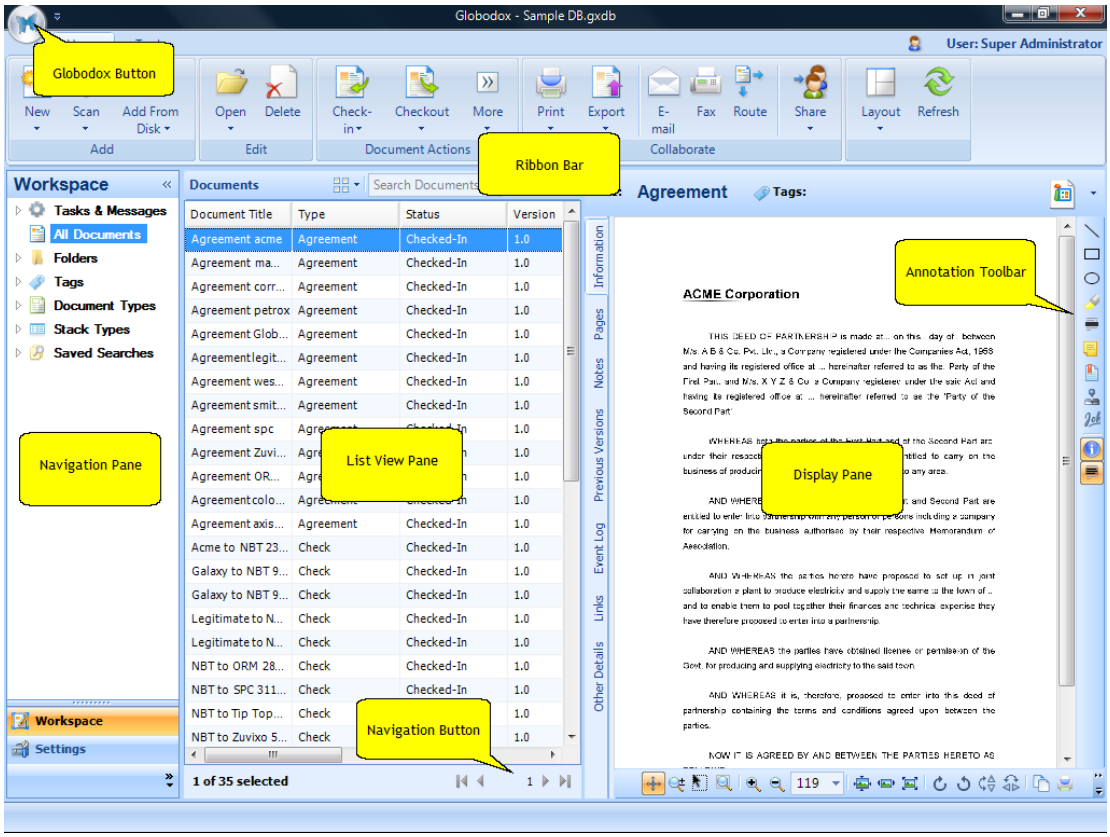
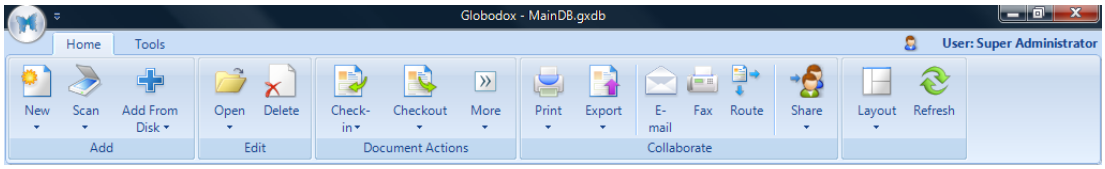


1. Ribbon Bar:

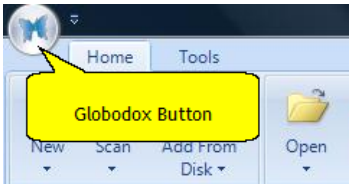


The Globodox user interface is similar to the familiar MS Outlook user interface. The menus and toolbars have been replaced with a single Ribbon bar. The Ribbon bar is divided into tabs (Home and Tools), which group related features together. This makes all important tools and features of Globodox very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

The Ribbon bar can be minimized by right-clicking it and selecting the Minimize the Ribbon option. You can also double-click the Ribbon bar tabs to minimize it.

For more information, see Home Tab 36, Tools Tab 39.

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



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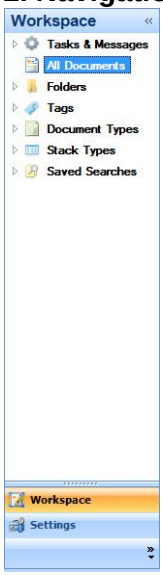
Quick Access toolbar: You can add the frequently used buttons to the Quick Access Toolbar. The Quick Access toolbar is located besides the Globodox button. For e.g. let's say you frequently use the Save, Add and Scan buttons. You can add these buttons to the Quick Access Toolbar to quickly access them. For more information, see Add buttons to Quick Access Toolbar 563.

2. Navigation pane:



The Navigation pane appears on the left side of Globodox 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...

- **Tasks and Messages:** Expand this node to view all your task and messages.
- **Inbox (Messages):** Select this node to view all the messages received by you.
- **Inbox (Tasks):** Select this node to view all the tasks assigned to you.
- **Sent Messages:** Select this node to view all the messages sent by you.
- **Drafts:** Select this node to view all the messages that you have created and saved but not sent.
- **Completed Tasks:** All the tasks that you have completed will be listed here.
- **All documents:** Select this node to view all documents that you are allowed to view.
- **Folders:** Expand this node to view the list of folders and sub folders.
- **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.
- **Stack Types:** Expand this node to view different Stack Types.
- **Saved Searches:** Expand this node to view the list of saved searches.
- **Recent Documents:** Select this node to view the list of recently added documents.
- **Recently Scanned:** Select this node to view the list of recently added scanned documents.
- **Custom Search:** Select this node to view the queries created and saved by you.

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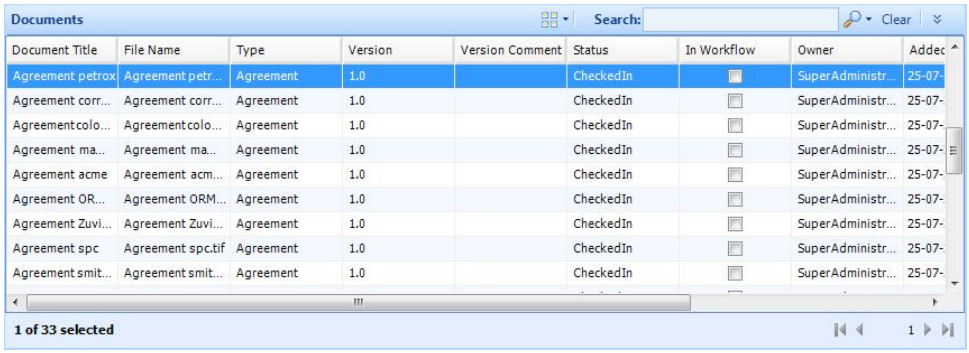
- **Reports:** Expand this node to view the Globodox Built-in Reports/Custom Reports.
- **Recycle Bin:** Expand this node to see the Recycle bin for All Documents, Document Types and Stack Types.

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

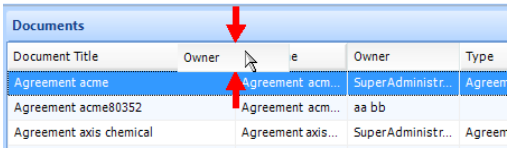
Settings contain the following items...

- **System Settings:** This node lists all the system settings options.
- **Groups:** Select this node to view/create/modify groups.
- **Users:** Select this node to view/create/modify users.
- **Roles:** Select this node to view/create/modify roles.
- **Connected Users:** Select this node to view all the users currently logged in to Globodox. You can also disconnect users from here.
- **Event Log:** Select this node to view the System Event Log.
- **DB List:** Select this node to view the list of DB's.
- **Security Labels:** Select this node to create/modify Security Labels 395.
- ***DB Settings:*** This node lists all the DB settings options.
- **Stack Types:** Select this node to create/modify Stack Types 136.
- **Document Types:** Select this node to create/modify Document Types 125.
- **File Stores:** Select this node to view/modify the Storage Location of the currently opened Globodox DB.
- **Encryption Settings:** Select this node to create and save new encryption settings for the Globodox DB.
- **Event Log:** Select this node to view the DB Event Log.

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



- 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.



- 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

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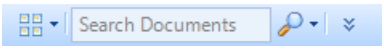
the List View pane

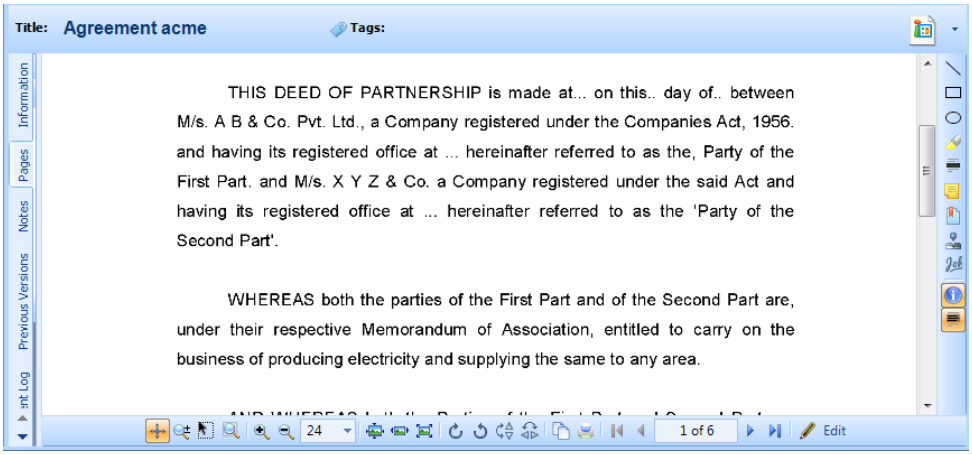
- You can click any column header to sort in the ascending or descending order of values in that column.

See Also: Customizing the List View pane 560

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 View (Display) Pane: This pane displays details about the currently selected document or stack in the List View Pane. By default, only the preview of the document is shown. But other details about the selected document can be viewed by clicking the tabs on the left of this pane.

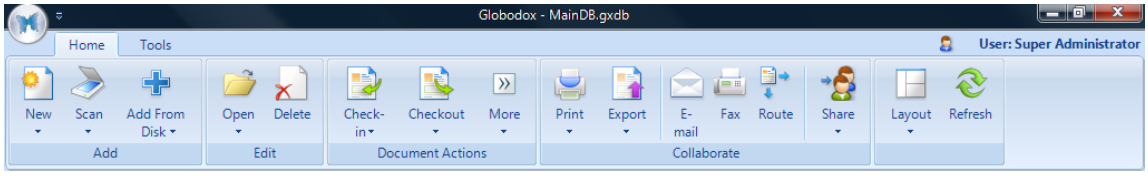


For more information, see Document Details window 165, Stack Details Window 139.

Now, that you are familiar with the Globodox user interface you can start using Globodox or you can continue with the tutorial 42.

4.3 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. You can add the most frequently used tasks to the Quick Access toolbar 34. The *Home* tab contains options to add documents, edit documents, check-in/check-out a document and many such features. The *Home* tab is spilt into 5 groups, they are as follows...



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Add Group

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

New: Click this button to add a new document.

▾ The New button has the following options...

- **Message:** Select this option to create a new Message 545
- **Document:** Select this option to create a new document.
- **Document using Template:** Select this option to create and add documents using a template.
- **Stack:** Select this option to create a new Stack 137.
- **Document Type:** Select this option to create a new Document Type 125.
- **Stack Type:** Select this option to create a new Stack Type 137.
- **File Store:** Select this option to create a new File Store 318.
- **Role:** Select this option to create a new Role 366.
- **User:** Select this option to create a new User 370.
- **Group:** Select this option to create a new Group 380.

Scan: Click this button to scan and add documents 72.

Add from disk: Click this button to add documents from the 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 Globodox DB.
- **Add Folders from Disk:** Select this option to add folders from disk 53 to the DB.

Edit Group

The Edit group consists of various options to edit a document. This group consists of 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 application.
- **Selected Application:** Select this option to select an application to open the document.

Delete: Click this button to delete a document.

Document Actions Group

The Document Actions consists of various actions and features that can be carried out on a document. This group consists of the following buttons:

Check-in: Use the Check-in button to check-in a document.

▾ The Check-in button has the following options...

- **Check-in From:** Select this option to select a document to check-in.
- **Cancel Checkout:** Select this option to cancel the check-out of a document and check it back in.

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Check-out: Use the Checkout button to check-out a document.

- The Checkout button has the following options...
  - **Checkout to:** Select this option to select a folder to check-out a document to.

More:

- Click the More button to access the following options...
  - **Encrypt:** Click this option to encrypt a document.
  - **Encrypt Using:** Click this option to select an encryption algorithm.
  - **Decrypt:** Click this option to decrypt a document.
  - **Extract and Index:** Click this option to extract and index text from documents in the currently open Globodox DB.
  - **Show Extracted Text:** Click this option to view the extracted text of the documents.
  - **Block Indexing:** Click this option to block indexing for specific files and file formats.
  - **Reset Indexing Status:** Click this option to perform indexing again on this particular Document.
  - **Apply Zone Map:** Click this option to apply Zone Map to a existing document in Globodox.
  - **Merge:** Click this option to Merge 2 PDF documents.
  - **Set Expiry Date**: Click this option to set the Expiry Date for a Document.
  - **Set Archival Date:** Click this option to set the Archival Date for this 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 of the following buttons:

- **Print:** Click this button to print the data that is displayed in the List View pane 35.
- **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 413
- **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 Globodox Fax Add-on.
- **Route:** Click this button to launch Globodox Workflow Add-on.
- **Share:** Click this button to share the selected document.
- **Assign:** Click the *Share* drop-down and select the *Assign* option to assign the document to another user.
- **Restrict:** Click the *Share* drop-down and select the *Restrict* option to restrict users from viewing your document.
- **Set Security Label:** Click the *Share* drop-down and select the *Set Security Label* option to assign the document to another user.

View Group

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

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- **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.

4.4 Tools Tab

The *Tools* tab consists of tools that can be used to import or automate documents from other applications into Globodox. It also consists of tools that can be used to customize the Globodox interface as well as your Globodox account as per your needs.

Template Manager: Click this option to add, modify or delete a template 262.
Destination Profiles: Click this option to configure Globodox 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 Globodox without needing to enter destination details every time.
Import: Click this option to import indexing data and/or documents from any delimited text file to a Globodox DB
Export Configuration: Click this option to export the multi-user.gdx file 309.
Workflow Designer: Click this option to launch the Workflow Designer 457.
Workflow Monitor: Click this option to launch Workflow Monitor 457.
Email Capture: Click this option to configure Globodox to receive all emails from your email client and archive them.
Capture Folder: Click this option to configure Globodox to monitor a pre-specified folder on your network or hard drive. Every document added to that drive will immediately be added to Globodox.

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4.5 Managing Your Documents

In Globodox you can manage your documents using any of the following methods:

- Folders
- Tags
- Document Types
- Stack 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 Globodox. The dropped folder and all its sub-folders, along with any files in them, will get added to Globodox.

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

Globodox folders can be secured. Each user can have their set of private folders and any folder can be shared to make it accessible to other users.

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.

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 example:
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.

Globodox ships with a few Document Types built-in such as Invoices, Checks etc. ready for your use. If required, you can easily add additional indexing fields or remove 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 an entirely new set of Document Types more suited to the type of documents you wish to manage.

Stack Types

Sometimes there is need to group related documents together. For example, you may be managing documents for multiple projects and might want to quickly access all documents for a particular project. There are several ways to do this in Globodox...

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- You could create a folder for each project and put all documents in their respective project folders.
- You could tag each document with the project name.
- You could create a field called *Project Name* in each Document Type you use.

All the above three methods above will help you quickly locate documents by project name. But what if you wanted to also store additional information about each project, such as *Project Start Date*, *Project Manager*, *Project Type* etc.? In that case, the above three methods would not work well. Stack Types are meant to handle such situations.

For the above example, you could create a Stack Type called *Projects* with indexing fields such as *Project Name, Project Start Date*, *Project Manager*, *Project Type* etc.Now for each project you can create a new stack of the type *Projects* and add each project's documents to its stack. Note that each document added to a stack can still have its own Document Type, its own set of tags and can even reside in a folder. You can define as many Stack Types as you want.

Other possible applications for Stack Types are:

- Law firms can create a Stack Type called *Cases* with indexing fields such as *Case Number*, *Case Title*, *Client Name* etc. Each *Case* stack would contain documents related to that case.
- Healthcare firms can create a Stack Type called *Patients* with indexing fields such as *Patient Name*, *Date of Birth*, *Gender* etc. Each *Patient* stack would contain documents related to the patient (e.g. X-Rays, Lab Reports, Prescriptions etc.).
- An organization's human resource department can create a Stack type called *Employees* with indexing fields such as *Employee Name*, *Designation*, *Department* etc.Each *Employee* stack would contain documents related to the employee (e.g. Photograph, Resume, Certifications etc.).

You can also use Stack Types if a group of documents must share the same indexing information. You can also use Stack Types if you just need to store some data without wanting to related any documents to this data.

Linking Documents and Stacks

Another way to organize documents is to link them to each other. You can link any document to multiple other documents. You can link a stack of any type to multiple stacks of any other type. You can also link a document to multiple stacks of any type. 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.

*Linking a document to a stack is different from **relating** a document to a stack. The former is a loose link while the latter is a much stronger link. When you delete a stack, Globodox can simultaneously delete all documents in that stack (i.e. all documents related to that stack). But any linked documents or stacks will not be touched.*

Bulk Import

You can use the Import data feature to quickly import all the required documents and stacks into the DB from CSV files. Each row of the CSV file would become a new stack in the DB. For more info see, Import data from a CSV file 421

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.

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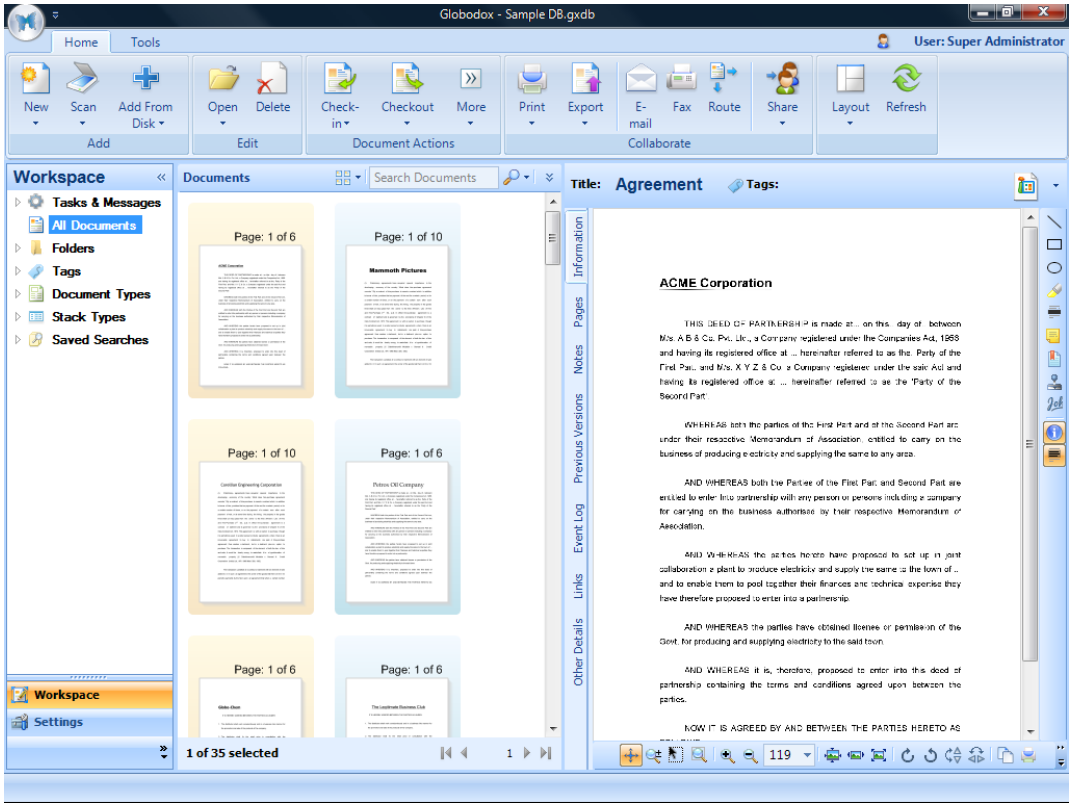
4.6 Working with Globodox

Working with Documents

When you start Globodox, the default node selected is *All Documents*. 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 the 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 View (Display) 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.

The Document 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 Document 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.

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On the left side of the Document Details window there are tabs, they are *Information*, *Pages*, *Notes*, *Previous Versions*, *Event Log*, *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. In addition to indexing information about the document type, this pane also gives information about...

  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.
  Related Stack: If the document is part of a stack, then the name of that stack is displayed in this box. You can also change the stack 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, about the document.
- **Previous Versions**: The Previous Versions tab displays the older versions of the document.
- **Event Log**: The Event Log tab displays the actions carried out on the document. The actions will only be displayed if the Event logging feature is enabled. The Event Log can be enabled from the Settings pane.
- **Links**: The Links tab displays the documents or stacks that are linked to the document. You can also link the document to another document or stack 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 Globodox and will be listed in the new folder.

The simplest way of adding a document to Globodox 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. 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 the documents to Globodox. 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 40).

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 the *Settings* node of the Navigation pane.

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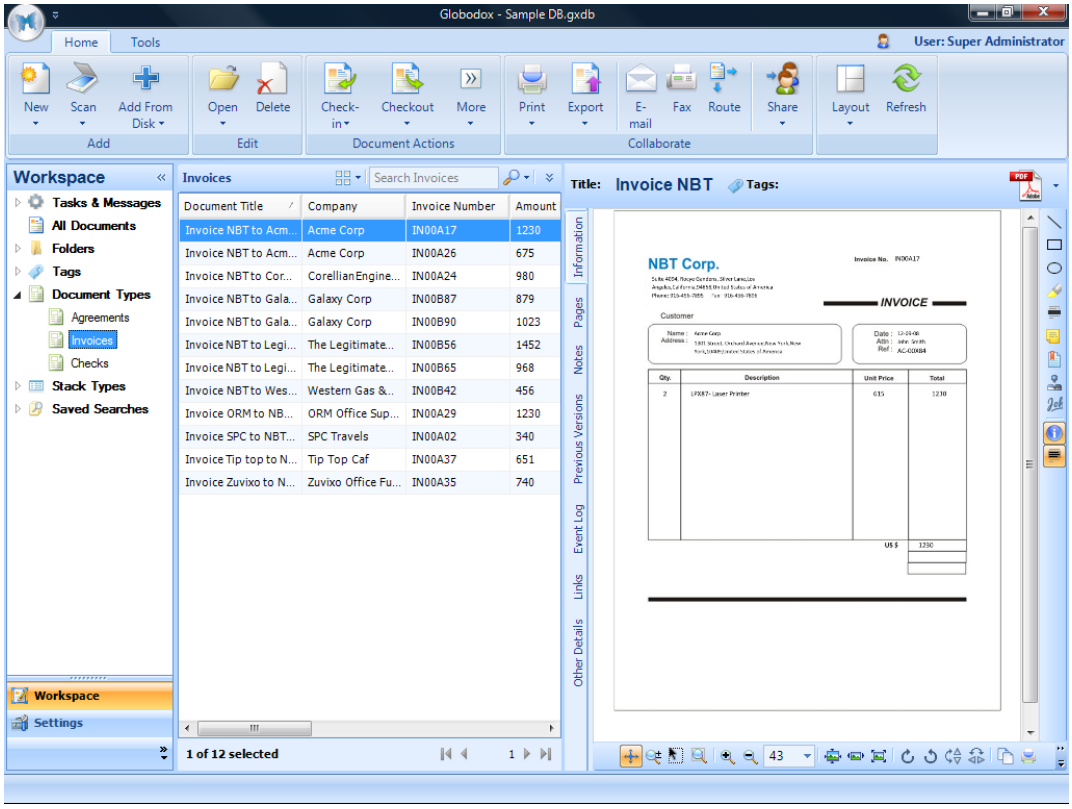
To view documents based on their types, in the Globodox main window, expand the Document Types node in the Navigation pane and select a document type (e.g. Invoice). All the documents that have their Document Type set to Invoice will now be displayed in the List View pane.



Document Actions

All the actions that are required in order to work with documents, are available on the Home tab or on the right-click menu of the respective document in the List View pane. Below are some of the actions that are available from the Home tab:

- **Email:** Select the document(s) and then click the *Email* button on the Home tab to mail the documents. Alternatively, you can right-click the document(s) in the List View pane and then select the Email option, to mail the 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 then selecting the *Fax* option.
- **Print:** Select the document(s) and then click the *Print* button on the Home tab to print the documents. Or you can right-click the document(s) in the List View pane and then select the Print option to print the documents.
- **Checkout:** Select a document and then click the *Checkout* button to check-out a document. Or you can right-click the document and then select the Checkout option to check-out the document.
- **Check-in:** Select a checked-out document and then click the *Check-in* button to check the document back in. Or you can right-click a checked-out document and then select the Check-in option to check the document back in.
- **Share:** Select a document and then click the *Share* button to share the document with other Globodox users. Or you can right-click a document and then select the Share option to share the document with other Globodox users. You can also control what actions the users can carry out on the shared document.

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- **Assign:** Click a document, click the *Share* button and then click the Assign option. Alternatively, you can right-click a document, select the Share option and then further select the Assign option to assign the document to another Globodox user (the user to whom the document is assigned will become the owner of that document).
- **Restrict:** Restrict documents owned by you from other users.

Annotation

You can use the *Annotation* toolbar on the right bar of the Details pane to mark, highlight, hide certain parts of the document and perform certain other actions. You can 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 Globodox DB and then indexing the text.

To extract text manually from the document(s), right-click the 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 Globodox 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 also be done by using the Microsoft OCR engine (to use this feature you must have Microsoft Office Document Imaging installed). To select your default OCR engine, click the *Globodox* button > *Options...* > *User Options* > *Extract & Index*.

Note: When a document is added or checked-in to Globodox, it is automatically indexed by the "ITAZ Globodox Indexing Service" at periodic intervals.

Working with Stack Types

For information about Stack Types, see Managing your documents 40

Stack Details Window: The Stack that is selected in the List View pane will be displayed in the Details pane. You can also double-click a Stack in the List View pane, to open it in its separate Stack Details window.

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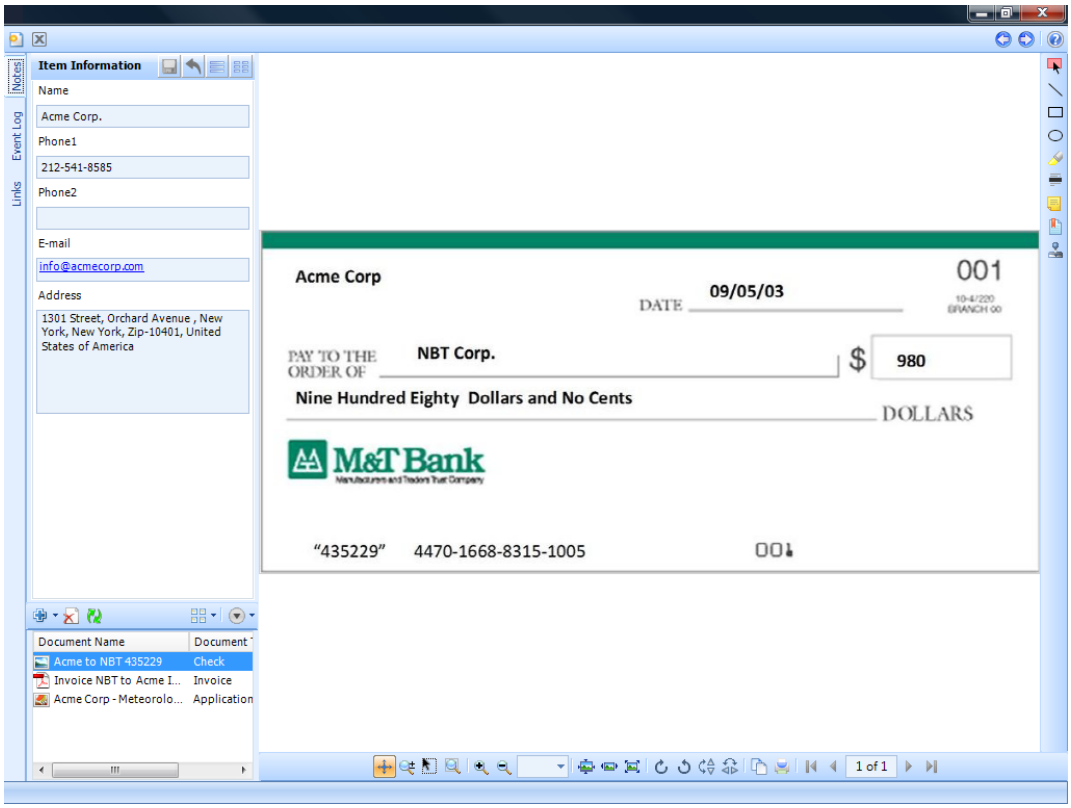

This is the Stack Details window. On the left side of the Document Details window there are the *Information, Notes, Event Log* and *Links* tabs. Towards the right is the Annotation toolbar and at the bottom is the Image toolbar. Use the Navigation button on the top right corner of the Details window to go the next or previous Stack. Use the Navigation button on the Image toolbar to navigate between the pages of the selected document.

On the left side of the Document Details window there are the *Information, Notes, Event Log* and *Links* tabs.

- **Information**: The Information pane displays the indexing information and the related documents of the Stack. You can add or modify the indexing information from this pane. You can also relate the document to the Stack from this pane. If there are documents related to this then their preview will be displayed in the Display pane of this window.
- **Pages**: The Pages pane will only appear if a document is related to a Stack. If no documents are displayed then the Pages pane will not be displayed. The Pages pane displays all the pages of the selected document as thumbnails. The Pages pane also displays Bookmarks of the selected document. Thumbnails for certain file types will not be displayed.
- **Notes**: The Notes pane displays the notes or comments entered by users, regarding the selected Stack.
- **Event Log**: The Event Log pane displays the logs (actions) carried out on the selected Stack. The actions will only be displayed if the Event logging feature is enabled. Event Log can be enabled from the Settings pane in the Globodox main window.
- **Links**: The Links pane displays the documents or stacks that are linked to the selected Stack. You can also link a Stack to another document or stack from this pane.

Close the Stack Details window. Now let's add a Stack, assuming that the Vendors Stack Type is selected. In the Home tab, click the New button. The New Stack window will now be launched. Enter the information of the Vendor. Click the Save button to save the information.

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Now, let's relate the document(s) to this Stack. In the Information pane, click the Add button on the documents list section. To add documents from Globodox, select the Relate existing document(s) option. To add files from disk (outside Globodox) select the Add files from disk and relate option. The simplest way of relating a document to a Stack is by dragging and dropping the document to the document list section. A document can at anytime be part of only one stack. When a stack is deleted then all documents in the stack will also be deleted. If you do not want this, remove the documents from the stack before deleting the stack.

That's It! Now that you are familiar with Globodox, 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 and Stacks.

4.7 Where Does Globodox Store All My Data

Globodox Database

Globodox uses a database to store all the information you add to it. Globodox databases can be MS Access based, MS SQL Server based or MySQL based. MS Access based Globodox DBs have a .GXDB extension. Every Globodox DB is linked to a Windows folder. When you add a file to Globodox, it copies the file to a special folder linked to the Globodox DB. Globodox refers to this folder as the File Store. Information about the newly added file is stored in the Globodox DB. The Globodox DB also holds information about what folder the file was added to, what tags have been attached to it as well any indexing data entered for the file.

Master DB

When you install Globodox, a default MS Access based Globodox DB is automatically installed (you can change the type of this DB to MS SQL Server or MySQL at anytime). This DB is called **Main DB.gxdb** and this DB is also designated as the Master DB. Apart from information about the files you add, the Master DB also contains security information related to the users, groups and roles that you create. Though you can create multiple DBs in Globodox, only one DB can be designated as the Master DB. The Master DB also contains the list of all other DBs that you create.

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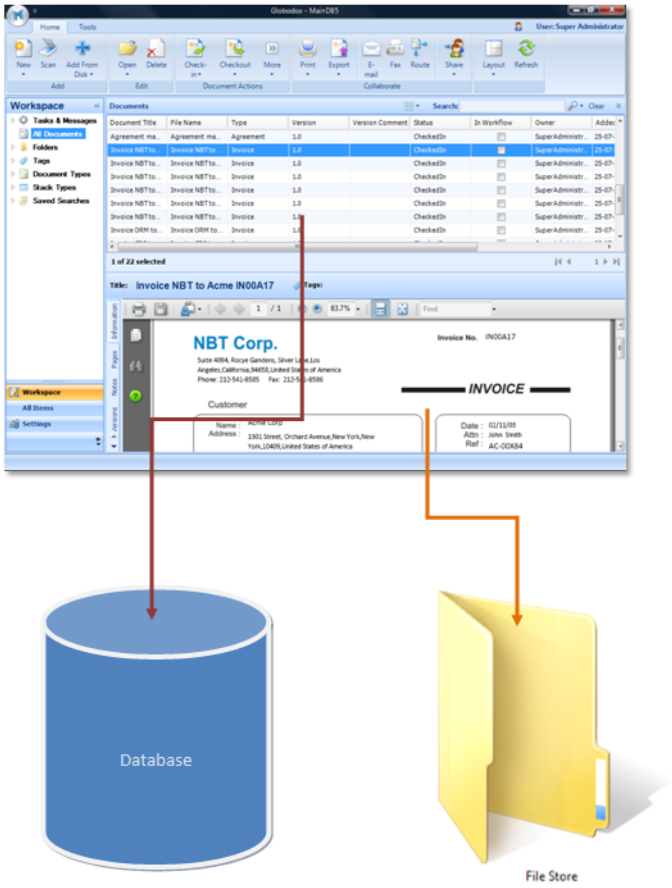

Related Topics

What is a Globodox DB? 308
Create a Globodox DB 312
Create a File Store 319

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4.8 FAQs About Advanced Features

Which feature do you want to learn about?

1. Document Full Text Search - FAQ 233
2. Document Check-in/Checkout - FAQ 272
3. Document Versioning - FAQ 289
4. Document Encryption - FAQ 295
5. Event Log- FAQ 346

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5 Add a Document

Topics Covered

1. Drag and Drop a Document 51
2. Add Documents from Disk 51
3. Add Existing Folder along with the Files from Disk 53
4. Find and Add Documents 55
5. Replace Document from Disk 59
6. Drag and Drop Text from a Document 59
7. Drag and Drop Image from a Web Page 60

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5.1 Drag and Drop a Document

You can add documents by dragging and dropping them to Globodox.

To Add Documents by Dragging & Dropping

1. In Globodox, **select** the ***All Documents*** **node** in the Navigation pane 34.
2. Using Windows Explorer **select the files** you want to add and, **drag & drop** them in the **List View pane**. The documents will now be added to Globodox.

Note:
Once the documents are added, you may 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*.

Notes:

- If the Draft Documents 278 feature is enabled, the List View will have two tabs at the bottom. One labeled *Published Documents* and the other labeled *Draft Documents*. If the *Published Documents* tab is selected when you drag and drop the files they will get added as published documents. If the *Draft Documents* tab is selected when you drag and drop the files they will get added as draft documents.
- You will be the Owner of the documents, that you have added.
- Dragging & dropping email messages as well as email attachments from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported.
- You can also drag and drop text from an RTF file.

Related Topics
Add document to Globodox drive 53
Drag and Drop a Folder 207
Find and Add a document 55

5.2 Add Documents from Disk

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

To Add Documents from Disk

1. In Globodox, **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 Globodox.

Note:
Once the documents are added, you may 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*.

Notes:

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- If the Draft Documents 278 feature is enabled, the List View will have two tabs at the bottom. One labeled *Published Documents* and the other labeled *Draft Documents*. If the *Published Documents* tab is selected when adding the files they will get added as published documents. If the *Draft Documents* tab is selected when you add the files they will get added as draft documents.
- You will be the Owner of the documents, that you have added.
- You can add your entire folder structure along with the documents on your disk that you use to organize your documents. For more information, see Add your existing folder structure along with files from disk 53.

Related Topics
Find and Add a document 55
Set a Document Type of a Document 134
Enter Indexing Information for a Document 121

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 Globodox v11 or above)

To enable this option:

1. In Globodox, click the Globodox 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 Globodox 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 267 on the right pane to categorize your documents.
5. Click on the Upload button. The documents will be added to Globodox.

Note:
The same dialog will be used when Adding Documents to Stack and Adding Documents in the Web Client.

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5.4 Add document to Globodox drive

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

To Add Documents by Dragging & Dropping to Globodox drive

1. Start Windows Explorer and click on My Computer. A list of drives will be displayed.
2. Double click the Globodox Drive icon. If you have already logged in to Globodox once or Globodox is running, the drive will open without a login confirmation or else you will be prompted to enter the Globodox credentials.
3. Double click on the DB to which you want to add documents. The DB will open listing Documents, Tags, folder and Stacks.
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 Globodox.

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. You can also add documents to a stack from the drive after a particular stack is open.

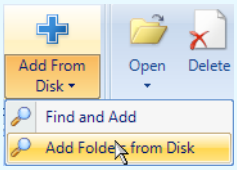
Related Topics
Add documents from Disk 51
Find and Add a document 55

5.5 Add Your Existing Folder Structure along with Files from Disk

You can add the entire folder structure that you use to organize your documents to Globodox.

To Add Existing Folder Structure along with Files to Globodox

1. In Globodox, 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 Globodox **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 Globodox.

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4. **Check** the ***Use exceptions*** option to use exceptions (optional).

   You can use *Exceptions* to exclude or include a particular file or file types to the Globodox DB.

   Example:
   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. 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 the *OK* button to close the *Exceptions* window.

5. You can ***Share*** or ***Restrict*** the selected folders with other users by using the ***Security* tab** on the top right corner. You can also **apply a *Security Label*** to the scanned document by using this tab.

   ▾ Follow these steps to apply Security

   a) Click the *Search* button next to the *Share with* box to select users to share the selected folders with. The Share window 188 will be launched. Select the users and click the *OK* button. The users will now be displayed in the *Share with* box.
   b) Click the *Search* button next to the *Restrict from* box to select users from whom you want to restrict the selected folders. The Restrict window 189 will be launched. Select the users and click the *OK* button. The users will now be displayed in the *Restrict from* box.
   c) Click the *Search* button next to the *Assign to* box to select users to assign the documents that are in the selected folder to. The Assign window 189 will be launched. Select the users and click the *OK* button. The users will now be displayed in the *Assign to* box.
   d) Select a Security Label 395 from the *Set a Security Label* drop-down to set a *Security Label* for the scanned document.

6. Click the ***Preview*** button to view the **folder structure** and the **files** that are **going to be imported** to Globodox.
7. Click the ***Add*** button to add the folder structure and the files to Globodox.
8. Click the ***Close*** button to close the ***Add Folders from disk*** window. Now, **navigate to** the ***Folders* node** in the Navigation pane 34 **to view** the folders along with the documents.
9. You can now set the Document Type 125, of these documents. Or you can also relate these documents to Stacks 136.

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

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want to delete the added documents then click the *Yes* button; if not, then click *No*.

Notes:

- If the Draft Documents 278 feature is enabled, you will see an option labeled *Add as Draft Document*. If you check this option any files you add will get added to *Draft Documents*. If this option is left unchecked, then the files will get added as *Published Documents*.
- You will be the Owner of the documents that you have added.
- You can add only the folder structure (without the documents) that you use to organize your documents, to Globodox. For more information see, Add existing folder structure to Globodox DB 209.
- If you are a Paperport user, then see Import data from Paperport 424, to import your documents from Paperport to Globodox.

Related Topics
Find and Add a document 55
Drag and Drop a Folder 207

5.6 Find and Add Documents

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

To Find Documents and Add them to Globodox:

1. In Globodox, 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 **next to** 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 folder's 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**

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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 Globodox.

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 a particular file or file types to Globodox.

Example:
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. 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. 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 the *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 267 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 next to 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

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the *Choose a Folder* box.

b) You can add Tags 217 (keywords) to the selected files in the *Attach Tags* option. You can type as many tags as you want by using a semi-colon to separate them.

c) Set the Document Type 126 of the document, from the *Set a Document Type* drop down. E.g. Set the Document Type to *'Invoice'* if the selected files are invoices.

d) If you want to relate the selected files to a Stack 136 then click this button next to the *Attach to existing Stack* box to find the Stack.

▾ The Look Up window will be launched

i. Select the Stack Type from the *Look for* drop-down of the Stack that you want to relate with the selected files.

ii. Now, type a word that describes the *Stack* in the *Look for* box. Click the *Find* button to find the *Stack*. The *Stacks* that contain the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.

iii. Select a Stack in the *Available Data* list, to relate it with the selected files. Use this button to add the selected Stack to the *Selected Data* list and use this button to remove the Stack from the *Selected Data* list and move it back to the *Available Data* list.

iv. Click the *OK* button to select the Stack. The Stack will now be related with the selected files and will be displayed in the *Attach to existing Stack* box.
Also see, Relate a Document to a Stack 178

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

▾ Use the Link to existing documents box to link the selected files to existing documents

a) Click this button next to 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 180

▾ Use the Link to existing Stack box to link the selected files to existing Stacks Item

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

b) Select the Stack from the *Look for* drop-down of the Stack, that you want to relate with the selected files.

c) Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contain the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.

d) Select the Stack in the *Available Data* list, to relate with the selected files. Use this button to add the selected Stack from the *Available Data* list to the *Selected Data* list and use this button to remove the Stack from the *Selected Data* list and move it back to the *Available Data* list.

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e) Click the *OK* button to select the Stack. The Stack will now be related with the selected files and will be displayed in the *Attach to existing Stack* box.

Note:
You can add more links by clicking this button and you can break a link by clicking this button.
Also see, Link Document with Stacks 155

13. You can ***Share*, *Assign* or *Restrict*** the selected files with other users by using the ***Security*** tab. You can also apply a Security Label 395 to the selected files by using this tab.
▾ Follow these steps to start using the Security tab

a) Click this button next to the *Share with* box to select the users to share the selected files. The Share window 188 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Share with* box.

b) Click this button next to the *Restrict from* box to select users from whom you want to restrict the selected files. The Restrict window 189 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Restrict from* box.

c) Click this button next to the *Assign to* box to select the user to assign the selected files. The Assign window 189 will be launched. Select the user and click the *OK* button. You can assign a document to only one user. The user will be displayed in the *Assign to* box.

d) Select a Security Label 395 from the *Set a Security Label* drop-down to set a *Security Label* for the scanned document.

14. Now, click the *Add* button to add the selected documents to the Globodox 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*.

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

Notes:

- You can add your entire folders structure along with the documents on your disk that you use to organize your documents. For more information, see Add the existing folder structure along with files from disk 53
- You can create a new document by dragging and dropping text from an RTF file to Globodox. See Create a New Document 172.
- You will be the Owner of the documents that you have added.
- If the Draft Documents 278 feature is enabled, you will see an option labeled *Add as Draft Document*. If you check this option any files you add will get added to *Draft Documents*. If this option is left unchecked, then the files will get added as *Published Documents*.

Related Topics

Edit a document 175
Find document quickly 227
Link one Document with another Document 180
Enter Indexing Information for a Document 121

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5.7 Replace Document from Disk

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

To Replace Document from Disk

1. In Globodox, select the document to be replaced from the List View pane 35.
2. Click the ***More*** button on the ***Ribbon* bar** 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 ***Replace*** button to replace the document.
6. Click the ***Close*** button to close the window.

Notes:

- You can add replace an existing document by scanning a document into Globodox. For more information, see Replace document by Scanning 93.
- You can create a new document by dragging and dropping text from an RTF file to Globodox. See Create a New Document 172.

Related Topics
View Documents Versions 292
Tag a Document 219

5.8 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 Globodox.

To Create a New Document by Dragging and Dropping Text

1. In Globodox, select ***Workspace > All Documents*** in the Navigation pane 34.
2. **Select the text** from a file. 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 35. A new HTML document will be created containing the text you selected.

Notes:

- You will be the Owner of the documents, that you have added.
- You can also drag and drop text to a folder, tag or document type node in Globodox.

Related Topics
Drag and drop image from a web page 60
Find and Add a document 55

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5.9 Drag and Drop Image from a Web Page

You can also drag and drop an image from a web page and add that image as a document in Globodox.

To Create a New Document by Dragging and Dropping an image

1. In Globodox, select ***Workspace > All Documents*** in the Navigation pane 34.
2. **Drag** any **image** from a **web page opened in a web browser** and **drop it in** the List View pane 35. The image will be added to Globodox.

Note:
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.

Notes:

- You will be set as the Owner of the documents, that you have added.
- You can also drag and drop text to a folder, tag or document type node in Globodox.

Related Topics
Drag and drop text from a document 59
Find and Add a document 55

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6 Scan and Add a Document

Topics Covered

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3. Image Editor Window 69
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6. Scan All Pages as One Document 77
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11. Specify Document Title of the Scanned Document 89
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14. Merge Two or More Scanned Documents 92
15. Replace Document by Scanning 93
16. Automate the Scan Process 93
17. Enhance Scanned Documents 95

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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 Globodox:

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
Globodox 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, Globodox used to support a fixed set 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 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 Globodox 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), Globodox 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 Globodox, 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 Globodox based on the last set file type settings.

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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, Globodox 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 Globodox TWAIN complaint?

Yes. Globodox is TWAIN compliant. This 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 Globodox.

Globodox also supports 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.

Globodox 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 Globodox's Virtual Duplex Scanning mode 88.

6.3 Scan Window

Use this window to scan and add paper documents to Globodox. The Scan Window also allows you to modify the scanned image before it is saved to Globodox. The Scan Window has the following tabs:

- Scan tab
- Settings tab
- Destination tab
- Links tab
- Security tab

Scan Tab

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

Select a Scan Profile Globodox 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.

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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. Instead of a scanner you can also choose the Import Scanned Files from Folder 88 option. Choosing this option will allow you to directly import existing scanned images to the Scan Window.

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

Start Scan Click this button to scan your document.
Once the scanning is completed successfully, the document image will

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be displayed.

Settings tab

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

Select a Scan Profile Globodox 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 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 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 takes effect if your scanner has an ADF attachment.

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

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

If your scanner is not a duplex scanner, then you can still perform a duplex scan using the Virtual Duplex Scanning feature.

Automatically deskew Check this option to auto-straighten scanned documents that are tilted. ***scanned image***

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

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Select a File Type Use this option to select a file type, 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. In Globodox, 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 Globodox

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 the JPG or PDF file type, then you can control the quality of the scanned documents. If you want the 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 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 Globodox 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.

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

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

Scan multi-page documents
This option is only available if the *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 document
Select this option if you want scan all the pages as a single document.

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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 Globodox will create a total of five documents with two pages each.

For example:
If you will be scanning 10 documents and you specify the number of pages per document as 2, then Globodox will create a total of 5 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. Globodox 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.

Note:
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 sometimes 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 Globodox 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, Globodox 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 Globodox may classify some blank white pages as non-blank pages. If you set this value too high then non-blank pages (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 69 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.

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Use this button (*Views*) to view the thumbnails of the scanned document.

Destination tab

Use the destination tab to set the location to save the scanned document in Globodox. The *Destination* tab has the following options.

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

Select a Destination Profile
Use this option to select or create a Destination Profile 267.

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

Attach Tags
Use this option to Tag 218 the scanned document.

Zone Map
Use this drop-down to select a Zone Map 194.

Set a Document Type
Use this option to set the Document Type 126 of the scanned document.

Attach to existing Stack
Use this option to relate the scanned image with a Stack 137.

Links tab

Use this tab to link the scanned image with other documents or Stack 136.

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

Link to existing Stacks
Use this option to link the scanned document with existing Stacks.

Security tab

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

Share with
Use this option to Share 188 the scanned document with other users.

Restrict from
Use this option to Restrict 189 other users from viewing the scanned document.

Assign to
Use this option to Assign 189 the scanned documents to other users.

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Set a Security Label

Use this option to set a Security Label 395 for the scanned image.

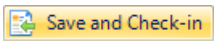
Related Topics

Scan and add single document 72
Scan documents with fixed number of pages 80
Separate documents with variable number of pages 80

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 them back to Globodox. The Image Editor Window has the following buttons:

Toolbar



Use this button to Save the modifications made to the document and Check-in to Globodox.

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.

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

Select the Zoom level 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 the *Fit to Window* button to resize the image to fit entirely in the Display area.

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

Click the *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 *Adjustments* 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 an 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 black and 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 dust particles on the paper or on the scanner's glass.

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

Click this option 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.

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Annotation Toolbar

The annotation toolbar is located on the extreme right of the Document Details pane 36.

Use this button to draw lines or underline 251 text.

Use this button to draw rectangles 252.

Use this button to draw ellipses or circles 252.

Use this button to highlight 251 text.

Use this button to hide 253 certain text.

Use this button to add notes 253 to the document.

Use this button to insert a bookmark 254 on the document.

Use this button to insert a stamp 255 on the document.

Use this button to insert a signature 255 on the document.

- **Delete all annotations on this page:** Use this option to delete all the annotations from the currently displayed page.
- **Delete all annotations on the document:** Use this option to delete all the annotations from the entire document.

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

Use this button to view the content below the redact.

Pages pane

The Pages pane only appears for a multi-page Tiff and PDF file (created by Globodox). 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 Globodox DB.

Scan and add a single page document

1. In Globodox, select the Home tab and click the Scan button . The Scan Window 63 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*

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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 Globodox.

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

Scan and add a multi-page document

1. In Globodox, select the Home tab and click the Scan button. The Scan Window 63 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 Globodox

6.6 Scanning (Detailed Step by Step Instructions)

6.6.1 Scan and Add a Single Document

You can use the *Scan* button to quickly scan documents to Globodox.

To Scan a Single Document

In Globodox, select the *Home* tab and click the *Scan* button. The Scan Window 63 will now be launched.

1. You can select a Scan Profile 265 from the *Select a scan profile* drop-down.
2. Select a scanner from the *Select a Scanner* drop down.
3. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the Scan window.
4. You can click the Edit button to edit the scanned document in the Image Editor 69. Using the Image Editor window 69 you can resize, crop and rotate a document.

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5. You can specify the location to add the scanned document in the *Destination* tab (optional). You can also use a Destination Profile 267 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 the search button next to 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 217 (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) Select a Zone Map 195 for the scanned documents from the Zone Map drop-down.
   e) Set the Document Type 126 of the scanned document, from the *Set a Document Type* drop down. E.g. Set the Document Type to *'Invoice'* if the scanned document is a invoice.
   f) If you want to relate the scanned document to a Stack 136 then click the search button next to the *Attach to existing Stack* box.
      - The Look Up window will be launched
      i. Select the Stack Type from the *Look for* drop-down of the Stack, that you want to relate with the scanned document.
      ii. Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contain the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
      iii. Select the Stack in the *Available Data* list, to relate with the scanned document. Use this >> button to add the selected Stack to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move it back to the *Available Data* list.
      iv. Click the *OK* button to select the Stack. The Stack will now be related with the document and will be displayed in the *Attach to existing Stack* box.
      Also see Relate a Document to a Stack 178
7. You can also link the scanned document with other documents and Stacks by using the *Links* tab.
   - Use the Link to existing Documents box to link the scanned document to existing documents
   a) Click the search button next to 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 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 the Add button and you can break a link by clicking the Remove button.

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Also see Link one Document with another Document 180

▾ Use the Link to existing Stack box to link the scanned document to existing Stacks Item

a) Click the search button next to the *Link to existing Stack* box. The *Look Up* window will be launched.
b) Select the Stack from the *Look for* drop-down of the Stack, that you want to relate with the scanned document.
c) Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contain the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
d) Select the Stack in the *Available Data* list, to relate with the scanned document. Use this >> button to add the selected Stack to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move it back to the *Available Data* list.
e) Click the *OK* button to select the Stack. The Stack will now be related with the document and will be displayed in the *Attach to existing Stack* box.

Note:
You can add more links by clicking the Add button and you can break a link by clicking the Remove button.
Also see Link Document with Stacks 155

8. You can *Share, Assign* or *Restrict* the scanned document with other users by using the *Security* tab. You can also apply a Security Label 395 to the scanned document by using this tab.
   ▾ Follow these steps to start using the Security tab
   a) Click the search button next to the *Share with* box to select the users to share the scanned document with. The Share window 188 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Share with* box.
   b) Click the search button next to the *Restrict from* box to select users from whom you want to restrict the scanned document. The Restrict window 189 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Restrict from* box.
   c) Click the search button next to the *Assign to* box to select the user to assign the scanned document to. The Assign window 189 will be launched. Select the user and click the *OK* button. You can assign a document to only one user. The user will be displayed in the *Assign to* box.
   d) Select a Security Label 395 from the *Set a Security Label* drop-down to set a Security Label for the scanned document.
9. Now, click the *Add* button to add the scanned document to Globodox. The scanned document will now be added to the location that you have specified in the *Destination* tab.
10. Click the *Close* button to close the Scan window.

Notes:

- 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 265 to save the frequently used scan settings. Also see Destination Profiles 267
- You can use the Settings tab 65 to change or set the scan setting.
- If the Draft Documents 278 feature is enabled, you will see an option labeled *Add as Draft Document*. If you check this option any files you add will get added as *Draft Documents*. If this option is left unchecked, then the files will get added as *Published Documents*.

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Related Topics
Scan document with variable number of pages 83
Scan documents with fixed number of pages 80
Recognize barcodes on documents 200

6.6.2 Scan Multiple Single Paged Documents

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

To Scan multiple Single paged Document

1. In Globodox, select the *Home* tab and click the *Scan* button. The Scan Window 63 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 e. g. 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 63 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* 69.
12. You can specify the location to add the scanned documents in the *Destination* tab (optional). You can also use a Destination Profile 267 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 the search 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 217 (keywords) to the scanned documents in the *Attach Tags* option.

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You can type as many tags you want by using a semi-colon to separate them.

d) Select a Zone Map 195 for the scanned documents from the Zone Map drop-down.

e) Set the Document Type 126 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.

f) If you want to relate the scanned document to a Stack 136 then click the search button besides the *Attach to existing Stack* box.

▾ The Look Up window will be launched

i. Select a Stack Type from the *Look for* drop-down of the Stack, that you want to relate with the scanned document.

ii. Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.

iii. Select the Stack in the *Available Data* list, to relate with the scanned document. Use this >> button to add the selected Stack to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.

iv. Click the *OK* button to select the Stack. The Stack will now be related with the document and will be displayed in the *Attach to existing Stack* box.
Also see Relate a Document to a Stack 178

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

▾ Use the Link to existing Documents box to link the scanned documents to existing documents

a) Click the search 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 the Add button and you can break a link by clicking the Remove button.
Also see Link one Document with another Document 180

▾ Use the Link to existing Stack box to link the scanned documents to existing Stacks Item

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

b) Select the Stack Type from the *Look for* drop-down of the Stack, that you want to relate with the scanned documents.

c) Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.

d) Select the Stack in the *Available Data* list, to relate with the scanned document. Use this >> button to add the selected Stack to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.

e) Click the *OK* button to select the Stack item. The Stack item will now be related with the scanned documents and will be displayed in the *Attach to existing Stack* box.

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Note:
You can add more links by clicking the Add button and you can break a link by clicking the Remove button.
Also see Link Document with Stacks 155

14. You can Share, Assign or Restrict the scanned document with other users by using the *Security* tab. You can also apply a Security Label 395 to the scanned document by using this tab.
    - Follow these steps to start using the Security tab
    a) Click the search button besides the *Share with* box to select the users to share the scanned documents. The Share window 188 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Share with* box.
    b) Click the search button besides the *Restrict from* box to select users from whom you want to restrict the scanned documents. The Restrict window 189 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Restrict from* box.
    c) Click the search button besides the *Assign To* box to select the user, to assign the scanned document. The Assign window 189 will be launched. Select the user and click the *OK* button. You can assign the document(s) to only one user. The user will be displayed in the *Assign To* box.
    d) Select a Security Label 395 from the *Set a Security Label* drop-down to set a Security Label for the scanned documents.
15. Now, click the *Add* button to add the scanned documents to the Globodox 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.

Note:

- 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 265 to save the frequently used scan settings. Also see Destination Profiles 267
- You can use the Settings tab 65 to change or set the scan setting.

Related Topics
Scan documents with fixed number of pages 87
Scan document with variable number of pages 83

6.6.3 Scan All Pages as One Document

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

To Scan all Pages as One Document

1. In Globodox, select the *Home* tab and click the *Scan* button. The Scan Window 63 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*

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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. 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 Globodox will support it.
7. Select the file type from *Select the file type* option 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.
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 63 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* 69. Using the Image Editor window 69 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 267 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 the search 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 217 (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) Select a Zone Map 195 for the scanned documents from the Zone Map drop-down.
e) Set the Document Type 126 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.
f) If you want to relate the scanned document to a Stack 136 then click the search button besides the *Attach to existing Stack* box.

▾ The Look Up window will be launched

i. Select the Stack Type from the *Look for* drop-down of the Stack, that you want to relate with the scanned document.
ii. Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
iii. Select the Stack in the *Available Data* list, to relate with the scanned document. Use this >> button to add the selected Stack to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.
iv. Click the *OK* button to select the Stack. The Stack will now be related with the

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document and will be displayed in the *Attach to existing Stack* box.
Also see Relate a Document to a Stack 178

14. You can also link the scanned documents with other documents and Stacks by using the *Links* tab.

▾ Use the Link to existing Documents box to link the scanned documents to existing documents

a) Click the search 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 the Add button and you can break a link by clicking the Remove button.
Also see Link one Document with another Document 180

▾ Use the Link to existing Stack box to link the scanned documents to existing Stacks Item

a) Click the search button besides the *Link to existing Stack* box. The *Look Up* window will be launched.
b) Select the Stack from the *Look for* drop-down of the Stack, that you want to relate with the scanned documents.
c) Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
d) Select the Stack in the *Available Data* list, to relate with the scanned document. Use this >> button to add the selected Stack to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.
e) Click the *OK* button to select the Stack. The Stack will now be related with the scanned documents and will be displayed in the *Attach to existing Stack* box.

Note:
You can add more links by clicking the Add button and you can break a link by clicking the Remove button.
Also see Link Document with Stacks 155

15. You can *Share*, *Assign* or *Restrict* the scanned document with other users by using the *Security* tab. You can also apply a *Security Label* to the scanned document by using this tab.

▾ Follow these steps to start using the Security tab

a) Click the search button besides the *Share with* box to select the users to share the scanned documents. The Share window 188 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Share with* box.
b) Click the search button besides the *Restrict from* box to select users from whom you want to restrict the scanned documents. The Restrict window 189 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Restrict from* box.

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c) Click the search button besides the *Assign To* box to select the user to assign the scanned document. The Assign window 189 will be launched. Select the user and click the *OK* button. You can assign the document(s) to only one user. The user will be displayed in the *Assign To* box.

d) Select a *Security Label* from the *Set a Security Label* drop-down to set a *Security Label* for the scanned documents.

16. Now, click the *Add* button to add the scanned documents to the Globodox 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.

Notes:

- 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 90 to save the frequently used scan settings. Also see Destination Profiles 267
- You can use the Settings tab 65 to change or set the scan setting.

Related Topics

Scan documents with fixed number of pages 80
Scan document with variable number of pages 83

6.6.4 Scan Documents With Fixed Number of Pages

Globodox separates various documents automatically while scanning. All you need to do is specify the number of pages each document contains and Globodox separates them based on this information.

For example:
If you are scanning 15 pages comprising 5 documents (with each document containing 3 pages), all you need to do is specify that each document contains 3 pages so that Globodox can separate them.

To Scan Documents with Fixed number of Pages

1. In Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
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. Check the *Scan both sides* option to scan both the sides of the document. Please note

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

7. Select the file type from *Select the file type* option 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.
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 63 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* 69. Using the Image Editor window 69 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 267 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 the search 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 217 (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) Select a Zone Map 195 for the scanned documents from the Zone Map drop-down.
e) Set the Document Type 126 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.
f) If you want to relate the scanned document to a Stack 136 then click the search button besides the *Attach to existing Stack* box.

▾ The Look Up window will be launched

i. Select a Stack Type from the *Look for* drop-down of the Stack, that you want to relate with the scanned document.
ii. Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
iii. Select the Stack in the *Available Data* list, to relate with the scanned document. Use this >> button to add the selected Stack to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.

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iv. Click the *OK* button to select the Stack. The Stack will now be related with the document and will be displayed in the *Attach to existing Stack* box.
Also see Relate a Document to a Stack 178

15. You can also link the scanned documents with other documents and Stacks by using the *Links* tab.

▾ Use the Link to existing Documents box to link the scanned documents to existing documents

a) Click the search button besides the *Link to existing documents* box. The *Look Up* window will be launched.
a) Select *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* button. 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 the Add button and you can break a link by clicking the Remove button.
Also see Link one Document with another Document 180

▾ Use the Link to existing Stack box to link the scanned documents to existing Stacks Item

a) Click the search button besides the *Link to existing Stack* box. The *Look Up* window will be launched.
b) Select a Stack Type from the *Look for* drop-down of the Stack, that you want to relate with the scanned documents.
c) Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
d) Select the Stack in the *Available Data* list, to relate with the scanned document. Use this button to add the selected Stack to the *Selected Data* list and use this button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.
e) Click the *OK* button to select the Stack. The Stack will now be related with the scanned documents and will be displayed in the *Attach to existing Stack* box.

Note:
You can add more links by clicking the Add button and you can break a link by clicking the Remove button.
Also see Link Document with Stacks 155

16. You can Share, Assign or Restrict the scanned document with other users by using the *Security* tab. You can also apply a Security Label to the scanned document by using this tab.

▾ Follow these steps to start using the Security tab

a) Click the search button besides the *Share with* box to select the users to share the scanned documents. The Share window 188 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Share with* box.
b) Click the search button besides the *Restrict from* box to select users from whom you want to restrict the scanned documents. The Restrict window 189 will be launched.

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Select the users and click the *OK* button. The users will be displayed in the *Restrict from* box.

c) Click the search button besides the *Assign To* box to select the user to assign the scanned document. The Assign window 189 will be launched. Select the user and click the *OK* button. You can assign the document(s) to only one user. The user will be displayed in the *Assign To* box.

d) Select a Security Label 395 from the *Set a Security Label* drop-down to set a *Security Label* for the scanned documents.

17. Now, click the *Add* button to add the scanned documents to the Globodox 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.

Notes:

- 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 265 to save the frequently used scan settings. Also see Destination Profiles 267
- You can also scan documents with variable number of pages, for more information, see Scan document with variable number of pages 83

Related Topics
Automate the Scan Process 93

6.6.5 Scan Document With Variable Number of Pages

You can scan documents that do not have fixed number of pages by using blank pages or by using a Document Separator Page on it.

For example:
Let's say you want to scan around 10 pages comprising 4 documents (with each document containing 2, 4, 1 and 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 pages).

To Scan Documents with Variable number of Pages

1. In Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
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. 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 Globodox will support it.

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7. Select the file type from *Select the file type* option 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.
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 63 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 67 value Globodox 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 *Start Scan* button to start scanning the document. The scanned documents 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* 69. Using the Image Editor window 69 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 267 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 the search 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 217 (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) Select a Zone Map 195 for the scanned documents from the Zone Map drop-down.

e) Set the Document Type 126 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.

f) If you want to relate the scanned document to a Stack 136 then click the search button besides the *Attach to existing Stack* box.

▾ The Look Up window will be launched

i. Select the Stack from the *Look for* drop-down of the Stack, that you want to relate with the scanned document.
ii. Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
iii. Select the Stack in the *Available Data* list, to relate with the scanned document. Use this button to add the selected Stack to the *Selected Data* list and use this

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button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.

iv. Click the *OK* button to select the Stack. The Stack will now be related with the document and will be displayed in the *Attach to existing Stack* box.
Also see Relate a Document to a Stack 178

15. You can also link the scanned documents with other documents and Stacks by using the *Links* tab.

▾ Use the Link to existing Documents box to link the scanned documents to existing documents

a) Click the search button besides the *Link to existing documents* box. The *Look Up* window will be launched.
b) Select *All 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*. 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 the Add button and you can break a link by clicking the Remove button.
Also see Link one Document with another Document 180

▾ Use the Link to existing Stack box to link the scanned documents to existing Stacks Item

a) Click the search button besides the *Link to existing Stack* box. The *Look Up* window will be launched.
b) Select the Stack Type from the *Look for* drop-down of the Stack, that you want to relate with the scanned documents.
c) Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
d) Select the Stack in the *Available Data* list, to relate with the scanned document. Use this button to add the selected Stack to the *Selected Data* list and use this button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.
e) Click the *OK* button to select the Stack. The Stack will now be related with the scanned documents and will be displayed in the *Attach to existing Stack* box.

Note:
You can add more links by clicking the Add button and you can break a link by clicking the Remove button.
Also see Link Document with Stacks 155

16. You can *Share*, *Assign* or *Restrict* the scanned document with other users by using the *Security* tab. You can also apply a Security Label to the scanned document by using this tab.

▾ Follow these steps to start using the Security tab

a) Click the search button besides the *Share with* box to select the users to share the scanned documents. The Share window 188 will be launched. Select the users and click the *OK* button. The users will be displayed in the *Share with* box.
b) Click the search button besides the *Restrict from* box to select users from whom you

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want to restrict the scanned documents. The Restrict window[189] will be launched. Select the users and click the *OK* button. The users will be displayed in the *Restrict from* box.

c) Click the search button besides the *Assign To* box to select the user to assign the scanned document. The Assign window[189] will be launched. Select the user and click the *OK* button. You can assign the document(s) to only one user. The user will be displayed in the *Assign To* box.

d) Select a Security Label[395] from the *Set a Security Label* drop-down to set a Security Label for the scanned documents.

17. Now, click the *Add* button to add the scanned documents to the Globodox 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.

Notes:

- 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[265] to save the frequently used scan settings. Also see Destination Profiles[267]
- You can also automate your scanning process, for more information, see Automate the Scan Process[93]

Related Topics

Scan documents with fixed number of pages[80]

6.6.6 Scan and Save Documents to Multiple New Stacks

You can scan documents and save documents to multiple new stacks by using the Scan window.

To Scan and Save documents to Multiple new Stacks

1. In Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window[63].
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. 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 Globodox will support it.
7. Select the file type from *Select the file type* option 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.
8. Select the color you want to scan in, from the *Select color depth* drop-down.

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9. Set the scan DPI(Dots Per Inch) from the *Set scan DPI* option. The Dots Per Inch 63 option controls the amount of dots which must be captured per inch of the document being scanned.
10. Select an appropriate option from the *Documents and Pages* section. For e.g. If your documents have fixed number of pages then select the *Scan multi-page documents* option and then the *Number of Pages per document* option to specify number of pages per document.
11. In the right pane of the Scan window check the *Create multiple new stacks for scanned documents* option to scan and save documents to multiple new stacks. Click the *Configure* button. The *Configure New Stacks for Scanned Documents* window will be launched.

a) If your documents has fixed number of pages then specify the number of pages the document has, in the *Number of Pages per stack* 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).

b) If you are using a separator to separate the documents then the *Stacks are separated by* option. By default the *Stack Barcode Separator Page* (Document with Barcode) will be selected. Click the *Click here to print separator pages* link to create a Separator Page.
For example:
Let's say you want to scan around 10 pages comprising 4 documents (with each document containing 2, 4, 1 and 3 pages respectively). To separate these documents, all you need to do is place a *Stack Barcode Separator Page* after every document (For this example you will need to place it after the 2nd, 6th and 7th page).

c) Click the OK button to apply the settings.

12. Click the *Start Scan* button to start scanning the document. The scanned documents will now be added to the Stacks and will be displayed in the *Preview* pane of the *Scan* window.
13. You can modify the scanned document by using the *Image* Toolbar of the *Preview* pane.
14. Click the *Close* button to close the *Scan* window.

Notes:

- 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 265 to save the frequently used scan settings. Also see Destination Profiles 267
- You can also automate your scanning process, for more information, see Automate the Scan Process 93

Related Topics
Scan documents with fixed number of pages 80
Scan document with variable number of pages 83

6.6.7 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 Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.

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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 e.g. 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 63 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.

Notes:

- 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 265 to save the frequently used scan settings. Also see Destination Profiles 267

Related Topics
Scan and add single document 72
Scan multiple single paged document 75
Recognize barcodes on documents 200

6.7 Virtual Duplex scanning mode

Globodox 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, Globodox 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). Globodox will scan the front side of each document. Now simply flip the stack of documents and place them in your scanner's ADF. Globodox will now scan the back side of all the documents in the stack. After this Globodox 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 Globodox.

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 Globodox will combine these these image files into multi-page TIFF or PDF files when you import them into Globodox via the *Import*

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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 title of the scanned document from Destination pane.

To specify Document Title from the Scan window

1. In Globodox, select the *Home* tab and click the *Scan* button. The Scan Window 63 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. 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 Globodox. 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.

Note:

- If you have scanned multiple documents then all the documents will have same name followed by a suffix. E.g. if you entered Acme Invoice, then the scanned document will be named as Acme Invoice1, Acme Invoice2, Acme Invoice3 and so on.

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- 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 72
Scan multiple single paged document 75

6.10 Save the Frequently Used Scan Settings as a Profile

Globodox uses *Scan Profile* to simplify the process of scanning 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*. Documents can be of several types (e.g. Color photographs, Black & White text etc.). The settings required to scan and save a black and 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 example:
Let's 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 another 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 Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
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.

Notes:

- 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 - 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.

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

- You can also create profiles which stores information about the document like its Document Type 125, its Stack 136 and its folder which can be saved and reused. These profiles are called as Destination Profiles 267. Thus by using Scan Profiles and Destination Profiles you can automate your scanning process 93.

Related Topics
Scan multiple single paged document 75

6.11 Insert a Page to a PDF or Tiff Document

You can insert a page to a PDF (created using Globodox) and Tiff file by using the Image Editor window 69.

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 *Save and Check-in* 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 36 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.

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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 Check-in* button to save the changes and close the dialog.

Note:

- 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

Merge two or more scanned documents 92
Scan and add single document 72
Scan multiple single paged document 75

6.12 Merge Two or More Scanned Documents

You can merge two or more scanned documents 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 Globodox, select the *Home* tab and click the *Scan* button. The Scan Window 63 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 Globodox DB. The merged document will now be added.
9. Click the *Close* button to close the Scan window.

Note:

- If you have a flat bed scanner then you can use the *Merge* feature to save the 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 265 to save the frequently used scan settings. Also see Destination Profiles 267
- You can use the Settings tab 65 to change or set the scan setting.

Related Topics

Insert a page to a multi-paged document 91
Scan document with variable number of pages 83
Scan documents with fixed number of pages 80

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6.13 Replace Document by Scanning

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

To Replace a Document by Scanning

1. In Globodox, select the document to be replaced from the List View pane 35.
2. Click the *More* button on the *Ribbon* bar 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 72.

Related Topics
Replace document from disk 59
Scan multiple single paged document 75

6.14 Automate the Scan Process

You can use a Scan Profile 90 along with a Destination Profile 267 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 125, its Stack 136 and its folder) which can be saved and reused. Instead of specifying the scan settings and location every time you want to scan and 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, Stack and folder will be set as per the information specified in the Destination Profile.

For example:
Let's say that you scan all the Invoices from Acme Corp. as *Black & White PDF* and then you set their Document Type to Invoice and 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 Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
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.

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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 217 (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 126 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. If you want to relate the scanned document to a Stack 136 then click this button besides the *Attach to existing Stack* box to find the Stack. The *Look Up* window will be launched.

a) Select the Stack Type from the *Look for* drop-down that has the Stack, you want to relate with the scanned document
b) Now, type a word that describes the Stack in the *Look for* box. Click the *Find* button to find the Stack. The Stacks that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
c) Select the Stack in the *Available Data* list, to relate with the scanned document. Use this button to add the selected Stack from the *Available Data* list to the *Selected Data* list and use this button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.
d) Click the *OK* button to select the Stack. The Stack will now be related with the document and will be displayed in the *Attach to existing Stack* box.
Also see Relate a Document to a Stack 178

12. 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.
13. 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.

Note:

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

Related Topics

Scan multiple single paged document 75
Separate various documents while scanning 80

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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 Globodox, double click the scanned document to open it in the Image Viewer. Or click the Edit button on the Image toolbar. The scanned document will now open in the Image editor window.
  2. Click Adjustments drop down 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 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 Globodox.

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

  - Click the Edit button on the Image toolbar. The scanned document will now open in the Image editor window.
  - Click Adjustments drop down and select the Deskew option. The document will now be straightened.

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

  To 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.

  Note:

  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 avoid the tiny black spots by:

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

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- 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.

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7 Index Documents

Topics Covered

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7.1 What are Data Fields

What are Data Fields?

When you add documents to Globodox, 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 125 and Stack Types 136.

Whenever you add a Data Field to a *Document Type* or *Stack 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 Globodox and the type of data that can be stored in fields of these Data Types.

Data Type	Description	Size
Text	Use this to enter text or combinations of text and numbers, as well as numbers that don't require calculations, such as phone numbers.	Up to 255 characters
Memo	Use this to enter lengthy text or combination of text and numbers	Up to 65,536 characters
Email	Use this to enter email address	Up to 255 characters
URL	Use this to enter web links	
Integer	Use this to enter numeric data used in mathematical calculations	
Decimal	Use this to enter Decimal values	
Currency	Use this to enter Currency values	
Date	Use this to enter Date values for the years through 1601 to 9999	
Time	Use this to enter Time values	
DateTime	Use this to enter both Date and Time value	
Yes/No	Yes or No values, fields that contain only one of the two values	
PickListSingle	Use this to create single item from a list.	
PickListMultiple	Use this to be able to select multiple items from a list.	
Lookup	Use this to be able to store a link to a Stack or a Document	

What is a Primary Field?

A primary field is a field that is used to represent its document or Stack. In other words it is used

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as the display name to identify its Stack 137 or document.

For example:
For a '*Customer'* Stack Type the *'Name'* data field (customer's name) can be its Primary Field. By default, a document's Primary Field is its name.

Primary field has the following uses:

- Value of the primary field is used to identify individual Document Type or Stack items.
- When a field is defined as a *Lookup* field the values of the primary field of the referenced entity (Document Type or Stack) are used for display in the Lookup field.

Related Topics

Data Fields - FAQ 100
Create Data Fields for Document Types 113
Create Data Fields for Stack Types 117

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7.2 Data Fields - FAQ

What are data fields?

When you add documents to Globodox, 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 and Stacks.

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.
If you want to add a data field to a Stack Type then select *Settings* > *Stack Types* 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 Globodox DB at anytime.

For more info see:
Creating Data Fields for Document Types 113
Creating Data Fields for Stack Types 117

How many data fields can I create in a Globodox DB?

The actual number of fields you can create in a Globodox 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...

Text	Stores up to 255 characters of text	You can use the *Text* data type to enter values such as Names, Telephone numbers etc.
Memo	Stores up to 65536 amount of text	You can use the *Memo* data type to enter Address, Description, Comments etc.
Email	Stores Email address	You can use the *Email* data type to enter email address
URL	Stores Web links	You can use the *URL* data type to enter Web Sites addresses for e.g. www.globodox.com
Integer	Stores numeric values	You can use the *Integer* data type to enter Telephone numbers, Age, Invoice number, etc.
Decimal	Stores Decimal values	You can use the *Decimal* data type to enter values such as Weight, Height, Length, etc.
Currency	Stores Currency values	You can use the *Currency* data type to enter values such as Price, Amount etc.
Date	Stores Date values	You can use the *Date* data type to enter values such as Date of Birth, Payment Date, Order Date, Shipment Date etc.
Time	Stores time values	You can use the *Time* data type to enter values such

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		as Shipment Time, Arrival and Departure time etc.
DateTime	Stores both Date and Time values	You can use the *DateTime* data type to enter values such as Shipment date and time, Arrival date and time, Departure date and time etc.
Yes/No	Stores Yes/No values	You can use the *Yes/No* data type to enter Boolean values such as Invoice Paid (Yes), Loan Approved (No),
PickListSingle	Stores data in the form of a List.	You can select only one item from this data field. You can use the *PickListSingle* data type to enter values such as Gender (Male, Female), Country (India, USA, UK, Brazil, China, Canada),
PickListMultiple	Stores data in the form of a List.	You can select only multiple item from this data field. You can use the *PickListMultiple* data type to enter values such as Items Purchased (Monitor, Mouse, Keyboard, wireless Keyboard), Items Owned (House, Car, Telephone, Credit Card) etc.
Lookup	Stores values of Stacks 137 and document	You can use the *LookUp* data type to look for values from a Document Type or a Stack. 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'*.

What is a Primary Field?

A primary field is a field that is used to represent its document or Stack. In other words it is used as the display name to identify its Stack 137 or document. By default the *Document Title* is the primary field for a document.

For e.g. For a '*Customer'* Stack the *'Name'* data field (customer's name) can be its Primary Field. By default a documents Primary Field is its name.

Primary field has the following uses:

- Value of the primary field is used to identify every individual item of an entity (Document Type or Stack).
- When a field is defined as a *Lookup* field the values of the primary field of the referenced entity (Document Type or Stack) is used as a value of the Lookup field.

Related Topics

Create Data Fields for Document Types 113
Create Data Fields for Stack Type 117

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7.3 Fields Tab

Fields Tab

All the data fields of the *Document Type* or *Stack Type* are displayed in the *Fields* pane. You can also add new data fields to the *Document Type* or *Stack 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.
If you want to add a data field to a Stack Type, then select *Settings* > *Stack Types* in the *Navigation* pane.
Double-click an existing Document Type or Stack Type to open it. If you want to create a new Document Type or Stack Type, then click the *New* button on the *Home* tab.
On the Document Type or Stack type window, click the ***Fields* tab** to add fields.

The *Fields* panel is divided into three sections: *Field List* pane and *Field Properties* 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 columns. These 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 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

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values for this field creating. If this option is checked, a new value will be auto-generated for this field every time you add a new document or stack.

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 Globodox 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 an 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 Globodox. 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.

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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 Globodox will increment the auto-generated value every time a document or stack 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 Length Specify the maximum number of characters that can be entered in this field. By default you can enter up to 255 characters in the *Text* data type.

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.

Security Select a Security Label 395 for the field.

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:

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 up to 65536 characters in the Text data type.

Default Specify a default value for this field. The value entered here becomes the

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Value 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.

Security Select a Security Label for the field.

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.

Security Select a Security Label for the field.

URL Data Type:

Use the *URL* data type to enter 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.

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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.

Security Select a Security Label for the field.

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 or stack.

Options to control the format of the auto-generated values are available in the Auto Generate Options tab 103.

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 up to 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.

Security Select a Security Label for the field.

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

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field properties:

Decimal Places Specify the place at which the decimal should be applied.

For example:
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 up to 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.

Security Select a Security Label for the field.

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:

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 up to 255 characters.

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

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.

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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.

Security Select a Security Label for the field.

Date Data Type:

Use the *Date* data type to enter date values for the years 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:

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 up to 255 characters.

Use system date as default value 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.

Security Select a Security Label for the field.

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 up to 255 characters.

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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.

Security Select a Security Label for the field.

DateTime Data Type:

Use the *DateTime* data type to enter both the date and time. You can use the *DateTime* data type to enter values such as Shipment date and time, Arrival date and time, Departure date and time etc. The *DateTime* 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 up to 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.

Security Select a Security Label for the field.

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YesNo Data Type:

Use the *YesNo* 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:

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.

Security Select a Security Label for the field.

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 example, you can use this to create a data field to store the names of all your customers as a list. This data field will have a drop-down with the list of all your customers' names. You can select your customer's 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 field. 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 example:
  Instead of entering a list of 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.

Security Select a Security Label for the field.

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 example, you can create a

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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 *PickListMultiple* data type can thus help in faster data entry and also avoid errors while entering data. The *PickListMultiple* data type has the following field properties:

List Source Specify the list of items for this field. 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 or other spread sheet program and click the *Paste* button to add these values to this data type.
  For example:
  Instead of entering a list of 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 type.
- **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.

Security Select a Security Label for the field.

Lookup Data Type:

Use the *LookUp* data type to look for values from a Document Type 125 or a Stack 136. *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 Stack or 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 Select this option if the field can be left empty.

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blank

Security Select a Security Label 395 for the field.

Description
Enter a short description about the data field in this box.

Field Properties
The Field Properties pane displays the properties of the selected data type. You can set or modify a field's property in this pane.

Related Topics

Create Data Fields for Document Types 113
Create Data Fields for Stack 117

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7.4 Create Data Fields for Document Types

You can create a new Document Type[126] and add Data Fields to it by using the Data Field Manger[102].

To Create Data Fields for a Document Type

1. In Globodox, select *Settings > DB Settings > Document Types* in the Navigation[34] 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[102] will now be launched.
3. By default the *Information* pane of the Data Field Manager will be displayed. You can enter information, like the Document Type name in this pane. You can also modify information of an existing Document Type from this pane.
   ▾ 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 example:
   If the name of the Document Type is '*Invoice'* its *Plural name* will be ' *Invoices'.*

   Alias: Enter an alias name for the Document Type in this box. By default the system creates an alias name. You can change the default alias name with the name of your choice.
   For example:
   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* pane 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[102]
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 a short description about the data field in the *Description* cell.
10. Click the *Save* button to save the changes and create the Data Field.

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Also see Example 114.

Notes:

- You can create as many Document Types you want. Each Document Type can have up to 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.
- By default the *Document Title* is the Primary Field 98 of the Document Type.
- 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 Stack Type 117
Create a Document Type 128
Enter Indexing Information of a Document 121
Automatically Index a document 197

7.4.1 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 Globodox, select *Settings* > *DB Settings* > *Document Types* in the Navigation 34 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 102 will now be launched.
3. By default, the *Information* pane 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 '

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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* pane 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 field. 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. If you wish you can apply a Security Label for the *Company Name* field from the *Security* drop-down. Now that we have created the *Company Name* field, we will now create the *Invoice Number* field.
16. 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* as the name for the field.
17. 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.
18. In the *Maximum Length* and *Minimum Length* box specify the maximum and minimum number of characters that can be entered in this field.
19. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
20. Specify that *Invoice Number* should not have any duplicate values in the *Allow Duplicates* option.
21. If you wish you can apply a Security Label for the *Invoice Number* field from the *Security* drop-down.
22. We will now create the fields for *Invoice Amount, Invoice Paid* and *Invoice Date*.
23. 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 Globodox and Set its Document Type 134.

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Notes:

- You can create as many Document Types you want. Each Document Type can have up to 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.
- By default the Document Name is the Primary Field 98 of the Document Type.
- 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 Stack Types 117
Create a Document Type 128
Delete Fields 123

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7.5 Create Data Fields for Stack Type

You can create a new Stack Type[137] and add Data Fields to it by using the Data Field Manager [102].

To Create Data Fields for a Stack Type

1. In Globodox, select *Settings* > *DB Settings* > *Stack Types* in the Navigation[34] pane. The existing Stack Types will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab. The Data Field Manager[102] will now be launched.
3. By default the *Information* pane of the Data Field Manager will be displayed. You can enter information like the Stack Type name in this pane. You can also modify the information of an existing Stack Type from this pane.
   ▾ The Information panel contains the following options

Name	Enter or modify the name of the Stack in this box.
Plural Name	Enter or modify the plural name of the Stack in this box. **For example:** If the name of the Stack Type is *Invoice* its Plural name will be *Invoices.*
Alias:	Enter an alias name for the Stack Type in this box. By default the system creates an alias name. You can change the default alias name with the name of your choice. **For example:** If your Stack Type is named *'Account'* its *Alias* could be *'Acc*.
Description	Enter a short description about this Stack Type in this box.

4. Click the *Fields* tab to add data fields for the Stack. The *Fields* pane will now be displayed. Data Fields of existing Stacks will be listed in the *Field List* pane.
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* field type is selected.
   The data field can be of the following types[102]
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 a short 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[118].

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Notes:

- Please note that you will have to set a Data Field as the Primary Field[100] of its Stack Type, otherwise you will not be able to save that Stack Type. You can set a primary field by right-clicking the data field and selecting the *Primary Field* option.
- 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.
- You can create as many Stack Types as you want. Each Stack Type can have up to 200 data fields.
- 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[117]
Create a Stack Type[145]
Automatically Index a stack[199]

7.5.1 Example

In this example we will create a Stack Type for *Customers*. You will need to store information such as the customer's name, address, telephone number, web site address and so on. 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	Text
Address	Text
Web Site	URL
Email Address	Email
Telephone	Text
Fax	Text

To Create Data Fields for a Stack Type

1. In Globodox, select *Settings* > *DB Settings* > *Stacks* in the Navigation[34] pane. The already existing *Stacks* will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab. The Data Field Manager[102] will now be launched.
3. By default the *Information* pane of the Data Field Manager will be displayed.
4. Enter a name for the Stack Type in the *Name* box. We will enter *'Customer'*.
5. Enter the plural name of the Stack Type in the *Plural name* box. We will enter ' *Customers'.*
6. Enter an alias name for the Stack Type in the *Alias* box. We will enter '*Cust'.*
7. Enter a short description about this Stack in the *Description* box.

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8. Click the *Fields* tab to add data fields for this Stack. The *Fields* pane 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'.* 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 *Text* 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.
12. In the *Maximum Length* and *Minimum Length* box specify the maximum and minimum number of characters that can be entered in this field.
13. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
14. Specify that *Company Name* should not have any duplicate values in the *Allow Duplicates* option.
15. If you wish you can apply a Security Label for the *Company Name* field from the *Security* drop-down.
16. We will now create a field for *Address*. Click the next line i.e. the *Click here to add a new field*, to create a new field. Follow the above steps to create the field.
17. We will now create a field for *Email Address*. Click the next line i.e. the *Click here to add a new field*, to create a new field.
18. Select the *Email* Data Type for this field from the *Field Type* drop-down. The properties of *Email* data type will now be displayed in the *Field Properties* section.
19. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
20. Specify that *Email Address* should not have any duplicate values in the *Allow Duplicates* option.
21. If you wish you can apply a Security Label for the *Email Address* field from the *Security* drop-down.
22. We will now create a field for *Web Site* address. Click the next line i.e. the *Click here to add a new field* to create a new field.
23. Select the *URL* Data Type for this field from the *Field Type* drop-down. The properties of *URL* data type will now be displayed in the *Field Properties* section.
24. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
25. Specify that Web Site should not have any duplicate values in the *Allow Duplicates* option.
26. If you wish you can apply a Security Label for the field from the *Security* drop-down.
27. We will now create fields for *Telephone* and *Fax*.
28. 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 *Stack Type* you can add a Stack 150 to it.

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Notes:

- Please note that you will have to set a Data Field as the Primary Field[100] of its Stack Type, otherwise you will not be able to save that Stack Type. You can set a primary field by right-clicking the data field and selecting the *Primary Field* option.
- 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.
- You can create as many Stack Types as you want. Each Stack Type can have up to 200 data fields.
- 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[113]
Add Stack to a Stack Type[150]
Delete Fields[123]

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7.6 Enter Indexing Information for a Document

You can index a document by either tagging it or by using data fields to store the document's indexing information.

To Enter Indexing Information or Description for a Document

1. Select a document from the List View 35 pane, to enter its information or description. The document will now be displayed in the Document Details 165 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 *Document 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* pane 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 information, see Document Types 125.
- Use the *Undo* button on the *Information* bar to undo the changes you made, in the *Information* pane.
- You can also choose to Auto Save the indexing information. For steps, see Auto Save option in Options Window 554.

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 *Document Details* pane.
2. Enter tags for this document in the *Tags* box of the *Document Details* pane. You can add as many relevant tags as you want to a document by separating them with a semi-colon.

   Points to remember while tagging a document...
   - Enter words that describe the document, like email, fax, invoice, acme corp, etc.
   - Use words that a user would use to search a document.
   - Use words that mean the same - you can use both *invoice* and *bill* to tag a document that is an invoice.

Note:

- You can use the *Forward* and *Back* navigation button on the top right corner of the *Document Details* window to navigate through the entire list of documents displayed in the List View pane.
- If you want to add text to an indexing field, you can either manually type it or select the text from the source document, copy it and paste it into the indexing field as the indexing field's value. If the text you want to add is from a document in Globodox, you will need to follow this path: *Document Details* pane --> *Image Toolbar --> Arrow beside the Scroll button (first from left)* --> click the *Select* option.

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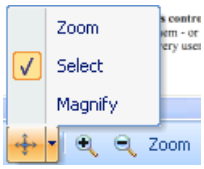

This will enable the selection mode. You can now select the text and copy and paste as explained above.

- 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
Create Data Fields for Document Types 113
Annotation 248

7.7 Update Common Indexing Information for Multiple Documents

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

To Update Common Indexing Information for Multiple Documents

1. In Globodox, select *Workspace* > *Document Types* in the Navigation 34 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.

Notes:

- There is no limit to the number of documents that can be selected for updating common indexing information. However, if the number of stacks to be updated together is greater than 50, it will be easier to change the number of stacks 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 560.

Related Topics
Automatically Index a Document 197
Link One Document with Another Document 180
Enter Comments for a Document 183
Change the number of items being displayed in List View 560

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7.8 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 Manager[102].

To Delete a Data Field of a Document Type

1. In Globodox, select *Settings* > *DB Settings* > *Document Types* in the Navigation[34] pane. The existing Document Types will now be displayed in the *List View* pane.
2. Select from the *List View* pane, the Document Type[126] whose data field you want to delete. 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* pane.
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.

To Delete a Data Field of a Stack Type

1. In Globodox, select *Settings* > *DB Settings* > *Stack Types* in the *Navigation* pane. The existing *Stack Types* will now be displayed in the *List View* pane.
2. Select from the *List View* pane, the Stack Type[136] whose data field you want to delete. Now, double-click this Stack Type to open it in its window.
3. Click the *Fields* tab to view the data fields of the selected Stack 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.

Notes:

- Please note that if you delete a Primary Field[100] of a Stack Type, you will need to set another data field as the *Primary field for* the Stack Type. You can set a primary field by right-clicking the data field and selecting the *Primary Field* option.
  By default the *Document Title* is the Primary field[98] of the Document Type.
- 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[113]
Create Data Fields for Stack Types[117]

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7.9 Block Indexing

By default, Globodox 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 that have no text which can be recognized or extracted). Sometimes Globodox can have trouble indexing a particular document. With this version, Globodox lets you block the indexing process for such documents.

To Block Indexing of a Document

1. In Globodox *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 the document from being indexed.

To Manually Choose to Index a Document

1. In Globodox *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 Globodox *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. Globodox will now consider that document as not indexed, until you manually choose to index it as explained in the section above.

Notes:

- When you manually choose to index a document, Globodox will begin indexing the document immediately if currently there are no other documents to be indexed. If there are other documents to be indexed, Globodox will pick up the documents randomly for indexing.

Related Topics

Create Data Fields for Document Types 113
Create Data Fields for Stack Types 117

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8 Document Types

Topics Covered

1. What are Document Types 126
2. Document Type - FAQ 127
3. Create Document Type 128
i. Example 129
4. Modify a Document Type 132
5. Add Documents to a Document Type 132
6. Drag and Drop Documents to a Document Type 133
7. Set the Document Type of a Document 134
8. Delete a Document Type 134

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8.1 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 example:
Store *Invoice Number*, *Invoice Date*, *Invoice Amount* with each stored Invoice and store *Sender Name*, *Date* with each stored Letter.

For more information, see Data Fields 98.

The main advantage of using Document Types is that detailed information about each type of document added 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 127
Create a Document Type 128

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8.2 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 example:
Store *Invoice Number*, *Invoice Date*, *Invoice Amount* with each stored Invoice and store *Sender Name*, *Date* with each stored Letter.

For more information, see Data Fields 98.

How is it useful?

The main advantage of using Document Types is that detailed information about each type of document added 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?

Globodox 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 even delete any of these Document Types and create a new set of Document Types more suited to your organization.

Related Topics

Create a Document Type 128
Set a Document Type of a Document 134
Create Data Fields for Document Types 113

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8.3 Create a Document Type

You can create a new Document Type[126] and add Data Fields to it from the *Settings* pane.

To Create a Document Type

1. In Globodox, select *Settings* > *DB Settings* > *Document Types* in the Navigation[34] 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[102] will now be launched.
3. By default the *Information* pane of the Data Field Manager will be displayed. You can enter information like the Document Type name in this pane. You can also modify information of an existing Document Type from this pane.
   ▾ 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 example:** If the name of the Document Type is *'Invoice'* its *Plural Name* will be *'Invoices'.*
Alias:	Enter an alias name for the Document Type in this box. By default the system creates an alias name. You can change the default alias name with the name of your choice. **For example:** If your Document Type is named *'Invoice'* its *Alias* could be *'Inv'*.
Description:	Enter a short description about this Document Type in this box.
Archive Documents of this type	Use this option if you want to archive Documents of this Documents Type. (A field called Archive Date will be automatically created)

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.
   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*

7. Select a Data Type for the data field from the Field Type drop-down. By default *Text* data type is selected.

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The data field can be of the following types[102]

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 a short 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[129].

Notes:

- You can create as many Document Types you want. Each Document Type can have up to 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.
- By default the Document Name is the Primary field[98] of the Document Type.
- To delete a data field, right-click that data filed 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[134]
Delete a Document Type[134]
Create a Stack Type[145]

8.3.1 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 Globodox, select *Settings* > *DB Settings* > *Document Types* in the Navigation[34] pane. The already existing Document Types will now be displayed in the right pane.

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2. Click the *New* button of the *Home* tab. The Data Field Manager 102 will now be launched.
3. By default, the *Information* pane 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* pane 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 field. 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. If you wish you can apply a Security Label for the *Company Name* field from the *Security* drop-down. Now that we have created the *Company Name* field, we will now create the *Invoice Number* field.
16. 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* as the name for the field.
17. 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.
18. In the *Maximum Length* and *Minimum Length* box specify the maximum and minimum number of characters that can be entered in this field.
19. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
20. Specify that *Invoice Number* should not have any duplicate values in the *Allow Duplicates* option.
21. If you wish you can apply a Security Label for the *Invoice Number* field from the *Security* drop-down.
22. We will now create the fields for *Invoice Amount, Invoice Paid* and *Invoice Date*.
23. Once you have created all the fields click the *Save* button to save the changes and

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create the Data Field.

Now that you have created a Document Type you can add a document to Globodox and Set its Document Type 134.

Notes:

- You can create as many Document Types you want. Each Document Type can have up to 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.
- By default the Document Name is the Primary Field 98 of the Document Type.
- 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 Stack Types 117
Create a Document Type 128
Delete Fields 123

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8.4 Modify a Document Type

You can modify an existing Document Type from the *Settings* pane.

To Modify a Document Type

1. In Globodox, select *Settings* > *DB Settings* > *Document Types* in the Navigation 34 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 open in its window.
3. By default the *Information* pane will be displayed. Modify the required data.
4. Click the *Fields* tab to modify data fields of the Document Type. The *Fields* pane will now be displayed. Modify the required fields.
5. Click the *Save* button to save the changes.

Notes:

- By default the *Document Name* is the Primary field 98 of the Document Type.
- 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 113
Set a Document Type of a Document 134
Delete a Document Type 134

8.5 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 Globodox, select *Workspace* > *Document Types* in the Navigation 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 51.
5. The *Information* pane 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 now relate this document with a Stack, from the *Information* pane. For more information, see Relate a Document to a Stack 178.

Notes:

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- 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 Globodox 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 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 133.

Related Topics
Document Details Window 165
Edit a document 175
Create a New Document 172
Automatically Index a document 197
Automatically Index a stack 199
Recognize barcodes on documents 200

8.6 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 Globodox, select the *Document Types* node in the Navigation 34 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 35 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*.

You can also drag and drop documents to a Document Type from the *All Documents, Folders and Tags* nodes.

To Create a New Document by Dragging and Dropping Text

1. In Globodox, select *Workspace* > *Document Types* in the *Navigation* pane.
2. Select text from an RTF file (Rich Text Format), like .DOC files, HTML files, .EML files, PDF files etc.
3. Drag this text and drop it in the List View 35 pane. A new document will be created containing the text you selected.

   Note:
   By default 50 documents will be displayed in the *List View* pane. If you have added more than 50 documents they will moved to the next page. To view the documents displayed on the next page use the *Next* button below the *List View* pane.

Notes:

- You will be the Owner of the documents, that you have added.
- To view documents based on their types, expand the Document Types node in the

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Navigation pane of the Globodox main window 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.

- Dragging & dropping email messages and email attachments from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported.

Related Topics
Create Data Fields for Document Types 113
Set a Document Type of a Document 134
Delete a Document Type 134

8.7 Set the Document Type of a Document

You can set the 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 Document Details 165 pane.
2. By default the *Information* pane will be displayed on the left side of the *Document 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.

Notes:

- To view documents based on their types, expand the Document Types node in the Navigation pane of the Globodox main window 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.
- Use the *Undo* button on the *Information* bar to undo the changes you made, in the *Information* pane.
- You can assign a common Document Type to multiple documents together. 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
Find and Add a Document 55
Relate a Document to a Stack 178
Share Documents with Other Users 188

8.8 Delete a Document Type

You can right-click a Document Type and select the *Delete* option to delete it.

To Delete a Document Type

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1. In Globodox, select *Settings* > *Document Types* in the Navigation 31 pane.
2. Select the Document Type you want to delete and click the *Delete* button on the *Home* tab to delete the Document Type.

Note:
You can also delete a Document Type by hitting the *Delete* key on the keyboard.

Related Topics

Delete Fields of a Document Type 123
Create a new Document Type 128
Delete a Document 177

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9 Stack Types

Topics Covered

1. What Are Stacks and Stack Types 137
2. Stacks - FAQ 138
3. Stack Details Window 139
4. Create a Stack Type 145
   i. Example 147
5. Modify a Stack Type 150
6. Add Stacks to a Stack Type 150
7. Relate Stack to a Document 152
8. Navigate Documents in a Stack in Continuous Mode 153
9. Break Relation Between Stack and Documents 154
10. Link Stack with Documents 155
11. Link Two or More Stacks 157
12. Break Links of a Stack 158
13. Enter Comments or Notes for a Stack 159
14. Print Documents Related to a Stack 159
15. Delete a Stack 160
16. Share a Stack with Other Users 161
17. Assign a Stack to Another User 162
18. Restrict Users from Viewing Stacks 163

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9.1 What are Stacks and Stack Types?

Sometimes there is need to group related document together. For example, you may be managing documents for multiple projects and might want to quickly access all documents for a particular project. There are several ways to do this in Globodox...

- You could create a folder for each project and put all documents in their respective project folders.
- You could tag each document with the project name.
- You could create a field called *Project Name* in each *Document Type* you use.

All the above three methods will help you quickly locate documents by project name. But what if you wanted to also store additional information about each project, such as *Project Start Date*, *Project Manager*, *Project Type* etc.? The above three methods would not work well in that case. Stack Types are meant to handle such situations.

For the above example, you could create a *Stack Type* called *Projects* with indexing fields such as *Project Name, Project Start Date*, *Project Manager*, *Project Type* etc. Now for each project you can create a new stack of the type *Projects* and add each project's documents to its stack.

Please note that each document added to a stack can still have its own *Document Type*, its own set of tags and can even reside in a folder. You can define as many Stack Types as you want.

Other possible applications for Stack Types are...

- Law firms can create a Stack Type called Cases with indexing fields such as Case Number, Case Title, Client Name etc. Each *Case* stack would contain documents related to that case.
- Healthcare firms can create a Stack Type called Patients with indexing fields such as Patient Name, Date of Birth, Gender etc. Each *Patient* stack would contain documents related to the patient (e.g. X-Rays, Lab Reports, Prescriptions etc.)
- An organization's human resource department can create a Stack Type called Employees with indexing fields such as Employee Name, Designation, Department etc. Each *Employee* stack would contain documents related to the employee (Photograph, C.V., Certifications etc.).

You can also use Stack Types if a group of documents must share the same indexing information.

You can also use Stack Types if you just need to store some data without wanting to relate any document to this data.

Related Topics

Create a Stack Type 145
Add Stack to a Stack Type 150
Relate a Stack to a Document 152

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9.2 Stacks - FAQ

What are Stacks and Stack Types?

For the answer, see What are Stacks and Stack Types? 137

How many Stack Types can I create in Globodox?

You can create as many Stack Types as you like.

Do I have to create Stack Types?

Globodox by default ships some Stack Types such as Contacts and Projects. You can modify these Stack Types by adding or removing fields, or you can create entirely new Stack Types based on your requirements.

Can I add Data Fields to a Stack Type?

Yes, you can add Data Fields to a Stack Type.

Related Topics

Create a Stack Type 145
Add Stacks to a Stack Type 150

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9.3 Stack Details Window

An entry (or record/case) added to a Stack Type is called a *Stack*.

For example:
Let's say you have a Stack Type called *Customers*, which you use to manage your customers' records. Each customer's record added to this Stack Type is called a *Stack*. Like documents, Stacks are also displayed in the List View pane.

The *Stack Details* pane displays the selected Stack along with all its details and documents. The *Stack Details* pane can be used to enter information, notes and documents about an entry (or record/case). The Stack Details pane can also be opened in its window by double-clicking the Stack.

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

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

Details Pane

The *Details* pane displays all the details of a Stack. The *Details* pane consists of four panes. By default the *Information* pane will be displayed. To view the other panes you will need to click the tab on the left bar of the *Details* pane.

Information Pane

The *Information* pane displays the data fields and the related documents of the Stack. The *Information* pane is divided into two sections: *Item Information* and *Document List.*

Item Information

The *Item Information* section displays the data fields. You can enter indexing information about a Stack (or record/case) in the data fields. The *Item Information* section also has a toolbar, which has the following options...

Click the *Save* button to save the changes made.

Click the *Undo* button to undo the changes made.

Document List

The *Document List* section displays the documents that are related with the selected Stack. A document that is selected in this list will be displayed in the *Display* pane.

Click the *Relate* button to relate the selected Stack with other documents. The *Relate* button has a drop-down with the following options...

Relate to existing document(s):	Click this option to relate the selected Stack with document(s) stored in the Globodox DB.
Add files from disk and relate it:	Click this option to add files from disk and relate it with the selected Stack.
Scan document and relate it:	Click this option to scan a document and relate it with the selected Stack.

Click this button to delete a document from the *Document List* section.

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Click the Refresh button to refresh the list.

Click this button to view the documents as thumbnails.

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

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

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

Email Document(s): Click this button to email the document(s) that is displayed in the list.

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

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

Notes Pane

Click the *Notes* tab on the left bar of the Stack Details pane to view the *Notes* Pane. The *Notes* pane can be used to enter notes, information or comments about the Stack. The notes entered here can be viewed by any user who has the privilege to view the selected Stack. The *Notes* pane 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* pane.

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

Print Data: Click this option to print the notes that are displayed in the list.

Export Data: Click this option to export the notes that are displayed in the list.

Event Log Pane

The Event Log 345 pane can be used to view the list of all the actions carried out on the selected Stack. The top bar displays the event filtering options. Apart from *Event Category*, events can be filtered according to the date and time of occurrence, the *Event Group* they belong to and by the result of the event. For more information, see Event Logs 345.
The events in the event list can be filtered in the following ways...

Date & Time of Occurrence The Event List can be filtered based on the date and time of the events. The drop-down box has the following options...

All: Select this option to view all the events (events will still be filtered by any other criteria if specified).

Last 12 hours: Select this option to view all the events of the last 12 hours.

Today: Select this option to view all the events of the current day.

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Yesterday:	Select this option to view all the events of the previous day.
Last 24 hours:	Select this option to view all the events of the last 24 hours.
This week:	Select this option to view all the events of the current week.
Last week:	Select this option to view all the events of the previous week.
Last 7 days:	Select this option to view all the events of the last 7 days.
This month:	Select this option to view all the events of the current month.
Last month:	Select this option to view all the events of the previous month.
Last 30 days:	Select this option to view all the events of the last 30 days.
Custom...:	Select this option if you wish to provide a custom date range. Selecting this option will launch the Event Date Range Dialog.

Event Group Events can be filtered based on the group the event belongs to. The following Event Groups are available...

All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
View Events:	Select this option to view all the events belonging to the View Event Group.
Add Events:	Select this option to view all the events belonging to the Add Event Group.
Modify Events:	Select this option to view all the events belonging to the Modify Event Group.
Workflow Events:	Select this option to view all the events belonging to the Workflow Event Group.
Other Events:	Select this option to view all the events belonging to the Other Event Group.

Event Result Events can also be filtered based on the outcome (result) of the event. The possible event results are...

All Results:	Select this option to view all the results (events will still be filtered by any other criteria if specified).
Success:	Select this option to view all the events which were completed successfully.
Failure:	Select this option to view all the events which could not be completed successfully.
Rejected:	Select this option to view all the events for which permission was denied to the
Access Denied:	user.
Approved:	Select this option to view all the events for which permission was denied to the user.
	Select this option to view all the events for which permission was denied to the user.

Click this button to refresh the *Event Log* pane.

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

Print Data:	Click this option to print the data that is displayed in the list.
Export Data:	Click this option to export the data that is displayed in the list.

Links Pane

The *Links* pane can be used to link the selected Stack with other documents and Stacks. You can also break an existing link from this pane. The *Links* pane is divided into two sections *Linked Documents* and *Linked Stacks*.

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

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

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Link existing document(s): Click this option to link the selected Stack with document (s).

Add files from disk and link: Click this option to add files from disk 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 Stack and the linked document.

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

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

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

Email Document(s): Click this button to email the document(s) that is displayed in the list.

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

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

Linked Stacks:
Use the *Linked Stacks* section to link the selected Stack with other Stacks in Globodox. The *Linked Stacks* section has a toolbar with the following options...

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

Link existing Stack: Click this option to link the selected document with an existing Stack.

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

Display Pane

The *Display* pane displays the document that is selected in the *Document List* section of the *Information* pane. The *Display* pane has two toolbars The Annotation toolbar 249 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 251 text.

Use this button to draw rectangles 252.

Use this button to draw ellipses or circles 252.

Use this button to highlight 251 text.

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Use this button to hide 253 certain text.

Use this button to add notes 253 to the document.

Use this button to insert a bookmark 254 on the document.

Use this button to insert a stamp 255 on the document.

Use this button to insert a signature 255 on the document.

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

Use this button to view the content below the redact.

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 arrow next to the *Scroll Mode* button and then click *Select* from the drop-down 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 level 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 the *Fit to Window* button to resize the image to fit entirely in the Display area.

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

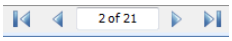
Click the *Rotate Anticlockwise* button to rotate the selected scanned document anti-clockwise.

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 69 you can resize, crop and rotate a document. You can save the modifications made to a document from the Image Editor.

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9.4 Create a Stack Type

You can create a new Stack Type[137] and add Data Fields to it from the *Settings* pane.

To Create a Stack Type

1. In Globodox, select *Settings* > *DB Settings* > *Stack Types* in the Navigation[34] pane. The existing Stack Types will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab to create a new Stack Type. The Data Field Manager[102] will now be launched.
3. By default the *Information* pane of the Data Field Manager will be displayed. You can enter information like the Stack Types name in this pane.
   ▾ The information pane contains the following options

Name:	Enter or modify the name of the Stack Type in this box.
Plural Name:	Enter or modify the plural name of the Stack Type in this box. **For example:** If the name of the Stack Type is *'Account'* its *Plural Name* will be *'Accounts'.*
Alias:	Enter an alias name for the Stack Type in this box. By default the system creates an alias name. You can change the default alias name with the name of your choice. **For example:** If your Stack Type is named *'Account'* its *Alias* could be *'Acc'*.
Description:	Enter a short description about this Stack Type in this box.
Archive Stacks of this type	Use this option to archive Stacks of this particular type. (A field called Archive Date will be automatically created)

4. Click the *Fields* tab to add data fields for the Stack Type. The *Fields* pane will now be displayed. Data Fields of existing Stack Type will be listed in the *Field List* pane.
5. Click the *Click here to add a new field* bar 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 row will now be created.
6. Select the *Field Name* cell to enter a name for the field.
   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*

7. Select a Data Type[98] for the data field from the Field Type drop-down. By default *Text* field type is selected.
   The data field can be of the following types[102]

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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 a short description about the data field in the *Description* cell.
10. Please note that you will have to set a Data Field as the Primary Field 100 of its Stack Type, otherwise you will not be able to save that Stack Type. You can set a primary field by right-clicking the data field and selecting the Primary Field option.
11. Click the *Save* button to save the changes and create the Stack.

Also see Example 147.

Notes:

- Please note that you will have to set a Data Field as the Primary Field 100 of its Stack Type, otherwise you will not be able to save that Stack Type. You can set a primary field by right-clicking the data field and selecting the Primary Field option.
- 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.
- You can create as many Stack Types you want. Each Stack Type can have up to 200 data fields.
- 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

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and select the *Move Down* option.

Related Topics
Delete a Stack 160
Add Stacks to a Stack Type 150
Relate Stack to a Document 152

9.4.1 Example

In this example we will create a Stack Type for *Customers*. You will need to store information such as the customer's name, address, telephone number, web site address and so on. 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	Text
Address	Text
Web Site	URL
Email Address	Email
Telephone	Text
Fax	Text

To Create Data Fields for a Stack Type

1. In Globodox, select *Settings* > *DB Settings* > *Stacks* in the Navigation 34 pane. The already existing *Stacks* will now be displayed in the right pane.
2. Click the *New* button of the *Home* tab. The Data Field Manager 102 will now be launched.
3. By default the *Information* pane of the Data Field Manager will be displayed.
4. Enter a name for the Stack Type in the *Name* box. We will enter *'Customer'*.
5. Enter the plural name of the Stack Type in the *Plural name* box. We will enter ' *Customers'.*
6. Enter an alias name for the Stack Type in the *Alias* box. We will enter '*Cust'.*
7. Enter a short description about this Stack in the *Description* box.
8. Click the *Fields* tab to add data fields for this Stack. The *Fields* pane 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'.* 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 *Text* Type for this field from the *Field Type* drop-down. The properties of *Text*

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data type will now be displayed in the *Field Properties* section.
12. In the *Maximum Length* and *Minimum Length* box specify the maximum and minimum number of characters that can be entered in this field.
13. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
14. Specify that *Company Name* should not have any duplicate values in the *Allow Duplicates* option.
15. If you wish you can apply a Security Label for the *Company Name* field from the *Security* drop-down.
16. We will now create a field for *Address*. Click the next line i.e. the *Click here to add a new field*, to create a new field. Follow the above steps to create the field.
17. We will now create a field for *Email Address*. Click the next line i.e. the *Click here to add a new field*, to create a new field.
18. Select the *Email* Data Type for this field from the *Field Type* drop-down. The properties of *Email* data type will now be displayed in the *Field Properties* section.
19. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
20. Specify that *Email Address* should not have any duplicate values in the *Allow Duplicates* option.
21. If you wish you can apply a Security Label for the *Email Address* field from the *Security* drop-down.
22. We will now create a field for *Web Site* address. Click the next line i.e. the *Click here to add a new field* to create a new field.
23. Select the *URL* Data Type for this field from the *Field Type* drop-down. The properties of *URL* data type will now be displayed in the *Field Properties* section.
24. Specify whether the field is required, recommended or can be left blank in the *Input Value* drop-down.
25. Specify that Web Site should not have any duplicate values in the *Allow Duplicates* option.
26. If you wish you can apply a Security Label for the field from the *Security* drop-down.
27. We will now create fields for *Telephone* and *Fax*.
28. 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 *Stack Type* you can add a Stack 150 to it.

Notes:

- Please note that you will have to set a Data Field as the Primary Field 100 of its Stack Type, otherwise you will not be able to save that Stack Type. You can set a primary field by right-clicking the data field and selecting the *Primary Field* option.
- 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.
- You can create as many Stack Types as you want. Each Stack Type can have up to 200 data fields.
- 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

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and select the *Move Down* option.

Related Topics

Create Data Fields for Document Types 113
Add Stack to a Stack Type 150
Delete Fields 123

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9.5 Modify a Stack Type

You can modify an existing Stack Type from the *Settings* pane.

To Modify a Stack Type

1. In Globodox, select *Settings* > *DB Settings* > *Stack Types* in the Navigation 34 pane. The existing Stack Types will now be displayed in the right pane.
2. Double-click the Stack Type that you want to modify. The Stack Type will now be opened in its window.
3. By default the *Information* pane will be displayed. Modify the data being displayed if required.
4. Click the *Fields* tab to modify data fields of the Stack Type. The *Fields* pane will now be displayed. Modify the required fields.
5. Click the *Save* button to save the changes.

Notes:

- Please note that if you delete a Primary Field 100 of a Stack Type, you will need to set another data field as the *Primary Field for* the Stack Type. You can set a primary field by right-clicking the data field and selecting the *Primary Field* option.
- You can create as many Stack Types you want. Each Stack Type can have up to 200 data fields.
- 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 Stack 117
Delete a Stack 160
Relate a Document to a Stack 152

9.6 Add Stacks to a Stack Type

An entry (or record/case) added to a Stack Type is called a Stack.

For example:
Let's say you have a Stack Type called *Customers*, which you use to manage your customer records. Each customer's details added to this Stack Type is called a Stack.

To Add a Stack to a Stack Type

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 34 pane.
2. Select a Stack Type from the *Stack Type* node to create a Stack for it.
3. Click the *New* button to create a Stack. The *New Stack* window will now be launched.
4. By default the *Information* pane will be displayed on the left side of the Stack Details 139 pane.
5. Enter appropriate descriptive/indexing information of the Stack in the respective data

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

   You can now relate this Stack with a document, from the *Information* pane. For more information, see Relate a Stack to a Document 152.

Notes:

- You will be the Owner of the Stacks that you have created.
- By default 50 stacks will be displayed in the List View pane. If you have added more than 50 stacks, they will moved to the next page. To view the stacks displayed on the next page, use the *Next* button below the List View pane.

Related Topics
Automatically Index a stack 199
Enter Comments for a Stack 159
Link a Stack with Documents 155
Change the number of items being displayed in List View 560

9.7 Update Common Indexing Information for Multiple Stacks

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

To Update Common Indexing Information for Multiple Stacks

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 34 pane.
2. Select a Stack Type from the *Stack Type* node.
3. This will display all the stacks under this stack type in the *List* pane.
4. Select all the stacks 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 of the stacks in the respective data fields in the *Information* pane of the *Stack Details* pane.
   Note:
   Whatever you enter in any field will apply to all the stacks. If you want to retain the value of an indexing field of a particular stack(s), then leave that field empty.
6. Click the *Save* button on the *Information* bar to save the information.

Notes:

- There is no limit to the number of stacks that can be selected for updating common indexing information. However, if the number of stacks to be updated together is greater than 50, it will be easier to change the number of stacks 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 560.

Related Topics
Automatically Index a stack 199

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Enter Comments for a Stack 159
Link a Stack with Documents 155
Change the number of items being displayed in List View 560

9.8 Relate Stack to a Document

Documents that have a common entity are grouped together by creating a Stack. For this group or relation to be formed, the Stack has to be related with the documents (in other words, add the documents). You can relate a Stack with multiple documents.

To Relate an Existing Document with a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 34 pane.
2. Now, select a Stack Type from the *Stack Types* node.The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select a Stack that you want to relate to a document. The Stack will now be displayed in the *Details* pane.
4. By default the *Information* pane will be displayed on the left side of the *Stack Details* pane. The documents that are already related to this Stack will be displayed in the *Document List* pane.
5. In the *Document List* section, click the *Relate* button and select the *Relate to existing Document(s)* option to an existing document. The *Look Up* window will be launched.
6. Select the *All 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. The documents that contain the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
7. Select a document to relate 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 it back to the *Search Result* list.
8. Click the *OK* button to select the document. The selected document will now be displayed in the *Document List* pane and will be related with the Stack.
9. Click the *Save* button on the *Information* bar to save the changes.

To Add Documents from Disk and Relate it with a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the *Navigation* pane.
2. Now, select a Stack Type from the *Stack Types* node.The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select the Stack that you want to relate to a document. The Stack will now be displayed in the *Details* pane.
4. By default the *Information* pane will be displayed on the left side of the *Stack Details* pane. The documents that are already related to this Stack will be displayed in the *Document List* pane.
5. In the *Document List* section, click the *Relate* button and select the *Add Document(s) from disk and Relate* option. The *Add Files* window will now be launched.
6. 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 Document List pane.
   Also see Add documents from disk 51.

   Note:
   Once the documents are added, you will get a confirmation message box asking you

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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*.

To Scan a Document and Relate it with a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the *Navigation* pane.
2. Now, select a Stack Type from the *Stack Types* node.The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select the Stack that you want to relate to a document. The Stack will now be displayed in the *Details* pane.
4. By default the *Information* pane will be displayed on the left side of the *Stack Details* pane. The documents that are already related to this Stack will be displayed in the *Document List* pane.
5. In the *Document List* section, click the *Relate* button and select the *Scan document and relate it* option. The Scan window 63 will now be launched.
6. Select a scanner from the *Select a Scanner* drop down.
7. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the *Scan* Window.
8. Select the location to add the scanned files in the *Destination* tab.
9. Now, click the *Add* button to add the scanned document to Globodox. The scanned document will now be displayed in the *Document List* pane.
   Also see Scan and add a document 61.

Notes:

- A document can be related to only one stack at any time though it can be linked to multiple stacks.
- You can click the document name displayed in the *Document List* pane to open it in the *Display* pane of the *Stack* window.
- The simplest way of relating a document to stack is by dragging and dropping the document to the *Document List* section.
- When you relate a Stack with a document, a strong link is created between the two. This means if you delete a Stack, all the documents that are related to it will also be deleted. You can use Links to create a loose link between a Stack and a document. In that case, if you delete a Stack, its linked documents will not be deleted and vice-versa. For more information, see Link the selected Stack 155.

Related Topics
Add Stacks to a Stack Type 150
Break Relation between Stack and Document 154

9.9 Navigate Documents in a Stack in Continuous Mode

You can continuously scroll through the documents of a stack by using the Navigation buttons displayed on the Preview pane. For this feature to work, you will need to enable the *Navigate documents in a continuous mode* option, from the Options window 554.

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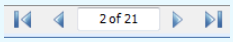
To Navigate documents in a Stack in continuous mode

1. In Globodox, click the *Globodox* button.
2. Now, click the *Options* button. The *Options* window will now be launched.
3. In the *User Options* node, scroll to the *Other User Options* section. Now, check the *Navigate documents in a continuous mode* option.
4. Click the *OK* button to apply the settings.
5. Now, select a Stack. The related documents of the stack, will now be displayed in the *Preview* pane.
6. Use the *Navigation* buttons 

on the *Preview* pane to navigate between the document pages as well as documents.
7. Click the *Next* button to go to the next page of a multi-page image file. When you reach the last page of the image file, on clicking the *Next* button the next document will be displayed. If it is a single page image file on clicking the *Next* button the next document will be displayed.

Related Topics
Add Stacks to a Stack Type 150
Link a Stack with Documents 155

9.10 Break Relation Between Stack and Document

You can break the relation between a document and a Stack from the *Information* pane of the Stack Details window 139.

To Break the Relation between Stack and Document

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 34 pane.
2. Now, select a Stack Type from the *Stack Type* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. By default the *Information* pane will be displayed on the left side of the *Stack Details* pane. The documents that are already related to this Stack will be displayed in the *Document List* pane.
4. In the *Document List* section, press SHIFT and click the *Delete* button to remove the document from the Stack.
5. In the *Document List* section, click the *Delete* button to delete the document permanently from GLOBODOX

Notes:

- You can click the Stack displayed in the *Related Stack* box to open it in the Stack Details window.
- You can also link a document to one or more Stacks. For more information, see Link Stack with Documents 155.

Related Topics
Relate Document to a Stack 178
Change the Folder of a Document 213

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9.11 Link a Stack with Documents

Links can be used when you do not want to relate or add a document to a Stack, but you want to maintain a connection between them so that you can refer to documents from its linked stack and vice versa. In other words, you want them to be loosely linked and not strongly linked. You can link a Stack with multiple documents.

To Link a Stack to an Existing Document

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 34 pane.
2. Now, select a Stack Type from the *Stack Types* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select the Stack that you want to relate to a document. The Stack will now be displayed in the *Details* pane.
4. Click the *Links* tab on the left bar of the *Stack Details* pane. The *Links* pane will now be displayed.
5. The documents that are already linked to this Stack will be displayed in the *Linked Documents* section. Click the *Link* button and select the *Link existing Documents* option to link the document to existing documents. The *Look Up* window will be launched.
6. Select the *All 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. The documents that contain the word that you have entered in the *Look for* box will be displayed in the *Search Result* list.
7. Select a document to link and add it to the *Selected Files* list. Use this >> button to add the selected document to the *Selected Files* list and use this << button to remove the document from the *Selected Files* list and move it back to the *Search Result* list.
8. Click the *OK* button to select the document. The selected document will now be displayed in the *Linked Documents* list.

To Add a Document from Disk and Link it with a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the *Navigation* pane.
2. Now, select a Stack Type from the *Stack Types* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select the Stack that you want to relate to a document. The Stack will now be displayed in the *Details* pane.
4. Click the *Links* tab on the left bar of the *Stack Details* pane. The *Links* pane will now be displayed.
5. The documents that are already linked to this Stack will be displayed in the *Linked Documents* section. Click the *Link* button and select the *Add Document(s) from disk and link* option. The *Add Files* window will now be launched.
6. Select one or more files that you want to add and click the *Open* button. The selected document will now be displayed in the *Linked Documents* list.

   Also see Add documents from disk 51.

To Scan a Document and Link it with a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the *Navigation* pane.
2. Now, select a Stack Type from the *Stack Types* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select the Stack that you want to relate to a document. The Stack will now be displayed in the *Details* pane.

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4. Click the *Links* tab on the left bar of the *Stack Details* pane. The *Links* pane will now be displayed.
5. The documents that are already linked to this Stack will be displayed in the *Linked Documents* section. Click the *Link* button and select the *Scan document and link it* option. The Scan window 63 will now be launched.
6. Select a scanner from the *Select a Scanner* drop-down.
7. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the *Scan* Window.
8. Select the location to add the scanned files in the *Destination* tab.
9. Now, click the *Add* button to add the scanned document to Globodox. The scanned document will now be displayed in the *Linked Documents* list.

   Also see Scan and add a document 61.

Notes:

- When you link a Stack with a document, a loose link is created between the two. This means if you delete a Stack, the documents linked to it will not be deleted and vice versa.
- You can click the Stack displayed in the *Linked Stacks* list to open it in the Stack Details window.
- You can create a strong link between Stack and a document. For more information, see Relate a Stack to a Document 152.

Related Topics

Find and Add a document 55
Add Stacks to a Stack Type 150
Break links of a Stack 158

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9.12 Link Two or More Stacks

Links can be used when you want to maintain a connection between two Stacks belonging to the same Stack Type or different Stack Types. In other words, you want them to be loosely linked and not strongly linked. You can link a single Stack with multiple Stacks.

To Link a Stack to Existing Stacks

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation pane.
2. Now, select a Stack Type from the *Stack Types* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select the Stack that you want to relate to a document. The Stack will now be displayed in the *Details* pane.
4. Click the *Links* tab on the left bar of the *Stack Details* pane. The *Links* pane will now be displayed.
5. The Stacks that are already linked to the selected Stack will be displayed in the *Linked Stacks* section. Click the *Link* button and select the *Link existing Stack* option to link the document to existing documents. The *Look Up* window will be launched.
6. Select the Stack from the *Look for* drop-down and type a word which best describes the Stack in the *Look for* box and click the *Find* button.
7. The Stack that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
8. Select the Stack in the *Available Data* list. Use this >> button to add the selected *Stack* to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move it back to the *Available Data* list.
9. Click the *OK* button to select the Stack. The selected Stack will now be displayed in the *Linked Stack* list.

Notes:

- When you link a Stack with other Stacks, loose links are created between them. This means if you delete a Stack, the linked Stacks will not be deleted.
- You can click the Stack displayed in the *Linked Stacks* list to open it in the Stack Details window.
- You can create a strong link between a Stack and a document. For more information, see Relate a Stack to a Document.

Related Topics

Link a Stack with Documents
Break links of a Stack

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9.13 Break Links of a Stack

You can break a link between a document and a Stack by right-clicking the linked Stack and selecting the *Remove Link* option.

To Break Link between a Stack and a Document

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 34 pane.
2. Now, select a Stack Type from the *Stack Types* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select a Stack in the right pane. The Stack will now be displayed in the *Details* pane.
4. Click the *Links* tab on the left bar of the *Details* pane. The *Links* pane will now be displayed.
5. The documents that are linked to the Stacks will be displayed in the *Linked Documents* list.
6. Now, select the document in the *Linked Documents* list and click the *Break Link* button to break the link.

To Break Link between two Stacks

1. In Globodox, select *Workspace* > *Stack Types* in the *Navigation* pane.
2. Now, select a Stack Type from the *Stack Types* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select a Stack in the right pane. The Stack will now be displayed in the *Details* pane.
4. Click the *Links* tab on the left bar of the *Details* pane. The *Links* pane will now be displayed.
5. The Stacks that are linked to the selected Stacks will be displayed in the *Linked Stacks* list.
6. Now, select a Stack in the *Linked Stacks* list and click the *Break Link* button to break the link.

Notes:

- If you delete a Stack, its linked Stacks or documents will not be deleted.
- You can click the Stack displayed in the *Linked Stacks* list to open it in the Stack Details window.
- You can create a strong link between a Stack and a document. For more information, see Relate a Stack to a Document 152.

Related Topics

Delete a Stack 160
Link Document with Stacks 155

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9.14 Enter Comments for a Stack

You can enter comments or notes regarding the selected Stack in the *Notes* pane, so that other users can read it.

To Enter Comments for a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation pane.
2. Now, select a Stack Type from the *Stack Type* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Click the *Notes* tab on the left bar of the *Stack Details* pane. The *Notes* pane will now be displayed.
4. Click the *New* button on the *Notes* pane toolbar. If a note is already included in the *Notes* pane, you can right-click and select the *New* option to enter notes or comments for the selected Stack. The *Edit Note* window will now be launched.
5. Enter notes in the *Edit Note* window. Click the *OK* button to save the note.

Notes:

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

Print Data:	Click this option to print the notes that are displayed in the list.
Export Data:	Click this option to export the notes that are displayed in the list.

Related Topics
Add Stacks to a Stack Type
Link a Stack with Documents

9.15 Print Documents Related to a Stack

You can print all the documents related to a stack by clicking the *Print All* option from the *More* drop-down .

To Print Documents related to a Stack

1. In Globodox, select a Stack Type from the *Stack Types* node. The Stacks of the selected Stack Type will now be displayed in the right pane.
2. Select a Stack to print its documents. The Stack will now be displayed in the *Details* pane.
3. In the *Document List* section, click the More button and select the *Print All* option to print all the documents. 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 range separated by

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commas counting from the start of the document.
For example:
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.

Notes:

- Few file formats such MS Word, MS Excel etc. 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. a .doc document will open in MS Word). Now, use the associated application to print the document.

Related Topics
Burn documents on a CD 184
Print the indexed information of a document 186

9.16 Delete a Stack

You can right-click a Stack and select the *Delete* option to delete it.

To Delete a Stack Type

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 31 pane.
2. Select the Stack Type you want to delete and click the *Delete* button of the *Home* tab to delete the Stack.

To Delete a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation 31 pane.
2. Now, select a Stack Type from the *Stack Types* node.The Stacks of the selected Stack Type will now be displayed in the right pane.
3. If the Recycle Bin feature is disabled, the stack will be deleted permanently. If it is enables, the stack will be deleted in the in the specified time frame.

Note:
Please note that when you delete a stack the documents that are related to it will also be deleted.

Note:
You can also delete a Stack by hitting the *Delete* key on the keyboard. However, you cannot delete a Stack Type using this method.

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From v13 onwards, we have introduced the Recycle Bin Feature. Stacks now deleted will be stored in the Recycle Bin based on the number of days specified. To know more, click here 306

Related Topics
Add Stacks to a Stack Type 150
Relate a Stack to a Document 152
Break link between a Document and Stack 158
Delete a Document 177

9.17 Share Stacks with Other Users

Globodox lets you share with other users, Stacks owned (created) by you. You can decide what modifications (if any) they can make to the Stack by giving them permission. You can share with a single user or multiple users. However, you cannot share with a group.

You can share a Stack with other users by right-clicking it and choosing the *Share...* option.

To Share Stacks with other Users

1. Select the stack that you want to share, from the List View 35 pane.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Add* button to add the users to the *Share with* list.
   - The Look Up window will be launched

   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user in the *Look for* box.
   b) Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list.
   For example:
   Let's say you had entered *'john'* in the *Look for* box. Then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Share with* list.
4. If you want the users to only view and not modify your Stack, then click the *OK* button to begin sharing.
   Note:
   The users that you have shared the stacks with, will have the *View* privilege by default. You cannot deny these users the *View* privilege.
5. If you want the users to modify your stack then, click the *Advanced* button and provide them Privileges 392 to modify.
6. If you want all the users to have the same privilege then, check the *Apply permissions to all users* option.
   Note:
   You can also provide different privileges for each user.
   For example:
   Let's say you want user *'john'* to only view your Stacks, user *'mary'* to modify but not delete your Stacks and user *'jane'* can modify and also delete your Stacks. You can do this by selecting each user and providing appropriate privileges to them.
7. Select user(s) from the *Share with* list and provide them with appropriate privileges.
8. Click the *OK* button to begin sharing the Stack.

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To Stop Sharing Stacks with other Users

1. Select the Stack that you want to stop sharing, from the *List View* pane.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Share with* list.
4. Click the *Ok* button to save the changes and close the *Share* window.

Note:
You can also assign Stacks owned by you to another user. For more information, see Assign Stack to another user 162.

Related Topics
Email a Document 177
Restrict Users from viewing Stacks 163

9.18 Assign a Stack to Another User

Globodox lets you assign to another user, Stacks owned (created) by you. You can assign a Stack to a user by right-clicking it and choosing the *Assign...* option.

You can assign a Stack to only one user and not multiple users.

To Assign a Stack to another User

1. In Globodox, select the Stack to assign to another user, from the List View 35 pane.
2. Click the *Share* drop-down on the *Ribbon* bar and select the *Assign* option. The *Assign* window will be launched.
3. Select a user from the *Users* list to assign the Stack.
4. Click the *OK* button to assign the Stack.

Note:
You can also use the *Route* feature in Globodox to route documents or tasks to a user(s) (E.g. approval of documents). For more information, see Route 547.

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Related Topics
Restrict Users from viewing Stacks 163
Share Stacks with other users 161

9.19 Restrict Users from Viewing a Stack

Globodox lets you restrict users from viewing the Stacks owned by you. You can restrict users from viewing a Stack by right-clicking it and choosing the *Restrict...* option.

To Restrict Users from viewing your Stacks

1. In Globodox, select the stack to restrict other user(s) from viewing, from the List View 35 pane.
2. Click the *Share* drop-down on the *Ribbon* bar and select the *Restrict* option. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   ▾The Look Up window will now be launched
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user that you want to add in the *Look for* box.
   b) Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list.
   For example:
   Let's say you had entered *'john'* in the *Look for* box. Then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Restrict* list.
4. Click the *OK* button to restrict the Stack from the selected user(s).

To Stop Restricting Users from viewing your Stacks

1. Select the Stack which you want to stop restricting users from viewing, from the List View 35 pane.
2. Click the *Share* drop-down on the *Ribbon* bar and select the *Restrict* option. The *Restrict* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Restrict* list.
4. Click the *Ok* button to save the changes and close the *Restrict* window.

Note:
You can set privileges for users to restrict them from performing certain actions. For more information, see Privileges 385.

Related Topics
Assign Stack to another user 162
Share Stacks with other users 161

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10 Documents

Topics Covered

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2. Create a New Document 172
3. Update Common Information for Multiple Documents 173
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8. Email a Document 177
9. Relate a Document to a Stack 178
10.Break Relation Between a Document and Stack 179
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10.1 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, view and control document versions, 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.

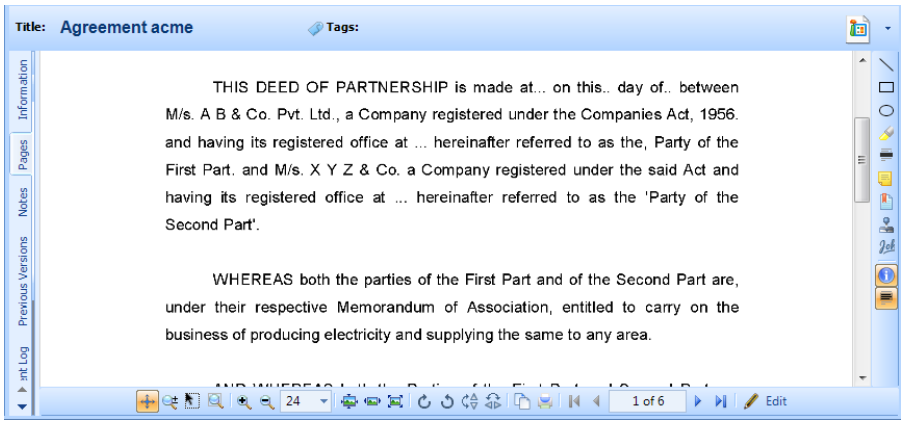
The *Document Details window* has the *Forward* and *Back* navigation button on the top right corner of the window which can be used to navigate through the entire list of documents displayed in the *List View* pane.

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 Pane

The *Information* panel displays the indexed data along with its associated Document Type 126, Folder 204 and Stack 137. 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 98. If the Document Type not set for the document then no Data Fields will be displayed.

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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* and *Stack* 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.

Related Stack: The Stack that is associated with the document will be displayed in the *Related Stack* box.

Pages Pane

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 of a multi-page document as thumbnail and also the Bookmarks 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. You can also delete a page by right clicking on its thumbnail and selecting the Delete option.

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 Pane

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

Versions Pane

Click the *Versions* tab on the left bar of the *Document Details* pane to view the *Versions* pane. The Versions pane can be used to to view, delete or promote older versions of the selected document. All the previous version of the selected document will be displayed in the list below.

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The *Current Version* number of the document will be displayed on the top left corner. The *Version* panel has a toolbar with the following options...

Click the *Add* button to add a document from disk or scanner, as the new version of the selected document. Once the document has been added, the version number of the document will be incremented by one and the document you select (or scan) will be stored as the new (current) version of the selected document. The existing version of the document will be stored as an older version.

Click the *Promote* button to promote the selected version of the document and make it the current version.
For example: Lets assume that the current version of a document is 6 and you want to promote an older version 4 as the current version. When you select version 4 of the document and then click the *Promote* button...
Globodox will make a copy of version 4 of the document and promote that copy as version 7. Version 6 of the document will be saved as an old version.

Click the *View* button to view the selected document version. If Globodox supports display of the selected document then the document will be displayed in the *Display* pane otherwise the document will be opened in it's associated application. The *View* button also has a drop-down portion with the following options...

Using Internal Viewer	Click this option to view the selected document version using the Globodox viewer.
Using Associated Application	Click this option to view the selected document version using the application associated with the document.
Using Selected Application	Click this option to select an application for viewing the selected document version.

Note: Globodox does not allow an older version of a document to be modified. When you use an external application to open a document version for viewing, Globodox first creates a temporary copy of that document and then opens that copy. Therefore any changes you make to the document will only be saved to the temporary copy of the document and not to the copy stored inside Globodox.

Click this button to delete the selected version from the list.

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

Print Document(s)	Click this option to print the document(s)
Export Document(s)	Click this option to export the data document(s) is displayed in the list
Email Document(s)	Click this button to e-mail the document(s) that is displayed in the list
Fax	Click this button to fax the document(s) that is displayed in the

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

Event Log Pane

Click the *Event Log* tab on the left bar of the Document Details pane to view the *Event Log* pane. The *Event Log* pane can be used to to view the list of all the actions carried out on the selected document. The top bar displays the event filtering options. Apart from Event Category, events can be filtered according to the date & time of occurrence, the Event Group they belong to and by the result of the event. For more information, see Event Logs 345.
The events in the event list can be filtered in the following ways...

Date & Time of Occurrence	The Event List can be filtered based on the date and time of the events. The drop down box has the following options...	
	All	Select this option to view all the events (events will still be filtered by any other criteria if specified).
	Last 12 hours	Select this option to view all the events of the last 12 hours.
	Today	Select this option to view all the events of the current day.
	Yesterday	Select this option to view all the events of the previous day.
	Last 24 hours	Select this option to view all the events of the last 24 hours.
	This week	Select this option to view all the events of the current week.
	Last week	Select this option to view all the events of the previous week.
	This month	Select this option to view all the events of the current month.
	Last month	Select this option to view all the events of the previous month.
	Last 30 days	Select this option to view all the events of the last 30 days.
	Custom...	Select this option if you wish to provide a custom date range. Selecting this option will launch the Event Date Range Dialog.
Event Group	Events can be filtered based on the group it belongs to. The following Event Groups are available...	
	All Events	Select this option to view all the events (events will still be filtered by any other criteria if specified).
	View Events	Select this option to view all the events belonging to the View Event Group.
	Add Events	Select this option to view all the events belonging to the Add Event Group.
	Modify Events	Select this option to view all the events belonging to the Modify Event Group.
	Other Events	Select this option to view all the events belonging to the Other Event Group.
Event Result	Events can also be filtered based on the outcome (result) of the event. The possible event results are...	
	All Results	Select this option to view all the results (events will still be filtered by any other criteria if specified).
	Success	Select this option to view all the events which were completed successfully.
	Failure	Select this option to view all the events which could not be completed

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successfully.

Permission Denied Select this option to view all the events for which permission was denied to the user.

Click this button to refresh the *Event Log* panel.

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

Print Data Click this option to print the data that is displayed in the list

Export Data Click this option to export the data that is displayed in the list

Links Pane

Click the *Links* tab on the left bar of the *Document Details* pane to view the *Links* pane. The *Links* pane can be used to link the selected documents with other documents and Stacks. You can also break an existing link from this panel. The *Links* panel is divided into two sections *Linked Documents* and *Linked Stacks*.

Linked Documents: Use the *Linked Documents* section to link the selected document with other document(s) in the Globodox 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 Globodox DB.
Add files from disk and link	Click this option to add files from disk to the Globodox 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 Document(s)	Click this option to print the document(s) that is displayed in the list
Export Document(s)	Click this option to export the document(s) that is displayed in the list
Email Document(s)	Click this button to e-mail the document(s) that is displayed in the list
Fax Document(s)	Click this button to fax the document(s) that is displayed in the list
Export to CD/ DVD	Click this button to export the data that is displayed in the list to a CD/DVD

Linked Stacks: Use the Linked Stacks section to link the selected document with Stacks in the Globodox DB. The Linked Stacks section has a toolbar with the following options...

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

Link existing Stack	Click this option to link the selected document with an existing Stack.

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

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linked Stack

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 three groups they are *Status*, *Document Details* and *File Details.*

Display Pane

The *Display* pane displays the selected document. The *Display* pane has two toolbars The Annotation toolbar 249 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 251 text.

Use this button to draw rectangles 252.

Use this button to draw ellipses or circles 252.

Use this button to hilight 251 texts.

Use this button to hide 253 certain text.

Use this button to add notes 253 to the document.

Use this button to insert a bookmark 254 on the document.

Use this button to insert stamps 255 on the document.

Use this button to insert signature 255 on the document.

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

Use this button to view the content below the redact.

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 *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

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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.

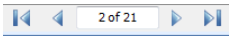
Click *Rotate Anticlockwise* button to rotate the selected scanned document anti-clockwise.

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

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

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 69 you can resize, crop and rotate a document. You can save the modifications made to a document from the Image Editor

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Related Topics
Create a New Document 172
Set a Document Type of a Document 134
Relate a Document to a Stack 178
Link one document with another Document 180

10.2 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 Globodox, select *Workspace > All Documents* in the Navigation 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 51.
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 Globodox, 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.

   You can now relate this document with a Stack, from the *Information* panel. For more information, see Relate a Document to a Stack 178.

Notes:

- 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.
- 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 175
Automatically Index a document 197
Enter Indexing Information of a Document 121

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10.3 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 Globodox, select Workspace > Document Types in the Navigation 34 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. 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.

Notes:

- 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 560. Once updated, you can revert to the default display of 50 documents if you want.

Related Topics
To Update Common Indexing Information for Multiple Documents 122
Change the number of items being displayed in List View 560

10.4 Merge Documents

You can now merge two Documents in GLOBODOX. 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, metadata for the merged document can selectively contain data from either of the documents being merged.

To Merge Documents:

1. In GLOBODOX, 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 'GLOBODOX - Merge Documents' window will be launched. (You can also right-click and select the Merge button.
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.
To merge documents, users will need to have the MODIFY and DELETE permission.

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10.5 Open a Document

You can select or double click a document in the List View pane to view or edit it using Globodox Internal Viewer or You can open a document in its associated application.

For example:
Let's 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 Globodox Internal Viewer.

To Open a Document

1. Select a document from the List View 35 pane.
2. A preview of the document along with its details will be displayed in the Document Details 165 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* i*n Associated Application* of the *Home* tab, Or right click the document in the *List View* pane and select the *Open* > *View* i*n Associated Application* option from the popup menu.

   Note:
   If you use any of the *Open* options of the *Home* tab to try and view a document which is in the checked out state, then Globodox will open the last checked-in copy of the document for viewing. This will happen even if the user trying to view the document is the same as the user who has checked out that document. For more information, see Document Check-in/Check out 271.

Notes:

- 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.
- Globodox supports the preview of most image file formats. You can manage files of any format using Globodox. Files which have a format which Globodox cannot display using it's internal viewer can be opened for viewing in their associated application (for e.g. .DOC files in MS Word) 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 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 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 175

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Set a Document Type of a Document 134
Relate a Document to a Stack 178
Link one document with another Document 180

10.6 Edit a Document

You can edit a document in its associated application by clicking the Open button in the Home tab.

For example:
Let's 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 Image toolbar to edit a document. Using the Image Editor window 69 you can resize, crop and rotate a document. You can save the modifications made to a document from the Image Editor.

   Note:
   If you use any of the Edit options to try and edit a document which is in the checked out state, then Globodox will not allow you to open the document unless you were the user who checked out the document. If you were the user who checked out the document, then when you use any of the Edit options, Globodox will try and open the checked out copy of the document (from your Checkout folder) for editing. For more information, see Document Check-in/Check out 271.

Notes:

- 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.
- Globodox supports the preview of most image file formats. You can manage files of any format using Globodox. Files which have a format which Globodox cannot display using it's internal viewer can be opened for viewing in their associated application (for e.g. .DOC files in MS Word) 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 Globodox 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. 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 165
Annotation 248

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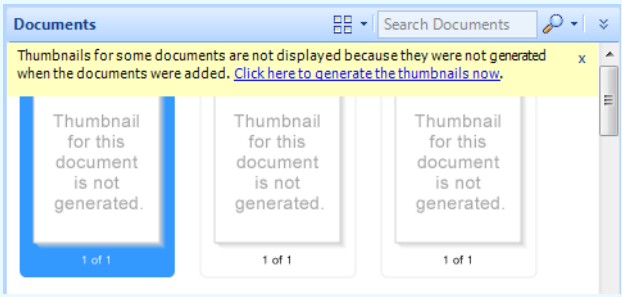
10.7 View Documents as Thumbnails

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 Globodox, 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 556 in the *Options* dialog.



Notes:

- 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. Due to performance reasons, this option is disabled by default for files which are stored in encrypted form and for files which are located on an FTP based File Store 319. You can enable this option from the Thumbnails section 556 in the *Options* dialog.

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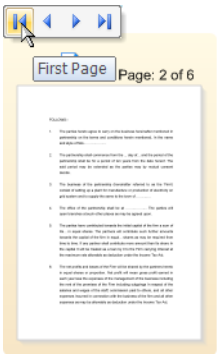

Related Topics
Change Globodox Main View layout 559
Change the number of items being displayed in List View 560
Advanced Search 228
Quick Search 227

10.8 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. If the Recycle Bin feature is disabled, the document will be deleted permanently. If it is enables, the document will be deleted in the in the specified time frame.

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

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

From v13 onwards, we have introduced the Recycle Bin Feature. Documents now deleted will be stored in the Recycle Bin based on the number of days specified. To know more, click here 306

Related Topics
Create a New Document 172
Burn documents on a CD 184
Print a Document 185

10.9 Email a Document

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

To Email a Document

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1. Select the document you want to mail from the List View[35] pane.
2. Click the *E-mail* button on the *Home* tab, or right-click the document and select the *Mail* option. The default email window will now be launched.

Notes:

- 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.
- You can create a new document by dragging and dropping text from a RTF file to Globodox. For more information, see Create a New Document[172].
- You can also use *Route* feature in Globodox to route documents or tasks (for e.g. approval of documents) to a user(s). For more information, see Route[547].

Related Topics
Share Documents with other Users[188]
Print a document[185]

10.9.1 Email indexing data with document

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

To Email a Document along with indexing data

To enable this option ..

1. Click the GLOBODOX 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.

10.10 Relate Document to a Stack

You can relate a single document or multiple documents to a Stack. When you relate a document with a Stack, a strong link is created between the two i.e. If you delete a Stack all the documents that are related to it will also be deleted.

To Relate a Document to a Stack

1. Select a document from the List View[35] pane, to relate it to a Stack. The document will now be displayed in the Documents Details[165] pane.
2. Click the *Information* tab on the left side of the *Documents Details* pane. Click the search button besides the *Related Stack* box to select a Stack. The *Look Up* window will be launched.
3. Select a Stack Type from the *Look for* drop-down and type a word which best describes the Stack in the *Look for* box. Now, click the *Find* button to find the Stack.
4. The *Stack* that contains the word that you have entered in the *Look for* box will be

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displayed in the *Available Data* list.

5. Select the Stack in the *Available Data* list. Use this >> button to add the selected *Stack* to the *Selected Data* list and use this << button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.
6. Click the *OK* button to select the Stack. The selected Stack will now be displayed in the *Related Stack* box.
7. Click the *Save* button on the *Information* bar.

Notes:

- You can click the Stack displayed in the *Related Stack* box to open it in the Stack Details window.
- You can also link a document to one or more Stacks. For more information, see Link Documents with Stack 181.
- You can also relate multiple documents to a common Stack together. To do this, first select the documents. Then go to *Document Details* pane --> *Information* pane --> *Other Information* --> select the stack from *Related Stack.* The documents will now be related to the selected stack.

Related Topics
Set a Document Type of a Document 134
Break Relation between a Document and Stack 179

10.11 Break Relation Between a Document and Stack

You can break relation between a document and a Stack by clicking the *Remove* button of the *Lookup* window.

To Break Relation between a Document and a Stack

1. Select a document from the List View 35 pane, to break its relation with its Stack. The document will now be displayed in the Documents Details 165 pane.
2. Click the *Information* tab on the left side of the *Documents Details* pane. Click this button besides the *Related Stack* box. The *Look Up* window will be launched.
3. Click the *Remove* button on the bottom right corner of the *Look Up* window to break the link .
4. Click the *OK* button to select the Stack.
5. Click the *Save* button on the *Information* bar to save the changes made.

Notes:

- You can click the Stack displayed in the *Related Stack* box to open it in the Stack Details window.
- You can also link a document to one or more Stack. For more information, see Link Documents with Stack 181.

Related Topics
Relate Document to a Stack 178
Change the Folder of a Document 213

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10.12 Link One Document with Another Document

Links can be used when you want to maintain a connection 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 35 pane. The document will now be displayed in the Documents Details 165 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 a Document 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 51.

To Scan a 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 63 will now be launched.
4. Select a Scan Profile 90 from the *Select a Scan Profile* drop-down to select the scan settings.
5. Select a scanner from the *Select a Scanner* drop down.

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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 Globodox DB. The scanned document will now be displayed in the *Linked Documents* list.
   Also see Scan and add a document 61.

Notes:

- 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.
- You can create a strong link between a document and a Stack. For more information, see Relate a Document to a Stack 178.

Related Topics
Link Document with Stacks 155
Break Link between linked Documents 182

10.13 Link Document with a Stack

Links can be used when you do not want to relate or add a document to a Stack, but you want to maintain a connection between them so that you can refer to documents from its linked stack and vice versa, in other words you want them to be loosely linked and not strongly linked. You can link single document with Stacks

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To Link a Document to an Existing Stack

1. Select a document from the List View 35 pane. The document will now be displayed in the Documents Details 165 pane.
2. Click the *Links* tab on the left bar of the *Document Details* pane. The *Links* panel will now be displayed.
3. The Stack that are already linked to the selected document will be displayed in the *Linked Stacks* section. Click the *Link* button and select the *Link existing Stacks* option. The *Look Up* window will be launched.
4. Select a Stack Type from the *Look for* drop-down and type a word which best describes the Stack in the *Look for* box and click the *Find* button.
5. The Stack that contains the word that you have entered in the *Look for* box will be displayed in the *Available Data* list.
6. Select the Stack in the *Available Data* list. Use this button to add the selected *Stack* to the *Selected Data* list and use this button to remove the Stack from the *Selected Data* list and move them back to the *Available Data* list.
7. Click the *OK* button to select the Stack. The selected Stack will now be displayed in the *Linked Stacks* list.

Notes:

- When you link a document with a Stack, a loose link is created between the two i.e. If you delete a document, its linked Stack 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.
- You can create a strong link between a document and a Stack, For more information, see Relate a Document to a Stack 178.

Related Topics
Link Document with Stacks 155
Break Link between linked Documents 182

10.14 Break Links of a Document

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

To Break a Link between a Document and a Stack

1. Select a document from the List View 35 pane. The document will now be displayed in the Documents Details 165 pane.
2. Click the *Links* tab on the left bar of the *Document Details* pane. The *Links* panel will now be displayed.
3. The Stacks that are linked to the selected document will be displayed in the *Linked Stacks* list.
4. Now, select the Stack from the *Linked Stacks* list and click the *Break Link* button to break the link.

To Break a Link between two Documents

1. Select the document from the *List View* pane. The document will now be displayed in the

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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.

Notes:

- You can click the Stack displayed in the *Linked Stacks list* to open it in the Stack Details window.
- You can create a strong link between a Stack and a document. For more information, see Relate a Document to a Stack 152.

Related Topics
Add Stacks to a Stack Type 150
Link Document with Stacks 181

10.15 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 35 pane. The document will now be displayed in the Documents Details 165 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.

Notes:

- 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 are displayed in the list.
Export Data	Click this option to export the notes that are displayed in the list.

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Related Topics
Add Stacks to a Stack Type 150
Link Document with Stacks 181

10.16 Burn Documents on a CD

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

To Burn Documents on a CD/DVD

1. In Globodox, 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 *Export to CD/DVD* window will be launched.
4. Select one of the following options to export the documents:
   a) If you want to export all the documents from the list select the *All Documents* option.
   b) If you want to export only the queried results, select the *Search results* option.
   c) If you want to export the selected items select the *Selected documents in the grid* option.
5. Select the burning device from the *Choose Device* drop down.
6. Select the burning speed from the *Choose speed* drop down.
7. Click the *Burn* button to start the burning process.

Notes:

- 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 414
Back up Globodox DB 430

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10.17 Print a Document

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

To Print a Document

1. In Globodox, select *Workspace* > *All Documents* in the Navigation 34 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.

Notes:

- A few file formats such MS Word, MS Excel etc. 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 word). Now, use the associated application to print the document.
- You can also print the indexed information of a document. For more information, see Print the indexed information of a document 186.

Related Topics

Burn documents on a CD 184

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10.18 Print the Indexed Information of a Document

You can print the indexed information of the documents that is displayed in the List View 35 pane by clicking the *Print* drop-down and selecting the Print List option.

To Print the Indexed Information of Documents

1. In Globodox, 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 270 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, 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.
    - To insert the search conditions click the Search Conditions button.
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.
    - To insert the search conditions click the Search Conditions 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.

Note:

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You can also export the indexed information along with the documents to a CSV file or a HTML file.,For more information, see Export Data 413.

Related Topics
Print a document 185
Burn documents on a CD 184
Print the Search Results along with the Query Conditions 245

10.19 Export Documents

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

To Export Documents

1. In Globodox, 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.

Note:
You can also export the documents along with its indexing data. See Export data to a CSV file 414.

Related Topics
Burn documents on a CD 184

10.20 Drag and Drop Documents from Globodox to a Folder

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

To Drag and Drop documents from Globodox to a folder

1. In Globodox, 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).

Note:
You can also drag and drop documents from Globodox to Microsoft Outlook and Microsoft Outlook Express. The document will be added as an attachment to the email message.

Related Topics
Drag and drop text from a document 59
Export a Folder 213

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10.21 Share Documents with Other Users

Globodox lets you to share documents owned by you with other users. You can decide what modifications (if any) they can make to the document by giving them permission. You can share with single or multiple users, however you cannot share a document with a group.

You can share a document by right clicking it and choosing the *Share...* option.

To Share Documents with other Users

1. Select the document that you want to share, from the List View 35 pane.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Add* button to add the users to the *Share with* list.
   The Look Up window will be launched
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user in the *Look for* box.
   b) Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Share with* list.
4. If you want the users to only view and not modify your documents then, click the *OK* button to begin sharing.
   Note: The users that you have shared the documents with, will have the *View* privilege by default. You cannot deny these users the *View* privilege.
5. If you want the users to modify your document then, click the *Advanced* button and provide them Privileges 392 to modify.
6. If you want all the users to have the same privilege then, check the *Apply permissions to all users* option.
   Note: You can also provide different privileges for each user. For e.g Lets say you want user *'john'* to only view your documents, user *'mary'* to modify but not delete your documents and user *'jane'* can modify and also delete your document. You can do this by selecting each user and providing appropriate privileges to them.
7. Select user(s) from the *Share with* list and provide them with appropriate privileges.
8. Click the *OK* button to begin sharing the document.

To Stop Sharing Documents with other Users

1. Select the document that you want to stop sharing, from the List View 31 pane.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Share with* list.
4. Click the *Ok* button to save the changes and close the *Share* window.

Note:
You can also assign documents or Stacks owned by you to another user. For more information, see Assign Document to another user 189.

Related Topics
Email a Document 177

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Restrict Users from viewing your Documents 189

10.22 Assign Document to Another User

Globodox 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 Globodox, select the document to assign to another user, from the List View 35 pane.
2. Click the *Share* drop-down on the *Ribbon* bar and select the *Assign* option. 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.

Note:
You can also use *Route* feature in Globodox to route documents or tasks (for e.g. approval of documents) to a user(s). For more details click here, Route 547.

Related Topics
Restrict Users from viewing your Documents 189
Share Documents with other user 188
Email a Document 177

10.23 Restrict Users from Viewing Your Documents

Globodox lets you to restrict users from viewing the documents owned by you. You can restrict users from viewing your documents by right clicking it and choosing the *Restrict...* option.

To Restrict Users from viewing your Documents

1. In Globodox, select the document to restrict other user(s) from viewing it, from the List View 35 pane.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   - The Look Up window will now be launched
   a) Select the *Users* option from the *Look for* drop-down and enter the either first or last name of the user that you want to add in the *Look for* box.
   b) Now, click on the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from

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the *Selected Data* list and move them back to the *Available Data* list.
d) Click the *OK* button to add the selected users to the *Restrict* list.
4. Click the *OK* button to restrict the document from the selected user(s).

To Stop Restricting Users from viewing your Documents

1. Select the document that you want to stop restricting, from the List View 31 pane.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Restrict* list.
4. Click the *Ok* button to save the changes and close the *Restrict* window.

Note:
You can set privileges for users to restrict them to perform certain actions. for more info see, Privileges 385

Related Topics
Assign document to another user 189
Share documents with other users 188

10.24 Fax a Document

You can fax a document from Globodox 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 35 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 their annotations.

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8. Click the *OK* button to fax the document.

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

Notes:

- 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 also use *Route* feature in Globodox to route documents or tasks (for e.g. approval of documents) to a user(s).For more details click here, Route 547.

Related Topics
Share Documents with other Users 188
Print a document 185
Email a Document 177

10.25 Enable/Disable the Automatic Preview of a Specific File Type

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

How to configure the built-in document viewer

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

1. Click *Options.* This opens a dialog box
2. In the left panel, *User Options* should 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 Globodox 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 191
Prevent users from changing file type viewer settings 193

10.26 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 Globodox must use to display the file (for e.g. for PDF files, you can choose between Globodox's built-in viewer or Adobe Reader).

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How to change the default viewer for a file type

Click the Globodox 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.

Notes:

- 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 Globodox 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 Globodox will not be displayed).

Related Topics:

Enable/disable the automatic preview of a specific file type 191
Prevent users from changing file type viewer settings 193

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10.27 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 Globodox as *superadmin*.

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

1. Click *Options.* This opens a dialog box.
2. In the left panel, *User Options* should 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 191
Change the default viewer for a file type 191

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11 Zone Map

Topics Covered

1. What is Zone Map 195
2. Creating a Zone Map 195
3. Applying Zone Map 197
4. Automatically Index a Document 197
5. Automatically Index a Stack 199
6. Recognize Barcodes on Documents 200

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11.1 What is Zone Map

The Zone Maps feature in Globodox lets you recognize scanned text and bar codes in specific areas of a scanned document and then automatically store the recognized values in their corresponding fields. This means that you can automate your indexing process for identically formatted documents (for e.g. bills from the same telephone company) and eliminate manual data entry.

Globodox provides a graphical user interface to mark zones and assign them to specific data fields. For each zone you can specify if it contains text that must be detected via OCR or if it contains a bar code that must be detected. Currently supported bar code types are Code 11, Code 39, Code 93, Code 128, EAN 8, EAN 13, UPC-A and 2 of 5 interleaved.

Usage Scenario: Let's say your organization receives many invoices from a company called ACME. Normally you would scan and add these invoices to Globodox and then manually enter data such as Company Name, Invoice Number and Date into the indexing fields. However since all these invoices contain the Company Name, Invoice Number and Date at the same location you can use the Zone Maps feature to mark these areas (zones) on the document and link them to their respective respective indexing fields. Then with the help of the OCR engine the text will be extracted from the document and automatically stored in to the linked fields. This would eliminate the need for manual indexing.

Note:
This would even work if the company printed the Invoice Number in the form of a bar code. In that case you would mark the area (zone) where the bar code is located and then tell Globodox that a bar code is expected in that zone.

Related Topics
Creating a Zone Map 195
Applying Zone Map 197
Automatically Index a document 197
Automatically Index a stack 199
Recognize barcodes on documents 200

11.2 Creating a Zone Map

The Zone Maps feature in Globodox lets you recognize scanned text and bar codes in specific pre-defined areas of a scanned document and then automatically store the recognized values in their corresponding fields. This means that you can automate your indexing process for identically formatted documents (for e.g. bills from the same telephone company) and eliminate manual data entry.

Let's say your organization receives many invoices from a company called ACME. Normally you would scan and add these invoices to Globodox and then manually enter data such as Company Name, Invoice Number and Date into the indexing fields. However since all these invoices contain the Company Name, Invoice Number and Date at the same location you can use the Zone Maps feature to mark these areas (zones) on the document and link them to their respective respective indexing fields. Then with the help of the OCR engine the text will be extracted from the document and automatically stored in to the linked fields. This would eliminate the need for manual indexing.

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To Create Zone Maps

1. In Globodox, click the *Tools* tab.
2. Click the *Template Manager* button. The *Template Manager* window be launched.
3. Click the *Zone Maps* option in the left pane. The *Zone Maps* pane will be displayed.
4. Click the *New* button on the *Template Manager* window to create a new *Zone Map*. The *New Zone Map* window will be launched.
5. Enter a name for the *Zone Map* in the *Name* box.
6. Enter a short description about the Zone Map in the *Description* box.
7. From the *Entity* drop-down, select the entity for which you want to create the *Zone Map*.
   - Select the *Document* option, to create the *Zone Map* for any document.
   - Select the *Document Type* option, to create a *Zone Map* for a particular type of document.
   - Select the *Stack Type* option, to create a *Zone Map* for a Stack type.
8. From the *Target* drop-down, select the Document Type/Stack Type to apply to the Zone Map.
9. Now, click the *OK* button to create the *Zone Map*. The *Zone Editor* window will now be launched.
10. Click the *Scan* button on the *Zone Editor* window. Now, scan a document that belongs to item that you have selected in the *Target* drop-down.
11. Click the *Add & Close* button. The scanned document will now be displayed in the *Preview* pane of the *Zone Editor* window. This document will be used as template.
12. Click the *Draw Zone* button to create a zone. Now, drag the mouse to select a zone in the preview pane. The *Zone Properties* pane will now be enabled.
13. In the *Zone Properties* pane, by default a name will be generated for the zone in the *Name* box. If you wish you can rename it.
14. Enter a short description about the zone in the *Description* box.
15. From the *Type* drop-down...
    - Select the *Barcode* option if the selected zone contains a barcode. Now, click the Options button to select the type of the zoned barcode. The list contains all the codes that are currently supported.
      Note:
      If you do not know the barcode's type, then select the *All* option, by doing this the system will match the zoned barcode with the right code. However, this affects the performance of the system. So, it is recommended to select the type of the zoned barcode.
    - Select the *OCR* option if the selected zone contains text.
16. From the *Target* drop-down select a field to to map the with the selected zone. The text in this zone will be extracted and stored in the selected field.
17. Again, click the *Draw Zone* button to create another zone and map with a field. You can create as many zones as you wish.
18. Click the Save button to save the zone map.

Notes:

- To delete a zone, select that zone in the preview pane and hit the Delete button on the keyboard.
- To modify an existing Zone Map, select a Zone Map from the list and click the *Edit* button on the *Template Manager* window.
- To delete a Zone Map, select a Zone Map from the list and click the *Delete* button on the *Template Manager* window.

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Related Topics
What is Zone Map 195
Applying Zone Map 197
Automatically Index a document 197
Automatically Index a stack 199

11.3 Applying Zone Map

You can apply a zone map to scanned documents from the scan window.

To apply a Zone Map

1. In Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
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. From the *Zone Map* drop-down, select an appropriate zone map. For e.g. if the scanned document is an invoice, then select the zone map that was created for it.
6. Now, click the *Add & Close* button. The scanned document will now be added to Globodox and the extracted text will be automatically stored in the mapped fields.

Related Topics
Creating a Zone Map 195
What is Zone Map 195

11.4 Apply Zone Map on existing documents

You can now apply Zone Maps to existing documents in GLOBODOX.

To apply a Zone Map

1. Right-click a document
2. Select ‘Apply Zone Map’
3. Select the Zone Map from the list which need to be applied to the document.

Note: You can apply Zone Map to multiple documents. You can apply the zone map to only PDF and TIF File types of documents.

Related Topics
Creating a Zone Map 195
What is Zone Map 195

11.5 Automatically Index a Document

You can use Zone Maps to extract text from specific areas of a scanned document and then automatically store the recognized values in their corresponding fields.

For example:
Let's say your organization receives many invoices from a company called ACME. Normally you

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would scan and add these invoices to Globodox and then manually enter data such as Company Name, Invoice Number and Date into the indexing fields. However since all these invoices contain the Company Name, Invoice Number and Date at the same location you can use the Zone Maps feature to mark these areas (zones) on the document and link them to their respective respective indexing fields. Then with the help of the OCR engine the text will be extracted from the document and automatically stored in to the linked fields. This would eliminate the need for manual indexing.

In the below instructions we will configure Globodox to automatically index Invoice documents.

To Automatically Index a Document

1. In Globodox, click the *Tools* tab.
2. Click the *Template Manager* button. The *Template Manager* window be launched.
3. Click the *Zone Maps* option in the left pane. The *Zone Maps* pane will be displayed.
4. Click the *New* button on the *Template Manager* window to create a new *Zone Map*. The *New Zone Map* window will be launched.
5. Enter a name for the *Zone Map* in the *Name* box. You can enter Invoice.
6. Enter a short description about the Zone Map in the *Description* box. You can enter *Use this zone map to automatically Index invoices.*
7. From the *Entity* drop-down, select the the *Document Type* option.
8. From the *Target* drop-down, select the *Invoice* Document Type.
9. Now, click the *OK* button to create the *Zone Map*. The *Zone Editor* window will now be launched.
10. Click the *Scan* button on the *Zone Editor* window. Now, scan an Invoice document.
11. Click the *Add & Close* button. The scanned document will now be displayed in the *Preview* pane of the *Zone Editor* window. This document will be used as template.
12. Click the *Draw Zone* button to create a zone. In the preview pane, drag the mouse to select the area which displays the Company name. The *Zone Properties* pane will now be enabled.
13. In the *Zone Properties* pane, by default a name will be generated for the zone in the *Name* box. If you wish you can rename it.
14. Enter a short description about the zone in the *Description* box.
15. From the Type drop-down, select the OCR option.
16. From the Target drop-down select the Name field to map it with the selected zone. The text (Company Name) in this zone will be extracted and stored in the selected field.
17. Now, create zones in a similar manner and map them with their corresponding fields.
18. Click the Save button to save the zone map. The zone map will now be created. You can close the window.
19. Now, we will scan some Invoices.
20. Select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
21. You can select a Scan Profile from the *Select a scan profile* drop-down.
22. Select a scanner from the *Select a Scanner* drop down.
23. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the Scan window.
24. From the Zone Map drop-down, select the Invoice zone map.
25. Now, click the Add & Close button. The scanned document will now be added to the Invoice Document Type and will be automatically indexed.

Notes:

- If your invoices has barcodes, you can extract information from them and store it in a data field. To do this, mark the barcode as a zone select the Barcode option from the *Type* drop-down. Click the *Options* button to select the type of the zoned barcode. From the *Target*

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drop-down, select a field to map it with the zoned barcode.

- You may receive Invoices from different company which may not have the indexing information located at the same place. In this case you will need to create separate zone maps for each company.
- To delete a zone, select that zone in the preview pane and hit the Delete button on the keyboard.
- To modify an existing Zone Map, select a Zone Map from the list and click the *Edit* button on the *Template Manager* window.
- To delete a Zone Map, select a Zone Map from the list and click the *Delete* button on the *Template Manager* window.

Related Topics
Automatically Index a stack 199
Recognize barcodes on documents 200

11.6 Automatically Index a Stack

You can use Zone Maps to extract text from specific areas of a scanned document and then automatically store the recognized values in their corresponding fields.

For example:
Let's say you scan forms that contains info like Customer name, Address, Telephone Number, Email Address etc, that are found at the same location on the form. Using Zone Map you can mark these areas on the document and then link them to their respective Stack Type as well as their respective fields.

In the below instructions we will configure Globodox to automatically index Customer contact forms.

To Automatically Index a Stack

1. In Globodox, click the *Tools* tab.
2. Click the *Template Manager* button. The *Template Manager* window be launched.
3. Click the *Zone Maps* option in the left pane. The *Zone Maps* pane will be displayed.
4. Click the *New* button on the *Template Manager* window to create a new *Zone Map*. The *New Zone Map* window will be launched.
5. Enter a name for the *Zone Map* in the *Name* box. You can enter *Contacts*.
6. Enter a short description about the Zone Map in the *Description* box. You can enter *Use this zone map to automatically Index contact forms.*
7. From the *Entity* drop-down, select the the *Stack Type* option.
8. From the *Target* drop-down, select the Contact Stack Type.
9. Now, click the *OK* button to create the *Zone Map*. The *Zone Editor* window will now be launched.
10. Click the *Scan* button on the *Zone Editor* window. Now, scan a Customer contact form.
11. Click the *Add & Close* button. The scanned document will now be displayed in the *Preview* pane of the *Zone Editor* window. This document will be used as template.
12. Click the *Draw Zone* button to create a zone. In the preview pane, drag the mouse to select the area which displays the Customers name. The *Zone Properties* pane will now be enabled.
13. In the *Zone Properties* pane, by default a name will be generated for the zone in the *Name* box. If you wish you can rename it.
14. Enter a short description about the zone in the *Description* box.

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15.From the Type drop-down, select the OCR option.
16.From the Target drop-down select the Name field to map it with the selected zone. The text (Customer Name) in this zone will be extracted and stored in the selected field.
17.Now, create zones in a similar manner and map them with their corresponding fields.
18.Click the Save button to save the zone map. The zone map will now be created. You can close the window.
19.Now, we will scan some contact forms.
20.Select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
21.You can select a Scan Profile from the *Select a scan profile* drop-down.
22.Select a scanner from the *Select a Scanner* drop down.
23.Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the Scan window.
24.From the Zone Map drop-down, select the *Contacts* zone map.
25.Now, click the Add & Close button. A new stack will be created and automatically indexed in the Contacts stack type and the scanned document will be related to it.

Notes:

- If your contact forms has barcodes, you can extract information from them and store it in a data field. To do this, mark the barcode as a zone select the *Barcode* option from the *Type* drop-down. Click the *Options* button to select the type of the zoned barcode. From the *Target* drop-down, select a field to map it with the zoned barcode.
- To delete a zone, select that zone in the preview pane and hit the Delete button on the keyboard.
- To modify an existing Zone Map, select a Zone Map from the list and click the *Edit* button on the *Template Manager* window.
- To delete a Zone Map, select a Zone Map from the list and click the *Delete* button on the *Template Manager* window.

Related Topics
Automatically Index a document 197
Recognize barcodes on documents 200

11.7 Recognize Barcodes on Documents

Zone map can be used to detect barcodes on any document being scanned. The information contained in the detected barcodes can be automatically stored in data fields. You can select the data fields in which information from the barcodes must be stored. Currently supported bar code types are Code 11, Code 39, Code 93, Code 128, EAN 8, EAN 13, UPC-A and 2 of 5 interleaved.

In the below instructions we configure globodox to recognize barcodes from Delivery Order documents.

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To Recognize Barcodes on a Document

1. In Globodox, click the *Tools* tab.
2. Click the *Template Manager* button. The *Template Manager* window be launched.
3. Click the *Zone Maps* option in the left pane. The *Zone Maps* pane will be displayed.
4. Click the *New* button on the *Template Manager* window to create a new *Zone Map*. The *New Zone Map* window will be launched.
5. Enter a name for the *Zone Map* in the *Name* box. You can enter *Delivery Orders*.
6. Enter a short description about the Zone Map in the *Description* box. You can enter *Use this zone map to automatically Index Delivery Order documents.*
7. From the *Entity* drop-down, select the the *Document Type* option.
8. From the *Target* drop-down, select the *Delivery Order* Document Type.
9. Now, click the *OK* button to create the *Zone Map*. The *Zone Editor* window will now be launched.
10. Click the *Scan* button on the *Zone Editor* window. Now, scan an Invoice document.
11. Click the *Add & Close* button. The scanned document will now be displayed in the *Preview* pane of the *Zone Editor* window. This document will be used as template.
12. Click the *Draw Zone* button to create a zone. In the preview pane, drag the mouse to select the area which displays the Barcode. The *Zone Properties* pane will now be enabled.
13. In the *Zone Properties* pane, by default a name will be generated for the zone in the *Name* box. If you wish you can rename it.
14. Enter a short description about the zone in the *Description* box.
15. From the *Type* drop-down, select the Barcode option.
16. Click the *Options* button. The *Barcode Types* dialog will be launched.
17. From the drop-down list, select the type of the zoned barcode and click the *OK* button. The list contains all the codes that are currently supported.

    Note:
    If you do not know the barcode's type, then select the All option, by doing this the system will match the zoned barcode with the right code. However, this affects the performance of the system. So, it is recommended to select the type of the zoned barcode.

18. From the *Target* drop-down select a field to map it with the selected zone. The barcode information will be extracted and stored in the selected field.
19. Now, create zones in a similar manner and map them with their corresponding fields.
20. Click the Save button to save the zone map. The zone map will now be created. You can close the window.
21. Now, we will scan some Delivery Orders.
22. Select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
23. You can select a Scan Profile from the *Select a scan profile* drop-down.
24. Select a scanner from the *Select a Scanner* drop down.
25. Click the *Start Scan* button to scan the document. The scanned document will now be displayed in the *Preview* pane of the Scan window.
26. From the Zone Map drop-down, select the Delivery Orders zone map.
27. Now, click the Add & Close button. The scanned document will now be added to the delivery Orders Document Type and the Barcode information will extracted and stored in their respective mapped field.

Notes:

- To delete a zone, select that zone in the preview pane and hit the Delete button on the keyboard.
- To modify an existing Zone Map, select a Zone Map from the list and click the *Edit* button

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on the *Template Manager* window.

- To delete a Zone Map, select a Zone Map from the list and click the *Delete* button on the *Template Manager* window.

Related Topics

What is Zone Map 195
Applying Zone Map 197
Automatically Index a document 197
Automatically Index a stack 199

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12 Folders

Topics Covered

1. What are Folders 204
2. View Folders 205
3. Create a New Folder 206
4. Create a Sub-Folder 206
5. Drag and Drop a Sub-Folder 207
6. Drag and Drop Documents to a Folder 208
7. Add Documents to a Folder 209
8. Add Existing Folder Structure to Globodox 209
9. Add Folder Structure along with Files from Disk 210
10. Search a Folder 212
11. Export Folder Structure 213
12. Change the Folder of a Document 213
13. Delete a Folder 214
14. Share Folders with Other Users 214
15. Restrict Users from Viewing Your Folders 216
16. Clone a Globodox Folder Structure 207

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12.1 What are Folders

What are Globodox Folders?

Globodox folders can be used to categorize documents in a hierarchical manner. Globodox folders are simple and easy to use and work the same as 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 Globodox 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 Globodox Folder by using the Quick Search 227 box or the Advanced Search 228.

The folder approach becomes cumbersome to use when you have lots of folders or a very deeply nested folder hierarchy. This approach also does not work when a document needs to belong to several categories (a document can belong to only one folder).

Note:
when you create a Globodox folder no folder is being created on your system. Globodox folders are just used to categorize your documents and not store them. All your documents are stored in the DB's File Store 318.

Related Topics
View Folders - FAQ 205
Create a New Folder 206
Where does Globodox store my data 47

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12.2 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 206
Add existing Folder structure along with files from disk 209

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12.3 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 Globodox, select *Workspace* > *Folders* in the Navigation pane.
2. Now, click the *Create New* to create a new Folder.
3. Enter a name for the Folder and hit the *Enter* key.

Note:
When you create a Globodox folder no folder is being created on your system. Globodox folders are just used to categorize your documents and not store them. All your documents are stored in the DB's File Store 318.

Notes:

- 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 to 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 209
Add existing folder structure to Globodox DB 209
Where does Globodox store my data 47

12.4 Create a Sub-Folder

You can create a hierarchy for folders by creating sub-folders.

To Create a Sub-Folder

1. In Globodox, select *Workspace* > *Folders* in the Navigation pane.
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.

Note:
When you create a Globodox folder no folder is being created on your system. Globodox folders are just used to categorize your documents and not store them. All your documents are stored in the DB's File Store 318.

Notes:

- 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.

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- 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 209
Add existing folder structure to Globodox DB 209
Delete a Folder 214

12.5 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 Globodox, select *Workspace* > Folders 204 in the Navigation pane.
2. Using Windows Explorer select the folder you want to add and drag & drop it on the selected Folder.

Notes:

- You can drag and drop your entire folder structure from the your disk that you use to organize your documents.
- You can also drag and drop text from a RTF file to a Folder for more information, see Drag and Drop Documents to a Folder 208.

Related Topics
Add documents from disk 51
Find and Add a document 55
Share Folders with other Users 214

12.6 Clone a Globodox Folder Structure

You can now create the same folder structure that you frequently use in Globodox by right clicking that folder structure and selecting the *Clone...* option.

For example:
Let say you create same set of 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 Globodox Folder Structure

1. In Globodox, select *Workspace* > *Folders* in the Navigation pane.
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.

Note:
When you create a Globodox folder no folder is being created on your system. Globodox folders are just used to categorize your documents and not store them. All your documents are stored in the DB's File Store 318.

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Notes:

- 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 209
Add existing folder structure to Globodox DB 209
Search a Folder 212

12.7 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 Globodox, select the Globodox 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.

   Note:
   Once the documents are added, you may 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 can also drag and drop documents to a Globodox folder from *All Documents, Documents Types and Tags* node

To Drag and Drop Text

1. In Globodox, select *Workspace* > *Folders* in the Navigation 34 pane.
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:
   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.

Notes:

- You will be the Owner of the documents that you have added.
- You can drag & drop documents from your disk to the Globodox Folder. You can also drag and drop folders from your disk to the Globodox. For more information, see Drag and Drop a Folder 207.
- 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.

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Related Topics
Edit a document 175
Add documents from disk 51
Find and Add a document 55
Scan mutilpe single paged document 75

12.8 Add Documents to a Folder

You can add documents to a Globodox Folder by dragging and dropping them.

To Add Documents to a Folder

1. In Globodox, select the Folder 204 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 Folder.

   Note:
   Once the documents are added, you may 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*.

Notes:

- Once you have added the documents to a folder, you can then set the Document Type 126 of these documents. To set a Document Type see, Set a Document Type of a Document 134
- A document can at anytime be part of only one folder.
- You can add documents from your disk to a Globodox folder by dragging & dropping.
- Dragging & dropping email messages from Microsoft Outlook, Microsoft Outlook Express and Thunderbird 9.x is supported.

Related Topics
Edit a document 175
Scan multiple single paged document 75
Add existing folder structure to Globodox DB 209

12.9 Add Existing Folder Structure to Globodox

You can add your existing folders structure (on your local machine) that you use to organize your documents, to the Globodox.

To Add existing Folder Structure to the Globodox

1. In Globodox, 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 Globodox 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. If you want to add the folder structure to an existing Globodox folder, then select the

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folder from the *Destination* tab.

▾ Follow these steps to specify the Destination of the selected folder

a) Click the *Search* 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. You can *Share, Assign or Restrict* the folder with other users by using the *Security* tab. You can also apply a Security Label [395] to the selected documents using this tab.

▾ Follow these steps to start using the Security tab

a) Click the *Search* button besides the *Share with* box to select the users to share the folders. The Share window [188] will be launched. Select the users and click the *OK* button. The users will be displayed in the *Share with* box.

b) Click the *Search* button besides the *Restrict from* box to select users to restrict the folders. The Restrict window [189] will be launched. Select the users and click the *OK* button. The users will be displayed in the *Restrict from* box.

c) Click the *Search* button besides the *Assign To* box to select the user to assign the scanned document. The Assign window [189] will be launched. Select the user and click the *OK* button. You can assign the document(s) to only one user. The user will be displayed in the *Assign To* box.

d) Select a Security Label [395] from the *Set a Security Label* drop-down to set a *Security Label* for the selected folders. The Security Label applied to the folder will be applied to all its sub-folders and to the documents in it.

6. Click the *Preview* button to view the folder structure that will be imported to the Globodox.
7. Now, click the *Add* button to add the folder structure to the Globodox.
8. Now, click the *Close* button to close the *Add Folders from disk* window.

Note:

- 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 [51]
Create a new Folder [206]
Add folder structure along with files from disk [210]
Export Folder Structure [213]

12.10 Add Folder Structure along with Files from Disk

You can add the entire folder structure that you use to organize your documents to Globodox.

To Add Existing Folder Structure along with Files to Globodox

1. In Globodox, 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.

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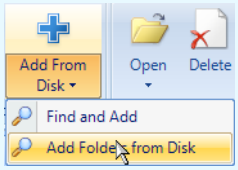

2. **Check the folder** or folder structure that you want **to import** to Globodox **from** the ***Choose folders from disk*** pane.
3. **Select** the ***Import files and folder tree*** option to import both the files and the folder structure to Globodox.
4. **Check** the ***Use exceptions*** option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

   You can use *Exceptions* to exclude or include a particular file or file types to the Globodox DB.

   Example:
   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. 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 the *OK* button to close the *Exceptions* window.

5. You can ***Share*** or ***Restrict*** the selected folders with other users by using the ***Security*** **tab** on the top right corner. You can also **apply a *Security Label*** to the scanned document by using this tab.

   ▾ Follow these steps to apply Security

   a) Click the *Search* button next to the *Share with* box to select users to share the selected folders with. The Share window 188 will be launched. Select the users and click the *OK* button. The users will now be displayed in the *Share with* box.
   b) Click the *Search* button next to the *Restrict from* box to select users from whom you want to restrict the selected folders. The Restrict window 189 will be launched. Select the users and click the *OK* button. The users will now be displayed in the *Restrict from* box.
   c) Click the *Search* button next to the *Assign to* box to select users to assign the documents that are in the selected folder to. The Assign window 189 will be launched. Select the users and click the *OK* button. The users will now be displayed in the *Assign to* box.
   d) Select a Security Label 395 from the *Set a Security Label* drop-down to set a *Security Label* for the scanned document.

6. Click the ***Preview*** button to view the **folder structure** and the **files** that are **going to be imported** to Globodox.

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7. Click the ***Add*** button to add the folder structure and the files to Globodox.
8. Click the ***Close*** button to close the ***Add Folders from disk*** window. Now, **navigate to** the ***Folders*** **node** in the Navigation pane 34 **to view** the folders along with the documents.
9. You can now set the Document Type 125, of these documents. Or you can also relate these documents to Stacks 136.

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*.

Notes:

- If the Draft Documents 278 feature is enabled, you will see an option labeled *Add as Draft Document*. If you check this option any files you add will get added to *Draft Documents*. If this option is left unchecked, then the files will get added as *Published Documents*.
- You will be the Owner of the documents that you have added.
- You can add only the folder structure (without the documents) that you use to organize your documents, to Globodox. For more information see, Add existing folder structure to Globodox DB 209.
- If you are a Paperport user, then see Import data from Paperport 424, to import your documents from Paperport to Globodox.

Related Topics
Find and Add a document 55
Drag and Drop a Folder 207

12.11 Search a Folder

You can quickly search a Globodox folder by holding the *Ctrl+J* buttons on the keyboard.

To Search a Globodox Folder

1. In Globodox, select *Folders* node in the Navigation 34 pane.
2. Right click a Folder and select the *Jump to...* option. Or type *Ctrl + J* on your keyboard. 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.

   Note:
   In case the folder name consists of more than one word and the word you type has less than three characters, you can prefix or suffix it with one or more asterisks (*). For example, if you want to jump to the *My Documents* folder, you can type **My* or *My** in the *Jump to...* dialog.

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.

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Note:

- For every document in Globodox, 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**. Globodox 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 227
Document Full Text Search 231
Search a Tag 223

12.12 Export Folder Structure

You can export Globodox folders along with all the sub folders and documents to any destination on your local disk (retaining the folder hierarchy).

To Export Globodox folder structure

1. In Globodox, select *Folders* node in the Navigation 34 pane.
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 *Globodox 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.

Notes:

- 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
Search a Folder 212
Burn documents on a CD 184
Export Data 413

12.13 Change (or Set) the Folder of a Document

You can change (or set) the Folder of a document by dragging and dropping the document to the folder you want.

To Change the Folder of a Document

1. In Globodox, select the document whose folder you want to change from the List View 35 pane. The document will now be displayed in the Documents Details 165 pane.
2. Click the *Information* tab on the left side of the *Documents Details* pane. The current folder of the selected document is be displayed in the *Related Folder* box.

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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.

Notes:

- A document can at anytime be part of only one folder.
- You can choose to save multiple documents to a common folder together. To do this, first select the documents. Then go to *Document 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 134
Relate a Document to a Stack 178
Add documents to a Folder 209

12.14 Delete a Folder

You can right click a Folder and select the *Delete* option to delete it.

To Delete a Folder

1. In Globodox, select *Workspace* > *Folders* in the *Navigation* pane.
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.

   Note:
   If you delete a folder the documents in it will not be deleted. They will be displayed in the All Documents node.

Notes:

- If you delete a parent folder its sub folders will also be deleted.

Related Topics
Create a new Folder 206
Add existing folder structure to Globodox DB 209
Delete a Document 177

12.15 Share Folders with Other Users

Globodox lets you share folders owned by you with other users. You can decide what modifications (if any) they can make to folder by giving them privileges. You can share a folder with single or multiple users.

You can share a folder with other users by right clicking it and choosing the *Share...* option.

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To Share Folders with other Users

1. Select the folder that you want to share, from the *Folders* node.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Add* button to add the users to the *Share with* list.
   - The Look Up window will be launched
     a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user that you want to add in the *Look for* box.
     b) Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
     c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
     d) Click the *OK* button to add the selected users to the *Share with* list.
4. If you want the users to only view and not modify, then click the *OK* button to begin sharing.

   Note:
   The users that you have shared the folders with, will have the *View* privilege by default. You cannot deny these users the *View* privilege.

5. If you want the users to modify the documents in the folder, click the *Advanced* button and provide them Privileges 392 to modify.
6. If you want all the users to have the same privilege then, check the *Apply permissions to all users* option.

   Note:
   You can also provide different privileges for each user. For e.g Lets say you want user *'john'* to only view your documents, user *'mary'* to modify but not delete your documents and user *'jane'* can modify and also delete your document. You can do this by selecting each user and providing appropriate privileges to them.

7. Select user(s) from the *Share with* list and provide them with appropriate privileges.
8. Click the *OK* button to begin sharing the folder.

To Stop Sharing Folders with other Users

1. Select the folder that you want to stop sharing.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Share with* list.
4. Click the *Ok* button to save the changes and close the *Share* window.

Related Topics
Restrict Folders from other Users 216

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12.16 Restrict Users from Viewing Your Folders

Globodox lets you to restrict users from viewing the folders owned by you.

You can restrict users from viewing your folders by right clicking it and choosing the *Restrict...* option.

To Restrict Users to view your Folders

1. In Globodox, select the folder to restrict other user(s) from viewing it, from the *Folders* node.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   The Look Up window will now be launched.
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user in the *Look for* box.
   b) Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Restrict* list.
4. Click the *OK* button to restrict the folder from the selected user(s).

To Stop Restricting Users from viewing your Folders

1. Select the folder that you want to stop restricting, from the *Folders* node.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Restrict* list.
4. Click the *OK* button to save the changes and close the *Restrict* window.

Notes:

- You can set privileges for users to restrict them to perform certain actions. For more information, see Privileges 385.

Related Topics

Share Folders with other users 214

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12.17 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 206

13 Tags

Topics Covered

1. What are Tags 218
2. Tags - FAQ 218
3. Create a Tag 219
4. Tag a Document 219
5. Drag and Drop Documents to a Tag 220
6. Add Documents to a Tag 221
7. Remove Tag from a Document 222
8. Search a Tag 223
9. Delete a Tag 223
10. Merge Tags 225

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13.1 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 example:
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 218
Tag a Document 219
Delete a Tag 223

13.2 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 218
Tag a Document 219
Delete a Tag 223

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13.3 Create a Tag

You can create a Tag by clicking the *Create New* button in the *Tags* node.

To Create a Tag

1. In Globodox, 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.

Notes:

- All tags are listed in the *Tags* node of the Navigation 34 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 information, see Drag and Drop Documents to a Tag 220.
- You can select a tag from the *Tags* node, to view the the documents attached to it.
- You can create a Tag by entering keywords in the *Tag* box of the *Document Details* window.

Related Topics
Tag a Document 219
Delete a Tag 223

13.4 Tag a Document

You can Tag a document by entering keywords in the *Tag* box of the *Document Details* window.

To Tag a Document

1. In Globodox, select the document from the List View 35 pane. The document will now be displayed in the Documents Details 165 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 or press Enter to apply the tags.

Notes:

- All tags are listed in the *Tags* node of the Navigation 31 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 information, see Drag and Drop Documents to a Tag 220.
- 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 219
Delete a Tag 223

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13.5 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 Globodox, select the documents from the List View 35 pane.
2. Enter the common tags for these documents 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.

Notes:

- All tags are listed in the *Tags* node of the Navigation 31 pane.
- You can select a tag from the *Tags* node, to view the the documents attached to it.
- You can also drag and drop documents from your disk to the Tag. You can also drag and drop text from a RTF file to a tag. For more information, see Drag and Drop Documents to a Tag 220.
- 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. First select all the documents. Then click the 'Delete' button ( ). 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 165 pane.

Related Topics
Create a Tag 219
Delete a Tag 223

13.6 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 Globodox, 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 in the List

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View 35 pane.
You can also drag and drop documents to a Tag from *All Documents, Documents Types and Folders* node

Note:
Once the documents are added, you may 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*.

To Drag and Drop Text

1. In Globodox, select *Workspace* > *Tags* in the Navigation 34 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 in the List View 35 pane. 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.

Notes:

- You will be the Owner of the documents that you have added.
- You can drag & drop documents from your disk to the Globodox Folder. You can also drag and drop folders from disk to the Globodox. For more information, see Drag and Drop a Folder 207.
- 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.

Related Topics
Edit a document 175
Add documents from disk 51
Find and Add a document 55

13.7 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 Globodox, 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:

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Once the documents are added, you may 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*.

Notes:

- 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 134.
- You can also drag and drop text from a RTF file to a tag. For more information, see Drag and Drop Documents to a Tag 220.
- You can 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.

Related Topics
Create a Tag 219
Delete a Tag 223
Edit a document 175

13.8 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.

Notes:

- A tag does not get deleted from the *Tags* node if you remove it from the *Tags* box.

Related Topics
Create a new Tag 219

13.9 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.
2. Select the documents from which you want to remove the tag. None of the documents will be displayed in the Documents Details 165 pane. Instead, a batch update note will be displayed.
3. Click the *Shift* + *Delete* button. 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 the tags attached to the document. Repeat the process for every tag

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that you want to remove from multiple documents together.

Notes:

- 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 in the Documents Details 165 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 165 pane.

Related Topics
Create a new Tag 219
Delete a Tag 223
Tag Multiple Documents Together 220

13.10 Search a Tag

You can quickly search a Tag by holding the *Ctrl+J* buttons on the keyboard.

To Search a Tag

1. In Globodox, select *Tags* node in the Navigation 34 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 227
Document Full Text Search 231
Search a Folder 212

13.11 Delete a Tag

You can right click a Tag and select the *Delete* option to delete it.

To Delete a Tag

1. In Globodox, 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.

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Related Topics

Remove Tag from a Document 222
Create a new Tag 219
Delete a Document 177

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13.12 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 'Aprovd' in some of the documents, you can merge the latter tag into the former by using drag and drop as outlined above. The 'Aprovd' 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.

Notes:

- Merging of tags is a *'Merge Tags*' privilege in the Other Privileges section under any Role. The role can be assigned to different users as per the requirement.
- 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 219

13.13 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 219

14 Search for a Document

Topics Covered

1. Find Document Quickly 227
2. Narrow Down the Search Result 228

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3. Document Full Text Search 231
4. Save a Search Criteria 242
5. Share a Saved Search 243
6. Restrict Users from Viewing Your Saved Searches 245
7. Print the Search Results along with the Query Conditions 245
8. Export the Search Result 247
9. Prompt User for the Condition Value When Applying Saved Search 243

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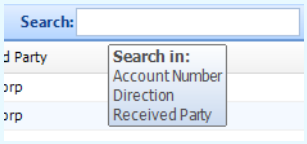
14.1 Find Document Quickly

Use the Quick Search box[31] (in the upper-right corner of the Globodox window) to quickly locate the items you are looking for.

To Search for a Document using Quick Search

1. In Globodox, select *Workspace > All Documents* in the Navigation[34] 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. For more info see, Select fields to include in the Quick Search[227]

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.

Notes:

- 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 to that Document Type and then search in the fields for the same.
- To search for text in a document you will need to ensure that text has been extracted from that document.
- To clear the Search Results, click the *Clear* button.
- You can also search for Stack, Users, Groups etc. using the *Quick Search*.
- 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[228].

Related Topics
Save Search[242]
Document Full Text Search[231]

14.2 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

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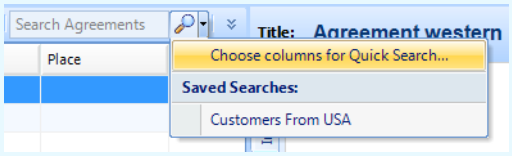
View) that you want to search in.

To select Fields to include in Quick Search

1. In Globodox, 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.

Notes:

- 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 to that Document Type and then search in the fields for the same.
- To search for text in a document you will need to ensure that text has been extracted from that document.
- Please note that if you select all the columns it may effect the search performance, i.e. it may take some time to display the search results. Therefore it is recommended to only select the column that is of importance to your search.

Related Topics
Save Search 242
Document Full Text Search 231

14.3 Narrow Down the Search Result

You can use the Advanced Search to narrow down your search results and to make it more specific.

For example:
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 Globodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.

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2. Click the *Double Down 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**
Equal To	Use this operator to exactly match the value you are looking for	Document Name *"equal to"* AcmeInvoice
Not Equal To	Use this operator when you do not want the value to match the text you are looking for	Document Name *"not equal to"* AcmeInvoice
Less Than	Use this operator to find values that are less than the value you are looking for	Invoice Amount "*less than* " 1000
Greater Than	Use this operator to find values that are greater than the value you are looking for	Invoice Amount "*greater than*" 1000
Less Than equal than	Use this operator to find values that are less than and equal to the value you are looking for	Invoice Amount "*less than equal* to" 1000
Greater Than	Use this operator to find values that are greater than and equal to the value you are looking for	Invoice Amount "*greater than equal to*" 1000
Begins With	Use this operator to find values that begins with the text that you are looking for.	Document Name *"begins with"* Acme
Ends With	Use this operator to find values that ends with the text that you are looking for.	Document Name *"ends with"* Invoice
Contains	Use this operator to find values that contains the text that you are looking for.	Document Name *"contains"* Acme
Does Not Begin With	Use this operator to find values that does not begin with the text that you are looking for.	Document Name *"does not begin with"* Acme

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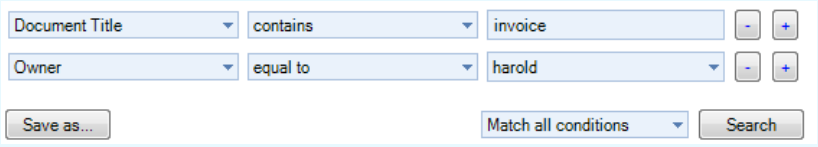
Does Not End With	Use this operator to find values that does not end with the text that you are looking for.	Document Name *"does not end with"* Invoice
Does Not Contain	Use this operator to find values that does not contain the text that you are looking for.	Document Name *"does not contain"* Acme
Is Empty	Use this operator to match empty values.	Invoice Date "*Is Empty*"
Is Not Empty	Use this operator to match non-empty values	Invoice Date "*Is Not Empty*"

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 the *Add* button. To remove a criteria click the *Remove* 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.



9. The search results will be displayed in the *List View* pane.

Notes:

- 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 to that Document Type and then search in the fields for 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*.
- You can also search for Stack, Users, Groups etc. using the Advanced Search.

Related Topics

Quick Search 227
Save Search 242
Document Full Text Search 231

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14.4 Document Full Text Search

Topics Covered

13.1.Learn about Document Full Text Search 232
13.2.Document Full Text Search - FAQ 233
13.3.Extract Text from Document 237
13.4.View the Extracted Text of the Document 238
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13.6.Search for Text in Document 239
13.7.Automatically Extract Text from Documents 241
13.8.OCR Document that contains Text in a Different Language 241

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14.4.1 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 Globodox based on their content. The Full Text Search feature works by extracting text from documents that you add to a Globodox and then indexing the text. The text can be automatically extracted when you add/modify 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 Globodox. To stop text extraction...
Open *Control Panel >Administrative Tools >Services.* Select *ITAZ Globodox Indexing Services* under the *Name* column. Right click the entry and select the *Stop* option.

Related Topics
Frequently asked questions - Document Full Text Search 233

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14.4.2 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 Globodox based on their content. The Full Text Search feature works by extracting text from documents that you add to Globodox and then indexing the text. The text can be automatically extracted in the background when you add/modify 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 Globodox. To stop text extraction...

Explore *Control Panel > Administrative Tools > Services.* Select *ITAZ Globodox 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 Globodox uses its built-in OCR engine to extract text. You can configure Globodox 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.

Globodox 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, Globodox uses IFilters installed on your machine to extract text

PDF files are handled a little differently. PDF files created by Globodox contain scanned images. So Globodox extracts text from them using OCR. For all other PDF files, Globodox first uses its built-in text extractor and if that does not return any text, Globodox 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 Globodox.

For Globodox 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 Globodox does not use this because it uses its built-in extractor for MS Word files.
- XLS (Microsoft Excel spreadsheet) - By default Globodox does not use this because it uses its built-in

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extractor for MS Excel files.

- HTML documents
- TXT documents

You can also install third party filters to enable Globodox 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 Globodox?

Although some IFilters are available for free, we cannot ship them with Globodox 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 Globodox?

Yes, OCR is available in Globodox. You can use the built-in OCR engine to extract text from TIFF, JPG, PNG and other image file types. You can configure Globodox 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).

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 'Use 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.*

How can I stop background text extraction on a machine?

Background text extraction only happens on the machine on which Globodox has been installed in server mode (a single user installation of Globodox is always installed in server mode). On this machine, the extraction of text from newly added documents continues in the background even when Globodox itself is not running. To stop background text extraction...

Explore *Control Panel > Administrative Tools > Services.* Select *ITAZ Globodox Indexing Service* under the *Name* column. Right-click the entry and select the *Stop* option.

Globodox does not extract text from my document. Why?

Globodox 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, Globodox uses its built-in OCR engine to extract text. You can configure Globodox to use the faster Microsoft Office OCR

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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 Globodox uses IFilters installed on your machine to extract text.

PDF files are handled a little differently. PDF files created by Globodox contain scanned images. So Globodox extracts text from them using OCR. For all other PDF files, Globodox first uses its built-in text extractor and if that does not return any text, Globodox 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. Why?

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 Globodox 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 Globodox display a message if it cannot extract text from a particular document?

No. Globodox attempts to find the IFilter for every document and proceeds without displaying any error message (and without extracting text) if the IFilter for a particular file cannot be found on the machine. However, for backward compatibility reasons Globodox does complain if it cannot find the IFilter for PDF files.

What are the options available with the document full text search feature?

The following options are available with the full text search feature...

- Automatically index documents on check-in
- Limit the size of documents to extract text from to

What is the 'Automatically index documents on check-in' option?

Select the *Automatically index documents on check-in* option if you want documents to be automatically indexed on check-in. This option can only be selected if you have selected the document check-in/checkout option. Selecting the *Automatically index documents on check-in* option ensures that documents will be indexed as soon as they are added or modified (in other words as soon as they are checked-in). However, enabling this option will slow down the addition (checking-in) of documents to Globodox because of the processing required to index the document. For more information, see Automatically Extract text from documents241.

What is the 'Maximum size of documents to extract text from' option?

Specify the file size that should be indexed in this box. Please note that this option is only available for MS Access DB. By default the limit of the file size is set to 1 MB. This means that files larger then 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-machine scenario where you can disable extracting and indexing of text on slow machines for large files without disabling full text search.

Can I disable the automatic extraction and indexing of documents on specific machines?

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Sometimes for slower machines you may want to turn off the automatic extraction and indexing of documents (even when the feature has been enabled for the Globodox DB). For this, open the Options window 554 (on the slow machine) and turn off the relevant option available for Document 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 Globodox, select *Workspace* > *All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.
- Click the *Double Down 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. 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 the *Add* button. To remove a criteria, click the *Remove* button.
- To get a result which matches all the criteria 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 was "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 239
View the Extracted Text of the Document 238

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14.4.3 Extract Text from a 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. 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. 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 Globodox, click the Globodox button 33.
2. Click the *Options* button. The *Options* window will be launched.
3. From the *Extract and Index* section,select *Use Microsoft Office OCR Engine* option 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.

Notes:

- Globodox uses it's built-in text extractor for MS Word (DOC, DOCX), MS Excel (XLS, XLSX) and PDF files. In case of any other file formats, for Globodox 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 239

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Document Full Text Search - FAQ 233
Recognize barcodes on documents 200

14.4.4 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.

Notes:

- You can also switch from Globodox OCR engine to Microsoft Office OCR engine to extract text from documents. For more information, see Extract Text from Document 237.

Related Topics
Search for text in a document 239
Document Full Text Search - FAQ 233

14.4.5 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

Notes:

- Globodox uses it's built-in text extractor for MS Word (DOC, DOCX), MS Excel (XLS, XLSX) and PDF files. In case of any other file formats, for Globodox 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 239

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Document Full Text Search - FAQ 233

14.4.6 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*.

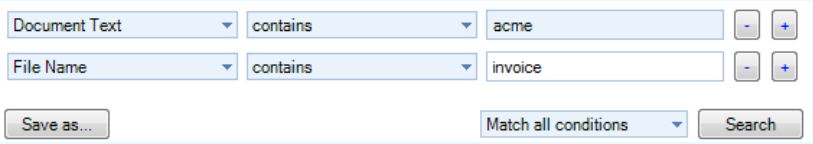
To Search for Text in a Document

1. In Globodox, select *Workspace > All Documents* in the *Navigation* pane. The documents will be displayed in the *List View* pane.
2. Click the *Double Down 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
Contains	Use this operator to find values that contains the text that you are looking for.	Document Text *"contains"* Acme
Does Not Contain	Use this operator to find values that does not contain the text that you are looking for.	Document Text *"does not contain"* Acme
Is Empty	Use this operator to match empty values.	Document Text "*Is Empty*"
Is Not Empty	Use this operator to match non-empty values	Document Text "*Is Not Empty*"

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 the *Add* button. To remove a criteria click the *Remove* 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.



9. The search results will be displayed in the *List View* pane.

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Notes:

- For Globodox 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

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14.4.7 Automatically Extract Text from Documents

You can automatically extract text from documents on check-in by selecting the *Automatically extract text from documents while adding* option from the *Options* window.

To Automatically Extract text from the Document

1. In Globodox, click the Globodox button 33.
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.

Note:
This option can only be selected if the Document Check-in/Checkout feature has been enabled. Please note that selecting this option can significantly slow down the process of adding/checking in of documents.

Notes:

- You can also switch from Globodox 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.
- Globodox 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 Globodox 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 239
Automatically Index a document 197
Automatically Index a stack 199
Recognize barcodes on documents 200

14.4.8 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 works if you are using the Microsoft Office OCR engine and only recognizes languages supported by the MS Office OCR engine.

To OCR document that contains text in a different

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language

1. In Globodox, click the Globodox button 33.
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 239
View the Extracted Text of a Document 238
Recognize barcodes on documents 200
[****] 200

14.5 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 Globodox, select *Workspace* > *All Documents* in the *Navigation* pane. The documents will be displayed in the List View 35 pane.
2. Click the *Double Down 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 the *Add* button. To remove a criteria click the *Remove* 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.

Notes:

- 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 view the saved query click the *Saved Searches* > *Custom Search* node in Workspace.
- To clear the Query Result, click the *Clear* button.

Related Topics
Advanced Search 228
Export the Search Result 247
Share a saved search with other users 243

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14.6 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 Globodox, select *Workspace* > *All Documents* in the *Navigation* pane. The documents will be displayed in the List View 35 pane.
2. Click the *Double own 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 the *Add* button. To remove a criteria click the *Remove* 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.

Notes:

- To clear the Query Result, click the *Clear* button.
- To view the saved query click the *Saved Searches* > *Custom Search* node in Workspace
- You can also search for Users, Groups etc. using the *Advanced Search*.

Related Topics

Advanced Search 228
Export the Search Result 247
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14.7 Share a Saved Search

Globodox lets you to share saved searches owned by you with other users. You can decide what modifications(if any) they can make to the query by giving them privileges. You can share with single or multiple users.

You can share a saved search with other users by right clicking it and choosing the *Share...*

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option.

To Share Saved Searches with other Users

1. Select the saved search that you want to share, from the *Saved Searches* node.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Add* button to add the users to the *Share with* list.
   The Look Up window will be launched.
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user in the *Look for* box.
   b) Now, click the *Find* button to find the user. Users with the same first or last name box will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Share with* list.
4. If you want the users to only view and not modify, then click the *OK* button to begin sharing.

   Note:
   The users that you have shared the saved searches with, will have the *View* privilege by default. You cannot deny these users the *View* privilege.

5. If you want the users to modify the saved search, click the *Advanced* button and provide them Privileges 392 to modify.
6. If you want all the users to have the same privileges then, check the *Apply permissions to all users* option.
   Note: You can also provide different privileges for each user. For e.g Lets say you want user *'john'* to only view the saved search, user *'mary'* to modify but not delete the saved search and user *'jane'* can modify and also delete your saved search. You can do this by selecting each user and providing appropriate privileges to them.
7. Select user(s) from the *Share with* list and provide them with appropriate privileges.
8. Click the *OK* button to begin sharing the saved search.

To Stop Sharing Saved Search with other Users

1. Select the saved search that you want to stop sharing.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Share with* list.
4. Click the *OK* button to save the changes and close the *Share* window.

Related Topics
Restrict users from viewing your Saved Searches 245

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14.8 Restrict Users from Viewing Your Saved Searches

Globodox lets you to restrict users from viewing saved searches owned by you. You can restrict a user from viewing your saved search by right clicking it and choosing the *Restrict...* option.

To Restrict Users to view your Saved Searches

1. In Globodox, select the saved search to restrict other user(s) from viewing it, from the *Saved Searches* node.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   The Look Up window will now be launched
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user in the *Look for* box.
   b) Now, click on the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Restrict* list.
4. Click the *OK* button to restrict the saved search from the selected user(s).

To Stop Restricting Users from viewing your Saved Searches

1. Select the saved search that you want to stop restricting.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Restrict* list.
4. Click the *Ok* button to save the changes and close the *Restrict* window.

Notes:

- You can set privileges for users to restrict them to perform certain actions. For more info see, Privileges 385

Related Topics
Share a saved search with other users 243

14.9 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

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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 Arrow* and *Down Arrow* 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.

Notes:

- 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 413

Related Topics

Print a document 185
Burn documents on a CD 184

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14.10 Export the Search Result

Globodox 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 Globodox, select *Workspace* > *All Documents* in the *Navigation* pane. The documents will now be displayed in the List View 35 pane.
2. Search the documents that you want to export by using the Quick Search 227 or the Advanced Search 228 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 270 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 *Arrow* and *Down Arrow* 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.

Notes:

- 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 415
Export data to a Excel file 416
Export data to a XML file 417
Back up Globodox DB 430

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15 Annotation

Topics Covered

1. What is Annotation 249
2. Underline Words or Sentence on a Document 251
3. Highlight Words on a Document 251
4. Mark Area Using Rectangles and Circles 252
5. Hide Confidential Content of a Document 253
6. Add Sticky Notes on a Document 253
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12. Share Annotations with Other Users 258
13. Assign Annotation to Another User 259
14. Restrict Users from Viewing Your Annotations 259

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15.1 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 anytime in going through the whole document again. Also, if you have passed on the document to your colleague, even he/she will know what to look for in it.

Globodox allows you to do the same with electronic documents, just as you would annotate documents in real life. 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 Globodox...

- Underline or circle important text
- Draw a rectangle
- Highlight certain text in the document
- Add sticky notes to the documents.
- Hide confidential text.
- Insert stamps on the documents.
- Bookmark the document.

Annotation Toolbar:

The annotation toolbar is located on the extreme right of the Document Details 36 pane.

Use this button to draw lines or underline 251 text.

Use this button to draw rectangles 252.

Use this button to draw ellipses or circles 252.

Use this button to hilight 251 texts.

Use this button to hide 253 certain text.

Use this button to add notes 253 to the document.

Use this button to insert a bookmark 254 on the document.

Use this button to insert stamps 255 on the document.

Use this button to insert signature 255 on the document.

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

Use this button to view the content below the redact.

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.

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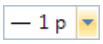
Use this button to change the color of the selected object.



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.

Use this button to share 188 the selected annotated object with other users.

Use this button to restrict 189 the selected annotated object with other users.

Use this button to assign 189 the selected annotated object with other users.

Use this button to set a security label 398 to the selected annotated object

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15.2 Underline Words or Sentences on a Document

You can use the Line button on the Annotation toolbar 249 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 165 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 249 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.

Notes:

- 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 249 toolbar.
- Use the *Information* button to display/hide the annotation's User Information.
- You can make the lines permanent by burning it on the document. 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
Hilight Words on a document 251
Insert a Bookmark on a document 254
Hide confidential content of a document 253

15.3 Highlight Words on a Document

Globodox allows you to hilight important words or sentences on a document just as you would use a Hilighter marker on your paper documents. Use the *Hilight* button on the Annotation toolbar 249 to hilight 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 165 pane.
2. Click the *Hilight* button on the *Annotation* toolbar.
3. Drag the pointer on that part of document that you want to hilight. That's it.
4. You can also change the *Hilight* area's color. To do this...
   a) Select the hilighted area and move your mouse over it. You will now get a Mini 249 toolbar.
   b) Select a color by clicking the *Color* button.

Notes:

- Please note the words or sentences hilighted by you on the document are not permanently

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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.

- Use the *Information* button to display/hide the annotation's User Information.
- You can make the lines permanent by burning it on the documents. 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 252
Insert a Bookmark on a document 254
Hide confidential content of a document 253

15.4 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 249.

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 165 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 249 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.

Notes:

- Use the *Information* button to display/hide the annotation's User Information.
- You can make the rectangles and circles permanent by burning it on the documents. 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 252
Insert a Bookmark on a document 254
Hide confidential content of a document 253

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15.5 Hide Confidential Content of a Document

You can redact (hide) confidential content of a document by using the *Redact* button on the Annotation toolbar 249.

To Hide Confidential contents of a Document

1. Select the document that you want to annotate. The document will now be displayed in the Details View 36 pane.
2. Click the *Redact* button on the *Annotation* toolbar.
3. Drag the pointer on that part of document that you want to hide. That's it.
4. You can also change the redacted area's color. To do this...
   a) Select the image drawn and move your mouse over it. You will now get a Mini 249 toolbar.
   b) Select a color by clicking the *Color* button.

Notes:

- Use the *Toggle Redact* button to view the content below the redacted area.
- Use the *Information* button to display/hide the annotation's User Information.
- Please note that redaction is not permanently imprinted on the document, 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

Underline Words or Sentences on a document 251
Hilight Words on a document 252
Insert a Bookmark on a document 254

15.6 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 36 pane.
2. Click the *Notes* button on the Annotation toolbar 249.
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.

Notes:

- Double click the *Notes* icon to view the added notes.
- Use the *Information* button to display/hide the annotation's User Information.
- 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 249 toolbar.

Related Topics

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Enter Comments for a Document 183
Underline Words or Sentences on a document 251
Hilight Words on a document 252
Insert a Bookmark on a document 254

15.7 Insert a Bookmark on a Document

You can add a bookmark to a document by using the *Bookmark* button on the Annotation toolbar 249. 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 35.

To Insert a Bookmark on a Document

1. Select a document to insert a Bookmark. The document will now be displayed in the Document Details 36 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 249 toolbar.

Notes:

- To view the bookmarks on a document, select the document and click the *Pages* tab on the left side of the *Document Details* pane.
- Use the *Information* button to display/hide the annotation's User Information.
- 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 183
Add Sticky Notes on a documents 253
Insert Stamp on a document 255

15.8 Place a Watermark on a Document

Globodox 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 be displayed in the Document Details 36 pane.
2. Click on the Watermark button on the Annotation toolbar 249.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.

Notes:

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- Watermark privileges are currently combined with Annotation privileges. A user having the Add annotation privilege can add a watermark on a document.
- 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.
- Users can print documents without the watermark only if they have the privilege to 'Distribute Document without Watermark'. This privilege is available in the Other privileges section in the Role dialog.

Related Topics
Enter Comments for a Document 183
Add Sticky Notes on a documents 253
Insert Stamp on a document 255

15.9 Place a Stamp on a Document

Globodox lets you to put a stamp on your documents.

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 36 pane.
2. Click the *Stamp* button on the Annotation toolbar 249. 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.

Notes:

- 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 249 toolbar.
- You can make the stamp permanent by burning it 256 on the documents. 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.
- Use the *Information* button to display/hide the annotation's User Information.
- You can create a stamp as per your requirement. For more information, see Create a Stamp 262.

Related Topics
Enter Comments for a Document 183
Add Sticky Notes on a documents 253
Insert a Bookmark on a document 254

15.10 Place Signature on a Document

Globodox lets you to put a signature on your documents. To insert a signature, you will need to create a signature.

To Place a Signature on a Document

1. Select the document to insert a signature. The document will now be displayed in the

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Document Details 36 pane.
2. Click the *Signature* button on the Annotation toolbar 249.
3. Drag the pointer on the document to insert the signature. You can resize the size of the signature by dragging it.

Notes:

- A user can be assigned only one Signature.
- 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 249 toolbar.
- You can make a signature permanent by burning it 256 on the documents. 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.
- Use the *Information* button to display/hide the annotation's User Information.

Related Topics
Enter Comments for a Document 183
Add Sticky Notes on a documents 253
Insert a Bookmark on a document 254

15.11 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 to burn it on the document. Please note that 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 69.
2. Select the annotation and move your mouse over it. You will now get a Mini 249 toolbar.
3. Click the Burn button on the *Mini* toolbar. The annotation will now be burnt on the document.

Notes:

- 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 257
Share Annotations with other user 188
Recognize barcodes on documents 200

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15.12 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 Globodox, select *Workspace > All Documents* in the Navigation 34 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 example:
      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.

Notes:

- You can also print the indexed information of a document. For more information, see Print the indexed information of a document 186.

Related Topics

Annotate the Document permanently 256
Burn documents on a CD 184

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15.13 Share Annotations with Other Users

Globodox lets you to share annotations owned (created) by you with other users. You can decide what modifications(if any) they can make to the annotations by giving them privileges. You can share with single or multiple user.

You can share a annotation with other users by clicking the *Share button* on the Mini toolbar.

To Share Annotations with other Users

1. Select the annotation and move your mouse over it. You will now get a Mini 249 toolbar.
2. Click the *Share* button on the Mini toolbar. The *Share* window will be launched.
3. Click the *Add* button to add the users to the *Share with* list.
   - The Look Up window will be launched
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user in the *Look for* box.
   b) Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Share with* list.
4. If you want the users to only view and not modify, then click the *OK* button to begin sharing.

   Note:
   The users that you have shared the annotations with, will have the *View* privilege by default. You cannot deny these users the *View* privilege.

5. If you want the users to modify the annotations, click the *Advanced* button and provide them Privileges 392 to modify.
6. If you want all the users to have the same privilege then, check the *Apply permissions to all users* option.
   Note: You can also provide different privileges for each user. For e.g Lets say you want user *'john'* to only view your annotations, user *'mary'* to modify but not delete your annotations and user *'jane'* can modify and also delete your annotations. You can do this by selecting each user and providing appropriate privileges to them.
7. Select user(s) from the *Share with* list and provide them with appropriate privileges.
8. Click the *OK* button to begin sharing the annotations.

To Stop Sharing Annotations with other Users

1. Select the annotation that you want to stop sharing and move your mouse over it. You will now get a *Mini* toolbar.
2. Click the *Share* button on the Mini toolbar. The *Share* window will be launched..
3. Click the *Remove All* button to remove all the users from the *Share with* list.
4. Click the *OK* button to save the changes and close the *Share* window.

Notes:

- You can burn annotations on a document 256. 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,

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the annotated object will be burnt in black color.

Related Topics
Assign Annotations to another User 259
Restrict Users from viewing your Annotations 259

15.14 Assign Annotation to Another User

Globodox lets you to assign annotations owned (created) by you to another user. You can assign a annotation to only one user and not multiple users.

You can assign annotations to another user by clicking the *Assign* button on the Mini toolbar.

To Assign Annotation to another User

1. Select the annotation and move your mouse over it. You will now get a Mini 249 toolbar.
2. Click the *Assign* button on the Mini toolbar. The *Assign* window will be launched.
3. Select a user from the *Users* list to assign the annotation.
4. Click the *OK* button to assign the annotation.

Notes:

- You can burn the annotation on the document 256. 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
Restrict Users from Viewing your annotations 259
Share Annotations with other user 258

15.15 Restrict Users from Viewing Your Annotations

Globodox lets you to restrict users from viewing annotations owned by you. You can restrict a user from viewing your annotations by clicking the *Restrict* button on the Mini toolbar.

To Restrict Users to view your Annotations

1. Select the annotation and move your mouse over it. You will now get a Mini 249 toolbar.
2. Click the Restrict button on the Mini toolbar. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   - The Look Up window will now be launched
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user in the *Look for* box.
   b) Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Restrict* list.

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4. Click the *OK* button to apply the settings.

To Stop Restricting Users from viewing your Annotations

1. Select a annotation and move your mouse over it. The Mini toolbar will now be dispalyed.
2. Click the Restrict button on the Mini toolbar. The *Restrict* window will be launched.
3. Click the *Remove All* button to remove all the users from the *Restrict* list.
4. Click the *OK* button to save the changes and close the *Restrict* window.

Notes:

- You can set privileges for users to restrict them to perform certain actions. For more information, see Privileges 385.

Related Topics

Share Annotations with other users 258
Assign Annotation to another user 259

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16 Templates, Themes, Profiles

Topics Covered

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2. Profiles 265
3. Create Theme 270

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16.1 Templates

Topics Covered

1.1 Create a Document Template 262

1.2 Create a Stamp Template 262

1.3 Create a Signature Template 264

16.1.1 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 Globodox 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 Globodox, 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 (selected by default). 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 File 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.

Notes:

- You can also click the *Save* button and then the *New* button to save the changes and add another template without closing the *New File 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 it from the list and click the *Delete* button on the *Template Manager* window.

Related Topics
Create a Stamp 262

16.1.2 Create a Stamp Template

Globodox is shipped with default stamps for e.g. the Approved and Reject, that are used to Annotate 248 documents. However, you can also create stamps using Globodox Template Manager.

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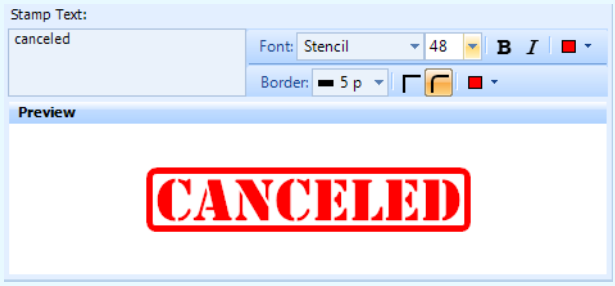
To Create a Stamp Template

1. In Globodox, 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. Enter a short description about this template in the *Description* box.
7. From the *Stamp Type* drop-down select the *General* option (selected by default).
8. 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 Globodox.
9. 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 button* 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 stamp will now be displayed on the right pane i.e. *Stamps* list.

Notes:

- 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

Insert Stamp on a document 255
Create a Document Template 262

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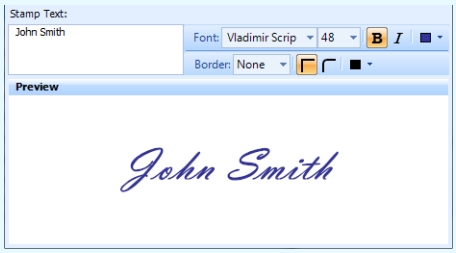
16.1.3 Create a Signature Template

You can create a signature by using Globodox Template Manager.

To Create a Signature Template

1. In Globodox, 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 button* 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 & Signatures* list.

Notes:

- A user can be assigned only one Signature.
- 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 255
Create a Document Template 262

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16.2 Profiles

Topics Covered

2.1 Create a Scan Profile 265
2.2 Create a Export Profile 266
2.3 Create a Destination Profile 267

16.2.1 Create Scan Profiles

Globodox uses *Scan Profile* to simplify the process of scanning 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*. Documents can be of several types (e.g. Color photographs, Black & White text etc.). The settings required to scan and save a black and 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 example:
Let's 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 another 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 Globodox, select the *Home* tab and click the *Scan* button. This will bring up the Scan Window 63.
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.

Notes:

- 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 - 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.

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- **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.

- You can also create profiles which stores information about the document like its Document Type 125, its Stack 136 and its folder which can be saved and reused. These profiles are called as Destination Profiles 267. Thus by using Scan Profiles and Destination Profiles you can automate your scanning process 93.

Related Topics
Scan multiple single paged document 75

16.2.2 Create an Export Profile

Globodox 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 Globodox, 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.

Notes:

- 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 419

Related Topics
Export data to a CSV file 414
Export data to a HTML file 415
Export data to a Excel file 416
Export data to a XML file 417

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16.2.3 Create Destination Profiles

Globodox uses Destination Profile to simplify the process of adding documents.

Destination Profile is a collections of information about the document like its Document Type 125, its Stack 136 and its folder which can be saved and reused from the above windows.Instead of specifying these settings every time you add a document, you can specify these settings once and save them as Destination Profiles.
For example:
Let's say on a daily basis you scan Invoices received from Acme Corp. You then set their Document Type to Invoice, and relate the documents to the Acme Corp. Stack. You make your work easy by creating one Destination profile for Acme Corp. Invoices.

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

You can create Destination Profiles from...
Scan window 267
Find and Add window 267
Add Folders from disk window 268

To Create a Destination Profile using the Destination Profiles Manager

1. In Globodox, 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 Destination Profile from the Scan Window

1. In Globodox, select the *Home* tab and click the *Scan* button. This will bring up the *Scan* Window.
2. In the *Destination* tab, enter a name for the new profile in the text *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 and Stacks by using the *Links* tab.
5. You can *Share*, *Assign* or *Restrict* the selected files with other users by using the *Security* tab. You can also apply a Security Label 395 to the selected files by using this tab.
6. Once you have specified these 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 Destination Profile from the Find and Add

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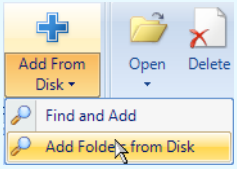
Window

1. In Globodox, 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 and Stacks by using the *Links* tab.
5. You can *Share*, *Assign* or *Restrict* the selected files with other users by using the *Security* tab. You can also apply a Security Label to the selected files by using this tab.
6. Once you have specified these 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 Destination Profile from the Add Folders from Disk Window

1. In Globodox, 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 and Stacks by using the *Links* tab.
5. You can *Share*, *Assign* or *Restrict* the selected files with other users by using the *Security* tab. You can also apply a Security Label to the selected files by using this tab.
6. Once you have specified these 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.

Notes:

- 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 93.

Related Topics

Scan mutilpe single paged document 75
Find and Add a document 55

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Add the existing folder structure along with files from disk

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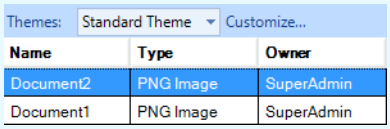
16.3 Create a Theme

When exporting or printing documents, Globodox 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* window or *Export Data* window. 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.

Note:
To delete a theme click the *Delete* button.

Related Topics

Export Data 413
Print the indexed information of a document 186

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17 Document Check-in/Checkout

Topics Covered

1. What is Document Check-in/Checkout 272
2. Document Check-in/Checkout - FAQ 273
3. Checkout a Document 276
4. Check-in a Checked Out Document 276
5. Change the Default Checkout Folder 277
6. Draft Documents 278

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17.1 What is Document Check-in/Checkout?

What is document Check-in/Checkout?

The Document Check In/Check Out feature is especially useful in a multi-user scenario where multiple users will be working with the same Globodox DB. Suppose you want to review and make modifications to a MS Word document which has been added to Globodox. Lets assume that it will take you three days to make these modifications to the document.

In a conventional scenario if you open the document in MS Word, then no other user on the network would be able to open the same document for editing. But this restriction will only apply till you have the document opened in MS Word. The other user can open the document as soon as you close it in your copy of MS Word. As per the above assumption the modification is likely to take you three days. In these three days you will open the document, make changes and close it several times. If while you had the document closed, another user was to open, edit and save the document your changes could get overwritten leading to loss of time, efforts and lot of needless confusion. The Check In/Check Out feature provides a simple elegant way to solve this problem.

With Globodox, when you want to make modifications to a document, you first check it out. Once you have checked out a document, then to all users that document will appear as a checked out document. This way they know that the document is being modified by some other user. Additionally when the document is checked out by you, no other user can check out the document (and therefore modify it) unless you check in the document or cancel the check out. While a document is in the checked out state, other users can still view the document (as it was at the time you checked it out).

Related Topics

Document Check-in/Checkout - FAQ 273

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17.2 Document Check-in/Checkout - FAQ

What is the document check-in/checkout feature?

The check-in/checkout feature lets you block others users of the Globodox DB from trying to edit a document that you are currently editing. When this feature has been enabled then whenever you want to modify a document, you must first check it out. When you checkout a document, then to all other users that document will appear as a checked out document. Once you have checked out a document, then no other user can checkout (and therefore modify) that document, until you have checked it back in. While a document has been checked out, other users can still view the document as it was when it was last checked in.

Why is it useful?

The document check-in/checkout feature is useful in a multi-user scenario where multiple users will be working with the same Globodox DB. It ensures that while a document is being modified by one user, no other user can modify it. Also while a document has been checked out, other users can still view the document as it was at the time it was last checked in. Therefore you can take as much time as you need for editing the document without worrying about some other user modifying the document in the mean time or you blocking other authorized users from viewing a copy of the document for a long time.

For what file types does the check-in/checkout feature work?

The check-in/checkout feature works for any file type.

How can I enable the check-in/checkout feature while creating a new Globodox DB?

The check-in/checkout feature is enabled by default when you create a new Globodox DB.

How do I check-in a new document?

If the check-in/checkout feature is enabled, a document is automatically checked in as soon as it is added.

How do I checkout a document?

You can only checkout a document if it is in the checked in state (i.e. if it has not already been checked out by another user).

To checkout a document, select that document in the List View pane and then click the *Checkout* option of the *Home* tab. You can also right click the document and select the *Checkout* option.

How do I open a checked out document for editing?

To open a checked out document for modifications select that document in the List View pane and click on either of the two *Edit* options in the *Open* drop down of the *Home* tab.

Can I cancel a checkout?

To cancel a checkout, select that document in the List View pane and click the *Check-in* drop down and then click *Cancel Checkout* option of the *Home* tab.

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What happens when I checkout a document?

When you checkout a document it is first marked as checked out in the Globodox DB. Then a copy of the document is placed in your Checkout folder (unless you have used the *Checkout to...* option to checkout the file). If you have used the *Checkout to...* option to checkout the file, then a copy of the document will be placed in the folder you have selected.

If the document you are checking out is encrypted then Globodox will create a decrypted copy of the document and then place that copy in your checkout folder (or any other selected folder).

How do I check-in a previously checked out document?

To check-in a previously checked out document...

If you had checked out the document to your default checkout folder and if the document is still located in that folder then...
Click the *Check-in* button of the *Home* tab.

If you had checked out the document to some other folder (and not your default checkout folder) then...
Click the *Check-in* drop down arrow and select the *Check-in from...* option. This will bring up the *Browse Folder* window. Navigate to the folder and select the document to Check it in.

What happens when I check in a previously checked out document?

When you check-in a previously checked out document, then...

1. If document encryption is enabled then a encrypted copy of the document being checked in, will be created.
2. If document versioning is enabled then the version number of the document is incremented by one. The existing version of the document is stored as a old version.
3. The encrypted copy of the document with the incremented version number is checked in.
4. If the document is being checked in from the Checkout folder then the document is automatically deleted from the Checkout folder, after it has been checked in.

What if I used the Open options of the Home tab to view a document that is in the checked out state?

If you use any of the *Open* options of the *Home* tab to try and view a document which is in the checked out state, then Globodox will open the last checked-in copy of the document for viewing. This will happen even if the user trying to view the document is the same as the user who has checked out that document.

Can I change the path of the Checkout folder?

Yes, a user can set his/her Checkout folder by clicking the *Checkout* drop down arrow and selecting the *Checkout to...* option of *Home* tab. This will launch the *Set Checkout Folder*

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window. Now, specify the location of the new checkout folder

What about the security of the document when it has been checked out?

When a document is checked out it is placed in the Checkout folder. The security of the document copy in the Checkout folder is the responsibility of the user who checked out the document. The copy of the document in the Globodox DB is still protected by Globodox. Therefore care must be taken when selecting a Checkout folder. Ideally a local folder on the user's machine should be set as the user's Checkout folder. However if the user is likely to logon to Globodox from different machines then a network accessible folder can be chosen as the user's Checkout folder. Windows security can be used to prevent unauthorized access to documents in the Checkout folder.

What if a user who checked out a document is no more available?

Only the user who checked out a document can check it back in. The superadmin can however use the *Cancel checkout* option to cancel the checkout if the user who checked out a document is no more available.

Related Topics

Checkout a document 276
Check-in a Checked out document 276

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17.3 Check-out a Document

You can only checkout a document if it is in the checked in state (i.e. if it has not already been checked out by another user).

To Checkout a Document

1. Select the document that you want to Checkout from the List View pane.
2. Click the *Checkout* option of the *Home* tab to checkout the document. You can also right click the document and select the *Checkout* option

   Note:
   If you are checking out the document for the first time then Globodox will ask you to specify a folder to checkout the document. The folder that you select will be your default checkout folder.

Notes:

- When a document is checked out it is placed in the Checkout folder. The security of the document copy in the Checkout folder is the responsibility of the user who checked out the document. The copy of the document in the Globodox DB is still protected by Globodox. Therefore care must be taken when selecting a Checkout folder. Ideally a local folder on the user's machine should be set as the user's Checkout folder. However if the user is likely to logon to Globodox from different machines then a network accessible folder can be chosen as the user's Checkout folder. Windows security can be used to prevent unauthorized access to documents in the Checkout folder.
- You can also change your checkout folder, to do this click the *Checkout* drop down arrow and select the *Checkout to...* option of *Home* tab. This will launch the *Set Checkout Folder* window. Now, specify the location of the new checkout folder.

Related Topics
Check-in a Checked out document 276

17.4 Check-in a Checked Out Document

You can check-in a checked-out document by right clicking it and selecting the *Check-in* option.

To Check-in a previously Checked-out Document

1. Select the checked out document that you want to check-in, from the List View pane.
2. Click the *Check-in* option of the *Home* tab to check-in the document. You can also right click the document and select the *Check-in* option. The document will now be checked-in to the Globodox DB from your default checkout folder.

   Note:
   If you had checked out the document to some other folder (and not your default checkout folder) then...
   Click the *Check-in* drop down arrow and select the *Check-in from...* option. This will bring

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up the *Browse Folder* window. Navigate to the folder and select the document to Check it in.

Notes:

- If document encryption is enabled then a encrypted copy of the document being checked in, will be created.
- If document versioning is enabled then the version number of the document is incremented by one. The existing version of the document is stored as a old version.
- The encrypted copy of the document with the incremented version number is checked in.
- If the document is being checked in from the Checkout folder then the document is automatically deleted from the Checkout folder, after it has been checked in.

Related Topics
Checkout a document 276

17.5 Change the Default Checkout Folder

You can change your default checkout folder by using the *Options* window.

To Change the Default Checkout folder

1. In Globodox, click the Globodox button 33.
2. Click the *Options* button. The *Options* window will now be launched.
3. In the *Default checkout folder* section click the *Browse* button to specify a new checkout folder.
4. Click the *OK* button to apply the settings.

Note:
When a document is checked out it is placed in the Checkout folder. The security of the document copy in the Checkout folder is the responsibility of the user who checked out the document. The copy of the document in the Globodox DB is still protected by Globodox. Therefore care must be taken when selecting a Checkout folder. Ideally a local folder on the user's machine should be set as the user's Checkout folder. However if the user is likely to logon to Globodox from different machines then a network accessible folder can be chosen as the user's Checkout folder. Windows security can be used to prevent unauthorized access to documents in the Checkout folder.

Related Topics
Checkout a document 276

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17.6 Draft Documents

17.6.1 What are Draft Documents?

What are Draft Documents?

Draft documents in Globodox are temporary, intermediate documents which may be created while a team of users are working on the next major version of a document. Draft documents can have different access permissions as compared to published documents. Thus draft documents enable a team of users to securely collaborate on the next version of a document and also enable the modified document to be reviewed by another team of users (e.g. via a workflow) before it is made available to a larger set of users (e.g. an entire department or company).

To understand draft documents better, let us look at how modification and review of a documents works in Globodox, when not using the draft documents feature...

- Jane wants to revise a policy document to incorporate some changes
- Jane and a few others in her department have the permission to edit this document while everyone else in the department can view the document
- Jane checks out the document
- All users who have the permission to edit or view the document can still view the document (as it was at the time when Jane checked it out)
- Jane makes changes to the document and then checks-in the document
- The new changed document is now visible to everyone in the department

While the above method works well, it has its limitations. It does not provide a good mechanism for collaboration during document revision or approval. Suppose Jane has to work with a team of users for modifying the document and/or if she must get approval from a team of users, before the document can be made available to the rest of the department. In such a case, Jane might have to manage such collaboration outside of Globodox. Draft Documents provide a simple method to enable such collaboration within Globodox.

A draft document is a document which is currently being modified or reviewed. Globodox provides a separate security mechanism for draft documents. So you can have one set of users allowed to view or edit the draft version of a document and another (usually larger) set of users who are only allowed to view the published version of the document.

Now let us see, how the draft documents features enables collaboration during the document revision and approval process.

- Jane wants to revise a policy document to incorporate some changes
- Jane and a few others in her department have the permission to edit this document while everyone else in the department can view the document
- Jane checks out the document
- All users who have the permission to edit or view the document can still view the document (as it was at the time when Jane checked it out)
- Jane makes changes to the document and then checks-in the document as a *draft document*
- The status of the documents automatically changes from *Checked Out* to *Under Review*. Other users know that this means a new modified version of the document is currently under review.

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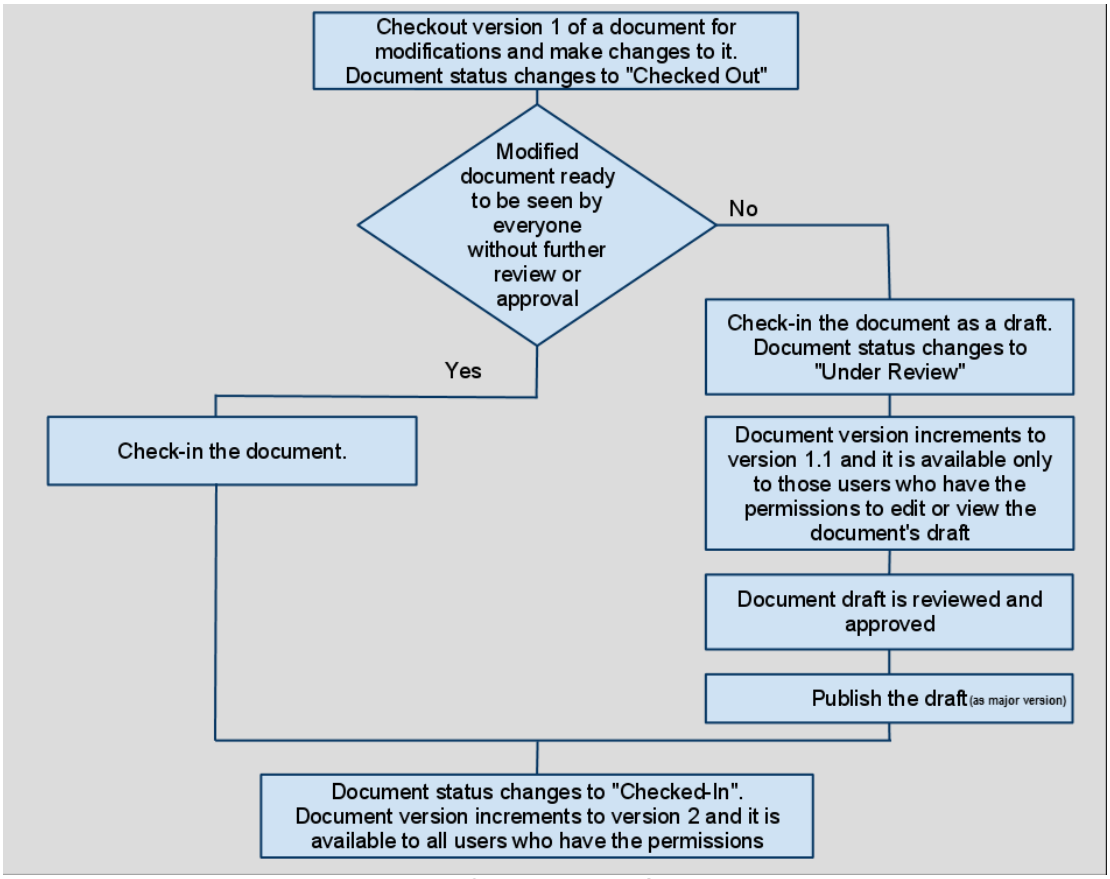
- Only those use who have been given permissions to edit or view the draft can now see the changes and make comments (they can even checkout the draft and check it back in with their own changes).
- Once the team is fine with changes, another team could review the document and then approve it (for e.g. the draft document could be sent in a workflow for approval)
- The approved draft document can then be published.
- The new changed document is now visible to everyone in the department

As you can see the draft documents feature provides a powerful and elegant way to handle collaborative document revision and approval.

Related Topics
Document Check-in/Checkout - FAQ 273
How does the draft mode work? 279

17.6.2 Draft Document Basics

The graphic below shows how and when draft documents should be created, how the *Status* of the document changes and what happens when you publish a draft document.



Draft Document - Basics

If you want to edit, for instance, an existing published document (let us assume its version is 1.0), as usual you need to first check it out.

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The published document's status will change to *Checked Out*.

If other users need to review your modifications before it can be made available to a larger set of users, you must check-in the modified document as a draft.

This version number of the new draft document will be 1.1 and it's status would be *Checked In*.

Since a new draft has been created for it, the published document's status would be changed to *Under Review*.

You can keep making changes to the draft document. Every time you checkout and check-in a draft document, it's minor version increments by 1. So it changes from 1.1 to 1.2, 1.3 and so on.

When you publish the draft document, its version number changes to 2.0 and its status changes to *Checked In*.

Notes:

- You can add a document directly as a draft document. In this case the new draft document gets the version number 0.1. You can review the draft document, check-in/checkout to make changes if required and publish the document when you are done.

Related Topics
More about draft documents 280

17.6.3 Important Notes About Draft Documents

Drafts behave just like published documents. They can be tagged, put in folders, have their document types set and be part of a stack. In any view (i.e. All Documents, Folders etc.) you can click on the new *Draft Documents* tab below the List View to see the drafts in that view. Click the *Published Documents* tab to see the published documents in that view.

You can add a scanned document or a document from the hard disk directly as a draft document. In this case the new draft document gets the version number 0.1. You can review the draft document, check-in/checkout to make changes if required and publish the document when you are done.

A document can be in one folder, while its draft can be in another folder. Similarly the tags, document type and stack for a document can be different than what it is for its draft. When a draft is published (i.e. when it becomes a published document) its folders, tags, document type and stack will be the ones that are used. This is useful because when a draft is passing through a workflow, it can be assigned a new folder, tags etc. which will be used upon approval of the draft.

Each Role in Globodox can have a different set of permission for drafts and published documents. Also, a security label applied to a draft is different from a security label applied to a published document. However, when a draft is published it inherits the security label (and other security settings) from its parent document. If the draft does not have a parent document, then it retains its own security settings.

Related Topics
How does the Draft Mode work? 279

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17.6.4 Draft Documents Usage Example

Scenario

John and Alan work in the operations department of a large life insurance company. They have been assigned the task of updating the Standard Operating Procedures (SOP) to reflect certain process changes approved by the company's senior vice-presidents. They have the SOP document (Version 2) on Globodox. They need to make some changes to sections of the document. John and Alan will work on the document and publish it as Version 3 as soon as possible. But their respective reporting managers need to review the changes they make in the document, before it is published. If the document is okay, they can publish it; but if it needs to be tweaked further, they must incorporate the desired changes and then have their reporting managers review it again, approve it, and then publish it.

Solution

Before version 7: John or Alan could check out the document, make the required changes and then check the document back in as Version 3, so that the entire team of Globodox users (the whole department) could view the changes. But they could not check in the document in a way that only their reporting managers would review it for approval before the rest of the team could see the updated version.

Result: any error in the updated SOP document would be visible to the entire department, resulting in confusion among other team members and possible action against John and Alan.

But from now: Globodox will allow John or Alan (any one of them) to save the revised document as a draft document, so that their reporting managers can first review the changes made. This draft will be saved as a minor version - in this case, Version 2.1. If the document is not approved, it can be checked out again, necessary changes made and then checked back in as Version 2.2. This process can be repeated until the document is approved for publishing and release to the entire team. In that case, either John or Alan or anyone with the required permission, can check the document back in - this time not as a draft check in, but as a published document (Version 3.0 in this example). This will officially roll out the revised SOP for implementation across the department.

Result: Errors in the document will not be visible to anyone not granted permission to access the document while in draft mode. Thus there won't be any confusion about the document's contents and therefore, no action - neither against John, nor against Alan.

Note:
This scenario would work just as well if an SOP document did not exist but had to be created. In that case, John or Alan could create a new draft document from within Globodox and then carry on with the process of building the document, draft check in and so on, until it was ready for publishing.

Related Topics

More about draft documents 280

17.6.5 Create a Draft Document

To create a draft document, you can either...

Checkout a published document, modify it and check it back in as as a draft document 282, Or

Scan a document or select any existing file from your 282

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17.6.6 Check-in a Document as a Draft Document

You can only check in a document as a draft document if it is in the checked out state

To Check in as a Draft Document:

1. For this, check out the document 276 as normal (let us assume the document's current version is 1.0)
2. Make changes to the document
3. Select the checked out document
4. From the *Check In* drop-down on the Ribbon Bar, select the *Check in Document As Draft* option
5. The modified document will be checked in as a draft version of the currently selected document
6. The version of this draft will be 1.1.

- Also, the status of the document will change from *Checked Out* to *Under Review.* No changes can be made to the document till it is under review. To change the *Under Review* status of a document, you can either *Cancel Checkout* of the document or *Publish* the document's draft.

Related Topics
Check out a draft document 283

17.6.7 Add a Document as a Draft Document

Add a document as a draft document

Sometimes you may want a file to go through an approval process before it is added to Globodox. To enable this, Globodox allows files to be directly added as drafts from disk or via scanning. To enable this, the *Destination Profile* panel (on the Scan Window, Find and Add Files window etc...) now has a new *Add As Draft* option. Check this option while adding or scanning files and the new documents will be added as draft documents. These documents will be versioned 0.1.

You can also add files as draft via drag & drop and the Add Files dialog, when the *Draft Document* tab of the List View has been selected. Again these documents will be versioned 0.1.

17.6.8 Check-in a Draft Document so that its Version Number is Incremented to the Next Major Version

Check in a draft document so that its version number is incremented to the next major version

This can be achieved by publishing the draft document. See...

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Publish a draft document as a Major Version 284

17.6.9 Check-out a Draft Document

You can only checkout a draft document if it is in the checked in state (i.e. if it has not already been checked out by another user).

To Checkout a Draft Document:

1. Select the draft document
2. Click on the Checkout button on the ribbon bar
3. The status of the draft will change to Checked Out.

Related Topics
Check in as a draft document 281

17.6.10 Cancel Checkout for Draft Document

To Cancel check out for a draft Document:

1. Select the draft document
2. From the *Check In* drop-down on the Ribbon Bar, select the *Cancel Check-out* option

17.6.11 Check in a Modified Version of a Draft Document

To Check in a Modified Version of a Draft Document:

1. Select the draft you want to check in (its current status should be *Checked Out*)
2. Click on the Check in button on the ribbon bar
3. The status of the draft will change to Checked In.

- If at the checkout, the version of the draft was 1.1, the version of the newly checked-in draft will change to 1.2. The 1.1 version of the draft will still be available in the versions tab of the Draft Window.

Related Topics
Check in as a draft document 281
Check out a draft document 283

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17.6.12 Publish a Draft as a Major Version

To Publish a Draft as a Major Version:

1. Select the draft document/s you want to publish. The draft/s must be in the checked-in state.
2. From the *Check-In* drop-down on the Ribbon Bar, select the *Publish Draft As Major Version* option
3. If the version of the draft was 1.2 (or 1.3 or 1.xx), it will be published as a document with version 2.0 and status as *Checked-In.*

Notes:

- You can now auto-publish multiple draft documents together. To select more than one draft document, press and hold the Control key and select the additional document/s. To select all draft documents, press Control + A or select the first document, press and hold the Shift key and select the last draft document in the list. Then continue with Step 2 above.
- The earlier v. 1.0 of the document will be available via the Version tab of the Documents window but minor versions such as 1.1, 2.2 etc. will be deleted. If multiple draft documents are published together, each of them will be published to its next major version respectively.

Related Topics

How does the Draft Mode work? 279
Use Case 281
More about draft documents 280

17.6.13 Publish a Draft as a Minor Version

To Publish a Draft as a Minor Version:

1. Select the draft document/s you want to publish. The draft/s must be in the checked-in state.
2. From the *Check-In* drop-down on the Ribbon Bar, select the *Publish Draft As Minor Version* option
3. If the version of the draft was 1.3, it will be published as a document with version 1.3 and status as *Checked-In.*

Notes:

- You can now auto-publish multiple draft documents together. To select more than one draft document, press and hold the Control key and select the additional document/s. To select all draft documents, press Control + A or select the first document, press and hold the Shift key and select the last draft document in the list. Then continue with Step 2 above.
- The earlier v. 1.0 of the document will be available via the Version tab of the Documents window but minor versions such as 1.1, 2.2 etc. will be deleted. If multiple draft documents are published together, each of them will be published keeping their existing version

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numbers unchanged.

Related Topics
How does the Draft Mode work? 279
Use Case 281
More about draft documents 280

17.6.14 Restrict Manual Publishing of Document

Normally when you add a documents to GLOBODOX, it is added in the Published mode. Some organizations may require that before any document is published, it must be treated as a Draft Document and routed via an approval workflow.

Users in Globodox can be blocked from adding documents directly in the Published mode. Draft documents are edited with minor version maintained and then sent to a Workflow for Approval or Rejection. Once the draft document is Approved the draft document is Published to a major version/a minor version via the Workflow. This avoids unapproved documents to be added in the Globodox published node.

By default, this feature is disabled in Globodox. To enable the feature, *Restrict Manual document publishing* should be enabled in the Role for the user. In the Draft mode, This will also disable manual publishing of documents when they are in Draft mode (i.e. they can only be published via a workflow).

To enable this feature:

1. In Globodox, click the *Settings* tab.
2. Select Roles under System Settings.
3. Double click the Role that needs to have this feature enabled.
4. Click the Other privileges tab. Scroll to the end of the list.
5. Check the feature 'Restrict Manual document publishing'.
6. Click Save & close.

Note: You cannot directly edit a System defined Role. You will need to Clone the role, open the cloned role to make changes to the Role.

All documents will now be added automatically to the Draft node. The behavior will be the same when adding Documents to the Stack as well as when adding document via the Web Client.

Documents added via the Virtual Printer method or the Send To option will also be added to the Draft node in Globodox.

Note: Documents added via Globodox Drive will be added to the Published node and not the Draft node.

17.6.15 Viewing the Current Draft of any Published Document

To view the current draft of any published document:

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1. Select the published document (it must be in the *Under Review* state)
2. On the Version tab, click the *Show Draft* button on the toolbar to view its draft.

Related Topics
Viewing the parent published document of any draft 286

17.6.16 Viewing the Parent Published Document of any Draft

To view the parent published document of any draft document:

1. Select the draft document
2. On it's Version tab, click the *Show Published* button on the toolbar (Documents directly added as drafts documents will not have a parent document. Such drafts will have 0.1, 0.2, 0.x and so on as their version number).

Related Topics
Viewing the current draft of any published document 285

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18 Document Versioning

Topics Covered

1. What is Document Versioning 288
2. Document Versioning - FAQ 289
3. Enable Versioning 292
4. View Document's Versions 292
5. Make an Old Version of a Document as the Current Version 293

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18.1 What is Document Versioning

The document versioning allows you to create and retain multiple versions of the same document.

There are two ways to create document versions. They are...

Simple Versioning
This allows you to select and add or scan and add a document as a newer version of any document stored in Globodox. Globodox then stores the existing document as an older version, increments the major version number by one and adds the new document as the current version.

For example:
Add a document called Test.txt
The version number of this document will be 1.0
Now check out text.txt
Now check in another document called AnotherTest.txt as a new version of Test.txt
Globodox will add AnotherTest.txt as the latest (current) version of Test.txt
The version number for AnotherTest.txt will be 2.0

Versioning on Check-in
If you enable this option, every time you check out and then check in a document, Globodox will store the current version of the document as an old version, increment the major version number by one and then add the document being checked in as the new version.

For example:
Assuming that the Create a new version on document check-in option has been enabled.
Add a document called Test.txt.
The version number of this document will be 1.0
Now checkout Test.txt, modify it and then check it back in.
Globodox will store the 1.0 version of Test.txt as an old version.
Globodox will add the modified Test.txt as the latest (current) version of Test.txt
The version number for the newly added Test.txt will be 2.0

Promoting an old version

You can promote an old version of a document to the latest version at anytime.
For example:
Lets assume that the current version of a document is 6 and you promote an older version 4 as the current version. Globodox will make a copy of version 4 of the document and promote that copy as version 7. Version 6 of the document will be saved as an old version.

Number of Versions

You can choose to have an unlimited number of versions for each document or set an upper limit for the number of versions.

An upper limit to the number of versions can be set for the Globodox DB and will apply to all the documents in that Globodox DB.

After the upper limit for a document's versions has been reached, the oldest version of the document is deleted every time you add a new version of that document.

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Related Topics
Document Versioning - FAQ 289

18.2 Document Versioning - FAQ

What is the document versioning feature?

The document versioning feature allows you to create and retain multiple versions of the same document.

Why is it useful?

The versioning feature is useful, if you modify a document on a regular basis and need access to old copies of that document.

For what file types does the document versioning feature work?

The document versioning feature works for any file type.

How can I enable the document versioning feature for an existing Globodox DB?

To enable the Versioning feature...

In Globodox, click Globodox button.
Now, click the *Options* button. The Options window will be launched.
Click the *DB Options* node in the left pane. The *DB* options will now be displayed on the right pane.
Check the *Enable document versioning* option of *Versioning*.

Note: When you enable the document versioning feature for an existing Globodox DB (for which versioning was never enabled before), all documents currently added to the Globodox DB are assumed to be version 1.0.

What do the additional versioning options do?

The additional versioning options let you control how the versioning feature works.

Always create a new version on document check-in
If the Document Check-in/Checkout feature has been enabled, you can specify that a new version of a document must be automatically created when a document is checked in. For this check the Always create a new version on document check-in option.

Retain up to [_] version for each document
By default Globodox will retain copies of all the older versions of a document. For frequently modified documents, this can take up a lot of disk space. You can configure the document versioning feature so that only a few older version copies are retained. For this check the Limit the number of older version document copies retained option and specify the number of copies you want to retain.

How can I disable the document versioning feature?

To disable the document versioning for an existing Globodox DB...

In Globodox, click Globodox button.
Now, click the *Options* button. The *Options* window will be launched.
Click the *DB Options* node in the left pane. The *DB* options will now be displayed on the right pane.
Uncheck the *Enable document versioning* option of *Versioning*.

How can I create new versions of a document?

The simplest way of creating a new version for a document is to select that document in the List View 35 pane. The document will now be displayed in the Details pane.

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Now, click the Versions tab.
Click this *Add* button and select the *Add version from disk...* (or the *Add version from scanner...*) option.
The version number of the document will be incremented by one and the document you select (or scan) will be stored as the new (current) version of the selected document. The existing version of the document will be stored as an older version.

When you enable versioning for a Globodox DB, you can also enable the *Create a new version on document check-in* option. With this option enabled the version number of the document is automatically incremented by one, every time you check-in the document. The existing version of the document is stored as an older version.

How many old version copies can I have stored for each document?

You can have an unlimited number of old version copies for each document. However to conserve storage space you may set an upper limit. For this...

In Globodox, click Globodox button.
Now, click the *Options* button. The Options window will be launched.
Click the DB Options node in the left pane. The *DB* options will now be displayed on the right pane.
Check the *Enable* option of *Versioning*.
Check the *Retain up to [__] versions for each document* option.
Specify the number of copies you want to retain.
Click the *OK*.

The upper limit you set will apply to all documents added to that Globodox DB.

What happens when the "number of old version copies" limit for a document has been reached?

When you try to create a new version after the specified limit has been, Globodox deletes the oldest version before adding the new version of the document.

For Example
If the limit for a document is 6, the oldest version stored is 1.0 and the current version is 6.0, then when you try to create a new version, Globodox will delete version 1.0 and then create version 7.0.

How do I view old versions of a document?

To view old versions of a document, select that document in the *List View*, the document will now be displayed in the Documents Details 165 pane, now click the *Versions* tab on the left bar of *Document Details* pane. All the older versions of the selected document will now be displayed in the *Versions* pane.

What if I want to make an old version of a document, the current version again?

Select that document in the List View, the document will now be displayed in the *Documents Details* pane, now click the *Versions* tab on the left bar of *Document Details* pane. All the older versions of the selected document will now be displayed in the *Versions* pane. Now select the version that you want to make the current version again. Click the *Promote* button of the *Versions* toolbar.

For example:
Lets assume that the current version of a document is 6 and you promote an older version 4 as the current version. Globodox will make a copy of version 4 of the document and promote that copy as version 7. Version 6 of the document will be saved as an old version.

How can I delete an old version of a document?

Select that document in the *List View*, the document will now be displayed in the *Documents*

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Details pane, now click the *Versions* tab on the left bar of *Document Details* pane. All the older versions of the selected document will now be displayed in the *Versions* pane. Now select the version that you want to delete. Now click the *Delete* button of the *Versions* toolbar.

Related Topics

Enable Versioning 292
View Documents Versions 292
Document Check-in/Check out 287
Document Encryption 287

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18.3 Enable Versioning

To Enable Versioning for a Globodox DB

1. In Globodox, click the Globodox button 33.
2. Click the *Options* button. The *Options* window will now be launched.
3. Click the *DB Options* node. The *DB* options will now be displayed on the right pane.
4. In the right pane, check the *Enable document versioning* option of Versioning.

Notes:

- The Document Versioning feature is enabled by default while creating a new Globodox DB.
- To disable versioning, uncheck the *Enable* option of Versioning.

Related Topics
View Documents Versions 292
Make an old Version of a Document, the current Version 293

18.4 View Documents Versions

You can view a documents version in the *Version* panel of the *Document Details* pane.

To View a Document's Version

1. Select the document whose versions you want to view, from the List View pane. The document will now be displayed in the Document Details 165 pane.
2. Click the *Versions* tab on the left bar of the *Document Details* pane. The *Versions* panel will now be displayed.
3. All the older versions of the selected document will listed in the *Versions* pane.
4. You can use the *View* button to view the selected document version. The View button also has a drop-down portion with the following options...
   - *Using Internal Viewer:* Click this option to view the selected document version using the Globodox viewer.
   - *Using Associated Application:* Click this option to view the selected document version using the application associated with the document.
   - *Using Selected Application:* Click this option to select an application for viewing the selected document version.

   Note:
   Globodox does not allow an older version of a document to be modified. When you use an external application to open a document version for viewing, Globodox first creates a temporary copy of that document and then opens that copy. Therefore any changes you make to the document will only be saved to the temporary copy of the document and not to the copy stored inside Globodox.

Notes:

- The Current Version number of the document will be displayed on the top left corner of the *Versions* panel. The oldest version of the document is denoted by 1.0.
- You can click the *Add version from disk...* (or the *Add version from scanner...*) option to create a new version for the selected document. The version number of the document will be incremented by one and the document you select (or scan) will be stored as the new

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(current) version of the selected document. The existing version of the document will be stored as an older version.

Related Topics
Enable Document Versioning 292
Make an old Version of a Document, the current Version 293
Document Versioning - FAQ 289

18.5 Make an Older Version of Document as the Current Version

You can make an older version of a document as the current version. For e.g. Lets assume that the current version of a document is 6 and you promote an older version 4 as the current version. Globodox will make a copy of version 4 of the document and promote that copy as version 7. Version 6 of the document will be saved as an old version.

To Make an Older Version of Document, the Current Version

1. Select the document whose versions you want to promote, from the List View pane. The document will now be displayed in the Documents Details 165 pane.
2. Click the *Versions* tab on the left bar of the *Document Details* pane. The *Versions* panel will now be displayed.
3. All the older versions of the selected document will listed in the *Versions* pane. Now select the version that you want to make the current version.
4. Click the *Promote* button of the *Versions* toolbar to promote the older version as the current version.

Notes:

- The Current Version number of the document will be displayed on the top left corner of the *Versions* panel.
- You can click the *Add version from disk...* (or the *Add version from scanner...*) option to create a new version for the selected document. The version number of the document will be incremented by one and the document you select (or scan) will be stored as the new (current) version of the selected document. The existing version of the document will be stored as an older version.

Related Topics
Enable Document Versioning 292
Document Versioning - FAQ 289

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19 Document Encryption

Topics Covered

1. What is Document Encryption 295
2. Document Encryption - FAQ 295
3. Enable Encryption 299
4. Encrypt Documents 299
5. Decrypt Documents 300
6. Create Encryption Settings 300

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19.1 What is Document Encryption

The document encryption feature enables you to store documents added to Globodox in an encrypted form.

Any documents you add to a Globodox DB, get added to a normal Windows folder, associated with that Globodox. Globodox calls this folder the File Store 318 for that Globodox DB. If you do not enable the document encryption feature, then unauthorized access to the documents is possible if someone bypasses Globodox and uses Windows Explorer to access the documents stored in the default File Store.

If you enable the document encryption feature for a Globodox DB, then any document you add to that Globodox DB will be encrypted before it is stored in it's Default File Store. That way, even if someone accessed the documents using Windows Explorer, they would still not be able to view or open the documents, as the documents would be in encrypted form.

Therefore the only way to view the document or open it for editing would be through Globodox. Globodox would only decrypt the document to allow the currently logged in user to view the document or open it for editing, if that user had the required View or Modify permissions for the document. If you enable the Automatically encrypt document on check-in option for a Globodox DB, then the entire encryption/decryption process is transparent to the user and no extra steps are required to encrypt or decrypt the documents.

Documents will be automatically encrypted when you check them in (also when you add them for the first time). When you checkout the document, then a decrypted copy of the document will be placed in your Checkout folder. Once encrypted, the document always remains in encrypted form in the File Store unless you specifically decrypt the document.

If you do not want all documents added to a Globodox DB, to be automatically encrypted but would prefer to selectively encrypt documents then you can only enable the Enable selective document encryption option.

Globodox lets you choose the algorithm and the key strength you want to use while encrypting documents. Globodox supports the AES (Rijndael), Blowfish and Triple DES encryption algorithms. Depending on the algorithm you use key strengths ranging from 128 bit to 256 bit are supported.

By default Globodox encrypts all documents using AES 128 bit encryption

---

Related Topics
Document Encryption - FAQ 295

19.2 Document Encryption - FAQ

- **What does the document encryption feature do?**

  The document encryption feature allows you to store documents added to a Globodox DB in an encrypted form.

- **Why is it useful?**

  The encryption feature ensures that documents cannot be opened for viewing or editing using Windows Explorer. Only users authenticated by Globodox can view the document or open it

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for editing, if they have the required permissions.

For what file types does the document encryption feature work?

The document encryption feature works for any file type.

What are the different algorithms available for encrypting a document?

The currently available encryption algorithms supported by Globodox are AES, Blowfish and Triple-DES.

AES - Advanced Encryption Standard

AES is Advanced Encryption Standard, approved by Federal Information Processing Standard (FIPS-197). This standard specifies Rijndael as a FIPS-approved symmetric encryption algorithm that may be used by U.S. Government organizations (and others) to protect sensitive information.

The AES algorithm is a symmetric block cipher, capable of using 128, 192, and 256 bit keys. AES is used widely both in the USA and internationally.

Blowfish

Blowfish is a symmetric block cipher that takes a variable-length key, from 32 bits to 448 bits. Blowfish was designed in 1993 by Bruce Schneier as a fast alternative to existing encryption algorithms. Since then it has been analyzed considerably, and it is slowly gaining acceptance as a strong encryption algorithm.

Triple DES

DES (Data Encryption Standard) is a symmetric block cipher developed by IBM. It was turned into a standard by the US National Institute of Standards and Technology (NIST), and was also adopted by several other governments worldwide. The algorithm uses a 56-bit key to encipher/decipher a 64-bit block of data. Triple-DES is a more secure variant of DES in which DES is applied three times.

What is key strength?

The key strength specifies the length of the key phrase used to encrypt the document. Generally speaking, larger the key strength, more secure the encryption will be. A common form of attack to decrypt an encrypted document is the "brute force attack". Here the attacker simply tries all possible key phrases till the correct key phrase can be found. Even a small increase in the key length increases the number of possible key phrases exponentially. This greatly increases the difficulty for an attacker to "guess" the correct key phrase and thus decrypt the document

Depending on the algorithm Globodox supports the following key strengths...

- AES 128 bit, 192 bit and 256 bit
- Blowfish 128 bit
- Triple-DES 192 bit

Just to give you an idea...

- 128 bits (i.e. 16 characters of text) corresponds to 3.4 x 1038 possible key combinations.
- 192 bits (i.e. 24 characters of text) corresponds to 6.2 x 1057 possible key combinations.
- 256 bits (i.e. 32 characters of text) corresponds to 1.1 x 1077 possible key combinations.

It would take a powerful machine to crack a 128-bit AES key.

What is the key phrase?

The key phrase is the text that is used to encrypt the document. The document can only be decrypted when this text is supplied during decryption. If you forget or lose the key phrase

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then the document cannot be decrypted.

Globodox does not directly use the key phrase you enter to encrypt a document. Therefore you can type in a key phrase of any length and not necessarily something which is the same size as the key strength you have selected. Using a method known as hashing, Globodox generates a fixed length hash value of the key phrase you enter. This hash value (the length of which is the same as that required by the selected key strength) is used to encrypt the document. The hash value is what gets stored in the Globodox DB along with other details about the encryption. The actual key phrase you enter is never stored in the Globodox DB.

Since the encryption details are stored in the Globodox DB, as long as the Globodox DB is available you do not need to know the encryption details in order to decrypt a document using Globodox. If you forget or lose the key phrase you will still be able decrypt a document using Globodox as long as the Globodox DB is available.

However in the unlikely event of the Globodox DB being deleted or corrupted, the only way to decrypt and recover your documents would be if you could provide the key phrase used to encrypt the document.

Other encryption details (except for the key phrase or it's hash) are also stored inside the encrypted document. So if you can supply the key phrase, it will be possible to decrypt the document (even when the Globodox DB is not available) .

What encryption settings does Globodox use by default?

The encryption settings Globodox uses by default are AES 128 bit encryption with the default Globodox key phrase. These settings are referred to as Globodox Standard Encryption settings.

How can I enable the document encryption feature for an existing Globodox DB?

The document encryption feature can only be enabled if the Document Check In/Check Out feature has been enabled.

To enable document encryption for an existing Globodox DB...

In Globodox, click the Globodox button.
Click the *Options* button. The *Options* window will now be launched.
Click the *DB Options* node. The *DB* options will now be displayed on the right pane.
Check the *Enable* option of *Encryption* to enable the encryption feature.

Note: When you enable the document encryption feature for an existing Globodox DB, all documents currently added to the Globodox DB will not be automatically encrypted. They will stay in their decrypted form.

How can I disable the document encryption feature?

To disable the document encryption for an existing Globodox DB...

In Globodox, click the Globodox button.
Click the *Options* button. The *Options* window will now be launched.
Click the *DB Options* node. The *DB* options will now be displayed on the right pane.
Uncheck the *Enable* option of *Encryption* to disable the encryption feature.

How can I selectively encrypt documents?

To selectively encrypt a document using the default encryption settings of the Globodox DB...
Select that document in the List View pane.
Click the *More* drop down arrow and select the *Encrypt* option of the *Home* tab.
The document will be encrypted using the default encryption settings of the Globodox DB.

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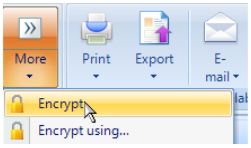

To selectively encrypt a document using non-default encryption settings...
Select that document in the List View pane.
Click *More* drop down arrow and select the *Encrypt Using...* option of the *Home* tab. The *Encryption Settings Manager* will now be launched.
If the encryption setting you want is available in the list then select it from the list and click the *OK* button.
If you want to create new encryption settings...
Click the *Add* button. This will launch the *Encryption Settings* window.
In the *Encryption Settings Name* box enter a name for the encryption settings.
From the *Encryption Type* drop-down list, choose the encryption algorithm you would like to use.
From the *Key Strength* drop-down list, choose the key strength you would like to use
If you would like to use the Globodox default encryption key phrase, then check the *Use default encryption key phrase* option.
If you would like to provide your own key phrase then uncheck the *Use default encryption key phrase* option and enter your key phrase in the *Enter a key phrase for encrypting documents* box.
Click the *OK* button to close the *Encryption Settings* window.
Click the *OK* button to close the *Encryption Settings Manager* window
The document will be encrypted using the newly specified encryption settings.

How can I decrypt an encrypted document?

To decrypt a document...
Select that document in the List View pane.
Click the *More* drop down arrow and select the *Decrypt* option of the *Home* tab.

Please note that you do not need to enter any information while decrypting a document. This is because all the information required to decrypt the document is already stored in the Globodox DB. Since before opening the Globodox DB, a user would have already logged in and authenticated herself, there is no need for Globodox to ask for any other information before decrypting the document.

Related Topics

Encrypt Documents 299
Document Check-in/Check out 287
Document Versioning 287

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19.3 Enable Encryption

To Enable Encryption for an existing Globodox DB

1. In Globodox, click the Globodox button 33.
2. Click the *Options* button. The *Options* window will now be launched.
3. Click the *DB Options* node. The *DB* options will now be displayed on the right pane.
4. In the right pane, check the *Enable document encryption* option enable the encryption feature.

Notes:

- The encryption feature is enabled by default when you create a new Globodox DB.
- The document encryption feature can only be enabled if the Document Check In/Check Out feature has been enabled.
- To disable encryption, uncheck the *Enable* option of *Encryption.*

Related Topics

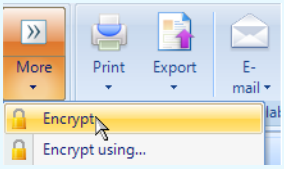
Encrypt Documents 299
Decrypt Documents 300

19.4 Encrypt Documents

You can encrypt documents by clicking the *More* drop down and selecting the *Encrypt* option of the *Home* tab.

To selectively Encrypt a Document using the Default Encryption Settings

1. Select the document that you want to encrypt from the List View pane.
2. Click the *More* drop down arrow and select the *Encrypt* option of the *Home* tab.
3. The document will be encrypted using the default encryption settings of the Globodox DB.



To selectively Encrypt a Document using Non-default Encryption Settings

1. Select the document that you want to encrypt from the List View pane.
2. Click the *More* drop down arrow and select the *Encrypt Using...* option of the *Home* tab. The *Encryption Settings Manager* will now be launched.
3. Select an encryption setting from the list and click the *OK* button, the document will now be encrypted.

Notes:

- The encryption settings Globodox uses by default are AES 128 bit encryption with the

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default Globodox key phrase. These settings are referred to as Globodox Standard Encryption settings

Related Topics
Decrypt Document 300
View Document Encryption - FAQ 295

19.5 Decrypt Documents

You can decrypt documents by clicking the More drop down and selecting the *Decrypt* option of the *Home* tab.

To selectively Decrypt an Encrypted Document

1. Select the document that you want to decrypt from the List View pane.
2. Click the *More* drop down arrow and select the *Decrypt* option of the *Home* tab. The document will now be decrypted.

Notes:

- You do not need to enter any information while decrypting a document. This is because all the information required to decrypt the document is already stored in the Globodox DB. Since before opening the Globodox DB, a user would have already logged in and authenticated itself, there is no need for Globodox to ask for any other information before decrypting the document.

Related Topics
Encrypt Document 299
View Document Encryption - FAQ 295

19.6 Create Encryption Settings

You can create an encryption settings from the *Settings* pane.

To Create Encryption Settings

1. In Globodox, select *Settings* > *DB Settings* > *Encryption Settings* in the Navigation 34 pane.
2. Click the *New* button of the Home tab to create a new encryption setting. This will launch the Encryption Settings window.
3. In the *Name* box enter a name for the encryption settings.
4. From the *Encryption Type* drop-down list, choose the encryption algorithm you would like to use.
5. From the *Key Strength* drop-down list, choose the key strength you would like to use.
6. Check the *Set as default* option to make this setting the default encryption setting.
7. If you would like to use the Globodox default encryption key phrase, then check the *Use default encryption key phrase* option.
8. If you would like to provide your own key phrase then uncheck the *Use default encryption key phrase* option and enter your key phrase in the *Enter a key phrase for encrypting documents* box.
9. Click the *OK* button to save the encryption settings and close the *Encryption Settings* window.

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Notes:

- The encryption settings Globodox uses by default are AES 128 bit encryption with the default Globodox key phrase. These settings are referred to as Globodox Standard Encryption settings

Related Topics

Decrypt Document 300
View Document Encryption - FAQ 295

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20 Document Retention

With version 13 of GLOBODOX, we introduce the Document Retention and Archival module. These comprise of the following features for both Documents and Stacks…

- Archive DB 302
- Archival Date 304
- Expiry Date 305
- Recycle Bin 306

20.1 ITAZ Archival Service

This Windows service handles the moving of documents and stacks from the Source DB to the Archive DB. Only documents and stacks marked as Archived are moved to the Archive DB.

- The service runs every few hours and performs the following actions…
- It checks every Source DB to see if the Source DB has a linked Archive DB.
- Once it finds a Source DB with a linked Archive DB…

It checks if the Archive DB has all the Folders and Tags which are present in the Source DB.

It adds Folders and Tags to the Archive DB accordingly

It compares fields in the Document Types and Stack Types defined in the Archive DB with those defined in the Source DB. If required, it adds fields to Document and Stack Types defined in the Archive DB to make sure they are identical to the ones in the Source DB.

If a Document or Stack Type in the Source DB had a field which was later deleted, then in the Archive DB that field will not be deleted but suitably renamed.

20.2 Archive DB

You can now create an Archive DB for every GLOBODOX DB (referred to henceforth as the Source DB). Any documents or stacks marked as Archived in the Source DB are moved to the Archive DB every few hours.

When an Archive DB is created it is blank. Once the ITAZ GLOBODOX ARCHIVAL SERVICE processes this DB for the first time, then Folders, Tags, Document Types and Stack Types get automatically created as required.

A Document Type and Stack Type is only created in the Archive DB when the first document or stack of that type is moved to the Archive DB.

For example, the source DB may have Agreements and Invoices as the two defined Document Types. But if only documents of the type Agreement have been marked as Archived then only the Agreement document type will be created in the Archive DB.

You can create multiple Archive DBs. This may be required if over the years your Archive DB becomes very large or if you prefer to have different Archive DBs for each year.

The Source DB is always linked to the newest Archive DB that was created.

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The Archival Date, Expiry Date and Recycle Bin features work even if you choose not to create or use an Archive DB. In this case documents or stacks marked as Archived continue to reside in the Source DB but the permissions on them change.

20.2.1 Archive DB - FAQ

How to create a Archive DB?

To create an Archive DB…

- Start GLOBODOX.
- Click on Settings>> DB List.
- Select the DB and click 'Create Archive DB' on the Ribbon bar.

Note: Only users with 'Manage Archived' privilege can create an Archive DB.

How do I archive documents in the same DB?

To archive documents in the same DB (and not create a separate Archive DB)…

- Start GLOBODOX.
- Click on Settings>>DB List.
- Double click the DB in the list view.
- Select the option "Mark it as archive but do not move it'
- You can also specify the permissions which must apply to the archived documents by choosing a Security Label.
- Click 'Save and Close'.

Note: Only users with the 'Manage Archived' privilege can set this option..

Which users are allowed to access archived documents and what actions are they allowed to perform on those documents?

When you create an Archive DB, you can choose a security label which will be automatically applied to any document or stack marked as Archived. Users listed in that security label will have access to the archived documents and the actions they can perform will also be those listed in the security label.

How do I change the security applied to the documents being Archived?

Security is applied to archived documents and stacks via a security label. You can either select another security label or edit the settings of the currently selected security label.

To change the Security Label…

- Start GLOBODOX.
- Click on Settings>>DB List.
- Double click the DB in the list view.
- Set the Security Label as required.
- Click 'Save and Close'.

To change the settings of the currently selected security label…

- Start GLOBODOX.
- Click on Settings>>Security Label.
- Double click the Security Label in the list view.
- Set the permission changes as required.

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- Click ‘Save and Close’.

How to create a new Archive DB when the current Archive DB becomes very large?

To create a new Archive DB…

- Start GLOBODOX.
- Click on Settings>>DB List.
- Click on Settings>> DB List.
- Select the DB and click ‘Create Archive DB’ on the Ribbon bar.

Note: All Documents and Stacks will now be archived to the new Archive DB. The old Archive DB will still be accessible though it will not be used anymore for archiving additional documents or stacks.

How to disable Archiving?

- Start GLOBODOX.
- Click on Settings>>DB List.
- Double click the DB in the list view.
- Select the option “Do not mark it as Archived’.
- Click ‘Save and Close’.

20.3 Archival Date

A field called Archival Date gets added to a Document Type when the Archive Documents of this Type option is checked*. If you want a document to be archived, simply use this field to enter the date on which you want the archival to happen. On the specified date, the document will be marked as Archived.

No changes can be made to Archived Documents. Also, if a Source DB is linked to a Archive DB then Archived Documents will be moved to the Archive DB within a few hours of being marked as Archived.

*For Stacks the option is called Archive Stacks of this Type and everything else works the same.

20.3.1 Archival Date - FAQ

How to set an archive date for a document or Stack Type?

To set an Archive date…

- Start GLOBODOX.
- In the navigation pane, select the Document Type/Stack Type (in which the Archival Date field has been created)
- Set the date value for the Archive Date field.

Note: You can also multi-select multiple documents in a Document Type or multiple stacks in a Stack Type and set the date value for this field. You can also Right-click and choose the option Set Expiry date to set the value.

How to archive Documents not part of a Document Type??

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This is currently not possible.

How to unarchive a document or a Stack Type?

You cannot unarchive a Document or Stack, once it is marked as Archived.

How to delete data and documents in an Archive DB?

You can manually delete Documents and Stacks in the Archive DB. Once a document/Stack is archived, a security label is applied. Now only users with the Delete privilege in the Security Label can delete data and documents in the Archive DB. You can also use the Expiry Date feature.

20.4 Expiry Date

The Expiry Date feature lets you set a expiry date for a document or a stack. You can choose to have the document automatically deleted (or moved to the Recycle Bin) on the Expiry Date. Alternatively you can search for documents which are past the Expiry Date and then manually delete them.

20.4.1 Expiry Date - FAQ

How to enable the Expiry Date feature in GLOBODOX?

To enable the Expiry Date feature, you must be logged in as Superadmin or a user with a Superadmin role.

To enable this feature…

- Start GLOBODOX.
- Click on the GLOBODOX button (the round button on the top left) >> Options
- Click on DB Options. Scroll to the Expiry Date section.
- Check ‘Enable Expiry Date’

How to set an expiry date on Documents or Stacks?

To set an Expiry date

- Select the document/Stack in the list.
- Click More button on the Ribbon bar >>Set Expiry Date.
- The Expiry Date dialog will be launched.
- Set a Date for the document/Stack.

How to remove an expiry date on Documents and Stacks?

To set an Expiry date

- Select the document/Stack in the list.
- Click More button on the Ribbon bar >> Set Expiry Date.
- The Expiry Date dialog will be launched.
- Check ‘Remove Expiry Date’

How to prevent users from using this feature?

Users with the privilege ‘Set or Remove Expiry date on documents or Stacks’ can only use this feature. This privilege is available in the ‘Other privileges’ tab in the Role.

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20.5 Recycle Bin

You can now configure GLOBODOX such that any documents or stacks you delete are moved to the Recycle Bin. Documents or stacks stay in the Recycle Bin for a period of time (which you can specify) before they are automatically delete.

While documents or stacks are in the Recycle Bin, they can be restored (i.e. Undeleted) or they can be deleted permanently.

When a Stack is deleted, it is moved to the Recycle Bin along with all the documents in that Stack. When you undelete this stack the documents which were part of the stack are undeleted as well.

20.5.1 Recycle Bin - FAQ

How to enable Recycle Bin feature in GLOBODOX?

To enable the Recycle Bin feature, you must be logged in as Superadmin or a user with a Superadmin role.

To enable this feature…

- Start GLOBODOX.
- Click on the GLOBODOX button (the round button on the top left) >> Options
- Click on DB Options. Scroll to the Recycle Bin section.
- Check ‘Enable Recycle Bin’

How to change the deletion interval of the data and documents in the Recycle Bin?

To change the interval…

- Start GLOBODOX
- Click on the GLOBODOX button (the round button on the top left) >> Options
- Click on DB Options. Scroll to the Recycle Bin section.
- Change the value for After section.

How do I Empty the Recycle Bin?

To empty items in the Recycle Bin...

- Start GLOBODOX
- Expand the Recycle Bin node in the Navigation pane.
- Click ‘Empty Recycle Bin’.

Note: All items present in the Recycle Bin will be deleted.

How to undelete items in the Recycle Bin?

To undelete items once recycled..

- Start GLOBODOX.
- Expand the Recycle Bin node in the Navigation pane.
- Select Document Type/Stack Type node
- Select the item in the list and click Undelete.

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21 Globodox DB

Topics Covered

1. What is Globodox DB 308
2. Globodox DB - FAQ 309
3. Globodox DB Types - FAQ 310
4. Create a Globodox DB 312
5. Open a DB 317
6. Delete a DB 317
7. File Stores 318
8. Set as Default DB 326
9. Globodox Multi-User Config File 309
10. Adding DB to the DB List 326
11. Convert DB 327
12. Configure Globodox DB for Multi-user Environment 335

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21.1 What is a Globodox DB?

Globodox 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.

There are three types of Globodox DBs...

- MS Access based Globodox DBs
- MS SQL Server based Globodox DBs
- MySQL based Globodox DBs

You can change the type of a Globodox DB at anytime. For example you can easily convert a MS Access Globodox DB to a MS SQL Server based Globodox DB or a MySQL based Globodox DB at anytime.

Notes:
MySQL 5 or higher along with MySQL ODBC Client driver 5.1 are supported

File Store

A Globodox DB is always linked to a local or network folder in which any documents you add to that DB are stored. Globodox refers to this folder as the DB's File Store.

- File Store 318 Folder - The folder in which the files added to the Globodox DB are stored

When you create a new Globodox DB, Globodox will automatically suggest paths for the Default File Store. You can accept the folder suggested by Globodox or provide your own path for folder.

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).

Once you create a new Globodox DB you can create folders, tags, document types and stack types that you think you will need and then start adding your documents.

MS Access based Globodox DB have the .GXDB extension.

Master DB

The MainDB.gxdb which is shipped by default, is designated as the Master DB. This means that apart from your indexing data it also holds security information about Roles, Users and Groups. Any additional DBs you create can only hold indexing data and the Master DB will always be used for Security Data.

When you start Globodox the Main DB is opened by default. You can set another DB to open by default if you wish.

Related Topics
Globodox DB 307
Frequently asked questions - Globodox DB 309

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21.2 Multi-User Config File

When you do a client installation of Globodox, Globodox may ask you for the multi-user.gdx file. Here is some information about the file...

The multi-user.gdx file stores information about the type of and location of the *Master DB*. This file is very important as it is required for multi-user setup.

When you do a server installation of Globodox a MS Access based Globodox DB called Main.GXDB is installed by default. The Main.GXDB is marked as the *Master DB*. The multi-user.gdx is also created at this time. The multi-user.gdx file is updated whenever the type of the Main DB is changed or when the location of the Main DB is changed.

The multi-user.gdx file is stored in the ITAZ\Globodox folder created under the folder designated as the Common Application Data folder in your Windows installation.

For Windows Vista/Windows Server 2008/Windows 7/Windows 8/Windows Server 2012/ Windows 10, this will be the C:\ProgramData\ITAZ\Globodox folder.

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

21.3 Globodox DB - FAQ

What is a Globodox DB?

The database that Globodox uses to store information about documents that you have added is known as a Globodox DB. Globodox DBs can be MS Access based, MS SQL Server based or MySQL based.

Do I have to create a Globodox DB?

Globodox ships with a default Globodox DB, which you can open and use. This is a MS Access based Globodox DB called Main.GXDB.

Can I change the type of the Main.GXDB?

Yes you can change the type of the Main.GXDB (or any other Globodox DB) at anytime. For example you can convert a MS Access based Globodox DB to a MS SQL Server based Globodox DB or a MySQL based Globodox DB.

What is the Master DB?

The MainDB.gxdb which is shipped by default, is designated as the Master DB. This means that apart from your indexing data it also holds security information about Roles, Users and Groups. Any additional DBs you create can only hold indexing data and the Master DB will always be used for Security Data.

There can only be one MasterDB in a Globodox installation.

How many Globodox DBs can I create?

You can create as many Globodox DBs as you want. However this feature has been mainly included for backward compatibility. Given the current feature set in Globodox, you should not need to create more than one Globodox DB.

Are the documents I add to a Globodox DB, stored inside the Globodox DB?

No the documents you add to a Globodox DB are copied and stored in a normal Windows folder linked to that Globodox DB. Only the references to the documents are stored in the Globodox DB. This ensures that your documents are safe and available to you even if you stop using Globodox. The folder in which a Globodox DB's documents are stored is known as

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the File Store. Each Globodox DB has it's own File Store folder. A single Globodox DB can be linked to one or more File Stores.

For more information about Globodox DBs,**click here** 308

Is there a limit to the amount of data the system can handle using Access?

Globodox itself does not impose any limits. The only limits are those imposed by the database in use (e.g. MS Access, MS SQL Server or MySQL) and your hardware (Processor, RAM etc.).

It is difficult to state the limits in terms of number of document types and stacks because it depends on the numbers and type of fields defined etc. For e.g. A MS Access based Globodox DB can be as large as 2 GB in size and MS SQL server based Globodox DBs can be as large as 1,048,516 TB (Terabytes) in size.

Please note that Globodox does not store the added documents inside the database. Therefore the size of documents is not restricted by this. Globodox only stores the indexing information about the documents in the database and even a 2 GB database would be able to store indexing information about a very large number of documents.

Related Topics
Globodox DB Types - FAQ 310
Creating a new MS Access based Globodox DB 313

21.4 Globodox DB Types - FAQ

What are types of Globodox DBs?

Globodox has three types of Globodox DBs. These are...

- MS Access based Globodox DBs
- MS SQL Server based Globodox DBs
- MySQL based Globodox DBs

What is the file extension of a MS Access based Globodox DB?

A MS Access based Globodox DB has the .GXDB extension.

Do I need MS Access installed on my machine to work with Globodox?

No. You **do not need** MS Access installed on your machine to work with Globodox and to create or open a MS Access based Globodox DB. Globodox installs all the files required to do this.

Do I need MS SQL Server installed on my machine to work with Globodox?

MS SQL Server must be installed on your machine or another machine on your network for you to be able to create, open and work with MS SQL Server based Globodox DBs. Globodox will work even when MS SQL Server is not installed or available. However in that case you will not be able to create, open or work with MS SQL Server based Globodox DBs.

MS SQL Server Express Edition is also supported.

Do I need MySQL installed on my machine to work with Globodox?

MySQL must be installed on your machine or another machine on your network for you to be able to create, open and work with MySQL based Globodox DBs. Globodox will work even when MySQL is not installed or available. However in that case you will not be able to create, open or work with MySQL based Globodox DBs. More information about MySQL is available at **http://www.mysql.org**

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Globodox currently works with MySQL 5 or higher and MySQL ODBC Client 5.1

Related Topics
Create a Globodox DB 312
Convert DB 327

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21.5 Create a Globodox DB

Topics Covered

5.1 Create MS Access-based DB 313
5.2 Create MS SQL-based DB 314
5.3 Create a MySQL-based DB 316

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21.5.1 Create MS Access-based DB

You do not need MS Access installed on your machine to work with Globodox and to create or open a MS Access based Globodox DB. Globodox installs all the files required to do this.

To Create a MS Access based Globodox DB

1. In Globodox, click the Globodox button 33.
2. Click the *New DB* button. The *New DB* window will now be displayed.
3. Select *MS Access based Globodox DB* option from the *DB Type* drop down.
4. Enter a name for the DB in the *DB Name* box.
5. Enter a short description about the DB in the *Description* box.
6. The default location of the DB's File Store 318 (folder) will be displayed in the *File Store Location* box. You can change the *File Store* location by clicking the *Browse* button besides the *File Store Location* box. Any documents you add to this Globodox DB will be stored in the *File Store*.
7. Click the *Create* button to create the MS Access based Globodox DB.

Notes:

- To open a newly created DB, click the Globodox button and select the DB from the DB list.
- By default all Globodox Databases and its File Stores are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Create a MS SQL based DB 314
Create a MySQL based DB 316
Configure Globodox DB for multi-user environment 335

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21.5.2 Create a MS SQL-based DB

MS SQL Server must be installed on your machine or another machine on your network for you to be able to create a MS SQL Server based Globodox DBs.
Globodox Supports MS SQL 2000, 2005, 2005 Express and 2008 Server.

To Create a MS SQL based Globodox DB

1. In Globodox, click the Globodox button 33.
2. Click the *New DB* button. The *New DB* window will now be displayed.
3. Select *MS SQL based Globodox DB* option from the *DB Type* drop down. The *MS SQL Settings* window will now be launched.
4. Enter or select the name of the machine on which MS SQL Server is running from the *Choose or type in a machine name* box. The new Globodox DB would be created on this machine. The drop-down list will display the names of all the machines on your network. It is recommended to type the machine's IP address.
5. For MS SQL Server 2000 or higher enter the name of the SQL Server Instance in the *Instance name* box on which the new Globodox DB should be created. When only one instance of SQL Server is running on a machine, the instance name is normally the same as the machine name. Leave the instance name blank unless you wish to connect to a named MS SQL server.

   Note: For MS SQL 2005 Express edition enter *SQLEXPRESS* in the *Instance name* box.
6. Select the type of connection Globodox should use to connect to SQL Server from the *Connection Type* drop-down. The *Default* connection type is selected by default. Other available connection types are...

- *TCP/IP*
- *Names Pipes*
- *SPX/IPX*
- *Multi Protocol/Windows RPC*

Note: For MS SQL 2005 Express edition select TCP/IP from the *Connection Type* drop-down.

7. In case you have chosen the TCP/IP connection type then specify the port number in the *Port* box. The default port used by MS SQL Server (port 1433) will be displayed in this box. If the MS SQL Server you have chosen uses a different port number then you must enter that port number in this box.
8. Choose the *Windows Authentication* option if the SQL Server you have chosen has been configured to use Windows authentication. Your Windows login information will be used to logon to the SQL Server.
9. Choose the *MS SQL Server Authentication* option if the SQL Server you have chosen has been configured to use SQL Server Authentication. You will also need to specify the user name and password which Globodox should use while connecting.
10. Check the *Remember Password* option you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened. If this option is left unchecked then the user will be prompted for the user name and password before opening the Globodox DB.
11. Click the *Test* button to test the connection.
12. Click the *OK* button to save the settings and close the *MS SQL Settings* window.
13. Enter a name for the DB in the *DB Name* box.
14. Enter a short description about the DB in the *Description* box.
15. The default location of the DB's File Store 318 (folder) will be displayed in the *File Store Location* box. You can change the *File Store* location by clicking the *Browse* button besides the *File Store Location* box. Any documents you add to this Globodox DB will be

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stored in the *File Store*.
16. Click the *Create* button to create the MS SQL based Globodox DB.

Notes:

- To open a newly created DB, click the Globodox button and select the DB from the DB list.
- By default the Databases *File Stores* are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Create a MS Access based DB 313
Create a MySQL based DB 316
Configure Globodox DB for multi-machine environment 335

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21.5.3 Create a MySQL-based DB

MySQL (Version 5) Server must be installed on your machine or another machine on your network for you to be able to create a MySQL Server based Globodox DBs. Please note Globodox supports only version 5 and above.

To Create a MySQL based Globodox DB

1. In Globodox, click the Globodox button 33.
2. Click the *New DB* button. The *New DB* window will now be displayed.
3. Select *MySQL based Globodox DB* option from the *DB Type* drop down. The *MySQL Settings* window will now be launched.
4. Enter or select the name of the machine on which MySQL Server is running from the *Choose or type in a machine name* box. The new Globodox DB would be created on this machine. The drop-down list will display the names of all the machines on your network. You can also type the machine's IP address.
5. Enter the port number in the *Port* box to connect to the MySQL Server. The default port used by MySQL (port 3306) will be displayed in this box. If the MySQL instance you have chosen uses a different port number then you must enter that port number in this box.
6. In the *Username* box enter the user name that Globodox should use when connecting to the MySQL Server.
7. In the *Password* box enter the password that Globodox should use when connecting to the MySQL Server.
8. Check the *Remember Password* option you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened. If this option is left unchecked then the user will be prompted for the user name and password before opening the Globodox DB.
9. Click the *Test* button to test the connection.
10. Click the *OK* button to save the settings and close the *MySQL Settings* window.
11. Enter a name for the DB in the *DB Name* box.
12. Enter a short description about the DB in the *Description* box.
13. The default location of the DB's File Store 318 (folder) will be displayed in the *File Store Location* box. You can change the *File Store* location by clicking the *Browse* button besides the *File Store Location* box. Any documents you add to this Globodox DB will be stored in the *File Store*.
14. Click the *Create* button to create the MySQL based Globodox DB.

Notes:

- Make sure that MyODBC drivers version 5.1.4 or higher is installed on all the machines on which Globodox is installed.
- To open a newly created DB, click the Globodox button and select the DB from the DB list.
- By default the Databases File Stores are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

  More information about MySQL is available at **http://www.mysql.org**

Related Topics

Create a MS Access based DB 313
Create a MS SQL based DB 314
Configure Globodox DB for multi-machine environment 335

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21.6 Open a DB

All Globodox DB's are listed in the DB list. Use the Globodox button 33 to open a DB from the DB List.

To Open a Globodox DB

1. In Globodox, click the Globodox button.
2. The Globodox DB List will be displayed.
3. Select a DB from the list to open it.

Notes:

- The Main DB opens by default as it is set as the default DB. You can change the Default DB, for more info see Set as Default DB 326
- To view the DB List click *Settings* > *System Settings* > *DB List* in the *Navigation* pane.

Related Topics
Create a Globodox DB 312
Set as Default DB 326

21.7 Delete a DB

You can right-click a DB displayed in the DB List and select the *Delete* option to delete it.

To Delete a Globodox DB

1. In Globodox, select *Settings* > *System Settings* > *DB List* in the Navigation 34 pane.
2. Select a DB from the right pane i.e. the DB List and click the *Delete* button on the *Ribbon* bar to delete it.
3. You will now get a confirmation message. Click *Yes* to delete the DB.

Notes:

- Please note that you cannot delete the Main DB 308 as it is your Master DB.
- When you delete a Globodox DB, the actual DB is never deleted. It is only removed from the list of Globodox DBs.

Related Topics
Create a MS Access based DB 313
Configure Globodox DB for multi-machine environment 335
Convert a MS Access Type Globodox DB to a MS SQL Server DB 327

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21.8 File Stores

Topics Covered

8.1 Learn about File Stores 319
8.2 Add a New File Store 319
8.3 Change the Default Store 321
8.4 Move File Store to Another Location 322
8.5 Create a New FTP-based File Store 323
8.6 Convert an Existing Folder-based File Store to FTP 324

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21.8.1 Learn About File Stores

What are File Store?

The folder/location in which Globodox stores any files you add to a Globodox DB is called the File Store.

- File Store can be a local folder on your disk, a shared folder on your network or a folder on a FTP server.
- Every Globodox DB has at least one File Store but a single DB can have multiple File Stores as well.
- Each Globodox 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 all newly added documents (including scanned documents) are saved in this folder.
- A Globodox DB cannot have more than one Default File Store at anytime.
- You can set any File Store as the Default File Store at anytime.
- A local/shared folder based File Store can be converted to a FTP based File Store at anytime

Some uses for File Store**...**

If the storage device on which your File Store is located is running out of space...

a) You can simply add a new device, create a new File Store on the new device and set it as the default File Store, OR
b) You can create a new File Store on another machine on the network

File Stores also enable storage of documents related to a Globodox 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.

21.8.2 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. File Store can be a local folder on your disk, a shared folder on your network or a folder on a FTP server. Click here for information about creating a new FTP based File Store 323

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 34 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.

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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, Globodox 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 Globodox 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 Globodox.
9. Click the *Save and close* button to create the new File Store.

Notes:

- Documents added to the Globodox DB are saved in the File Store.
- Every Globodox DB has at least one File Store but a single DB can have multiple File Stores as well.
- Each Globodox 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 all newly added documents (including scanned documents) are saved in this folder.
- A Globodox DB cannot have more than one Default File Store at anytime.
- You can set any File Store as the Default File Store at anytime.
- A local/shared folder based File Store can be converted to a FTP based File Store at anytime

Related Topics

Move File Store to another location 322
Create a new FTP based File Store 323
Convert an existing folder based file store to FTP 324

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21.8.3 Change the Default File Store

You can change the default file Store of a DB to another .

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 34 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 *OK* 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.

Notes:

- 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 Globodox backup) to a new location
- Each Globodox 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 all newly added documents (including scanned documents) are saved in this folder.
- A Globodox DB cannot have more than one Default File Store at anytime.
- You can have only one file store set as the default for a Globodox DB.

Related Topics

Move File Store to another location 322
Create a new FTP based File Store 323

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21.8.4 Move File Store to Another Location

You can move a File store from one location to another and then point Globodox 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 Globodox 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 34 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 to *Workspace*. The documents will now be displayed.

Notes:

- 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 Globodox backup) to a new location

Related Topics

Add a New File Store 319
Change the Default File Store for a Globodox DB 321
Convert an existing folder based file store to FTP 324

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21.8.5 Create a New FTP-based File Store

You can configure Globodox so that any files you add are stored on a pre-designated FTP server (for e.g. a IIS FTP server). In a multi-user setup a FTP based file store would be more secure than a network share based File Store. By creating FTP based File stores you eliminate the possibility of users directly going to a File Store and modifying documents.

To create a New FTP based File Store

1. Open the DB to which you want to add the new FTP based File Store.
2. Click *Settings* in the Navigation Pane.
3. Now, 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. Check the *Use FTP location* option to make it a FTP based file store. The FTP Settings dialog will now be launched.
6. In the *Host name or IP address* box enter the name or the IP address of the machine on which the FTP folder resides.
7. In the *Port* box enter the port number to connect to the FTP. By default the FTP uses port 21.
8. In the *Folder Path* enter path of the FTP folder. for e.g. */documentmanagement.*
9. In the *Example* box the location of your FTP folder will be displayed.
10. In the User Name and Password box, enter the user name and password, that Globodox should use to connect to the FTP location.
11. Select the transfer mode from the Transfer Mode box.
12. Click the *Test* button to test FTP the connection. If the test is successful, then click the OK button to save the settings.
13. Check the *Set as default file store* option if you want the FTP File Store to be set as the *Default File Store*.
14. Check the *Set as read-only* option to set the read-only attribute for the FTP File-Store.
15. 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 FTP 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 //machinename/MyFileStore, then
    If this option is checked then documents will first create a sub-folder called Location1 and then stores documents in that (//machinename/MyFileStore/Location1) folder.
    When the maximum number of files (see File Count based) have been stored in the Location1 sub-folder, Globodox will automatically create a new sub-folder called Location2. Documents will then be stored in the //machinename/MyFileStore/Location2 folder.
    If this option is unchecked then documents will be stored directly in the //machinename/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 FTP File Store.

    File count based
    Enter a numeric value in the box which specifies the maximum number of files that Globodox 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

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FTP File Store.

When working with a very large number of documents creating sub-folders can improve the performance of Globodox.

16. Click the *Save and close* button to create the new FTP based File Store.

Notes:

- Every Globodox DB has at least one File Store but a single DB can have multiple File Stores as well.
- Each Globodox 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 all newly added documents (including scanned documents) are saved in this folder.

Related Topics

Move File Store to another location 322
Change the Default File Store 321
Convert an existing folder based file store to FTP 324

21.8.6 Convert an Existing Folder-based File Store to FTP

You can configure Globodox so that any files you add are stored on a pre-designated FTP server (for e.g. a IIS FTP server). In a multi-user setup a FTP based file store would be more secure than a network share based File Store. By creating FTP based File stores you eliminate the possibility of users directly going to a File Store and modifying documents.

To convert an existing folder based File store to a FTP based File Store

1. Before converting please make sure you configure the existing File Store folder for FTP access.
2. Open the DB whose file store you want to convert FTP based File Store.
3. Click *Settings* > *DB Settings* in the Navigation 34 Pane.
4. Select the *File Store* node and double click the existing File Store in the List View pane. The File Store window will now be launched.
5. Check the *Use FTP location* option to make it a FTP based file store. The FTP Settings dialog will now be launched.
6. In the *Host name or IP address* box enter the name or the IP address of the machine on which the FTP folder resides.
7. In the *Port* box enter the port number to connect to the FTP. By default the FTP uses port 21.
8. In the *Folder Path* enter path of the FTP folder. for e.g. */documentmanagement.*
9. In the *Example* box the location of your FTP folder will be displayed.
10. In the *User Name* and *Password* box, enter the user name and password, that Globodox should use to connect to the FTP.
11. Select the transfer mode from the *Transfer Mode* box.
12. Click the *Test* button to test FTP the connection. If the connection is fine, then click the *OK* button to save the settings.
13. Click the *Save and close* button to convert the file store to FTP based File Store.

Notes:

- Every Globodox DB has at least one File Store but a single DB can have multiple File Stores as well.

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- Each Globodox 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 all newly added documents (including scanned documents) are saved in this folder.

Related Topics

Move File Store to another location 322
Change the Default File Store 321
Create a new FTP based file store 323

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21.9 Set as Default DB

You can make a DB the default DB from the *DB List* node.

To Set a DB as the Default DB

1. Make sure no users are logged on to Globodox.
2. Login as superadmin, from Globodox desktop client.
3. Select *Settings* > *System Settings* > *DB List* in the Navigation 34 pane. The *DB List* tab will now be displayed in the *Ribbon* bar.
4. From the *DB List* pane i.e. the right pane select the DB that you want set as the default DB.
5. Click the *Set As Default* option on the *DB List* tab. This DB will now be set as the default DB.

Notes:

- The MainDB is the master DB in Globodox. All the security information is stored in this DB. Hence the MainDB is set as your default DB.

Related Topics
File Stores 318
Configure Globodox DB for multi-machine environment 335

21.10 Adding a DB to the DB List

You can add an existing DB to the DB List from the *DB List* node.

To Add an Existing DB to the DB List

1. Select *Settings* > *System Settings* > *DB List* in the Navigation 34 pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
2. Click the *New* button of the *Home* tab. The *New DB Details* dialog will be launched.
3. Select the type of DB that you want to add from the *DB Type* drop down. Depending on the type of DB selected the Settings window will pop up. Enter the information to connect to the DB.
4. Enter the name of the DB that you want to add in the *Select or enter the Data DB* box.
5. You can enter a display name for the DB in the *DB display name* box.
6. You can also enter a short description about the DB in the *Description* box.
7. Click the *Save* button to save the changes.

Notes:

- You can add MS SQL and My SQL Server based DB to DB List.
- Make sure that MyODBC drivers version 5.1.4 or higher is installed on all the machines from which you are going to access the MySQL DB.

Related Topics
File Stores 318
Configure Globodox DB for multi-machine environment 335

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21.11 Convert DB

Topics Covered

11.1Convert MS Access DB to MS SQL DB 327
11.2Convert MS Access DB to MySQL DB 328
11.3Convert MS SQL DB to MS Access DB 330
11.4Convert MS SQL DB to My SQL DB 330
11.5Convert MySQL DB to MS Access DB 332
11.6Convert MySQL DB to MS SQL DB 332

21.11.1 Convert MS Access DB to MS SQL DB

MS SQL Server must be installed on your machine or another machine on your network for you to be able to create a MS SQL Server based Globodox DBs.
Globodox Supports MS SQL 2000, 2005, 2005 Express and 2008 Server.

To Convert MS Access DB to MS SQL DB

1. Make sure no users are logged on to Globodox.
2. Login as superadmin, from Globodox desktop client.
3. Select *Settings* > *System Settings* > DB List in the Navigation 34 pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
4. From the *DB List* pane i.e. the right pane select the DB that you want configure for multi-machine environment.
5. Click the *Convert DB* option on the *DB List* tab. The *Convert DB* window will now be launched.
6. You can change the name for the DB from the *New DB Name* box.
7. Select *MS SQL based Globodox DB* option from the *DB Type* drop down. The *MS SQL Settings* window will now be launched.
8. Enter or select the name of the machine on which MS SQL Server is running from the *Choose or type in a machine name* box. The new Globodox DB would be created on this machine. The drop-down list will display the names of all the machines on your network. It is recommended to type the machine's IP address.
9. For MS SQL Server 2000 or higher enter the name of the SQL Server Instance in the *Instance name* box on which the new Globodox DB should be created. When only one instance of SQL Server is running on a machine, the instance name is normally the same as the machine name. Leave the instance name blank unless you wish to connect to a named MS SQL server.

   Note:
   For MS SQL 2005 Express edition enter *SQLEXPRESS* in the *Instance name* box.

10. Select the type of connection Globodox should use to connect to SQL Server from the *Connection Type* drop-down. The *Default* connection type is selected by default. Other available connection types are...
    - *TCP/IP*

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- *Names Pipes*
- *SPX/IPX*
- *Multi Protocol/Windows RPC*

Note:
For MS SQL 2005 Express edition select TCP/IP from the *Connection Type* drop-down.

11. In case you have chosen the TCP/IP connection type then specify the port number in the *Port* box. The default port used by MS SQL Server (port 1433) will be displayed in this box. If the MS SQL Server you have chosen uses a different port number then you must enter that port number in this box.
12. Choose the *Windows Authentication* option if the SQL Server you have chosen has been configured to use Windows authentication. Your Windows login information will be used to logon to the SQL Server.
13. Choose the *MS SQL Server Authentication* option if the SQL Server you have chosen has been configured to use SQL Server Authentication. You will also need to specify the user name and password which Globodox should use while connecting.
14. Check the *Remember Password* option you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened. If this option is left unchecked then the user will be prompted for the user name and password before opening the Globodox DB.
15. Click the *Test* button to test the connection.
16. Click the *OK* button to save the settings and close the *MS SQL Settings* window.
17. The default location of the DB's File Store 318 (folder) will be displayed in the *File Store Location* box. You can change the *File Store* location by clicking this **[...]** button besides the *File Store Location* box. Any documents you add to this Globodox DB will be stored in the *File Store*.
18. Click the *Convert* button to convert the MS Access DB to an MS SQL Server DB.

Notes:

- For MS Access DB: By default all Globodox Databases and its *File Stores* are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MS SQL SERVER: By default all Globodox Databases are are stored in the SQL Server Management Studio. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MySQL: By default all Globodox Databases are stored in the My SQL Administrator. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics
Convert a MS Access DB to MySQL DB 328
Convert MS SQL DB to MS Access DB 330
Configure Globodox DB for multi-machine environment 335

21.11.2 Convert MS Access DB to MySQL DB

MySQL (Version 5) Server must be installed on your machine or another machine on your network for you to be able to create a MySQL Server based Globodox DBs. Please note Globodox supports only version 5 and above.

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To Convert MS Access DB to MySQL DB

1. Make sure no users are logged on to Globodox.
2. Login as superadmin, from Globodox desktop client.
3. Select *Settings* > *System Settings* > DB List in the Navigation pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
4. From the *DB List* pane i.e. the right pane select the DB that you want configure for multi-user environment.
5. Click the *Convert DB* option on the *DB List* tab. The *Convert DB* window will now be launched.
6. You can change the name for the DB from the *New DB Name* box.
7. Select *MySQL* option from the *New DB Type* drop down. The *MySQL Settings* window will now be launched.
8. Enter or select the name of the machine on which MySQL Server is running from the *Choose or type in a machine name* box. The new Globodox DB would be created on this machine. The drop-down list will display the names of all the machines on your network. It is recommended to type the machine's IP address.
9. Enter the port number in the *Port* box to connect to the MySQL Server. The default port used by MySQL (port 3306) will be displayed in this box. If the MySQL instance you have chosen uses a different port number then you must enter that port number in this box.
10. In the *Username* box enter the user name that Globodox should use when connecting to the MySQL Server.
11. In the *Password* box enter the password that Globodox should use when connecting to the MySQL Server.
12. Check the *Remember Password* option if you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened. If this option is left unchecked then the user will be prompted for the user name and password before opening the Globodox DB.
13. Click the *Test* button to test the connection.
14. Click the *OK* button to save the settings and close the *MySQL Settings* window.
15. The default location of the DB's config file will be displayed in the *Config file location* box. You can change the location by clicking the browse button besides the *Config file location* box.
16. Click the *Convert* button to convert the MS Access DB to a MySQL Server DB.

Notes:

- For MS Access DB: By default all Globodox Databases and its File Stores are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MS SQL SERVER: By default all Globodox Databases are are stored in the SQL Server Management Studio. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MySQL: By default all Globodox Databases are stored in the My SQL Administrator. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Configure Globodox DB for multi-machine environment
Convert a MS Access DB to MS SQL DB
Convert MySQL DB to MS Access DB

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21.11.3 Convert MS SQL DB to MS Access DB

You do not need MS Access installed on your machine to work with Globodox and to create or open a MS Access based Globodox DB. Globodox installs all the files required to do this.

To Convert MS SQL DB to MS Access DB

1. Make sure no users are logged on to Globodox.
2. Login as superadmin, from Globodox desktop client.
3. Select *Settings* > *System Settings* > *DB List* in the Navigation 34 pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
4. From the *DB List* pane i.e. the right pane select the DB that you want configure for multi-user environment.
5. Click the *Convert DB* option on the *DB List* tab. The *Convert DB* window will now be launched.
6. You can change the name for the DB from the *New DB Name* box.
7. Select *MS Access* option from the *New DB Type* drop down. The *MS Access - Settings* window will now be launched.
8. The default location of the DB's File Store 318 (folder) will be displayed in the *Choose or type in the DB location* box. You can change the *File Store* location by clicking the *Browse* button.
9. Click the *Convert* button to convert the MS SQL DB to an MS Access DB.

Notes:

- For MS Access DB: By default all Globodox Databases and its File Stores are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MS SQL SERVER: By default all Globodox Databases are are stored in the SQL Server Management Studio. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MySQL: By default all Globodox Databases are stored in the My SQL Administrator. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Configure Globodox DB for multi-machine environment 335
Convert a MS Access DB to a MS SQL DB 327
Convert MS SQL DB to My SQL DB 330

21.11.4 Convert MS SQL DB to My SQL DB

MySQL Server (Version 5) must be installed on your machine or another machine on your network for you to be able to create a MySQL Server based Globodox DBs.

To Convert MS SQL DB to MySQL DB

1. Make sure no users are logged on to Globodox.
2. Login as superadmin, from Globodox desktop client.
3. Select *Settings* > *System Settings* > DB List in the Navigation 34 pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
4. From the *DB List* pane i.e. the right pane select the DB that you want configure for multi-

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user environment.
5. Click the *Convert DB* option on the *DB List* tab. The *Convert DB* window will now be launched.
6. You can change the name for the DB from the *New DB Name* box.
7. Select *MySQL* option from the *New DB Type* drop down. The *MySQL Settings* window will now be launched.
8. Enter or select the name of the machine on which MySQL Server is running from the *Choose or type in a machine name* box. The new Globodox DB would be created on this machine. The drop-down list will display the names of all the machines on your network. It is recommended to type the machine's IP address.
9. Enter the port number in the *Port* box to connect to the MySQL Server. The default port used by MySQL (port 3306) will be displayed in this box. If the MySQL instance you have chosen uses a different port number then you must enter that port number in this box.
10. In the *Username* box enter the user name that Globodox should use when connecting to the MySQL Server.
11. In the *Password* box enter the password that Globodox should use when connecting to the MySQL Server.
12. Check the *Remember Password* option you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened. If this option is left unchecked then the user will be prompted for the user name and password before opening the Globodox DB.
13. Click the *Test* button to test the connection.
14. Click the *OK* button to save the settings and close the *MySQL Settings* window.
15. The default location of the DB's config file will be displayed in the *Config file location* box. You can change the location by clicking the browse button besides the *Config file location* box.
16. Click the *Convert* button to convert the MS SQL to a MySQL Server DB.

Notes:

- For MS Access DB: By default all Globodox Databases and its File Stores are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MS SQL SERVER: By default all Globodox Databases are are stored in the SQL Server Management Studio. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MySQL: By default all Globodox Databases are stored in the My SQL Administrator. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Configure Globodox DB for multi-machine environment 335
Convert a MS Access DB to MS SQL DB 327
Convert MS SQL DB to MS Access DB 330

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21.11.5 Convert MySQL DB to MS Access DB

You do not need MS Access installed on your machine to work with Globodox and to create or open a MS Access based Globodox DB. Globodox installs all the files required to do this.

To Convert MySQL DB to MS Access DB

1. Make sure no users are logged on to Globodox.
2. Login as superadmin, from Globodox desktop client.
3. Select *Settings* > *System Settings* > DB List in the Navigation 34 pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
4. From the *DB List* pane i.e. the right pane select the DB that you want configure for multi-user environment.
5. Click the *Convert DB* option on the *DB List* tab. Provide your MySQL Server Login details and click OK. The *Convert DB* window will now be launched.
6. You can change the name for the DB from the *New DB Name* box.
7. Select *MS Access* option from the *New DB Type* drop down. The *MS Access - Settings* window will now be launched.
8. The default location of the DB's File Store 318 (folder) will be displayed in the *Choose or type in the DB location* box. You can change the *File Store* location by clicking the *Browse* button.
9. Click the *Convert* button to convert the MySQL DB to an MS Access DB.

Notes:

- For MS Access DB: By default all Globodox Databases and its File Stores are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MS SQL SERVER: By default all Globodox Databases are are stored in the SQL Server Management Studio. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MySQL: By default all Globodox Databases are stored in the My SQL Administrator. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Configure Globodox DB for multi-machine environment 335
Convert a MS Access DB to MS SQL DB 327
Convert MySQL DB to MS SQL DB 332

21.11.6 Convert MySQL DB to MS SQL DB

MS SQL Server must be installed on your machine or another machine on your network for you to be able to create a MS SQL Server based Globodox DBs.

Globodox Supports MS SQL 2000, 2005, 2005 Express and 2008 Server.

To Convert MySQL DB to MS SQL DB

1. Make sure no users are logged on to Globodox.
2. Login as superadmin, from Globodox desktop client.
3. Select *Settings* > *System Settings* > DB List in the Navigation 34 pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
4. From the *DB List* pane i.e. the right pane select the DB that you want configure for multi-

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user environment.

5. Click the *Convert DB* option on the *DB List* tab. Provide your MySQL Server Login details and click OK. The *Convert DB* window will now be launched.
6. You can change the name for the DB from the *New DB Name* box.
7. Select *MS SQL based Globodox DB* option from the *DB Type* drop down. The *MS SQL Settings* window will now be launched.
8. Enter or select the name of the machine on which MS SQL Server is running from the *Choose or type in a machine name* box. The new Globodox DB would be created on this machine. The drop-down list will display the names of all the machines on your network. It is recommended to type the machine's IP address.
9. For MS SQL Server 2000 or higher enter the name of the SQL Server Instance in the *Instance name* box on which the new Globodox DB should be created. When only one instance of SQL Server is running on a machine, the instance name is normally the same as the machine name. Leave the instance name blank unless you wish to connect to a named MS SQL server.

   Note:
   For MS SQL 2005 Express edition enter *SQLEXPRESS* in the *Instance name* box.

10. Select the type of connection Globodox should use to connect to SQL Server from the *Connection Type* drop-down. The *Default* connection type is selected by default. Other available connection types are...
    - *TCP/IP*
    - *Names Pipes*
    - *SPX/IPX*
    - *Multi Protocol/Windows RPC*

    Note:
    For MS SQL 2005 Express edition select TCP/IP from the *Connection Type* drop-down.

11. In case you have chosen the TCP/IP connection type then specify the port number in the *Port* box. The default port used by MS SQL Server (port 1433) will be displayed in this box. If the MS SQL Server you have chosen uses a different port number then you must enter that port number in this box.
12. Choose the *Windows Authentication* option if the SQL Server you have chosen has been configured to use Windows authentication. Your Windows login information will be used to logon to the SQL Server.
13. Choose the *MS SQL Server Authentication* option if the SQL Server you have chosen has been configured to use SQL Server Authentication. You will also need to specify the user name and password which Globodox should use while connecting.
14. Check the *Remember Password* option you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened. If this option is left unchecked then the user will be prompted for the user name and password before opening the Globodox DB.
15. Click the *Test* button to test the connection.
16. Click the *OK* button to save the settings and close the *MS SQL Settings* window.
17. Click the *Convert* button to convert the MS Access DB to an MS SQL Server DB.

Notes:

- For MS Access DB: By default all Globodox Databases and its *File Stores* are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.
- For MS SQL SERVER: By default all Globodox Databases are are stored in the SQL Server

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Management Studio. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

- For MySQL: By default all Globodox Databases are stored in the My SQL Administrator. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Convert a MS Access DB to MySQL DB 328
Convert MySQL DB to MS Access DB 332
Configure Globodox DB for multi-machine environment 335

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21.12 Configure Globodox DB for Multi-machine Environment

For MS Access based Globodox DBs, please ensure that the Globodox DB (a file with a .GXDB extension) is located in a shared folder which is accessible from all those machines from which users need to open and work with the DB. Users from all these machines will need read/write/ modify permissions to this shared folder as well as to the .GXDB file itself.

To be usable in a multi-machine environment, the Globodox DB should be accessible from all machines from which access is required. Each Globodox DB is linked to one or more File Stores 318. Each of these folders must also be accessible from all machines from which access is required (i.e. these folders should be shared or must reside inside a shared folder). Users from other machines will need read/write/modify permissions to these folders.

Tip: *All MS Access based Globodox DBs and their linked folders are by default located in the C:\Globodox Databases folder. By default File Stores for MS SQL Server and MySQL based Globodox DBs are also created in the C:\Globodox Databases folder. So configuration will be easier if you simply share the C:\Globodox Databases folder and make sure all users who need access have read/write/modify permissions to this shared folder.*

To Automatically Configure Globodox DB for Multi-machine Environment

1. Make sure no users are logged on to Globodox.
2. Make sure that the folder in which Globodox DB's are located (usually the C:\Globodox Databases folder) and the folder in which Globodox is installed (usually the C:\Program files\Globodox) is shared.
3. Login as superadmin, from Globodox desktop client.
4. Select *Settings* > *System Settings* > *DB List* in the Navigation 34 pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
5. From the DB List pane i.e. the right pane select the DB that you want configure for multi-machine environment.
6. Click the *Multi-user DB* button. A dialog will now pop up. Click the *Automatic* button on it.
7. The *Multi-User Configuration* window will be launched and will start configuring your DB automatically for multi-user environment.
8. Once the DB is configured *Status* will display *Configuration Completed* on the *Multi-User Configuration* window. Click the *Close* button to close the window.
9. In the *DB List* pane i.e. the right pane the DB's location that is displayed in the *Location* columns will now change to UNC format (for e.g. \\MachineName\ShareName). The DB will now be ready for multi-machine environment.

To Manually Configure Globodox DB for Multi-machine Environment

1. Make sure no users are logged on to Globodox.
2. Make sure that the folder in which Globodox DB's are located (usually the C:\Globodox Databases folder) and the folder in which Globodox is installed (usually the C:\Program files\Globodox) is shared.
3. Login as superadmin, from Globodox desktop client.
4. Select *Settings* > *System Settings* > *DB List* in the *Navigation* pane. The *DB List* tab will now be displayed on the *Ribbon* bar.
5. From the DB List pane i.e. the right pane select the DB that you want configure for multi-machine environment.
6. Click the *Multi-user DB* button. A dialog will now pop up. Click the *Manual* button on it.

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The *Manual Configuration* window will be launched.
7. Specify the location of the shared Globodox databases folder and the Default file store in the *Manual Configuration* window. Click the *OK* button to save the new location and to close the window
8. Once the DB is configured *Status* will display *Configuration Completed* on the *Multi-User Configuration* window. Click th Close button to close the window.
9. In the *DB List* pane i.e. the right pane the DB's location that is displayed in the *Location* columns will now change to UNC format (for e.g. \\MachineName\ShareName). The DB will now be ready for multi-machine environment.

Notes:

- By default all Globodox Databases and its *File Stores* are stored in the C:\Globodox Databases folder. *File Store* is a normal Windows folder which is located inside a folder with the same name as the name of its related DB.

Related Topics

Create a MS Access based DB 313
Create a MS SQL based DB 314
Convert DB 327

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21.13 Moving Globodox Databases to New Location

Topics Covered

13.1Move MS Access-based Globodox DBs to New Location 338
13.2Move MS SQL-based Globodox DBs to New Location 340
13.3Move MySQL-based Globodox DBs to New Location 342

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21.13.1 Moving MS Acces-based Globodox Databases to New Location

Assumptions:

1. We are assuming all the folders linked to all your Globodox DBs are located inside a single root folder (for e.g. C:\Globodox Databases) on the old machine. i.e. if we move this single folder to the new machine, then we would have moved all the file stores for all the DBs.
2. You have backed up all your Databases 431 and their file Stores

The following are the instructions for moving the folders linked to all Globodox DBs to the new machine...

I. Moving the DBs and the File Store to the new machine

1. Make sure Globodox is not running on any of the machines on the network.
2. Using Windows Explorer copy the root folder (i.e the Globodox Databases' folder) to the new machine. We are copying and not moving so that we can revert back to the old setup if required.
3. Make sure users have permissions on this new root folder(see the permissions on the root folder on the old machine for reference).
4. Share the folder on the new machine. Make sure users have permissions on this new share (see the permissions on the share on the old machine for reference).
5. Rename the share for the root folder on the old machine. The aim is to make sure Globodox can no more access the files on the old machine.
6. Install Globodox on the new machine.
7. Now, copy the multi-user.gdx file from the ITAZ\Globodox folder, created under the folder designated as the Common Application Data folder in the Windows installation, of the old machine.

   For Windows Vista/Windows 2008/Windows 7, this will be the C:\ProgramData\ITAZ\Globodox folder.
   For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

   Note:
   If Globodox is launched after the installation you may get this message "Required configuration file 'multi-user.gdx' does not exist or access denied". Just close the message box and follow the above step.

8. Now, paste this file in the ITAZ\Globodox folder located on the new machine.

II. Configuring Globodox to launch the Main DB from the new location

1. Open the Command Line Window (Start > All programs > Accessories > Command Prompt).
2. In the Command Line window type the following at the cursor...

   "C:\Program Files\Globodox Desktop\Globodox.exe" /reconfiguremaindb
   (Assuming that Globodox is installed in the default location.)

3. Now, hit the *Enter* key.
4. Globodox will now launch. Now, specify the location where the Main DB is located. (It is usually located in the C:\Globodox Databases folder)
5. After this is configured, you will get a message confirming that Command Line action has been completed. Globodox will now close.
6. Start Globodox. The Main DB will now be opened (Assuming that is set as the default DB).

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Note:
If the Main DB is not set as the default DB then follow the below to launch Main DB...
Launch the Command Line Window. In the Command Line window type the following at the cursor.

"C:\Program Files\Globodox Desktop\Globodox.exe"/ignoredefaultdb
(Assuming that Globodox is installed in the default location.)

Now, hit the *Enter* key. The Main DB will now be launched.

7. As you browse through the DB, you may get *File not found message* as the File Stores are still pointing to the old location. You will now have to point the Main DB to use the new File Store location. To do this follow the Steps below
8. Click *Settings* > *DB Settings* in the Navigation Pane.
9. Select the *File Store* node. The File Store will be displayed in the right pane, i.e. the *File Stores* list.
10. Double click the current Default File Store from the *File Stores* list. The *File Store* window will now be launched.
11. Click the *Browse...* button to specify the new location of the file store. This is usually the C:\Globodox Databases\MainDB\Default File Store folder.
12. Click the *OK* button to select the new location.
13. Click the *Save and close* button to save the settings.
14. Now, go to to *Workspace*. The documents will now be displayed.

III. If you have more DBs (other than the Main DB) then follow the steps below

1. Select *Settings* > *System Settings* > *DB List* in the Navigation pane.
2. Double click a DB from the list to specify its new location. The *DB Details* window will now be launched.
3. Specify the location of the DB in the *Select or enter the Data DB* box (This is usually located in C:\Globodox Databases folder). You can also click the *Browse* button and select the location.
4. Click the *Save and close* button to save the changes
5. Now, open the DB and change its File Store location. Follow the above steps for all the remaining DBs.

IV. Pointing Globodox clients to the server installation

1. Make sure you have configured the DB's for multiple-users 335.
2. Copy the multi-user.gdx file from the ITAZ\Globodox folder located on the new machine.
3. Now paste the multi-user.gdx file in the ITAZ\Globodox folder on all the machines on which Globodox is installed.
4. Start Globodox Desktop client on another client machine and open a Globodox DB. Check if it opened successfully.

If everything works fine then you can uninstall Globodox and delete the Globodox Databases folder from the old machine (assuming you have already taken a backup of the Globodox Databases folder)

That's It!

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21.13.2 Moving MS SQL-based Globodox Databases to New Location

Assumptions:

1. We are assuming all the folders linked to all your Globodox DBs are located inside a single root folder (for e.g. C:\Globodox Databases) on the old machine. i.e. if we move this single folder to the new machine, then we would have moved all the file stores for all the DBs.
2. You have backed up all your Databases 432 and their file Stores

The following are the instructions for moving the folders linked to all Globodox DBs to the new machine...

I. Moving the DBs and the File Store to the new machine

1. Make sure Globodox is not running on any of the machines on the network.
2. Using Windows Explorer copy the root folder (i.e the Globodox Databases' folder) to the new machine. We are copying and not moving so that we can revert back to the old setup if required.
3. Make sure users have permissions on this new root folder (see the permissions on the root folder on the old machine for reference).
4. Share the folder on the new machine. Make sure users have permissions on this new share (see the permissions on the share on the old machine for reference).
5. Rename the share for the root folder on the old machine. The aim is to make sure Globodox can no more access the files on the old machine.
6. Now, move the backed-up copy of the MS SQL based Globodox DBs to the new machine.
7. Install MS SQL Server on the new machine.
8. Restore the backed up MS SQL based Globodox DBs on the new machine.
9. Install Globodox on the new machine.
10. Now, copy the multi-user.gdx file from the ITAZ\Globodox folder, created under the folder designated as the Common Application Data folder in the Windows installation, of the old machine.

    For Windows Vista/Windows 2008/Windows 7, this will be the C:\ProgramData\ITAZ\Globodox folder.
    For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

    Note:
    If Globodox is launched after the installation you may get this message "Required configuration file 'multi-user.gdx' does not exist or access denied". Just close the message box and follow the above step.

11. Now, paste this file in the ITAZ\Globodox folder located on the new machine.

II. Configuring Globodox to launch the Main DB from the new location

1. Open the Command Line Window (*Start > All programs > Accessories > Command Prompt*).
2. In the Command Line window type the following at the cursor...

"C:\Program Files\Globodox Desktop\Globodox.exe" /reconfiguremaindb
(Assuming that Globodox is installed in the default location.)

3. Now, hit the Enter key.
4. Globodox will now launch. The DB Details window will be launched.
   - Specify the details to connect to the new MS SQL Server

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a) Enter or select the name of the machine on which MS SQL Server is running from the *Choose or type in a machine name* box. It is recommended to type the machine's IP address.
b) For MS SQL Server 2000 or higher enter the name of the SQL Server Instance in the *Instance name* box.
Note: For MS SQL 2005 Express edition enter *SQLEXPRESS* in the Instance name box.
c) Select the type of connection Globodox should use to connect to SQL Server from the *Connection Type* drop-down. The Default connection type is selected by default.
Note: For MS SQL 2005 Express edition select TCP/IP from the Connection Type drop-down.
d) In case you have chosen the TCP/IP connection type then specify the port number in the *Port* box. The default port used by MS SQL Server (port 1433) will be displayed in this box. If the MS SQL Server you have chosen uses a different port number then you must enter that port number in this box.
e) Choose the *Windows Authentication* option if the SQL Server you have chosen has been configured to use Windows authentication.
f) Choose the *MS SQL Server Authentication* option if the SQL Server you have chosen has been configured to use SQL Server Authentication.
g) Check the *Remember Password* option you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened.
h) Click the *Test* button to test the connection.
i) Click the *OK* button to save the settings and close the MS SQL Settings window.

5. After this is configured, you will get a message confirming that Command Line action has been completed. Globodox will now close.
6. Start Globodox. The Main DB will now be opened (Assuming that is set as the default DB).

Note:
If the Main DB is not set as the default DB then follow the below to launch Main DB...
Launch the Command Line Window. In the Command Line window type the following at the cursor.

"C:\Program Files\Globodox Desktop\Globodox.exe"/ignoredefaultdb
(Assuming that Globodox is installed in the default location.)

Now, hit the Enter key. The Main DB will now be launched.

7. As you browse through the DB, you may get *File not found message* as the File Stores are still pointing to the old location. You will now have to point the Main DB to use the new File Store location. To do this follow the Steps below.
8. Click *Settings* > *DB Settings* in the *Navigation* pane.
9. Select the *File Store* node. The File Store will be displayed in the right pane, i.e. the *File Stores* list.
10. Double click the current Default File Store from the *File Stores* list. The *File Store* window will now be launched.
11. Click the *Browse...* button to specify the new location of the file store. This is usually the C:\Globodox Databases\MainDB\Default File Store folder
12. Click the *OK* button to select the new location.
13. Click the *Save and close* button to save the settings.
14. Now, go to to *Workspace*. The documents will now be displayed.

III. If you have more DBs (other than the Main DB) then follow the steps below

1. Select *Settings* > *System Settings* > *DB List* in the *Navigation* pane.
2. Double click a DB from the list to specify its new location. The *DB Details* window will now be launched.

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3. Specify the details to connect to the the DB located on the new MS SQL Server.
4. Click the *Save and close* button to save the changes.
5. Now, open the DB and change its File Store location. Follow the above steps for all the remaining DBs.

IV. Pointing Globodox clients to the server installation

1. Make sure you have configured the DB's for multiple-users 335.
2. Copy the multi-user.gdx file from the ITAZ\Globodox folder located on the new machine.
3. Now paste the multi-user.gdx file in the ITAZ\Globodox folder on all the machines on which Globodox is installed.
4. Start Globodox Desktop client on another client machine and open a Globodox DB. Check if it opened successfully.

If everything works fine then you can uninstall Globodox and delete the Globodox Databases folder from the old machine (assuming you have already taken a backup of the Globodox Databases folder)

That's It!

21.13.3 Moving MySQL-based Globodox Databases to New Location

Assumptions:

1. We are assuming all the folders linked to all your Globodox DBs are located inside a single root folder (for e.g. C:\Globodox Databases) on the old machine. i.e. if we move this single folder to the new machine, then we would have moved all the file stores for all the DBs.
2. You have backed up all your Databases 440 and their file Stores

The following are the instructions for moving the folders linked to all Globodox DBs to the new machine...

I. Moving the DBs and the File Store to the new machine

1. Make sure Globodox is not running on any of the machines on the network.
2. Using Windows Explorer copy the root folder (i.e the Globodox Databases' folder) to the new machine. We are copying and not moving so that we can revert back to the old setup if required.
3. Make sure users have permissions on this new root folder (see the permissions on the root folder on the old machine for reference).
4. Share the folder on the new machine. Make sure users have permissions on this new share (see the permissions on the share on the old machine for reference).
5. Rename the share for the root folder on the old machine. The aim is to make sure Globodox can no more access the files on the old machine.
6. Now, move the backed-up copy of the MS SQL based Globodox DBs to the new machine.
7. Install MySQL Server on the new machine.
8. Restore the backed up MySQL based Globodox DBs on the new machine.
9. Install Globodox on the new machine.
10. Now, copy the multi-user.gdx file from the ITAZ\Globodox folder, created under the folder designated as the Common Application Data folder in the Windows installation, of the old machine.

    For Windows Vista/Windows 2008/Windows 7, this will be the C:\ProgramData\ITAZ\Globodox folder.
    For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application

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Data\ITAZ\Globodox

Note:
If Globodox is launched after the installation you may get this message "Required configuration file 'multi-user.gdx' does not exist or access denied". Just close the message box and follow the above step.

11. Now, paste this file in the ITAZ\Globodox folder located on the new machine.

II. Configuring Globodox to launch the Main DB from the new location

1. Open the Command Line Window.
2. In the Command Line window type the following at the cursor.

"C:\Program Files\Globodox Desktop\Globodox.exe" /reconfiguremaindb
(Assuming that Globodox is installed in the default location.)

3. Now, hit the Enter key.
4. Globodox will now launch. The DB Details window will be launched.
   - Specify the details to connect to the new MS SQL Server

   a) Enter or select the name of the machine on which MySQL Server is running from the Choose or type in a machine name box. The new Globodox DB would be created on this machine. The drop-down list will display the names of all the machines on your network. You can also type the machine's IP address.
   b) Enter the port number in the Port box to connect to the MySQL Server. The default port used by MySQL (port 3306) will be displayed in this box. If the MySQL instance you have chosen uses a different port number then you must enter that port number in this box.
   c) In the Username box enter the user name that Globodox should use when connecting to the MySQL Server.
   d) In the Password box enter the password that Globodox should use when connecting to the MySQL Server.
   e) Check the Remember Password option you want Globodox to remember the user name and password and automatically apply it when the Globodox DB is opened. If this option is left unchecked then the user will be prompted for the user name and password before opening the Globodox DB.
   f) Click the Test button to test the connection.
   g) Click the OK button to save the settings and close the MySQL Settings window.

5. After this is configured, you will get a message confirming that Command Line action has been completed. Globodox will now close.
6. Start Globodox. The Main DB will now be opened (Assuming that is set as the default DB).

Note:
If the Main DB is not set as the default DB then follow the below to launch Main DB...
Launch the Command Line Window. In the Command Line window type the following at the cursor.

"C:\Program Files\Globodox Desktop\Globodox.exe"/ignoredefaultdb
(Assuming that Globodox is installed in the default location.)
Now, hit the Enter key. The Main DB will now be launched.

7. As you browse through the DB, you may now get File not found message as the File Stores are still pointing to the old location. You will now have to point the Main DB to use the new File Store location. To do this follow the Steps below
8. Click Settings > DB Settings in the Navigation Pane.
9. Select the File Store node. The File Store will be displayed in the right pane, i.e. the File Stores list.
10. Double click the current Default File Store from the File Stores list. The File Store window will now be launched.

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11.Click the Browse... button to specify the new location of the file store. This is usually the C:\Globodox Databases\MainDB\Default File Store folder
12.Click the OK button to select the new location.
13.Click the Save and close button to save the settings.
14.Now, go to to Workspace. The documents will now be displayed.

III. If you have more DBs (other than the Main DB) then follow the steps below

1. Select Settings > System Settings > DB List in the Navigation pane.
2. Double click a DB from the list to specify its new location. The DB Details window will now be launched.
3. Specify the details to connect to the the DB located on the new MySQL Server.
4. Click the Save and close button to save the changes
5. Now, open the DB and change its File Store location. Follow the above steps for all the remaining DBs.

IV. Pointing Globodox clients to the server installation

1. Make sure you have configured the DB's for multiple-users 335.
2. Copy the multi-user.gdx file from the ITAZ\Globodox folder located on the new machine.
3. Now paste the multi-user.gdx file in the ITAZ\Globodox folder on all the machines on which Globodox is installed.
4. Start Globodox Desktop client on another client machine and open a Globodox DB. Check if it opened successfully.

If everything works fine then you can uninstall Globodox and delete the Globodox Databases folder from the old machine (assuming you have already taken a backup of the Globodox Databases folder)

That's It!

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22 Event Logs

Topics Covered

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7.2 Event Log - FAQ 346
7.3 Configure Events Log 346
7.4 View Event Logs 349
7.5 View Event Log of the Selected Document 352
7.6 View Event Log of the Selected Stack 354

22.1 Event Log Basics

This feature allows you to log details about user actions. For example you can configure this feature so that whenever a document is deleted, details about the action are logged. Details logged include the name of the user performing the action along with the date and time of the action. Almost any action a user can perform in Globodox can be logged. You can choose the actions you wish to log.

Events have been divided into two types...

System Events

Systems Events are events which are not database specific. For example User log on, User log off, User addition etc..

Globodox DB events

All events which are specific to the currently opened Globodox DB are known as Globodox DB events. (Add document, delete document etc...)

You can separately select and enable/disable specific System events and Globodox DB events. For example, you can easily have a scenario where only two System events (Log On and Log Off) are audited and only two events of a single Globodox DB (Delete Stack, Delete Document) are audited. Similarly you can choose to not audit any event in a particular Globodox DB by not enabling the feature for that Globodox DB.

Viewing the Event Log

To view the list of *System Events* which have been logged, click *Settings* > *System Settings* > *Event Log*.
To view the list of *DB Events* which have been logged, click *Settings* > *DB Settings* > *Event Log* .

You can easily sort and filter events using the *Event Log Viewer* pane.

To view events for a particular document click the *Event Log* tab on the Document Details 36 pane. Similarly to view events for a particular Stack click the *Event Log* tab on the *Stack Details* 36 pane.

Related Topics
Event Log- FAQ 346

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22.2 Event Log- FAQ

What is the event auditing feature?

The event auditing feature allows you to log details about user actions. For example you can configure this feature so that whenever a document is deleted, details about the action are logged. Details logged include the name of the user performing the action along with the date and time of the action.

Why is it useful?

The event auditing feature lets you keep a record of the actions of all Globodox users.
For example,
You can find out who deleted a document and when?
What time a user logged in on a particular day?
etc..

For what user actions can information be logged?

You can log information about almost any user action in Globodox. Events are divided into two categories, *System Events* and *DB Events*. You can choose to enable auditing of only *System Events* or only *DB Events* or both. Event auditing must be separately enabled for each Globodox DB.

How can I enable the auditing of System Events?

To enable auditing of System Events...

1. In Globodox, click the Globodox button 33.
2. Click the *Options* button. The *Options* window will now be launched.
3. Click the *DB Options* node. The *DB* options will now be displayed on the right pane.
4. In the right pane, check the *Enable Event Auditing* option under Event Auditing.

How can I disable the Event Auditing feature?

To disable auditing of System Events...

1. In Globodox, click the Globodox button 33.
2. Click the *Options* button. The *Options* window will now be launched.
3. Click the *DB Options* node. The *DB* options will now be displayed on the right pane.
4. In the right pane, uncheck the *Enable Event Auditing* option of Event Auditing.

Should I select all listed events for auditing?

You should only select the events that are important to you. If you select all events for auditing then the event log will grow in size very quickly. For example if you decided to log the *"Open Globodox DB"* event and if you had 50 users using Globodox, then every time all the users opened a Globodox DB, 50 entries (one for each user) would be added to the log.

Does this feature affect performance?

Yes, it does but only if you have chosen to log a lot of events or if you have chosen to log an event which occurs very frequently. When you enable event auditing and select an event to be logged, Globodox has to perform the extra step of logging information every time that event occurs. The time taken to perform this step will affect performance if a lot of events need to be logged.

How do I view the logged events?

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To view the list of *System Events* which have been logged, click *Settings* > *System Settings* > *Event Log*. To view the list of *DB Events* which have been logged, click *Settings* > *DB Settings* > *Event Log*.

You can easily sort and filter events based on the *Date of occurrence*, *Event type* and *Event Result*.

How can I see events for only a particular document?

To view events for a particular document select the document in the List View 35 pane and click the *Event Log* tab on the Document Details 36 pane.

Can I delete entries from the log viewer?

Yes, you can delete entries from the log viewer. Please note that when you click the *Delete* button on the toolbar of the *Event Viewer* Window, only the selected entry will be deleted. Individual or selected log entries can be deleted by right-clicking the selected log entry and choosing the delete option.

When the log entries are deleted a new log entry recording the deletion of the log entries will be added to log. You cannot delete such log entries (In other words, you cannot delete log entries which record the deletion of other log entries).

Can I export entries from the log viewer?

Yes, you can export entries from the log viewer. Entries which meet the currently specified filter conditions will be exported in the CSV (Comma Separated Values) format. Files in the CSV format can be easily opened by applications such as MS Excel.

Depending on the amount of log entries you generate, we recommend that you export and then delete log entries from time to time. For example after six months of use, you can decide to, every month export and delete all log entries which are older than six months. You can set in a policy for storage and retention of the CSV files which contain the exported log entries.

Related Topics

View Event Logs 349

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22.3 Configure Events Log

You can use the event auditing feature to log details about user actions. For example you can configure this feature so that whenever a document is deleted, details about the action are logged. Details logged include the name of the user performing the action along with the date and time of the action.

To Configure System Event Log

1. In Globodox, select *Settings* > *System Settings* > *Event Log* in the Navigation pane. The *Event Log* tab will now be displayed on the Ribbon bar.
2. Click the *Configure* button of the *Event Log* tab. The *Configure Audit Events* window will now be launched.
3. In the event list, check those events for which you want information to be logged. Uncheck the events for which you do not want information to be logged.
4. Click on *OK* to apply the settings and close the window.

To Configure DB Event Log

1. In Globodox, select *Settings* > *DB Settings* > *Event Log* in the *Navigation* pane. The *Event Log* tab will now be displayed on the *Ribbon* bar.
2. Click the *Configure* button of the *Event Log* tab. The *Configure Audit Events* window will now be launched.
3. In the event list, check those events for which you want information to be logged. Uncheck the events for which you do not want information to be logged.
4. Click on *OK* to apply the settings and close the window.

Notes:

- You can click the *Refresh* button of the *Event Log* tab to refresh the *Event Log* list.
- You can click the *Delete* button of the *Event Log* tab to delete the selected event(s) in the list. After the events have been deleted, a new event logging the "log entries deleted" event will be added to the event log. This event cannot be deleted.

Related Topics

View Event Logs 349
View Event Log of the selected Document 352
View Event log of the selected Stack 354

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22.4 View Event Logs

You can view the all the logs in the *Event list* pane. You can use the Advanced Search to filter out events you want to view.

To View System Event Log:

1. In Globodox, select *Settings* > *System Settings* > *Event Log* in the *Navigation* pane. The *System Events* that are logged will be displayed as a list in the *Event list* pane (i.e. the right pane).
2. Click the *Double Down Arrow* button to bring up the *Advanced Search* pane.
3. Select a column name from the *Field Name* drop down, to display event logs based on it.
4. Select the appropriate comparison operator (i.e. contains, equal to etc.) from the *Comparison* drop down. For e.g. To view Add Documents log the *"equal to"* operator in your query condition.
   - The following Comparison Operators are available

Comparison Operator	Description	Example
Equal To	Use this operator to exactly match the value you are looking for	Name *"equal to" login*
Not Equal To	Use this operator when you do not want the value to match the text you are looking for	Name *"not equal to" login*
Contains	Use this operator to find values that contains the text that you are looking for.	*Comments "contains" MainDB*
Does Not Contain	Use this operator to find values that does not contain the text that you are looking for.	*Comments "does not contain" MainDB*
Is Empty	Use this operator to match empty values.	Date "*Is Empty*"
Is Not Empty	Use this operator to match non-empty values	Date "*Is Not Empty*"

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 the *Add* button. To remove a criteria click the *Remove* 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.
9. The Event logs will be displayed in the *List View* pane.

To View DB Event Log

1. In Globodox, select *Settings* > *DB Settings* > *Event Log* in the *Navigation* pane. The *DB Events* that are logged will be displayed as a list in the Event list pane (i.e. the right pane).

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2. Click the *Double Down Arrow* button to bring up the *Advanced Search* pane.
3. Select a column name from the *Field Name* drop down, to display event logs based on it.
4. Select the appropriate comparison operator (i.e. contains, equal to etc.) from the *Comparison* drop down. For e.g. To view Add Documents log the *"equal to"* operator in your query condition.
   - The following Comparison Operators are available

Comparison Operator	Description	Example
Equal To	Use this operator to exactly match the value you are looking for	Name *"equal to" login*
Not Equal To	Use this operator when you do not want the value to match the text you are looking for	Name *"not equal to" login*
Contains	Use this operator to find values that contains the text that you are looking for.	*Comments "contains" MainDB*
Does Not Contain	Use this operator to find values that does not contain the text that you are looking for.	*Comments "does not contain" MainDB*
Is Empty	Use this operator to match empty values.	Date "*Is Empty*"
Is Not Empty	Use this operator to match non-empty values	Date "*Is Not Empty*"

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 the *Add* button. To remove a criteria click the *Remove* 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.
9. The Event logs will be displayed in the *List View* pane.

Notes:

- You can click any column header of the event list to sort the event list in the ascending or descending order of values in that column.
- You can click the *Delete* button to delete all the currently displayed events (not only the selected ones) in the list. After the events have been deleted, a new event logging the "log entries deleted" event will be added to the event log. This event cannot be deleted.

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Related Topics

View Event Log of the selected Document 352
View Event log of the selected Stack 354

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22.5 View Event Log of the Selected Document

You can use the *Event Log* panel to view the list of all the actions carried out on a selected document. The Event list pane consists of three drop down that have predefined filtering options which are used to filter out events. Using these drop downs, events can be filtered according to the date & time of occurrence, the *Event Group* they belong to and by the result of the event.

To View Event Log of a Document

1. Select a document from the List View 35 pane, to view its event logs. The document will now be displayed in the Documents Details 165 pane.
2. Click the *Event Log* tab on the left bar of the *Document Details* pane. The *Event Log* panel will now be displayed and all the logs of the selected document will be displayed in the *Event list* pane.
3. Use the first drop down i.e. *Date & Time of Occurrence* of the event, to filter out events based on the date and time of the events.
   - The drop down has the following options

All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
Last 12 hours:	Select this option to view all the events of the last 12 hours.
Today:	Select this option to view all the events of the current day.
Yesterday	Select this option to view all the events of the previous day.
Last 24 hours:	Select this option to view all the events of the last 24 hours.
This week:	Select this option to view all the events of the current week.
Last week:	Select this option to view all the events of the previous week.
Last 7 days:	Select this option to view all the events of the last 7 days.
This month:	Select this option to view all the events of the current month.
Last month:	Select this option to view all the events of the previous month.
Last 30 days:	Select this option to view all the events of the last 30 days.
Custom:	Select this option if you wish to provide a custom date range. Selecting this option will launch the Event Date Range Dialog.

4. Use the second drop down i.e. *Event Group*, to filter out events based on the group it belongs to.
   - The following Event Groups are available

All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
View	Select this option to view all the events belonging to the View Event

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Events:	Group.
Add Events:	Select this option to view all the events belonging to the Add Event Group.
Modify Events:	Select this option to view all the events belonging to the Modify Event Group.
Other Events:	Select this option to view all the events belonging to the Other Event Group.

5. Use the third drop down i.e. *Event Result*, to filter out events based based on the outcome (result) of the event.
   - The possible event results are

All Results:	Select this option to view all the results (events will still be filtered by any other criteria if specified).
Success:	Select this option to view all the events which were completed successfully.
Failure:	Select this option to view all the events which could not be completed successfully.
Permission Denied:	Select this option to view all the events for which permission was denied to the user.

6. Event logs will now be displayed in the Event list pane, based on the filters that you have selected.
   - The Event list pane has the following options

Event Name:	Displays the name of the event
Event Date:	Displays the date and time on which the event occurred.
Result:	Displays the outcome(result) of the event, i.e. Success, Failure or Permission Denied
User Name:	Displays the name of the user who performed the event.
Comments:	Displays remarks or extra information (if any) regarding that event.

Notes:

- You can click any column header of the event list to sort the event list in the ascending or descending order of values in that column.
- Use the *More Actions* button for more options. The following options will be displayed...

Print Data	Click this option to print the data that is displayed in the Event list
Export Data	Click this option to export the data that is displayed in the Event list

Related Topics

View Event log of the selected Stack 354

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22.6 View Event Log of the Selected Stack

You can use the *Event Log* panel to view the list of all the actions carried out on a selected Stack[137]. The Event list pane consists of three drop down that have predefined filtering options which are used to filter out events. Using these drop downs, events can be filtered according to the date & time of occurrence, the *Event Group* they belong to and by the result of the event.

To View Event Log of a Stack

1. In Globodox, select *Workspace* > *Stack Types* in the Navigation[31] pane.
2. Now, select a Stack Type[136] from the *Stack* node.The Stack of the selected Stack Type will now be displayed in Stack .
3. Select the Stack from the List View pane, to view its event logs. The Stack Details pane will now be displayed.
4. By default the *Information* panel will be displayed on the left side of the *Stack Details* pane. Click the *Event Log* tab on the left bar of the *Stack Details* pane. The *Event Log* panel will now be displayed and all the logs of the selected Stack will be displayed in the *Event list* pane.
5. Use the first drop down i.e. *Date & Time of Occurrence* of the event, to filter out events based on the date and time of the events.
   - The drop down has the following options

All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
Last 12 hours:	Select this option to view all the events of the last 12 hours.
Today:	Select this option to view all the events of the current day.
Yesterday	Select this option to view all the events of the previous day.
Last 24 hours:	Select this option to view all the events of the last 24 hours.
This week:	Select this option to view all the events of the current week.
Last week:	Select this option to view all the events of the previous week.
Last 7 days:	Select this option to view all the events of the last 7 days.
This month:	Select this option to view all the events of the current month.
Last month:	Select this option to view all the events of the previous month.
Last 30 days:	Select this option to view all the events of the last 30 days.
Custom:	Select this option if you wish to provide a custom date range. Selecting this option will launch the Event Date Range Dialog.

6. Use the second drop down i.e. *Event Group*, to filter out events based on the group it belongs to.
   - The following Event Groups are available

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All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
View Events:	Select this option to view all the events belonging to the View Event Group.
Add Events:	Select this option to view all the events belonging to the Add Event Group.
Modify Events:	Select this option to view all the events belonging to the Modify Event Group.
Other Events:	Select this option to view all the events belonging to the Other Event Group.

7. Use the third drop down i.e. *Event Result*, to filter out events based based on the outcome (result) of the event.
   - The possible event results are

All Results:	Select this option to view all the results (events will still be filtered by any other criteria if specified).
Success:	Select this option to view all the events which were completed successfully.
Failure:	Select this option to view all the events which could not be completed successfully.
Permission Denied:	Select this option to view all the events for which permission was denied to the user.

8. Event logs will now be displayed in the Event list pane, based on the filters that you have selected.
   - The Event list pane has the following options

Event Name:	Displays the name of the event
Event Date:	Displays the date and time on which the event occurred.
Result:	Displays the outcome(result) of the event, i.e. Success, Failure or Permission Denied
User Name:	Displays the name of the user who performed the event.
Comments:	Displays remarks or extra information (if any) regarding that event.

Notes:

- You can click any column header of the event list to sort the event list in the ascending or descending order of values in that column.
- Use the *More Actions* button for more options. The following options will be displayed...

Print Data	Click this option to print the data that is displayed in the Event list
Export Data	Click this option to export the data that is displayed in the Event list

Related Topics

View Event Log of the selected Document 352

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23 Globodox Security

Topics Covered

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23.1 Security Basics

Users

Globodox lets you create as many users as you want*. For each user you must provide at least a user name, an email id, a group and a role. The user name is used for logging in to Globodox 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).

Providing an email id is mandatory because the email id is required for certain current (and future) Globodox features to work correctly. This includes features such as workflow and messaging. If you do not intend to use these features, you can provide a dummy email id.

Every user must be a member of at least one group. By default any new user you create is made a member of the *Users* group. If you make a user a member of more than one group then you must mark one of these groups as the user's primary group.

Every user must also be assigned to at least one role. By default any new user you create is automatically assigned the *Writer (Owned & Shared Items)* 358 role.

*Though Globodox 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.

Roles

Roles let you group privileges and assign them to multiple users. This reusability makes managing security simpler. Roles also help in scenarios where an employee has been transferred or has left the organization. Simply assigning a new employee to the earlier employee's role ensures that much of the information accessible to the earlier employee immediately becomes accessible to the new employee.

A user can be assigned to multiple roles but must be assigned to at least one role.

To decide if a user is allowed to perform a particular action, Globodox checks if a privilege corresponding to that action has been granted to the user. However Privileges are not directly granted to users. Privileges are granted to Roles and users assigned to those Roles inherit the privileges from the Roles.

There are two ways to plan what kind of roles you will create in Globodox...

Action based Roles

You can use roles like blocks of privileges which you combine to arrive at the final set of privileges for a user. Certain system roles shipped by default in Globodox take this approach. These roles are...

Reader (All Items)

Users in this role can view all items (i.e. Documents & Stacks) in the database unless any of those items have been specifically restricted to them. No other privileges allowing modification or deletion of items are granted in this role.

Reader (Owned & Shared Items)

Users in this role can view all items (i.e. Documents & Stacks) in the database, that they own*

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as well as any items that have been shared to them. No other privileges allowing modification or deletion of items are granted in this role.

Writer (All Items)
Users in this role can add/modify/delete all items (i.e. Documents & Stacks) in the database unless any of those items have been specifically restricted to them.

Writer (Owned & Shared Items)
User in this role can view, add, modify or delete items which are owned by them and items that have been assigned to them.

Note:
A user becomes owner of an item (i.e. Document or Stack), when the user creates that item or when an item is assigned to the user.

Designation based Roles

You can use roles as equivalents to designations/job profiles in your organization. So you could have a *Sales Manager* role and *Sales Executive* role with each role having appropriate privileges. For e.g. users in the *Sales Executive* role can be allowed to view documents but not modify them whereas users in the *Sales Manager* role can be allowed to view and modify documents.

Often an employee may perform multiple roles in a company. For example the sales manager might also be looking after marketing. Since Globodox allows multiple roles to be assigned to a user, such situations can be easily handled.

Privileges

To decide if a user is allowed to perform a particular action, Globodox combines the privileges of the various roles assigned to the user. Globodox then checks if a privilege corresponding to that action has been granted to the user.

Core Privileges

Each type of item in the database (e.g. documents, folders etc...) has it's own list of privileges (known as the Core Privileges of that item) which you can grant to a role (for example documents have privileges such as *View*, *Modify*, *Delete*).

Core Privileges are available for *Documents*, *Folders*, *Annotations*, *Stamps*, *Saved Queries*, *Fields* and the *DB List*. Core Privileges are also available for all the *Stack Types* that you have created in all your DBs.

Privilege Access Level

When you grant a privilege for a user you must first decide the access level at which you are granting the privilege. For example if you are granting the *Modify* privilege to a *Role*, you need to decide if you want the users in that role to be able to modify **all** the documents in the DB or only modify documents that have been **shared** to them.

The following privilege access levels are available for any core privilege...

Full	e.g. If a role is granted the *View* privilege at the *Full* level, then users in that role can view absolutely any document. Privilege granted at

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	this level will override any restrictions placed by any other user on the document. For e.g. even if the owner of the document specifically restricts the user from viewing a document, the user will still be able to view the document.
Full (Restricted)	e.g. If a role is granted the *View* privilege at the *Full (Restricted)* level, then users in that role can modify view any document unless some other user (such as the owner of a document) has specifically restricted them from viewing the document.
Group & Subgroup Owned	e.g. If a role is granted the *View* privilege at the *Group & Subgroup Owned* level, then users in that role can view documents owned by their **primary** group, documents owned by them, documents owned by users in their group, documents owned by their subgroups and documents shared to them. Privilege granted at this level will override any restrictions placed by any other user on the document. For e.g. even if the owner of the document specifically restricts the user from viewing a document, the user will still be able to view the document.
Group & Subgroup Owned (Restricted)	e.g. If a role is granted the *View* privilege at the *Group & Subgroup Owned (Restricted)* level, then users in that role can view any document owned by their **primary** group, documents owned by them, documents owned by users in their group, documents owned by their subgroups and documents shared to them. However, if some other user (such as the owner of a document) has specifically restricted them from viewing the document, they will not be able to view it.
Group Owned	e.g. If a role is granted the *View* privilege at the *Group Owned* level, then users in that role can view documents owned by their **primary** group, documents owned by them and documents shared to them. Privilege granted at this level will override any restrictions placed by any other user on the document. For e.g. even if the owner of the document specifically restricts the user from viewing a document, the user will still be able to view the document.
Group Owned (Restricted)	e.g. If a role is granted the *View* privilege at the *Group Owned (Restrictable)* level, then users in that role can view any document owned by their **primary** group, documents owned by them and documents shared to them. However, if some other user (such as the owner of a document) has specifically restricted them from viewing the document, they will not be able to view it.
Owned	e.g. If a role is granted the *View* privilege at the *Owned* level, then users in that role can view any document that they own and any document shared to them. Privilege granted at this level will override any restrictions placed by any other user on the document. For e.g. even if some other user (such as the admin) specifically restricts the user from viewing a document that is owned by the user, the user will still be able to view the document.
Owned (Restricted)	e.g. If a role is granted the *View* privilege at the *Owned (Restrictable)* level, then users in that role can view any document that they own and any document shared to them. However if some other user (such as the admin) specifically restricts them from viewing the document, they will not be able to view it.
Shared	e.g. If a role is granted the *View* privilege at the *Shared* level, then users in that role can only view documents that have been shared to them. However if some other user simultaneously restricts them from

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	viewing the same document, they will not be able to view it.
None	e.g. If a role is granted the *View* privilege at the *None* level, then users in that role cannot view any document even if the document is owned by them or the document has been shared or assigned to them.

A role can of course have different levels of access for each privilege. For example a role can be allowed to view all documents but allowed to modify only group owned document and allowed to delete only owned documents.

Other Privileges

The privileges listed in the *Other Privileges* list also control what actions a user is allowed to perform. However these privileges do not have access levels. These privileges control actions such adding a tag, disconnecting a user, viewing a event log etc..

Groups

Each user must be a member of at least one group. Users can be members of multiple groups but only one group can be set as the user's **Primary Group**.

When any user adds an item (i.e. Document or Stack), the user becomes the owner of that item. At the same time, the user's primary group becomes the owning group of that item. Because of this any users belonging to the same group can automatically get access to this item if their access level for any privilege is set to *Group Owned* or higher.

You can think of the Primary Group as the department to which the user belongs in the organization. Apart from the primary groups users can belong to other groups as well. These groups can be thought of as other departments or temporary teams that the user is also a part of.

Users working together on a project can be made members of a group. Since documents can be shared with individual users or entire groups, this makes it easy to quickly share documents with the entire project team. Yet, to maintain security, access to documents is based on hierarchical security groups 383.

Notes:

- You cannot delete groups but you can deactivate them. However you cannot deactivate a group if it has been set as a users' primary group.
- When a user is assigned an item (i.e. when a user is made owner of an item), then the user's primary group is made the owning group of that item.
- A user can be a member of multiple groups
- Sharing to a group instead of a user is possible
- A group can also be used in security labels

Sharing

Globodox allows you to share individual documents, stacks, folders etc.. to specific users or groups. Sharing is required in cases where the normal Role, User and Group mechanism would not do the job. For e.g. you could be using the Role, User and Group mechanism to ensure that each user can only view documents that they own. Now if you wanted a specific document to be viewable by all of these users, you could achieve this by sharing the document with all the users.

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You can share items with a user/s or groups. While sharing you can also grant different privileges to each user or group.

Sharing is also required if you need to decide on a per document level which users can work with a document and what privileges they will have.

Security Label

Using Security Labels is very similar to sharing. If you find yourself repeatedly sharing to the same set of users or groups you can use security labels instead. Security labels let you save the list of users and groups that you frequently share items with. Along with each user and group you can also save the privileges granted to them. When you save security label, you must provide a name for it.

Now every time you wanted to share an item to the same set of users or groups you can simply apply the saved security label to that item. This eliminates the need to select users/groups and grant permissions every time you share an item. In other words security labels let you reuse your share settings.

Security Labels are preferable to sharing. Technically they offer a higher performance. Also any changes you make to a security label are immediately propagated to all the items which use that security label. For example if you add a new user to a security label and grant the *View* privilege to the user, all existing items to which the security label was applied would become immediately visible to the new user.

If you wanted to stop sharing an item you can simply remove the security label from that item. If you modify the security label to remove some users/groups from it, then those users and groups will immediately lose access to all items with that security applied (unless these users/groups).

Only one security label can be applied to any item.

Security Labels can only be deactivated. They cannot be deleted.

Security Label Special Groups

Normally Security Labels contain a list of users and/or groups as well as the privileges granted to each user or group. Security labels can also contain Special Groups. Currently *Owner*, *Owning Group* and *Others* are the three special groups available. Special Groups are context sensitive groups and their membership is decided when the security label is evaluated at run time to figure out if the user has access to an item.

Owner Special Group

You can add the *Owner* special group to a security label and grant it the delete privilege. Now when the security label is applied, whichever user is set as the owner of the document/stack/folder will be allowed to delete the document/stack/folder, even if that user's role has not been granted the *Delete Document/Stack/Folder*.

Owning *Group* Special Group

You can add the *Owning Group* special group to a security label and grant it the delete privilege. Now when the security label is applied to a document/stack/folder, any user belonging to that document's/stack/folder owning group will be allowed to delete the document/stack/folder, even if that user's role has not been granted the *Delete Document/Stack/Folder* privilege.

Others Special Group

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Sometimes you might want to grant privileges to an item to all the users in the system. In this case you can add the *Others* special group to the security label and grant it the required privileges.

Suppose you add the *Others* special group to a security label and grant it the View privilege. Now when the security label is applied to a document/stack/folder, any user of the system will be allowed to modify the document/stack/folder, even if that user's role has not been granted the *Modify Document/Stack/Folder* privilege.

Restrict

The *Restrict* feature lets you block a user's access to any item. You can restrict an item from any number of users. The owner of an item or any user who has *Restrict* privileges on that item, can restrict that item from other users.

You can only restrict users. You cannot restrict entire groups.

Restrict takes precedence over a *Share*. For example, a user has been granted privileges over a document via a security label. The same user has also been restricted. In this case the user will be denied access to the document.

Restrict also takes precedence over Role Privileges granted at the Full (Restrictable), Group Owned (Restrictable), Owned (Restrictable) and Shared access levels. Restrict does not take precedence over Role Privileges granted at the Full, Group Owned and Owned access levels.

For example, if the user's role has been granted the *View* privilege for Documents at the Full access level, then the user will be allowed to see any document, even if it has been restricted. On the other hand, if the user's role has been granted the View privilege for Documents at the Full (Restrictable) access level, then the user can view all documents except for the documents that have been restricted.

Restrict specific user actions

Globodox not only lets you restrict a Role from performing one or more actions on all documents, but also to restrict the user from performing those actions on specific documents.

For example, you can decide that a user with the Role set as *Assistant* cannot delete any document. But you can also let the user view and modify a specific document, but not delete it. So even if the user has been assigned a Role that has the privilege to delete all the documents, they can still be restricted from deleting a particular document if the need be.

Owner

A user becomes the owner of an item (for e.g. Document or Stacks) 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.

Owning Group

When a user becomes the owner of an item (for e.g. Document or Stack) the user's primary group becomes the owning group of that item. Because of this any users belonging to the same group as an item's owning group, can automatically get access to the item if their access level for any privilege of that item is set to *Group Owned* or higher.

You can use this mechanism in situations where all users of a department need some level of access to all documents owned by other users of that department.

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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. Globodox 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 Globodox 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 Globodox 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 Globodox

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 Globodox on Windows startup.

Redact Permission

When annotating a scanned document (or any other image file) you can redact (hide) parts of the document by drawing opaque blocks over those parts. In this case, you may still want to allow certain users to be able to remove the opaque blocks and view the hidden content underneath. Globodox lets you do this, by simply selecting the list of users who are allowed to view the hidden parts.

23.2 Active Directory Integration

What is an Active Directory?
An Active Directory is a database that stores information about items on a network, such as user names, groups, passwords etc. Its purpose is to enable specific users and network administrators to have a hierarchical view of information stored in the database from a single

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location.

Integration with Globodox

Active Directory Integration helps you quickly import Windows users as Globodox users. That means that you do not need to separately create user names and passwords in Globodox. Active Directory Integration thus makes managing multiple users much simpler.

Once users have been imported, the superadmin can assign role based permissions in Globodox to the imported users.

When these users login into Windows and start Globodox, Globodox will no more prompt them for their username and password; Globodox will simply use their Windows credentials to log them in. So if a user is logged onto Windows as Mike then when the user starts Globodox, he will be automatically logged into Globodox as Mike.

Notes:

- Active Directory Users can only be imported using the Active Directory Integration module.
- Non Active Directory users will not be able to login to Globodox once the Active Directory Authentication mode is enabled.
- At least one Active Directory user must be assigned a Administrator role before switching to Active Directory Authentication mode.
- **Before you can proceed with the integration, make sure that the Active Directory Integration module is installed. If not, click here to download it.**

Related Topics

How to integrate Windows Active Directory with Globodox 364

23.2.1 How to Integrate Windows Active Directory with Globodox

The steps given below show you how you can integrate Windows Active Directory with Globodox. Once this is done, user will be able to access Globodox without being asked to enter their login details.

How to integrate Windows Active Directory with Globodox

Note:
Before you can proceed with the integration, make sure that the Active Directory Integration module is installed. If not, click here to download it.

1. Click the *Start* button on your computer screen, and go to *Programs*.
2. In *Globodox Desktop*, click Active Directory Integration Module. This opens up a new window with a *Login* dialog box.
3. Enter your superadmin username and password in the *Login* dialog box and click *OK*.
4. *Click Add User*. This opens a dialog box called *Globodox: User Import Wizard*.
5. Click *Next*. This displays the *Select Role* screen.

Note:
In order to change the mode from Native to Active Directory, you will need to assign the Superadmin Role to at least one imported AD user.

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6. Select the Globodox security role for which you want to add a user. Click *Next*. This displays the *Select License Type* screen.
7. On this screen, select the type of license you want to grant the user. Click *Next* again. This displays the *Select Primary Group* screen.
8. From the drop-down, select the Globodox group for which you want to add the user. Click *Next*. This displays the *Select Domain* screen.
9. Select the domain for which you want to import the user. Click *Next* once more. This displays the *Select Active Directory Users* screen.
10. Select the Active Directory users you want to import into Globodox. Click *Next*. This displays the *Status* screen.
11. This screen shows you the status of the Active Directory users imported to Globodox. Click *Close* to close the dialog box.
12. The newly added user's details can now be seen in the Active Directory Integration Module window.
13. In the new window's top toolbar, click the *Authentication: Native* button and from the drop-down options, select *Active Directory*. The button changes to *Authentication: Active Directory*.

Note:
The new user will now be able to access Globodox without having to log-in to Globodox separately, as their Windows login credentials will be used to log them in.

Related Topics

Active Directory Integration 363

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23.3 Roles

Topics Covered

1.1 Learn about Roles 367
1.2 Create a New Role 367
1.3 Modify a System Role 368
1.4 Create a New Role based on an Existing Role 369
1.5 Delete a Role 369

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23.3.1 Learn about Roles

Roles let you group privileges and assign them to multiple users. This reusability makes managing security simpler. Roles also help in scenarios where an employee has been transferred or has left the organization. Simply assigning a new employee to the earlier employee's role ensures that much of the information accessible to the earlier employee immediately becomes accessible to the new employee.

A user can be assigned to multiple roles but must be assigned to at least one role.

To decide if a user is allowed to perform a particular action, Globodox checks if a privilege corresponding to that action has been granted to the user. However Privileges are not directly granted to users. Privileges are granted to Roles and users assigned to those Roles inherit the privileges from the Roles.

By default the following built-in roles are available...

SuperAdmin: This is the most powerful role in Globodox and cannot be deleted. The SuperAdmin role is provided with all privileges by default. In addition the Superadmin is also automatically allowed all permissions for all Globodox DBs, document types, tags and documents that are created by any user.

Admin: Users in this role can perform admin tasks such as creating, modifying or deleting stack types, document types etc.

Writer (Owned &Shared Items): Users in this role can view, add, modify or delete items which are owned by them and items that have been assigned to them. By default this role is assigned to a newly created user.

Writer (All Items): Users in this role can view, add, modify or delete all items except for items that they have been restricted from viewing.

Reader (All Items): Users in this role can view all items except for items that they have been restricted from viewing.

Reader (Owned & shared Items): Users in this role can only view items which are owned by them and items that have been assigned to them.

Related Topics
Create a New Role 367
Delete a Role 369

23.3.2 Create a New Role

You can create a role by clicking the *New* drop-down and selecting the *Role* option.

To Create a Role

1. In Globodox, select *Settings* > *System Settings* > *Roles* in the Navigation 34 pane. The default *Roles* will be displayed in the right pane i.e. *Roles* list.
2. Now, click the *New* button on the *Ribbon* bar to create a new role. The *New Role* window will now be launched.
3. By default the *Information* tab will be displayed. Enter a name for the role in the *Role Name* box.
4. Enter a short description about the role in the *Description* box.
5. Click the *Core Privileges* tab to provide privileges 385 for the Role. The *Core Privileges*

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pane will now be displayed.
6. Select an entity from the *Choose Entity* drop down to provide the privilege. For e.g. If you want to provide privileges for documents, you will need to select the *Document* option from the drop down.
7. All the privilege related to the selected entity will now be displayed in the pane. Provide the appropriate privilege for the role.
8. Once you have provided the *Core Privileges* then, click the *Other Privileges* tab. The *Other Privileges* pane will now be displayed.
9. Provide the appropriate privilege for the role.
10. Click the *Save and Close* button to create the role and close the window. The role will now be displayed in the *Roles* list.

Notes:

- You can click the *Save and New* button to save a new Role and open the *New Role* window to create a new Role.
- You can assign a Role to a user, for more info see, Assign Role to a User 373

Related Topics
Learn about Roles 367
Delete a Role 369

23.3.3 Modify a System Role

You can modify a default system role for e.g. the *Admin* role or *Writer (All Items)* role and save it as a new role.

To Modify a system Role

1. In Globodox, select *Settings* > *System Settings* > *Roles* in the Navigation 34 pane. The default *Roles* will be displayed in the right pane i.e. *Roles* list.
2. Double click a default role to open it in its window.
3. Modify the privileges as per your requirements.
4. Enter a new name for the modified role in the *Role Name* box of the *Information* tab.
5. Click the *Save and Close* button to create the role and close the window. The role will now be displayed in the *Roles* list.

Notes:

- You can click the *Save and New* button to save a new Role and open the *New Role* window to create a new Role.
- You can assign a Role to a user, for more info see, Assign Role to a User 373

Related Topics
Learn about Roles 367
Delete a Role 369

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23.3.4 Create a New Role-based on an Existing Role

You can clone/duplicate an existing role for e.g. the *Admin* role or *Writer (All Items)* role and save it as a new role.

To Create a new Role based on an existing Role

1. In Globodox, select *Settings* > *System Settings* > *Roles* in the Navigation 34 pane. The existing *Roles* will be displayed in the right pane i.e. *Roles* list.
2. Select the Role based on which you want to create a new role.
3. Now, click the *Clone Role* button on the Ribbon bar to duplicate this Role. You can also right click the role and select the *Clone role* option to clone it. The *Clone Role* window will now be launched.
4. Enter a name for the cloned role in the *Enter a new name for the cloned role* box.
5. Enter a short description about the clone in the *Enter a description for the cloned role* box.
6. Click the *OK* button to create the new role. The role will now be displayed in the *Roles* list.

Notes:

- You can assign this Role to a user, for more info see, Assign Role to a User 373

Related Topics
Learn about Roles 367
Delete a Role 369

23.3.5 Delete a Role

You can right click a role in the *Roles* list and select the *Delete* option to delete it.

To Delete a Role

1. In Globodox, select *Settings* > *System Settings* > *Roles* in the Navigation 31 pane.
2. Select a role from the right pane i.e. the *Roles* list and click the *Delete* button on the *Ribbon* bar to delete it.
3. You will now get a confirmation message. Click *Yes* to delete the role.

Notes:

- If you delete a role, the users assigned to that role will not be deleted.

Related Topics
Create a New Role 367
Assign Role to a User 373

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23.4 Users

Topics Covered

2.1 Learn about Users 371
2.2 Create a User Account 371
2.3 Make User a Member of a Group 373
2.4 Assign Role to a User 373
2.5 Lock a User Account 374
2.6 Deactivate a User Account 374
2.7 Disconnect an Active User 375
2.8 Allow Users to Only View Documents Owned by Them 376
2.9 Restrict User to Access a Document 377
2.10 Grant Permission to User to View a Document 378

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23.4.1 Learn about Users

You must create a user for every person that you want to be able to log on to Globodox.

By default the following users are automatically created…

1. **SuperAdmin** - This is the most powerful user in Globodox and cannot be deleted. The *SuperAdmin* is not a member of any group. *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 Globodox DBs, 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 Globodox.
2. **Administrator** - The *Administrator* is also as powerful as the *SuperAdmin* but the permissions for the *Administrator* can be changed. The *Administrator* is also a member of the *Administrators* group. The *Administrator* user can be deleted and unlike the *SuperAdmin* the *Administrator* is not automatically allowed all permissions for all Globodox DBs, document types, tags and documents that are created.

Globodox lets you create as many users as you want*. For each user you must provide at least a user name, an email id, a group and a role. The user name is used for logging in to Globodox 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).

Providing an email id is mandatory because the email id is required for certain current (and future) Globodox features to work correctly. This includes features such as workflow and messaging. If you do not intend to use these features, you can provide a dummy email id.

Every user must be a member of at least one group. By default any new user you create is made a member of the *Users* group. If you make a user a member of more than one group then you must mark one of these groups as the user's primary group.

Every user must also be assigned to at least one role. By default any new user you create is automatically assigned the Writer (Owned & Shared Items) 367 role.

*Though Globodox 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.

Related Topics
Create a User Account 371
Make User a member of a Group 373

23.4.2 Create a User Account

You must create a user for every person that needs to log on to Globodox. You can create a user by clicking the *New* drop-down and selecting the *User* option.

To Create a User Account

1. In Globodox, select *Settings* > *System Settings* > *Users* in the Navigation 34 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.

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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 *Password never expires* option if you do not want the user's password to expire.

   Note:
   If this option is not checked the user's password will expire after the number of days specified in the *Maximum password age* password policy. Beginning from seven days before the expiry of the password, the user will be prompted to change his/her password every time the user logs on. The user must change his/her password before it expires. After the password expires the user will not be allowed to log on before first changing his/her password.
   If you also check the *User cannot change password* option then the user will not be prompted to change the password before it expires. In this case, beginning from seven days before the expiry of the password, every time the user logs on he/she will simply be informed that his/her password is about to expire. After the password expires the user will not be allowed to log in. To obtain a new password the user must contact the administrator.

7. Check the *Account is disabled* 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.
8. Check the *View-only Access* option to force the user to always login using a view-only access license. This option controls the type of license that Globodox uses by default when this user logs in. This option is only relevant when you own a mix of full access and view-only licenses.
   Logging in using a view-only access license does not mean that the user has view-only access to all resources. Permissions in place at all security levels (i.e. System, Globodox DB, Document and Fields) still apply. However actions which require a change to a Globodox DB will not be allowed when a user has logged in with view-only access even when the user has the permissions to make those changes.
9. Enter the users general information in the *General Information* section and click the *Save* button. The *Groups* tab and the *Roles* tab will now be enabled.
5. Click the *Groups* tab to assign a group to the user. By default the user is assigned to the *Users* group.
6. Click the *Roles* tab to assign a role to the user 373. By default the Write (Owned & Shared Items) role 367 is assigned to a newly created user. This means that the user will only be able to view and modify the documents that he owns.
7. 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.

Notes:

- 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.
- You can make a user a member of a group, for more info see, Make User a member of a Group 373
- Please note that you cannot delete a user, however you can disable that user account.

Related Topics

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Disable a User Account 374
Assign Role to a User 373
Allow users to view and modify documents owned by them 376

23.4.3 Make User a Member of a Group

You can add users to a Group 380 from the *Groups* tab of the *Users* window.

To Make User a Member of a Group

1. In Globodox, select *Settings* > *System Settings* > *Users* in the Navigation 34 pane.
2. Select a user from the right pane i.e. the *Users* list and click the *Open* button on the *Ribbon* bar. You can also double click the selected user to open it.
3. Click the *Groups* tab and click the *Join Group* button to join a group. This will bring up the *Look Up* window.
4. Select the *Group* option from the *Look for* drop-down and enter the name of the group in the *Look for* box.
5. Now, click the *Find* button to find the group.
6. The groups that contains the name that you have entered in the *Look for* box will be displayed in the *Available Data* list.
7. Select the group in the *Available Data* list. Use this >> button to add the selected group to the *Selected Data* list and use this << button to remove the group from the *Selected Data* list.
8. Click the *OK* button to join the group.
9. Select the group and click the *Set Primary* button to make it the users main group.
10. Click the *Save* button to save the changes.

Notes:

- A user can join more than one group 380.
- To remove a user from a group, select the group and click the *Remove* from *Group* button.

Related Topics
Assign Role to a User 373
Create a Group 381

23.4.4 Assign Role to a User

You can assign Roles 366 to a user by using the *Roles* tab of the *Users* window.

To Assign a Role to a User

1. In Globodox, select *Settings* > *System Settings* > *Users* in the Navigation 34 pane.
2. Select a user from the right pane i.e. the *Users* list and click the *Open* button on the *Ribbon* bar. You can also double click the selected user to open it.
3. Click the *Roles* tab and click the *Assign Roles* button. This will bring up the *Look Up* window.
4. Select the *Roles* option from the *Look for* drop-down and enter the the name of the role in the *Look for* box.
5. Now, click the *Find* button to find the role. The roles that contains the name that you have

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entered in the *Look for* box will be displayed in the *Available Data* list.
6. Select the role in the *Available Data* list. Use this >> button to add the selected role to the *Selected Data* list and use this << button to remove the role from the *Selected Data* list.
7. Click the *OK* button to assign the role.
8. Click the *Save* button to save the changes.

Notes:

- A user can be assigned more than one role.
- To unassign roles, select the roles and click the *Unassign Roles* button.

Related Topics

Create a New Role 367
Allow users to view and modify documents owned by them 376
Restrict User to Access a document 377
Grant Permission to a User to view a document 378

23.4.5 Lock a User Account

You temporarily disable a user account by locking it.

To Lock a User Account

1. In Globodox, select *Settings* > *System Settings* > *Users* in the Navigation 34 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 Globodox.

Notes:

- To unlock a locked user account click the *Unlock* button on the Users tab.

Related Topics

Create a User Account 371
Deactivate a User Account 374
Disconnect an Active User 375

23.4.6 Deactivate a User Account

You cannot delete a user account in Globodox, you can only deactivate that user account.

To Deactivate a User Account

1. In Globodox, select *Settings* > *System Settings* > *Users* in the Navigation 31 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 Globodox, select *Settings* > *System Settings* > *Users* in the Navigation 31 pane.

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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.

Notes:

- 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 371
Lock a user account 374
Disconnect an Active User 375

23.4.7 Disconnect an Active User

The *Connected Users* node displays a list of all the users/applications currently logged in to Globodox. The *Connected Users* node can also be used to forcefully log off any logged in user.

To Disconnect an Active User

1. In Globodox, select *Settings* > *System Settings* > *Connected Users* in the Navigation 31 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

1. Click Start > All Programs > Globodox Desktop > Globodox Connection Manager. The Globodox 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.

Notes:

- You can click the *Refresh* button on the *Ribbon* bar to refresh the contents of the connection list.
- Some times Globodox displays a message saying that the *maximum number of users already logged into Globodox*. However nobody has logged into Globodox. This usually happens when Globodox is not shut down properly and the logging off process is not completed.

Related Topics
Create a User Account 371
Disable a User Account 374

23.4.8 Set Password Policies for Users

You can set policies for password and thus control some aspects of security.

Set Maximum Password age

1. Select *Settings* > *Password Policies* in the Navigation 34 pane.

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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

1. Select *Settings* > *Password Policies* in the Navigation 34 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

1. Select *Settings* > *Password Policies* in the Navigation 34 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 Globodox 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.

Notes:

- You can click the *Refresh* button on the *Ribbon* bar to refresh the contents of the connection list.

Related Topics
Create a User Account 371
Disable a User Account 374

23.4.9 Allow a User to Only View Documents

You can provide privileges such that a user can only modify the document or data owned by them.

To Allow users to only View Documents

1. In Globodox, select *Settings* > *System Settings* > *Users* node in the Navigation 34 pane. All the existing users will now be displayed in the *Users* list.
2. Select a user from the list and double click it to open it in the *Users* window.
3. Click the *Roles* tab and click the *Assign Roles* button. This will bring up the *Look Up* window.
4. Select the *Roles* option from the *Look for* drop-down and enter *Reader* in the *Look for* box.
5. Now, click on the *Find* button to find the role. The result will be displayed in the *Available*

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Data list.
6. Select the *Reader (All Items)* role in the *Available Data* list. Use this >> button to add the selected role to the *Selected Data* list and use this << button to remove the role from the *Selected Data* list.
7. Click the *OK* button to assign the role.
8. Click the *Save* button to save the changes.

Notes:

- A user can be assigned more than one role.
- To unassign roles, select the roles and click the *Unassign Roles* button.

Related Topics

Restrict User to Access a document 377
Grant Permission to a User to view a document 378

23.4.10 Restrict User to Access a Document

You can restrict users from accessing a Particular document or a Stack by using the *Restrict* feature.

To Restrict a user from accessing a particular Document or Stack

1. In Globodox, select the document or Stack to restrict, from the List View 31 pane.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   The Look Up window will now be launched.
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user that you want to add in the *Look for* box.
   b) Now, click on the *Find* button to find the user. Users with the same first or last name that you have entered in the *Look for* box will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list.
   d) Click the *OK* button to add the selected users to the *Restrict* list.
4. Click the *OK* button to restrict the document or Stack from the selected user(s).

Notes:

- A user can be assigned more than one role.
- To unassign roles, select the roles and click the *Unassign Roles* button.

Related Topics

Allow users to view and modify documents owned by them 376
Grant Permission to a User to view a document 378

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23.4.11 Grant Permission to a User to View a Document

You can allow users that do not have privilege to access a document or Stack either by Sharing 188 that document or by applying Security Label 398 to that document.

To Grant Permission to a User to View or Modify a Document or Stack by Sharing

1. Select the document or Stack 136 that you want another user(s) to view or modify, from the List View 31 pane.
2. Click the *Share* button on the *Ribbon* bar. The *Share* window will be launched.
3. Click the *Add* button to add the users to the *Share with* list.
   The Look Up window will be launched.
   a) Select the *Users* option from the *Look for* drop-down and enter the either the first or last name of the user that you want to add in the *Look for* box.
   b) Now, click on the *Find* button to find the user. Users with the same first or last name that you have entered in the *Look for* box will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list.
   d) Click the *OK* button to add the selected users to the *Share with* list.
4. If you want the users to only view and not modify your documents or Stack then, click the *OK* button to begin sharing.

   Note:
   The users that you have shared the documents with, will have the *View* privilege by default. You cannot deny these users the *View* privilege.

5. If you want the users to modify your document or Stack then, click the *Advanced* button and provide them Privileges 385 to modify the document.
6. If you want all the users to have the same privilege then, check the *Apply permissions to all users* option.

   Note:
   You can also provide different privileges for each user. For e.g Lets say you want user *'john'* to only view your documents, user *'mary'* to modify but not delete your documents and user *'jane'* can modify and also delete your document. You can do this by selecting each user and providing appropriate privileges to them.

7. Select user(s) from the *Share with* list and provide them with appropriate privileges.
8. Click the *OK* button to begin sharing the document. The document or Stack will now be available to the user(s) with whom you have shared.

To Grant Permission to a User to View or Modify a Document or Stack by using Security Label

1. In Globodox, select *Settings* > *System Settings* > *Security Labels* in the Navigation 34 pane. The already existing *Security Labels* will be displayed in the right pane i.e. *Security Labels* list.

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2. Now, click the *New* button on the *Ribbon* bar to create a new Security Label. The *New Security Label* window will now be launched.
3. Enter a name for the label in the *Label Name* box.
4. Enter a short description about the Security Label in the *Description* box.
5. Click the *Add...* button to add users or groups to apply this *Security Label.*
   - The Look Up window will be launched
   a) From the *Look for* drop-down select the *Users* option if you want to add users or select the *Groups* option if you want to add groups to this *Security Label*.
   b) Enter either the first or last name of the user or the name of the group that you want to add, in the *Look for* box.
   c) Now, click the *Find* button to find the user. Users with the same first or last name or the Groups that contain the word that you have entered in the *Look for* box will be displayed in the *Available Data* list. For e.g. Lets say that you have selected users in the *Look for* drop down and you have had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   d) Select the user(s) or group in the *Available Data* list. If the user you are searching for does not exist in the list then, click the *New* button to create a new user. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list.
   e) Click the *OK* button to add the selected users to the *Apply To* list.
6. Use the *Privileges* pane to provide necessary Privileges 385 for this Security Label.
7. Click the *Save* button to create the *Security Label*.
8. Now, we will apply this Security Label to a document/Stack.
9. Select a document or Stack to which you want to apply a Security Label.
10. Click the *Share* drop-down arrow and select the *Set Security Label* option or right click the document and select *Share* > *Security* Label option. The *Set Security Label* window will now be launched.

11. Select a *Security Label* from the list.

    Note:
    If you have selected a document then be sure that you are applying a Security Label that is is created for a document and if you have selected a Stack then select a Security label created for a Non Document entity.

12. Click the *OK* button to apply the *Security Label*.

Notes:

- A user can be assigned more than one role.
- To unassign roles, select the roles and click the *Unassign Roles* button.

Related Topics

Allow users to view and modify documents owned by them 376
Restrict User to Access a document 377

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23.5 Groups

Topics Covered

3.1 Learn about Groups 381
3.2 Create a Group 381
3.3 Add Users as Members of a Group 382
3.4 Deactivate a Group 383
3.5 Hierarchical Security Groups 383

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23.5.1 Learn about Groups

A group is a collection of users. Groups can be used to quickly assign identical privileges to a set of users.

By default the following groups are automatically created…

Administrators - A user called Administrator is automatically created and made member of this group.
Users - New users are automatically added to this group. This group cannot be deleted.

Each user must be a member of at least one group. Users can be members of multiple groups but only one group can be set as the user's **Primary Group**.

When any user adds an item (i.e. Document or Stack), the user becomes the owner of that item. At the same time, the user's primary group becomes the owning group of that item. Because of this any users belonging to the same group can automatically get access to this item if their access level for any privilege is set to *Group Owned* or higher.

You can think of the Primary Group as the department to which the user belongs in the organization. Apart from the primary groups users can belong to other groups as well. These groups can be thought of as other departments or temporary teams that the user is also a part of.

Users working together on a project can be made members of a group. Since documents can be shared with individual users or entire groups, this makes it easy to quickly share documents with the entire project team. Yet, to maintain security, access to documents is based on hierarchical security groups 383.

Notes:

- You cannot delete groups but you can deactivate them. However you cannot deactivate a group if it has been set as a users' primary group.
- When a user is assigned an item (i.e. when a user is made owner of an item), then the user's primary group is made the owning group of that item.
- A user can be a member of multiple groups
- Sharing to a group instead of a user is possible
- A group can also be used in security labels

Related Topics
Create a group 381
Delete a Group 383

23.5.2 Create a Group

You can create a group by clicking the *New* drop-down and selecting the *Group* option.

To Create a Group

1. In Globodox, select *Settings* > *System Settings* > *Groups* in the *Navigation* pane. The default *Groups* will be displayed on the on the right pane i.e. the *Group* list.
2. Now, click the *New* button on the *Ribbon* bar to create a new Group. The *New Group* window will now be launched
3. Enter the name for the group in the *Group Name* box.
4. Enter a small description about the Group in the *Description* box.

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5. From the drop down, select the parent group name if you want the group to be a dub group. If not, leave it blank.
6. Click the *Users* tab to add users to the Group 382.
7. Click the *Sub groups* tab and add sub groups, if any, to the respective parent groups.
8. Click the *Save and Close* button to create the group and close the *Group* window. The group will now be displayed in the *Groups* list.

Notes:

- You can click the *Save and New* button to save a group and to open a new *Group* window to create a new group.

Related Topics

Add Users as members of a group 382
Delete a Group 383

23.5.3 Add Users as Members of a Group

You can add users as members of a Group 380 from the *Group Members* tab of the *Groups* window.

To Add Users as Members of a Group

1. In Globodox, select *Settings* > *System Settings* > *Groups* in the Navigation 34 pane.
2. Select a group from the right pane i.e. the *Group* List and click the *Open* button on the *Ribbon* bar. You can also double click the selected group to open it.
3. Click the *Group Members* tab and click the *Add Members* button to add users. This will bring up the *Look Up* window.
4. Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user that you want to add in the *Look for* box.
5. Now, click the *Find* button to find the user. Users with the same first or last name that you have entered in the *Look for* box will be displayed in the *Available Data* list. For e.g. Lets say you had entered '*john'* in the *Look for* box, then all users that contain '*john'* in their first or last name will be displayed in the *Available Data* list.
6. Select the user(s) in the *Available Data* list to add to the group. Use this >> button to add the selected user(s) from the *Available Data* list to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
7. Click the *OK* button to add the selected users.
8. Click the *Save* button to save the changes.

Notes:

- To remove a user from a group, select the user and click the *Remove Member* button.

Related Topics

Create a User Account 371
Delete a Group 383

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23.5.4 Deactivate a Group

You cannot delete a group in Globodox, you can only deactivate that group.

To Deactivate a Group

1. In Globodox, select *Settings* > *System Settings* > *Groups* in the *Navigation* pane.
2. Select a group from the right pane i.e. the *Group* List.
3. On the *Groups* tab click the *Deactivate* button to deactivate the group

To Re-activate a Group

1. In Globodox, select *Settings* > *System Settings* > *Groups* in the *Navigation* pane.
2. Select a group from the right pane i.e. the *Group* List.
3. On the *Groups* tab click the *Activate* button to re-activate the group

Notes:

- You will need to remove members from the group before deactivating the group.

Related Topics
Create a Group 371
Add Users as members of a group 382

23.5.5 Hierarchical Security Groups

Hierarchical Security Groups

Hierarchical Security Groups allow the creation of a group tree. This allows organizations to closely mimic their organization structure.

For example:
A company could have a different sales sub-division for each geography (e.g. North America, Europe, Asia etc.) with all the sales sub-divisions reporting to a single Global Sales division. While users in each sub-division would need access to only their documents, some users in the Global Sales division who would need access to documents of all the sub-division.

Hierarchical Security Groups make such a requirement simple to implement. You simply create a group called *Global Sales* plus groups for each sub-division. You then add the sub-division groups as sub-groups of the *Global Sales* group.

The *Group & Subgroup Owned* and *Groups & Subgroup Owned (Restricted)* security levels in Role Privileges can be used to allows specific users...

- Access to documents owned by users of their primary group, as well as
- Access to documents owned by users of the sub-groups of their primary group.

Notes:
Users belonging to primary groups at the same level of hierarchy cannot access each other's documents.

For example:
Consider an organization in which a Superadmin has created two groups of users - say Group 1 and Group 2 - under which each group has its own sub groups - say Group 3 and Group 4 as

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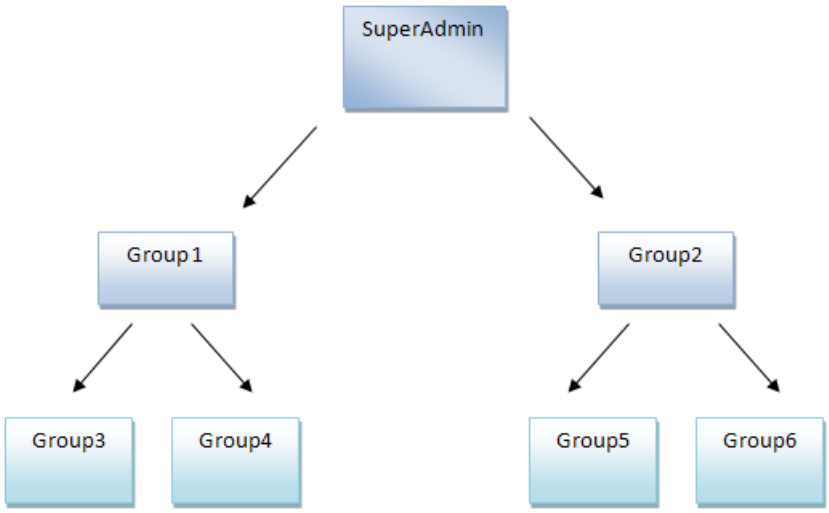
sub groups of Group 1; and Group 5 and Group 6 as sub groups of Group 2 respectively.



Let assume that all users in these groups are part of a Role that allows access at the *Group & Subgroup Owned* level

- In the scenario described above...
- The Superadmin will have access to all the documents of the organization.
- Users in Group 1 will now be able to access only Group 1's own documents and those of its sub groups (i.e. Group 3 and Group 4).
- Users in Group 2 will be able to access only Group 2's own documents and those of its sub groups (i.e. Group 5 and Group 6).
- The users in Group 3, Group 4, Group 5 and Group 6 will have access only to the documents owned by their own group.

Related Topics

Groups 380

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23.6 Privileges

Privileges control the ability of a user to perform a specific action. Privileges are granted to *Roles* and users are assigned to one or more *Roles*. Privileges cannot directly be granted to a user. A user will only be allowed to perform an action if any of the roles to which the user has been assigned has been granted the privilege to perform that action.

For more information about privileges, see Security Basics 358

Globodox divides privileges in two different lists called the Core Privileges and the Other Privileges.

Core Privileges: The Core Privilege lists all the entities to which you can apply privileges. The following entities are...

Document: You can control what a user can or cannot do with a document in Globodox.

Add	Add documents to Globodox
View	View documents in Globodox
Modify	Modify Documents in Globodox
Delete	Delete documents
Link	Link documents
Set Security Label	Set Security Label for a document
Assign	Assign documents to another user
Share	Share documents with other users
Restrict	Restrict user from viewing documents
Distribute	Restrict/Allow users from distributing document. For e.g. mailing a document, printing a document, faxing a document, select and copy text from a document etc.
Edit Metadata	Edit data field value of a document
Tag Document	Add Tags to documents
Annotate	Add annotations to a document
Set folder	Assign the document to a folder
Set Document Type	Set document Type for a document
Unlink	Break the link between documents
Initiate workflow	Route the document in a workflow

Edit Metadata	Edit data field value of a document

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Tag Document	Add Tags to documents
Annotate	Add annotations to a document
Set folder	Assign the document to a folder
Set Document Type	Set document Type for a document
Unlink	Break the link between documents
Route	Route the document in a workflow
Mark as Archived	Mark a document as Archived
Mark as Vital	Mark a document as Vital
Unmark as Vital	Unmark a document which is marked as Vital
Mark as Record	Mark a document as Record
Unmark as Record	Unmark a document which is marked as Record

Folder: You can control what a user can or cannot do with a folder in Globodox.

Add	Add folders in Globodox
View	View folders in Globodox
Modify	Modify folders in Globodox
Delete	Delete folders from Globodox
Link	Adding documents to a folder
Set Security Label	Set Security Label for a folder
Assign	Assign a folder to another user
Share	Share folder with other users
Restrict	Restrict other users from viewing the folder
Unlink	Remove a document the folder

Annotation: You can control what a user can or cannot do with annotations in Globodox.

Add	Add annotations to documents
View	View Annotations
Modify	Modify Annotations

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Delete	Delete Annotations
Set Security Label	Set Security Label on Annotations
Assign	Assign annotation to another user
Share	Share annotations with other users
Restrict	Restrict users to view annotation

Saved Query: You can control what a user can or cannot do with Saved Queries in Globodox.

Add	Save a query
View	View Saved query
Modify	Modify a Saved query
Delete	Delete a Saved query
SetLabel	Set Security Label on a Saved Query
Assign	Assign a saved query to another user
Share	Share a saved query with other user
Restrict	Restrict users from viewing a Saved Query

Stamp: You can control what a user can or cannot do with stamps in Globodox.

Add	Create a Stamp
View	View Stamps
Modify	Modify Stamps
Delete	Delete a Stamp
Set Security Label	Set Security Label for a Stamp
Assign	Assign Stamp to another user
Share	Share Stamp with other users
Restrict	Restrict users from viewing Stamps

AtributeMetadata: You can control what a user can or cannot do with data fields in Globodox.

Set Security Label	Set Security Label for a Data Field

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Assign	
Share	Share data field with other users
Restrict	Restrict users from viewing data fields

Database: You can control what a user can or cannot do with DB's, being displayed in DB List.

View	View DB List
Modify	Modify the DB List
Delete	Delete DB from the DB List
Set Security Label	Set Security Label to a DB in the DB List
Assign	Assign a DB to another user
Share	Share DB with other users
Restrict	Restrict users from viewing the DB
Add	Create a new Globodox DB

Draft: You can control what a user can or cannot do with a draft document in Globodox.

Add	Add draft documents to Globodox
View	View draft documents in Globodox
Modify	Modify draft documents in Globodox
Delete	Delete draft documents
Link	Link draft documents
Set Security Label	Set Security Label for a draft document
Assign	Assign draft documents to another user
Share	Share draft documents with other users
Restrict	Restrict user from viewing draft documents
Distribute	Restrict/Allow users from distributing draft document. For e.g. mailing a draft document, printing a draft document, faxing a draft document, select and copy text from a document etc.
Edit Metadata	Edit data field value of a draft document
Tag Document	Add Tags to draft documents

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Annotate	Add annotations to a draft document
Set folder	Assign the draft document to a folder
Set Document Type	Set document Type for a draft document
Unlink	Break the link between draft documents
Initiate workflow	Route the draft document in a workflow

Stack Types: You can control what a user can or cannot do with Stack Types in Globodox. All the Stack Types that have been created will be listed down. You will have to select each Stack Type and provide them with appropriate privileges.

Add	Add Stacks to the Stack Type
View	View Stacks
Modify	Modify a Stack
Delete	Delete a Stack form the Stack Type
Link	Link Stacks with documents or other stacks
Assign	Assign Stack to another user
Share	Share Stacks with other users
Restrict	Restrict users from viewing stacks
Set Security Label	Set a security label on the stack
Unlink	Unlink stack from documents or other stacks
Initiate Workflow	Route the stack in a workflow
Mark as Archived	Mark a stack as Archived
Mark as Vital	Mark a Stack as Vital
Unmark as Vital	Unmark a stack which is marked as Vital
Mark as Record	Mark a Stack as Record
Unmark as Record	Unmark a Stack which is marked as Record

Other Privileges: The Other Privileges list contains privileges that are of System Level. Using this level you can control user's access to Print, E-mail, Open DB etc.

You can only Allow or Deny privileges to the tasks that are listed here. Check a task from the list to Allow the user to perform it. Uncheck a task from the list to Deny the user to perform the task.

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Print	Print documents
Email	Email documents
Fax	Fax documents
Export Data	Export data from Globodox
Change Database Settings	Modify DB settings
Save Database as Template	*Upcoming Feature*
Backup Database	Backup a Globodox DB
Compact Database	Compact a DB
Manage File Stores	Manage File store, i.e. Create, Modify, delete file store
Restore Databases	Restore a backed-up DB
View Document Versions	View Document Versions
Delete Document Versions	Delete Document Versions
View Event Log	View Event Log
Delete Event Log	Remove logged events
Create Databases	Create a new DB
Open Databases	Open a DB
Manage Database Schema	Manage DB List, Modify or Delete DB
Manage Database Registration	Add DB to the DB List
Manage Security Principal	Manage Security in Globodox, i.e. Create/Modify/Delete Users, Roles, Groups, Security Label etc.
Add Tags	Add Tags to a Document
Modify Tags	Modify a Tag
Merge Tags	Merge one tag with another
Delete Tags	Delete a tag
Delete Notes	Delete document notes
Add Security Labels	Create a Security Label
Modify Security Labels	Modify a Security Label

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Delete Security Labels	Delete a Security Label
Cancel Checkout	Cancel Checkout
Override Lock	*Upcoming Feature*
Put document on hold	*Upcoming Feature*
Release document on hold	*Upcoming Feature*
Bulk Update	Batch update information for multiple documents or stacks
Bulk Delete	Delete multiple entity
Import Data	Import data to Globodox
Selective Encryption	Selectively encrypt or decrypt documents (as opposed to letting Globodox handle encryption for all documents.
Manage Audit Events	Select/unselect which events must be audited and recorded in the Event Log.
Manage Owned Workflows	View owned workflows in the workflow designer
Manage All Workflows	View all workflows in the workflow designer
Create Workflows	Design new workflows
Modify Owned Workflows	Modify any workflows owned by you
Modify All Workflows	Modify all workflows
Delete Owned Workflows	Delete any workflows owned by you
Delete All Workflows	Delete all workflows
Change Encryption Settings	Change settings used for document encryption
Change Policy Settings	Change the Security and Password policies
Monitor All Workflows	View the status of all workflows in the workflow monitor (you can even pause, restart or cancel a workflow)
Monitor Owned Workflows	View the status of all workflows you own, in the workflow monitor (you can even pause, restart or cancel a workflow)
Replace Document Version	Replace document from disk or by scanning

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Distribute Document without Annotation	Print document without annotation
Distribute Document without Watermark	Print document without watermark
Distribute Document without Redact	Print document without Redact
Allow users to add sub-folders to folders not owned by them	Allow users to add sub-folders to folders not owned by them
Reassign workflow tasks to another user (Web Client)	Assign the workflow tasks of one user to another user
Allow document actions during workflow	Disable certain document actions when a document is in workflow.
Restrict Manual Document Publishing	Only allow newly added documents (and documents in Draft Mode) to be published via an approval workflow.
Set or Remove Expiry Date on Documents or Stacks	Users with this privilege can only Set Expiry Date on documents or Stacks
Combine Edit Metadata and Modify Permissions	Users can edit meta data only if Modify permission is also given

Share: Using the share window you can select the users with whom you want to share the entity and also control what actions they can perform on the entity.

The following privileges are available from the Share window.

View	View documents
Modify	Modify documents
Delete	Delete documents
Link	Link documents
Unlink	Unlink documents
Assign	Assign document to another user
Share	Share documents with other users
Restrict	Restrict users from viewing the documents
Set Security Label	Set Security Label
Annotate	Annotate a document
Distribute	Restrict/Allow users from distributing an entity. For e.g. mailing a document, printing a document, faxing a document,select and copy text from a document etc.

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Edit Metadata	Edit the Data Field value of a document
Set Document Type	Set Document Type for a documents
Set Folder	Set a Folder for a document
Tag	Apply Tag to documents
Route/Initiate Workflow	Route this document in a workflow
Mark as Archived	Mark a document as Archived
Mark as Record	Mark a document as Record
Mark as Vital	Mark a document as Vital
Unmark as Record	Unmark a document marked as Record
Unmark as Vital	Unmark a document marked as Vital

Restrict: Using the restrict window you can select the users with whom you want to restrict the entity and also control what actions they can perform on the entity.

The following privileges are available from the Restrict window.

View	View documents
Modify	Modify documents
Delete	Delete documents
Link	Link documents
Unlink	Unlink documents
Assign	Assign document to another user
Share	Share documents with other users
Restrict	Restrict users from viewing the documents
Set Security Label	Set Security Label
Annotate	Annotate a document
Distribute	Restrict/Allow users from distributing an entity. For e.g. mailing a document, printing a document, faxing a document,select and copy text from a document etc.
Edit Metadata	Edit the Data Field value of a document
Set Document Type	Set Document Type for a documents

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Set Folder	Set a Folder for a document
Tag	Apply Tag to documents
Route/Initiate Workflow	Route this document in a workflow
Mark as Archived	Mark a document as Archived
Mark as Record	Mark a document as Record
Mark as Vital	Mark a document as Vital
Unmark as Record	Unmark a document marked as Record
Unmark as Vital	Unmark a document marked as Vital

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23.7 Security Label

Topics Covered

5.1 Learn about Security Label 396
5.2 Create a Security Label 397
5.3 Set a Security Label 398
5.4 Deactivate a Security Label 399

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23.7.1 Learn about Security Label

Security Label is like a key or a token which can be provided to users to perform a task that they are not authorized to do on the entity that you own.

When you Share an item with other users you also grant them privileges which decide what actions they can perform on the shared item. If you frequently apply the same Share settings to the same set of users, then we recommend you to use Security Labels. A Security Label let you save and re-use you frequently used share settings. Whenever you want to share an item all you need to do is select that item and apply the Security Label.

Security Label can be applied to a document and a non-document entity.

Note:
In the earlier version of Globodox (Version 5 onwards), when a Security Label was created, you had to specify whether the Label was for a document or a non-document entity. A Security Label that was created for a document could only be applied for a document and not for a non-document entity and vice versa. However this has been changed from version 5.2.0.7 onwards. Now, you don't have to create separate labels for a document or a non-document entity. The same label can be used for both.

The following Privileges are available for a Security Label...

View	View documents in Globodox
Modify	Modify Documents in Globodox
Delete	Delete documents
Link	Link documents
Assign	Assign documents to another user i.e. change the owner of the document
Share	Share documents with other users
Restrict	Restrict a user from viewing documents
Set Security Label	Set Security Label for a document
Annotate	Annotate a document
Distribute	Perform any action which would allow distribution of the documents e.g. Print, Fax, Email etc..
Edit Metadata	Edit data field value of a document
Set Document Type	Set document Type for a document
Set Folder	Set a folder for a document
Tag	Add Tags to documents
Initiate Workflow	
Mark as Archive	Mark a document as Archived

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Mark as Record	Mark a Document as Record
Mark as Vital	Mark a document as Vital
Unmark as Record	Unmark a document marked as Record
Unmark as Vital	Unmark a document marked as Vital

23.7.2 Create a Security Label

You can create a *Security Label* by using the *Security Labels* node in the *Settings* group.

Note:
In the earlier version of Globodox (Version 5 onwards), when a Security Label was created, you had to specify whether the Label was for a document or a non-document entity. A Security Label that was created for a document could only be applied for a document and not for a non-document entity and vice versa. However this has been changed from version 5.2.0.7 onwards. Now, you don't have to create separate labels for a document or a non-document entity. The same label can be used for both.

To Create a Security Label

1. In Globodox, select *Settings* > *System Settings* > *Security Labels* in the Navigation pane. The already existing *Security Labels* will be displayed in the right pane i.e. *Security Labels* list.
2. Now, click the *New* button on the *Ribbon* bar to create a new Security Label. The *New Security Label* window will now be launched.
3. Enter a name for the label in the *Label Name* box.
4. Enter a short description about the Security Label in the *Description* box.
5. Click the *Add...* button to add users or groups to apply this *Security Label.*
   - The Look Up window will be launched
   a) From the *Look for* drop-down select the *Users* option if you want to add users or select the *Groups* option if you want to add groups to this *Security Label*.
   b) Enter either the first or last name of the user or the name of the group that you want to add, in the *Look for* box.
   c) Now, click the *Find* button to find the user. Users with the same first or last name or the Groups that contain the word that you have entered in the *Look for* box will be displayed in the *Available Data* list. For e.g. Lets say you have selected Users in the Look for drop down and you have had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   d) Select the user(s) or group in the *Available Data* list. If the user you are searching for does not exist in the list then, click the *New* button to create a new user. Use this >> button to add the selected user(s) from the *Available Data* list to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   e) Click the *OK* button to add the selected users to the *Apply To* list.
6. Use the *Privileges* pane to provide necessary Privileges for this Security Label.
7. Click the *Save* button to save the *Security Label*.

Notes:

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- You can click the *Save and New* button to save a *Security Label* and open a *New Security Label window* to create a new *Security Label*.

Related Topics
Set a Security Label 398
Delete a Security Label 399

23.7.3 Set a Security Label

You can set a Security Label by right clicking a document and selecting the *Security Label* option.

To Set a Security Label for a Document:

1. In Globodox, select the document(s) to which you want to apply a Security Label.
2. Click the *Share* drop-down arrow and select the *Set Security Label* option or right click the document and select *Share* > *Security* Label option. The *Set Security Label* window will now be launched.

3. Select a *Security Label* from the list.
4. Click the *OK* button to apply the *Security Label*.

To Set a Security Label for a Stack

1. In Globodox, select the Stack(s) to which you want to apply a *Security Label*.
2. Click the *Share* drop-down arrow and select the *Set Security Label* option or right click the document and select *Share* > *Security Label* option. The *Set Security Label* window will now be launched.
3. Select a *Security Label* from the list.
4. Click the *OK* button to apply the *Security Label.*

To Set a Security Label for Folder

1. In Globodox, select the Folder to which you want to apply a *Security Label*.
2. Right click the Folder and select *Set Security Label* option. The *Set Security Label* window will now be launched.
3. Select a *Security Label* from the list.
4. Click the *OK* button to apply the *Security Label.*

Note:
The Security Label applied to the folder will be applied to all its sub-folders and to the documents in it.

Notes:

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- You can click the *Save and New* button to save a *Security Label* and to open a *New Security Label window* to create a new *Security Label.*
- If a Security Label has been applied to a document and then you apply a Security Label to the folder in which it it is then the latter label will be applied to that document.

Related Topics
Create a Security Label 397
Delete a Security Label 399

23.7.4 Deactivate a Security Label

You cannot delete a Security Label in Globodox, you can only deactivate that security label.

To Deactivate a Security Label

1. In Globodox, select *Settings* > *System Settings* > *Security Labels* in the Navigation 31 pane.
2. Select a security from the right pane i.e. the *Security Labels* List.
3. On the *Security Labels* tab click the *Deactivate* button to deactivate the security label.

Notes:
- Once a Security Label is deactivated it cannot be reactivated.

Related Topics
Create a Security Label 397
Set a Security Label 398

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23.8 Securing Data

Topics Covered

8.1.1 Secure Documents 401

8.1.2 Secure Stacks 407

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23.8.1 Secure Documents

Topics Covered

8.1.1 Restrict Users from Viewing Certain Documents 402
8.1.2 Restrict a User from Modifying a Document Opened by Another User for Modifications 402
8.1.3 Restrict Users from Viewing Files Outside Globodox 403
8.1.4 Keep a Record of the Actions Carried Out on a Document 404

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23.8.1.1 Restrict Users from Viewing Certain Documents

You can restrict users from viewing a document by using the *Restrict* option.

To Restrict user from viewing a particular Document

1. In Globodox, select the document to restrict other user(s) from viewing it.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   The Look Up window will now be launched
   a) Select the *Users* option from the *Look for* drop-down and enter the either the first or last name of the user that you want to add in the *Look for* box.
   b) Now, click on the *Find* button to find the user. Users with the same first or last name that you have entered in the *Look for* box will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list.Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Restrict* list.
4. Click the *OK* button to restrict the document from the selected user(s).

Note:
You can set privileges for users to restrict them to perform certain actions. For more information, see Privileges 385.

Related Topics
Allow users to only view documents 376
Restrict a user to modify a document opened by another user 402

23.8.1.2 Restrict a User from Modifying a Document Opened by Another User

You can only checkout a document if it is in the checked in state (i.e. if it has not already been checked out by another user).

To Checkout a Document

1. Select the document that you want to Checkout from the List View pane.
2. Click the *Checkout* option of the *Home* tab to checkout the document. You can also right click the document and select the *Checkout* option

   Note:
   If you are checking out the document for the first time then Globodox will ask you to specify a folder to checkout the document. The folder that you select will be your default checkout folder.

Notes:

- When a document is checked out it is placed in the Checkout folder. The security of the document copy in the Checkout folder is the responsibility of the user who checked out the

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document. The copy of the document in the Globodox DB is still protected by Globodox. Therefore care must be taken when selecting a Checkout folder. Ideally a local folder on the user's machine should be set as the user's Checkout folder. However if the user is likely to logon to Globodox from different machines then a network accessible folder can be chosen as the user's Checkout folder. Windows security can be used to prevent unauthorized access to documents in the Checkout folder.

- You can also change your checkout folder, to do this click the *Checkout* drop down arrow and select the *Checkout to...* option of *Home* tab. This will launch the *Set Checkout Folder* window. Now, specify the location of the new checkout folder.

Related Topics
Check-in a Checked out document 276

23.8.1.3 Restrict Users from Viewing Files Outside Globodox

You can restrict users from opening files from outside Globodox that are stored in the windows folder by encrypting them.
You can encrypt documents by clicking the *More* drop down and selecting the *Encrypt* option of the *Home* tab.

To selectively Encrypt a Document using the Default Encryption Settings

1. Select the document that you want to encrypt from the List View pane.
2. Click the *More* drop down arrow and select the *Encrypt* option of the *Home* tab.
3. The document will be encrypted using the default encryption settings of the Globodox DB.

To selectively Encrypt a Document using Non-default Encryption Settings

1. Select the document that you want to encrypt from the List View pane.
2. Click the *More* drop down arrow and select the *Encrypt Using...* option of the *Home* tab. The *Encryption Settings Manager* will now be launched.
3. Select an encryption setting from the list and click the *OK* button, the document will now be encrypted.

Notes:

- The encryption settings Globodox uses by default are AES 128 bit encryption with the default Globodox key phrase. These settings are referred to as Globodox Standard

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Encryption settings

Related Topics
Decrypt Document 300
View Document Encryption - FAQ 295

23.8.1.4 View a Log of the Actions Carried Out on a Document

You can use the Event Log pane to view the list of all the actions carried out on a selected document. The Event list pane consists of three drop down that have predefined filtering options which are used to filter out events. Using these drop downs, events can be filtered according to the date & time of occurrence, the Event Group they belong to and by the result of the event.

To View Event Log of a Document

1. Select a document from the List View pane, to view its event logs. The document will now be displayed in the Documents Details 165 pane.
2. Click the *Event Log* tab on the left bar of the *Document Details* pane. The *Event Log* panel will now be displayed and all the logs of the selected document will be displayed in the *Event list* pane.
3. Use the first drop down i.e. Date & Time of Occurrence of the event, to filter out events based on the date and time of the events.
   - The drop down has the following options

All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
Last 12 hours:	Select this option to view all the events of the last 12 hours.
Today:	Select this option to view all the events of the current day.
Yesterday	Select this option to view all the events of the previous day.
Last 24 hours:	Select this option to view all the events of the last 24 hours.
This week:	Select this option to view all the events of the current week.
Last week:	Select this option to view all the events of the previous week.
Last 7 days:	Select this option to view all the events of the last 7 days.
This month:	Select this option to view all the events of the current month.
Last month:	Select this option to view all the events of the previous month.
Last 30 days:	Select this option to view all the events of the last 30 days.
Custom:	Select this option if you wish to provide a custom date range. Selecting this option will launch the Event Date Range Dialog.

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4. Use the second drop down i.e. event Group, to filter out events based on the group it belongs to.
   - The following Event Groups are available
     - **All:** Select this option to view all the events (events will still be filtered by any other criteria if specified).
     - **View Events:** Select this option to view all the events belonging to the View Event Group.
     - **Add Events:** Select this option to view all the events belonging to the Add Event Group.
     - **Modify Events:** Select this option to view all the events belonging to the Modify Event Group.
     - **Other Events:** Select this option to view all the events belonging to the Other Event Group.
5. Use the third drop down i.e. Event Result, to filter out events based based on the outcome (result) of the event.
   - The possible event results are
     - **All Results:** Select this option to view all the results (events will still be filtered by any other criteria if specified).
     - **Success:** Select this option to view all the events which were completed successfully.
     - **Failure:** Select this option to view all the events which could not be completed successfully.
     - **Permission Denied:** Select this option to view all the events for which permission was denied to the user.
6. Event logs will now be displayed in the Event list pane, based on the filters that you have selected.
   - The Event list pane has the following options
     - **Event Name:** Displays the name of the event.
     - **Event Date:** Displays the date and time on which the event occurred.
     - **Result:** Displays the outcome(result) of the event, i.e. Success, Failure or Permission Denied
     - **User Name:** Displays the name of the user who performed the event.
     - **Comments:** Displays remarks or extra information (if any) regarding that event.

Notes:

- You can click any column header of the event list to sort the event list in the ascending or descending order of values in that column.
- Use the More Actions button for more options. The following options will be displayed...
  - **Print Data** Click this option to print the data that is displayed in the Event list.
  - **Export Data** Click this option to export the data that is displayed in the Event list.

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Related Topics

Keep a record of the actions carried out on a Stack 408

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23.8.2 Secure Stacks

Topics Covered

8.2.1 Restrict a User from Accessing Stacks 408

8.2.2 View a Log of the Actions Carried Out on a Stack 408

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23.8.2.1 Restrict a User from Accessing Stacks

You can restrict users to access a Stack by using the *Restrict* option.

To Restrict user to access a Stack

1. In Globodox, select the stack to restrict other user(s) from viewing it, from the List View 31 pane.
2. Click the *Share* drop-down and select the *Restrict* option on the *Ribbon* bar. The *Restrict* window will be launched.
3. Click the *Add* button to add the users to the *Restrict* list.
   The Look Up window will now be launched
   a) Select the *Users* option from the *Look for* drop-down and enter either the first or last name of the user that you want to add in the *Look for* box.
   b) Now, click on the *Find* button to find the user. Users with the same first or last name that you have entered in the *Look for* box will be displayed in the *Available Data* list. For e.g. Lets say you had entered *'john'* in the *Look for* box, then all users that contain *'john'* in their first or last name will be displayed in the *Available Data* list.
   c) Select the user(s) in the *Available Data* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
   d) Click the *OK* button to add the selected users to the *Restrict* list.
4. Click the *OK* button to restrict the Stack from the selected user(s).

Note:
You can set privileges for users to restrict them to perform certain actions. For more information, see Privileges 385.

Related Topics
Restrict users to view certain documents 402
Allow users to only view and modify documents owned by them 376
Restrict a user to modify a document opened by another user 402

23.8.2.2 View a Log of the Actions Carried Out on a Stack

You can use the *Event Log* panel to view the list of all the actions carried out on a selected Stack 137. The Event list pane consists of three drop down that have predefined filtering options which are used to filter out events. Using these drop downs, events can be filtered according to the date & time of occurrence, the Event Group they belong to and by the result of the event.

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To View Event Log of a Stack

1. In Globodox, select *Workspace* > *Stack* in the Navigation 31 pane.
2. Now, select a Stack Type 136 from the *Stack* node.The Stacks of the selected Stack Type will now be displayed in the right pane.
3. Select the Stack from the List View pane, to view its event logs. The Stack Details pane will now be displayed.
4. By default the *Information* panel will be displayed on the left side of the *Stack Details* pane. Click the *Event Log* tab on the left bar of the <*%Stack DETAILS%*> pane. The *Event Log* panel will now be displayed and all the logs of the selected Stack will be displayed in the *Event list* pane.
5. Use the first drop down i.e. Date & Time of Occurrence of the event, to filter out events based on the date and time of the events.
   - The drop down has the following options

All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
Last 12 hours:	Select this option to view all the events of the last 12 hours.
Today:	Select this option to view all the events of the current day.
Yesterday	Select this option to view all the events of the previous day.
Last 24 hours:	Select this option to view all the events of the last 24 hours.
This week:	Select this option to view all the events of the current week.
Last week:	Select this option to view all the events of the previous week.
Last 7 days:	Select this option to view all the events of the last 7 days.
This month:	Select this option to view all the events of the current month.
Last month:	Select this option to view all the events of the previous month.
Last 30 days:	Select this option to view all the events of the last 30 days.
Custom:	Select this option if you wish to provide a custom date range. Selecting this option will launch the Event Date Range Dialog.

3. Use the second drop down i.e. event Group, to filter out events based on the group it belongs to.
   - The following Event Groups are available

All:	Select this option to view all the events (events will still be filtered by any other criteria if specified).
View Events:	Select this option to view all the events belonging to the View Event Group.
Add Events:	Select this option to view all the events belonging to the Add Event

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Group.

Modify Events: Select this option to view all the events belonging to the Modify Event Group.

Other Events: Select this option to view all the events belonging to the Other Event Group.

4. Use the third drop down i.e. Event Result, to filter out events based based on the outcome (result) of the event.
   - The possible event results are

All Results: Select this option to view all the results (events will still be filtered by any other criteria if specified).

Success: Select this option to view all the events which were completed successfully.

Failure: Select this option to view all the events which could not be completed successfully.

Permission Denied: Select this option to view all the events for which permission was denied to the user.

5. Event logs will now be displayed in the Event list pane, based on the filters that you have selected.
   - The Event list pane has the following options

Event Name: Displays the name of the event

Event Date: Displays the date and time on which the event occurred.

Result: Displays the outcome(result) of the event, i.e. Success, Failure or Permission Denied

User Name: Displays the name of the user who performed the event.

Comments: Displays remarks or extra information (if any) regarding that event.

Notes:

- You can click any column header of the event list to sort the event list in the ascending or descending order of values in that column.

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- Use the *More Actions* button for more options. The following options will be displayed...

Print Data	Click this option to print the data that is displayed in the Event list
Export Data	Click this option to export the data that is displayed in the Event list

Related Topics

Keep a record of the actions carried out on a document 404
Allow users to only view and modify documents owned by them 376
Restrict a user to modify a document opened by another user 402

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24 Export and Import data

Topics Covered

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24.1 Export Data

Topics Covered

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1.2 Export Data to HTML File 415
1.3 Export Data to Excel File 416
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1.5 Save the Frequently Used Export Settings 418
1.6 Use a Export Profile to Export Data 419
1.7 Export Documents to CD/DVD 420
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24.1.1 Export Data to CSV File

Globodox Export can be used to export the documents along with its indexed information from the Globodox 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 Globodox, 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 or Stack Type then select that Document Type or Stack 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 270 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 Arrow* button and *Down Arrow* 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.

Notes:

- 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.

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Related Topics
Export data to a HTML file 415
Export data to a Excel file 416
Export data to a XML file 417
Back up Globodox DB 430

24.1.2 Export Data to HTML File

Globodox Export can be used to export the documents along with its indexed information from the Globodox 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 Globodox, 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 or Stack Type then select that Document Type or Stack 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 270 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 Arrow* button and *Down Arrow* 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.

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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.

Notes:

- 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 414
Export data to a Excel file 416
Export data to a XML file 417
Back up Globodox DB 430

24.1.3 Export Data to Excel File

Globodox Export can be used to export the documents along with its indexed information from the Globodox 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 Globodox, 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 or Stack Type then select that Document Type or Stack 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 270 by clicking the *Customize...* button.

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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 Arrow* button and *Down Arrow* 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.

Notes:

- 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

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Export data to a HTML file 415
Export data to a XML file 417
Back up Globodox DB 430

24.1.4 Export Data to XML File

Globodox Export can be used to export the documents along with its indexed information from the Globodox 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 Globodox, 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 or Stack Type then select that Document Type or Stack Type.
3. Select the *Home* tab and click the *Export* button in the *Collaborate* group. The *Data*

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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 270 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 Arrow* button and *Down Arrow* 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.

Notes:

- 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

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24.1.5 Save the Frequently Used Export Settings

Globodox 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*.

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

To Save the Frequently used Export Settings as Export Profile

1. In Globodox, 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.

Notes:

- 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 419

Related Topics
Export data to a CSV file 414
Export data to a HTML file 415
Export data to a Excel file 416
Export data to a XML file 417

24.1.6 Use a Export Profile to Export Data

Globodox 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 Globodox, 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.

Notes:

- To delete a *Export Profile*, click the *Delete* button besides the *Saved Profile* box.

Related Topics
Save the frequently used Export settings 418

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24.1.7 Export Document to CD/DVD

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

To Burn Documents on a CD/DVD

1. In Globodox, 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 *Export to CD/DVD* window will be launched.
4. Select one of the following options to export the documents:
   a) If you want to export all the documents from the list select the *All Documents* option.
   b) If you want to export only the queried results, select the *Search results* option.
   c) If you want to export the selected items select the *Selected documents in the grid* option.
5. Select the burning device from the *Choose Device* drop down.
6. Select the burning speed from the *Choose speed* drop down.
7. Click the *Burn* button to start the burning process.

Notes:

- 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

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Back up Globodox DB 430

24.2 Import Data

Topics Covered

2.1 Import Data from CSV File 421
2.2 Import Data from PaperPort 424
2.3 Folder Monitor 425

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24.2.1 Import Data from CSV File

The Import Data Wizard lets you quickly populate your Globodox 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 Globodox DB. This is the fastest way to add a large data to a Globodox 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 Globodox, 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 and Stack Info* option if the CSV file contains the information of documents and Stack.

   If you select the *Documents and Stack Info* option then the *Choose existing Stack* drop-down option will be available. Select an existing Stack from this drop-down to import the documents and Stack information to it.

   d) Select the *Documents* option if the CSV file contains information of only documents.
   e) Select the *Stack* option if the file contains the information of only Stack.

   If you select the *Stack Info* option then the *Choose existing Stack* drop-down option will be available. Select an existing Stack from the *Choose existing Stack* drop-down to import the Stack information.

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

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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 or the Stack Types 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

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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 Globodox interprets date values which contain two digit years (for e.g. 03 instead of 2003). The default time span used by Globodox is 1930 to 2029. Therefore by default Globodox 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 Globodox 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 Globodox 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 Globodox 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 Globodox 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

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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 Globodox should take if it encounters invalid or empty values for any field. You can specify different actions for each field. By default Globodox will import empty or invalid values as empty values wherever possible (if the Globodox DB field cannot accept empty values then by default Globodox will not import the row containing that value.
17. Select the action Globodox 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 Globodox 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 Globodox DB field in the Globodox 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.

Note:
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 414
Export data to a HTML file 415
Export data to a Excel file 416
Export data to a XML file 417

24.2.2 Import Data from PaperPort

You can import data to Globodox 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 Globodox, 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.

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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 Globodox 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 Globodox. 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 Globodox 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 Globodox DB.
6. Click the Close button to close the Add Folders from disk window. Now, navigate to the Folders node in the Navigation 34 pane to view the folders along with the documents.

   You can now create Document Types 125 and Stack Types 136 for these documents.

Notes:

- You can add only the folders structure (without the documents) that you use to organize your documents, to the Globodox DB. For more information, see Add existing folder structure to Globodox DB 209.
- You can also drag and drop folders in Globodox.

Related Topics
Find and Add a document 55
Scan multiple single paged document 75

24.2.3 Local Capture Folder

Note: Folder Monitor is now renamed to 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 Globodox. You can use this feature to directly add files to Globodox even when Globodox is not running. All you need to do is, add the files to the monitored folder and Folder Monitor will automatically add these files to Globodox. This is also handy when working with Network Scanners which put the scanned documents in a folder.

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You can also configure the Folder monitor to delete the files from the monitored folder, after they have been added to Globodox.

Following are the main features of Globodox Local Capture Folder...

1. Watch multiple folders at the same time
2. Select a Destination Profile 267 to use, while adding a document to Globodox
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 Globodox 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 Globodox 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 267 to be used while adding a document from this folder. Using the Destination Profile you can specify how the documents should be categorized in Globodox. For example you can specify the Globodox 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 Globodox 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)

  Globodox Local Capture Folder automatically starts monitoring folders as soon as you configure it and 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

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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 Globodox 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 Globodox 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 Globodox

  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 Globodox

  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.

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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 Globodox

  Use the steps below if you want files to be automatically deleted from the monitored folder after they are added to Globodox...

  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 Globodox

  Use the steps below if you want files to be automatically deleted from the monitored folder after they are added to Globodox...

  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 Globodox

  You can save a MS Word file or any file, from any application, directly in Globodox 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 Globodox.

  If you wish you can automatically delete the files from this folder by using the *Delete files from the monitored folder* option.

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25 Back-up and Restore

Topics Covered

1. Back-up Globodox DB 430
2. Restore a Backed-up DB 442

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25.1 Back-up Globodox DB

Topics Covered

1.1 Back-up MS Access-based Globodox DB 431
1.2 Back-up MS SQL based-Globodox DB 432
1.3 Back-up MySQL based-Globodox DB 440

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25.1.1 Back-up MS Access-based Globodox DB

You will need to zip the MS Access Based Globodox DB to take its backup.

You will need to take a backup of...
The Master DB i.e. the MainDB.gxdb
And all your Globodox DBs

For each Globodox DB, you must also backup it's linked folder which contains the System Folder and the documents and their cache files, by zipping it.

All the above files and folders are usually located in the 'C:\Globodox Databases' folder

In the below example we are backing up the MainDB

To Backup a MS Access based Globodox DB

1. Make sure Globodox is not running.
2. Open the folder where Globodox Databases are located. This is usually the *C:\Globodox Databases* folder.
3. Locate the MainDB.gxdb file (i.e. the DB that you want to back-up) and zip it.
4. Locate the MainDB folder (This is the DB's linked folder which contains the documents) and zip it.
5. Locate the MainDB_cache file and zip it
6. Open the the ITAZ\Globodox 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\Globodox folder.
   For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox
7. Locate the multi-user.gdx file and zip it.
8. Now, copy these backed up files to a secure location. Follow the same steps to back-up other DB's.

Notes:

- To restore a backed-up copy of MS Access based Globodox DB see, Restore a backed-up MS Access DB 443

Related Topics

Backup a MS SQL based Globodox DB 432
Backup a MySQL based Globodox DB 440
Use the CD/DVD Module

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25.1.2 Back-up MS SQL-based Globodox DB

Topics Covered

1.2.1 Backup MS SQL 2000 DB 433
1.2.2 Backup MS SQL 2005 DB 435
1.2.3 Backup MS SQL 2008 DB 437

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25.1.2.1 Back-up MS SQL Server 2000 DB

You will need to use the SQL Server Enterprise Manager to backup your MS SQL Server 2000 based Globodox DB.

For a complete backup you will need to take a backup of...
The Master DB i.e. the MainDB and its Cache file i.e the MainDB_cache
And all your Globodox DBs along with their cache files

For each Globodox DB, you must also backup it's linked folder which contains the File Store, by zipping it.

In the below example we are backing up the *MainDB*.

On SQL Server machine we will back-up the...

MainDB and the MainDB_cache

AND

In the folder where Globodox Databases are located (this is usually the *C:\Globodox Databases folder),* we will back-up the MainDB *sub-folder.*

To Backup a MS SQL Server 2000 based Globodox DB

1. Make sure Globodox is not running. Click Start > All Programs > MS SQL Server 2000 > 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* from the list. Right-click this database and select *All Tasks* > *Backup Database...* option.
5. The *SQL Server Backup* window will be launched. Enter a name for the backup in the *Name* box.
6. Select the *Database – complete* option to perform a complete database backup.
7. Select the *Append to media* option to append the current backup to existing file or device.
8. Click the *Add* button to specify a destination for the backup.
9. Click the *Options* tab. The options will now be displayed.
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_cache* from the list and follow step 4-11 to backup this DB.
13. Once you have backed-up *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
14. Now, open the folder where Globodox Databases are located. This is usually the *C:\Globodox Databases* folder. (You can also backup the entire Globodox Databases folder by zipping it)
15. Locate the *MainDB* folder in the Globodox Databases folder. Now, zip this folder.
16. Open the the ITAZ\Globodox 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\Globodox folder.
    For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox
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. Follow the

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same steps to back-up other DB's

For more info on backup see, Backup MS SQL Server 2000

Notes:

- To restore a backed-up copy of MS SQL Server 2000 based Globodox DB see, Restore a Backed-up MS SQL Server 2000 DB 445

Related Topics

Backup MS SQL Server 2005 DB 435
Backup MS SQL Server 2008 DB 437
Backup a MySQL based Globodox DB 440
Use the CD/DVD Module

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25.1.2.2 Back-up MS SQL Server 2005 DB

You will need to use the SQL Server Enterprise Manager to backup your MS SQL Server 2005 based Globodox DB.

You will need to take a backup of...
The Master DB, i.e. MainDB and its Cache file i.e the MainDB_cache
And all your Globodox DBs along with their cache files

For each Globodox DB, you must also backup its linked folder which contains the File Store, by zipping it.

In the below example we are backing up the *MainDB*.

On the SQL Server machine we will back-up the...

MainDB and the MainDB_cache

Note: To completely backup a MS SQL SERVER 2005 DB you will need to backup the DB and also its *Transaction logs*.

AND

On the folder where Globodox Databases are located (this is usually the *C:\Globodox Databases folder),* we will back-up the MainDB *sub-folder*

To Backup a MS SQL Server 2005 based Globodox DB

1. Make sure Globodox is not running. Click Start > All Programs > MS SQL Server 2005 > 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* from the list. Right-click this database and select *Tasks* > *Back Up...* option. The *Back Up Database* window will be launched.
5. Select the *Full* option to perform a complete database backup from the *Backup Type* drop down.
6. Select the *Database* option from the *Backup Component* section.
7. Enter a name for the backup in the *Name* box. enter a short description about the Backup in the Description box.
8. Click the *Add* button to specify a destination for the backup.
9. Click the *Options* tab in the left pane. The options will now be displayed.
10. Select the *Append to the existing backup set* option to append the current backup to existing file or device.
11. Check the *Verify backup upon completion* option to verify the backup upon completion.
12. Click the *OK* button to begin the Backup. Once the backup is complete you will get a confirmation message, click *OK*.
13. Now, again right-click *MainDB* from the list and select *Tasks* > *Back Up...* option. The *Back Up Database* window will be launched.
14. Select the *Transaction Log* option to backup the DB's log from the *Backup Type* drop down.
15. Enter a name for the backup in the *Name* box. Enter a short description about the backup in the *Description* box.
16. Click the *Add* button to specify a destination for the backup.
17. Click the *Options* tab in the left pane. The options will now be displayed.
18. Select the *Append to the existing backup set* option to append the current backup to existing file or device.

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19. Check the *Verify backup upon completion* option to verify the backup upon completion.
20. Click the *OK* button to begin the Backup. Once the backup is complete you will get a confirmation message, click *OK*.
21. Now, select *MainDB_cache* from the list and follow step 4-21 to backup this DB.
22. Once you have backed-up *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
23. Now, open the folder where Globodox Databases are located. This is usually the *C:\Globodox Databases* folder. (You can also backup the entire Globodox Databases folder by zipping it)
24. Locate the *MainDB* folder in the Globodox Databases folder. Now, zip this folder.
25. Open the the ITAZ\Globodox 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\Globodox folder.
    For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox
26. Locate the multi-user.gdx file and zip it.
27. Now, copy these files to a device (Pen Drive) or burn them on a CD. Follow the same steps to back-up other DB's

    For more info on backup see, MS SQL Server 2005 Backup

Notes:

- To restore a backed-up copy of MS SQL Server 2005 based Globodox DB see, Restore a Backed-up MS SQL Server 2005 DB 447

Related Topics

Backup MS SQL Server 2000 DB 433
Backup MS SQL Server 2008 DB 437
Backup a MySQL based Globodox DB 440
Use the CD/DVD Module

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25.1.2.3 Back-up MS SQL Server 2008 DB

You will need to use the SQL Server Management Studio to backup your MS SQL Server based Globodox DB.

You will need to take a backup of...
The Master DB, i.e. MainDB and its Cache file i.e the MainDB_cache
And all your Globodox DBs along with their cache files

For each Globodox DB, you must also backup its linked folder which contains the File Store, by zipping it.

In the below example we are backing up the *MainDB*.

On the SQL Server machine we will back-up the...

MainDB and the MainDB_cache

Note: To completely backup a MS SQL SERVER 2008 DB you will need to back the DB and also its Transaction logs.

AND

In the folder where Globodox Databases are located (this is usually the *C:\Globodox Databases folder),* we will back-up the *MainDB sub-folder*

To Backup a MS SQL Server 2008 based Globodox DB

1. Make sure Globodox is not running. Click Start > All Programs > MS SQL Server 2008 > 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 the *MainDB* from the list. Right-click this database and select *Tasks > Back Up...* option. The *Back Up Database* window will be launched.
5. Select the *Full* option to perform a complete database backup from the *Backup Type* drop down.
6. Select the *Database* option from the *Backup Component* section.
7. Enter a name for the backup in the *Name* box. enter a short description about the backup in the *Description* box.
8. Click the *Add* button to specify a destination for the backup.
9. Click the *Options* tab in the left pane. The options will now be displayed.
10. Select the *Append to the existing backup set* option to append the current backup to existing file or device.
11. Check the *Verify backup upon completion* option to verify the backup upon completion.
12. Click the *OK* button to begin the Backup. Once the backup is complete you will get a confirmation message, click *OK*.
13. Now, again right-click the *MainDB* from the list and select *Tasks > Back Up...* option. The *Back Up Database* window will be launched.
14. Select the *Transaction Log* option to backup the DB's logs from the *Backup Type* drop down.
15. Select the *Database* option from the *Backup Component* section.
16. Enter a name for the backup in the *Name* box. enter a short description about the backup in the *Description* box.

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17. Click the *Add* button to specify a destination for the backup.
18. Click the *Options* tab in the left pane. The options will now be displayed.
19. Select the *Append to the existing backup set* option to append the current backup to existing file or device.
20. Check the *Verify backup upon completion* option to verify the backup upon completion.
21. Click the *OK* button to begin the backup. Once the backup is complete you will get a confirmation message, click *OK*.
22. Now, select *MainDB_cache* from the list and follow step 4-21 to backup this DB.
23. Once you have backed-up *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
24. Now, open the folder where Globodox Databases are located. This is usually the *C:\Globodox Databases* folder. (You can also backup the entire Globodox Databases folder by zipping it)
25. Locate the *MainDB* folder in the Globodox Databases folder. Now, zip this folder.
26. Open the the ITAZ\Globodox 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\Globodox folder.
    For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox
27. Locate the multi-user.gdx file and zip it.
28. Now, copy these files to a device (Pen Drive) or burn them on a CD. Follow the same steps to back-up other DB's

    For more info on backup see, Backup MS SQL Server 2008

Notes:

- To restore a backed-up copy of MS SQL Server 2008 based Globodox DB see, Restore a Backed-up MS SQL Server 2008 DB 449

Related Topics

Backup MS SQL Server 2005 DB 435
Backup MS SQL Server 2000 DB 433
Backup a MySQL based Globodox DB 440
Use the CD/DVD Module

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25.1.2.4 Back-up MS SQL Server 2012 DB

You will need to use the SQL Server Management Studio to backup your MS SQL Server based Globodox DB.

You will need to take a backup of...
The Master DB, i.e. MainDB and its Cache file i.e the MainDB_cache
And all your Globodox DBs along with their cache files

For each Globodox DB, you must also backup its linked folder which contains the File Store, by zipping it.

In the below example we are backing up the *MainDB*.

On the SQL Server machine we will back-up the...

MainDB and the MainDB_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 Globodox Databases are located (this is usually the *C:\Globodox Databases folder),* we will back-up the *MainDB sub-folder*

To Backup a MS SQL Server 2012 based Globodox DB

1. Make sure Globodox 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 the *MainDB* from the list. Right-click this database and select *Tasks > Back Up...* option. The *Back Up Database* window will be launched.
5. Select the *Full* option to perform a complete database backup from the *Backup Type* drop down.
6. Select the *Database* option from the *Backup Component* section.
7. Enter a name for the backup in the *Name* box. enter a short description about the backup in the *Description* box.
8. Click the *Add* button to specify a destination for the backup.
9. Click the *Options* tab in the left pane. The options will now be displayed.
10. Select the *Append to the existing backup set* option to append the current backup to existing file or device.
11. Check the *Verify backup upon completion* option to verify the backup upon completion.
12. Click the *OK* button to begin the Backup. Once the backup is complete you will get a confirmation message, click *OK*.
13. Now, again right-click the *MainDB* from the list and select *Tasks > Back Up...* option. The *Back Up Database* window will be launched.
14. Select the *Transaction Log* option to backup the DB's logs from the *Backup Type* drop down.
15. Select the *Database* option from the *Backup Component* section.
16. Enter a name for the backup in the *Name* box. enter a short description about the backup in the *Description* box.

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17. Click the *Add* button to specify a destination for the backup.
18. Click the *Options* tab in the left pane. The options will now be displayed.
19. Select the *Append to the existing backup set* option to append the current backup to existing file or device.
20. Check the *Verify backup upon completion* option to verify the backup upon completion.
21. Click the *OK* button to begin the backup. Once the backup is complete you will get a confirmation message, click *OK*.
22. Now, select *MainDB_cache* from the list and follow step 4-21 to backup this DB.
23. Once you have backed-up *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
24. Now, open the folder where Globodox Databases are located. This is usually the *C:\Globodox Databases* folder. (You can also backup the entire Globodox Databases folder by zipping it)
25. Locate the *MainDB* folder in the Globodox Databases folder. Now, zip this folder.
26. Open the the ITAZ\Globodox 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 Server 2012, this will be the C:\ProgramData\ITAZ\Globodox folder.
    For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox
27. Locate the multi-user.gdx file and zip it.
28. Now, copy these files to a device (Pen Drive) or burn them on a CD. Follow the same steps to back-up other DB's

Notes:

- To restore a backed-up copy of MS SQL Server 2012 based Globodox DB see, Restore a Backed-up SQL Server 2012 DB 451

25.1.3 Back-up MySQL-based Globodox DB

You will need to use the MySqlDump application to backup your MySql Server based Globodox DB.

You will need to take a backup of...
The Master DB, i.e. MainDB and its Cache file i.e the MainDB_cache
And all your Globodox DBs along with their cache files

For each Globodox DB, you must also backup it's linked folder which contains the File Store, by zipping it.

In the below example we are backing up the *MainDB*.

On the MySQL Server machine we will back-up the...

MainDB and the MainDB_cache

AND

In the folder where Globodox Databases is located (this is usually the *C:\Globodox Databases folder),* we will back-up the *MainDB sub-folder.*

To Backup a MySQL Server based Globodox DB

1. Make sure Globodox is not running. Click Start > All Programs > Accessories > Command Prompt. The Command Line window will now be launched.

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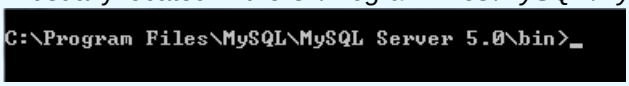
2. You will need to run the mysqldump application from the Command Line. Using the Command line browse to the folder where mysqldump is installed. The mysqldump is usually located in the *C:\Program Files\MySQL\MySQL Server 5.0\Bin folder.*



3. Now, type the following at the Command line...

   mysqldump –-user [user name] –-password=[password] [database name] > [sql file] where,

   [user name] = --user followed by the user name of the account that can connect to the MySQL Server.
   [password] = The password of the above user.
   [database name] = The name of the database that you want to backup.
   [sql file] = The name of the backup file

Example: **mysqldump --user admin --password=alphaomega MainDB > MainDBbackup.sql**

4. Hit the *Enter* key to begin the backup. The backup file will be created in the folder in which mysqldump is located, i.e. *C:\Program Files\MySQL\MySQL Server 5.0\Bin folder.*
5. Follow steps 3-4 to back-up the *MainDB_cache*.
6. Once you have backed-up *MainDB* and *MainDB_cache,* close the Command Prompt.
7. Now, open the folder where Globodox Databases are located. This is usually the *C:\Globodox Databases* folder. (You can also backup the entire Globodox Databases folder by zipping it)
8. Locate the *MainDB* folder in the Globodox Databases folder. Now, zip this folder.
9. Open the the ITAZ\Globodox 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\Globodox folder.
   For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox
10. Locate the multi-user.gdx file and zip it.
11. Now, copy these files to a device (Pen Drive) or burn them on a CD. Follow the same steps to back-up other DB's

Notes:

- To restore a backed-up copy of MySQL Server based Globodox DB see, Restore a Backed-up MySQL DB 452

Related Topics

Backup MS SQL Server 2000 DB 433
Backup MS SQL Server 2005 DB 435
Backup MS SQL Server 2008 DB 437
Use the CD/DVD Module

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25.2 Restore a Backed-up Globodox DB

Topics Covered

2.1 Restore a backed-up MS Access DB 443
2.2 Restore a backed-up MS SQL DB 443
2.3 Restore a backed-up MySQL DB 452

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25.2.1 Restore a Backed-up MS Access DB

You will require the latest Backup copy of the Master DB i.e. the *MainDB* its cache file i.e. the *MainDB_cache*, and the MS Access based Globodox DBs that you want to restore along with their linked folder which contains the File Store. Also see, Backup a MS Access based Globodox DB 431

To Restore a Backed-up MS Access based Globodox DB

1. Make sure Globodox is not running.
2. Open the folder where Globodox Databases are located. This is usually the *C:\Globodox Databases* folder.
3. Unzip the backed-up *MainDB* i.e. the MainDB.gxdb file and restore it in the folder in which Globodox Databases are stored.
4. Unzip the backed-up *MainDB_cache* file and restore it in the folder in which Globodox Databases are stored.
5. Now that you have restored the DB, you will now have to restore the DB's File Store 318 i. e. its linked folder which contains the File Store.
6. Unzip this backed up folder i.e. the *MainDB* folder that contains the File Store and add it to the folder where Globodox databases are stored. This is usually the C:\Globodox Databases folder.
7. The DB is now restored and ready to use. Follow the same steps to restore other backed-up DB's
8. Now, unzip the multi-user.gdx file and paste it in the ITAZ\Globodox 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\Globodox folder.
   For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

Note:
The restore process may take some time depending on the size of the backed-up Globodox DB being restored.

Related Topics
Restore a backed-up MS SQL DB 444
Restore a backed-up MySQL DB 452

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25.2.2 Restore a Backed-up MS SQL DB

Topics Covered

2.2.1 Restore a backed-up MS SQL 2000 DB 445
2.2.2 Restore a backed-up MS SQL 2005 DB 447
2.2.3 Restore a backed-up MS SQL 2008 DB 449

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25.2.2.1 Restore a Backed-up MS SQL Server 2000 DB

You can use the SQL Server Enterprise Manager to restore your MS SQL Server 2000 based Globodox DB. You will require the latest Backup copy of the Master DB, i.e. the MainDB its cache file i.e. the *MainDB_cache*, all the MS SQL Server 2000 based Globodox DB along with their linked folder which contains the File Store. Also see, Backup MS SQL Server 2000 DB 433

Note: You will need to have an existing DB or you will have to to create a blank DB to restore the data from the Backed up DB.

To Restore a Backed-up MS SQL Server 2000 based Globodox DB

1. Make sure Globodox is not running. Click Start > All Programs > MS SQL Server 2000 > 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 a DB from the *Restore as database* drop-down to restore the backed-up DB. Incase you want to create a new DB to restore the backed-up DB then type the name of the DB in this box.
6. All the DB backups that were performed will be displayed in the *Show backups of database* drop-down. Select a backup from the list to restore.
   *Note:*To specify the location of the backed up file, select that file from the list and click the *Properties* button. In the properties dialog click the *Change...* button to specify the location or type the location in the *Restore from* box.
7. Click the *OK* button to begin the restore. Once the restore is complete you will get a confirmation message, click *OK*.
8. Now, select *MainDB_cache* from the list and follow step 4-6 to restore this DB.
9. Once you have restored *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
10. Now that you have restored the DB, you will now have to restore the DB's File Store 318 i. e. its linked folder which contains the File Store.
11. Now, unzip this backed up folder folder that contains the File Store i.e. the MainDB and add it to the folder where Globodox databases are stored. This is usually the C:\Globodox Databases folder.

    The DB is now restored and ready to use.

12. Start Globodox, click *Settings* > *System Settings* > *DB List node*.
13. Click the *New* button to add the restored DB to Globodox DB List. The DB Details window will now be launched.
14. Select *MS SQL* option from the *DB Type* drop-down.
15. Provide the machine name and the login details of the MySQL Server.
16. Once you are connected to the MS SQL server, all the DB's will be listed in the *Globodox DB Name* drop-down. Type the DB name or select the DB that you have restored from the *Globodox DB Name* drop-down and click the *OK* button.
17. When you open this DB, you may be prompted to specify the File Store for the DB. Point it to the 'C:\Globodox Databases' folder.

    Follow the same steps to restore the other backed-up DB's

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18.Now, unzip the multi-user.gdx file and paste it in the ITAZ\Globodox 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\Globodox folder.
For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox
For more info on restore see, Restore MS SQL Server 2000

Notes:

- Incase you get the following error...

  ```
  "The backup set holds a backup of a database other than the existing
  'Database Name' database".
  ```

  Type the following in the Query window...

  ```
  RESTORE DATABASE dbname
   FROM DISK = 'C:\Backupdbname.bak'
        WITH REPLACE
  ```

  where `dbname` is the name of the Database to which you want to restore the backed-up data.
  and `'C:\Backupdbname.bak'` is the location and the name of the backed-up file
- The restore process may take some time depending on the size of the backed-up Globodox DB being restored.

Related Topics

Restore a backed-up MS SQL Server 2005 DB 447
Restore a backed-up MS SQL Server 2008 DB 449
Restore a backed-up MySQL based Globodox DB 452

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25.2.2.2 Restore a Backed-up MS SQL Server 2005 DB

You can use the SQL Server Enterprise Manager to restore your MS SQL Server 2005 based Globodox DB. You will require the latest Backup copy of the Master DB, i.e. the MainDB its cache file i.e. the *MainDB_cache*, all the MS SQL Server 2005 based Globodox DB along with their linked folder which contains the File Store. Also see, Backup MS SQL Server 2005 DB 435

To Restore a Backed-up MS SQL Server 2005 based Globodox DB

1. Make sure Globodox is not running. Click Start > All Programs > MS SQL Server 2005 > 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 a DB from the *To database* drop-down to restore the backed-up DB. Incase you want to create a new DB to restore the backed-up DB then type the name of the DB in this box.
6. All the DB backups that were performed will be displayed in the *From Database* drop-down. Select a backup from the list to restore.
7. Incase the backup file is not listed in the *From Database* drop-down then select the *From device* option to specify the location of the back-up file. Click this **[...]**button to specify the location of the backed up file.
8. Once the backup file is selected the DB backup and the Transaction log back will be displayed in the *Select the backup sets to restore* section. Make sure both the back up of the DB and its Transaction log is checked.
9. Click the *Options* tab in the left pane. The options will now be displayed.
10. From the *Restore options* choose the appropriate option or leave it blank.
11. Select the *RESTORE WITH RECOVERY* option from the recovery state.
12. Click the *OK* button to begin the restore. Once the restore is complete you will get a confirmation message, click *OK*.
13. Now, select *MainDB_cache* from the list and follow step 4-8 to restore this DB.
14. Once you have restored *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
15. Now that you have restored the DB, you will now have to restore the DB's File Store 318 i. e. its linked folder which contains the File Store.
16. Now, unzip this backed up folder that contains the File Store i.e. the *MainDB* folder and add it to the folder where Globodox databases are stored. This is usually the C:\Globodox Databases folder.

    The DB is now completely restored and ready to use.

17. Start Globodox, click *Settings* > *System Settings* > *DB List node*... The *DB List Manager* will now be displayed.
18. Click the *New* button to add the restored DB to Globodox DB List. The DB Details window will now be launched.
19. Select *MS SQL* option from the *DB Type* drop-down.
20. Provide the machine name and the login details of the MySQL Server.
21. Once you are connected to the MS SQL server, all the DB's will be listed in the *Globodox DB Name* drop-down. Type the DB name or select the DB that you have restored from the *Globodox DB Name* drop-down and click the *OK* button.

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22.When you open this DB, you may be prompted to specify the File Store for the DB. Point it to the 'C:\Globodox Databases' folder.

Follow the same steps to restore the other backed-up DB's

23.Now, unzip the multi-user.gdx file and paste it in the ITAZ\Globodox 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\Globodox folder.
For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

For more info on restore see, Restore MS SQL Server 2005

Notes:

- Sometimes after restoration the DB is still in the restoring state. To solve this type the following in the Query window.
  ```
  Restore database dbname With RECOVERY
  ```
  Replace "dbname" with the name of the DB that you want to restore.

- If you are restoring a database on another existing active database, you may get the following error.

  ```
  "The backup set holds a backup of a database other than the existing
  'Database Name' database".
  ```

  To solve this type the following in the Query window....

  ```
  RESTORE DATABASE dbname
   FROM DISK = 'C:\Backupdbname.bak'
        WITH REPLACE
  ```
  where `dbname` is the name of the Database to which you want to restore the backed-up data.
  and `'C:\Backupdbname.bak'` is the location and the name of the backed-up file

- The restore process may take some time depending on the size of the backed-up Globodox DB being restored.

Related Topics

Restore a backed-up MS SQL Server 2000 DB 445
Restore a backed-up MS SQL Server 2008 DB 449
Restore a backed-up MySQL based Globodox DB 452

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25.2.2.3 Restore a Backed-up MS SQL Server 2008 DB

You can use the SQL Server Enterprise Manager to restore your MS SQL Server 2008 based Globodox DB. You will require the latest Backup copy of the Master DB, i.e. the MainDB its cache file i.e. the *MainDB_cache*, all the MS SQL Server 2008 based Globodox DB along with their linked folder which contains the File Store to restore the DB's. Also see, Backup MS SQL Server 2008 DB 437

Note: You will need to have an existing DB or you will have to to create a blank DB to restore the data from the Backed up DB.

To Restore a Backed-up MS SQL Server 2008 based Globodox DB

1. Make sure Globodox is not running. Click Start > All Programs > MS SQL Server 2008 > 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 a DB from the *To database* drop-down to restore the backed-up DB. Incase you want to create a new DB to restore the backed-up DB then type the name of the DB in this box.
6. All the DB backups that were performed will be displayed in the *From Database* drop-down. Select a backup from the list to restore.
7. Incase the backup file is not listed in the *From Database* drop-down then select the *From device* option to specify the location of the back-up file. Click this **[...]**button to specify the location of the backed up file.
8. Once the backup file is selected the DB backup and the Transaction log back will be displayed in the *Select the backup sets to restore* section. Make sure both the back up of the DB and its Transaction log is checked.
9. Click the *Options* tab in the left pane. The options will now be displayed.
10. From the *Restore options* choose an appropriate option or leave it blank.
11. Select the *RESTORE WITH RECOVERY* option from the recovery state.
12. Click the *OK* button to begin the restore. Once the restore is complete you will get a confirmation message, click *OK*.
13. Now, select *MainDB_cache* from the list and follow step 4-8 to restore this DB.
14. Once you have restored *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
15. Now that you have restored the DB, you will now have to restore the DB's File Store 318 i. e. its linked folder which contains the File Store.
16. Now, unzip this backed up folder that contains the File Store i.e. the MainDB folder and add it to the folder where Globodox databases are stored. This is usually the C:\Globodox Databases folder.

    The DB is now completely restored and ready to use.

17. Start Globodox, click *Settings* > *System Settings* > *DB List node*... The *DB List Manager* will now be displayed.
18. Click the *New* button to add the restored DB to Globodox DB List. The DB Details window will now be launched.
19. Select *MS SQL* option from the *DB Type* drop-down.

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20.Provide the machine name and the login details of the MySQL Server.
21.Once you are connected to the MS SQL server, all the DB's will be listed in the *Globodox DB Name* drop-down. Type the DB name or select the DB that you have restored from the *Globodox DB Name* drop-down and click the *OK* button.
22.When you open this DB, you may be prompted to specify the File Store for the DB. Point it to the 'C:\Globodox Databases' folder.

Follow the same steps to restore the other backed-up DB's

23.Now, unzip the multi-user.gdx file and paste it in the ITAZ\Globodox 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\Globodox folder.
For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

For more info on restore see, Restore MS SQL Server 2008

Notes:

- Sometimes after restoration the DB is still in the restoring state. To solve this type the following in the Query window.
  ```
  Restore database dbname With RECOVERY
  ```
  Replace "dbname" with the name of the DB that you want to restore.

- If you are restoring a database on another existing active database, you may get the following error.

  ```
  "The backup set holds a backup of a database other than the existing
  'Database Name' database".
  ```

  To solve this type the following in the Query window....

  ```
  RESTORE DATABASE dbname
   FROM DISK = 'C:\Backupdbname.bak'
        WITH REPLACE
  ```

  where `dbname` is the name of the Database to which you want to restore the backed-up data.
  and `'C:\Backupdbname.bak'` is the location and the name of the backed-up file

- The restore process may take some time depending on the size of the backed-up Globodox DB being restored.

Related Topics

Restore a backed-up MS SQL Server 2000 DB 445
Restore a backed-up MS SQL Server 2005 DB 447
Restore a backed-up MySQL based Globodox DB 452

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25.2.2.4 Restore a Backed-up MS SQL Server 2012 DB

You can use the SQL Server Management Studio to restore your MS SQL Server 2012 based Globodox DB. You will require the latest Backup copy of the Master DB, i.e. the MainDB its cache file i.e. the *MainDB_cache*, all the MS SQL Server 2012 based Globodox DB along with their linked folder which contains the File Store to restore the DB's.

Note: You will need to have an existing DB or you will have to to create a blank DB to restore the data from the Backed up DB.

To Restore a Backed-up MS SQL Server 2012 based Globodox DB

1. Make sure Globodox 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 a DB from the *To database* drop-down to restore the backed-up DB. Incase you want to create a new DB to restore the backed-up DB then type the name of the DB in this box.
6. All the DB backups that were performed will be displayed in the *From Database* drop-down. Select a backup from the list to restore.
7. Incase the backup file is not listed in the *From Database* drop-down then select the *From device* option to specify the location of the back-up file. Click this **[...]**button to specify the location of the backed up file.
8. Once the backup file is selected the DB backup and the Transaction log back will be displayed in the *Select the backup sets to restore* section. Make sure both the back up of the DB and its Transaction log is checked.
9. Click the *Options* tab in the left pane. The options will now be displayed.
10. From the *Restore options* choose an appropriate option or leave it blank.
11. Select the *RESTORE WITH RECOVERY* option from the recovery state.
12. Click the *OK* button to begin the restore. Once the restore is complete you will get a confirmation message, click *OK*.
13. Now, select *MainDB_cache* from the list and follow step 4-8 to restore this DB.
14. Once you have restored *MainDB* and *MainDB_cache,* close the SQL Server Management Studio.
15. Now that you have restored the DB, you will now have to restore the DB's File Store 318 i. e. its linked folder which contains the File Store.
16. Now, unzip this backed up folder that contains the File Store i.e. the MainDB folder and add it to the folder where Globodox databases are stored. This is usually the C:\Globodox Databases folder.

    The DB is now completely restored and ready to use.

17. Start Globodox, click *Settings* > *System Settings* > *DB List node*... The *DB List Manager* will now be displayed.
18. Click the *New* button to add the restored DB to Globodox DB List. The DB Details window will now be launched.
19. Select *MS SQL* option from the *DB Type* drop-down.
20. Provide the machine name and the login details of the MySQL Server.

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21. Once you are connected to the MS SQL server, all the DB's will be listed in the *Globodox DB Name* drop-down. Type the DB name or select the DB that you have restored from the *Globodox DB Name* drop-down and click the *OK* button.
22. When you open this DB, you may be prompted to specify the File Store for the DB. Point it to the 'C:\Globodox Databases' folder.

    Follow the same steps to restore the other backed-up DB's

23. Now, unzip the multi-user.gdx file and paste it in the ITAZ\Globodox 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 Server 2012, this will be the C:\ProgramData\ITAZ\Globodox folder.
    For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

Notes:

- Sometimes after restoration the DB is still in the restoring state. To solve this type the following in the Query window.
  ```
  Restore database dbname With RECOVERY
  ```
  Replace "dbname" with the name of the DB that you want to restore.

- If you are restoring a database on another existing active database, you may get the following error.

  ```
  "The backup set holds a backup of a database other than the existing
  'Database Name' database".
  ```

  To solve this type the following in the Query window....

  ```
  RESTORE DATABASE dbname
   FROM DISK = 'C:\Backupdbname.bak'
        WITH REPLACE
  ```

  where `dbname` is the name of the Database to which you want to restore the backed-up data.
  and `'C:\Backupdbname.bak'` is the location and the name of the backed-up file

- The restore process may take some time depending on the size of the backed-up Globodox DB being restored.

Related Topics
Restore a backed-up MS SQL Server 2000 DB 445
Restore a backed-up MS SQL Server 2005 DB 447

25.2.3 Restore a Backed-up MySQL DB

You can use the *mysqldump* application to restore your backed MySQL Server based Globodox DB. You will require the latest Backup copy of the Master DB, i.e. the MainDB its cache file i.e. the *MainDB_cache*, all the MySQL Server based Globodox DB along with their linked folder which contains the File Store. Also see, Backup MySQL Server based Globodox DB 440

Note:
The backed-up DB files i.e. the .sql files should be located in the Bin folder, which is usually

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located in the *C:\Program Files\MySQL\MySQL Server 5.0\Bin folder*

To Restore a Backed-up MySQL Server based Globodox DB

1. Make sure Globodox is not running.
2. Start *MySQL Command Line Client*. The MySQL Command Line Client will now be launched.
3. Enter the admin password and hit *Enter* to login.
4. Create a DB to import the backed-up data. To create a DB type the following...

   create database [database name]**;**
   [database name] = name of the DB

   For example: *create database MainDB**;***

5. Hit the Enter key to create the DB.The DB will now be created.
6. Select the created DB to restore the backed-up data. To select the DB type...

   use [database name]**;**
   [database name] = name of the DB

   For example: *use MainDB**;***

7. Hit the Enter key to select the DB.The DB will now be selected.
8. Specify the backed-up file to restore the data. To specify the file type...

   source [dump sql];
   [dump sql] = The name of the backup file

   For example: *source MainDBbackup.sql;*

9. Hit the Enter key to restore the DB.The DB will now be restored.
10. Follow steps 4-9 to restore the *MainDB_cache*.
11. Once you have backed-up *MainDB* and *MainDB_cache,* close the Command Prompt.
12. You will now have to restore the DB's File Store 318 i.e. its linked folder which contains the File Store.
13. Unzip this backed up folder that contains the File Store i.e. the MainDB and add it to the folder where Globodox databases are stored. This is usually the C:\Globodox Databases folder.

    The DB is now completely restored and ready to use.

14. Start Globodox, click *Settings* > *System Settings* > *DB List node*.
15. Click the *New* button to add the restored DB to Globodox DB List. The DB Details window will now be launched.
16. Select *MySQL DB* option from the *DB Type* drop-down.
17. Provide the machine name and the login details of the MySQL Server.
18. Once you are connected to the MySQL server, all the DB's will be listed in the *Globodox DB Name* drop-down. Type the DB name or select the DB that you have restored from the *Globodox DB Name* drop-down and click the *OK* button.
19. When you open this DB, you may be prompted to specify the File Store for the DB. Point it to the 'C:\Globodox Databases' folder.

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Follow the same steps to restore the other backed-up DB's

20. Now, unzip the multi-user.gdx file and paste it in the ITAZ\Globodox 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\Globodox folder.
For Windows 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

Notes:

- The restore process may take some time depending on the size of the backed-up Globodox DB being restored.

Related Topics

Restore a backed-up MS SQL DB 444
Restore a backed-up MS Access DB 443

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26 Globodox Workflow

Topics Covered

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26.1 Introduction

What is Globodox Workflow?

Globodox Workflow can be used to route documents/tasks to a particular user (or set of users) to perform actions as per your current work processes. In other words Globodox Workflow helps with the automation of business processes. A user can either be a person or a computer application.

What can I use Globodox Workflow for?

You can use Globodox workflow to automate the routing of documents as per the current business processes of your organization. You can do this by creating and assigning tasks using logical and rule based procedures that are similar to those used by your organization to do the same task in real life scenario.

For a simple example see: Workflow created for Acme Corp using Globodox Workflow 490

Features of Globodox Workflow...

1. The *Workflow Designer* application provides a simple method to create and design your workflow as per your work processes.
2. Several pre-defined *Tasks* are available that you can use while designing your workflow.
3. Several *Conditions And Loops* are available to conditionally perform certain tasks or to perform certain tasks repeatedly..
4. Workflow tasks can be assigned to one or more users.
5. You can notify any user about any workflow event.
6. Workflow *Inbox* application provides an easy to use way to view and perform tasks assigned to you as well as to view notifications sent to you.
7. *Workflow Monitor* application provides an easy to use way to monitor the on going workflow.

Advantages of Globodox Workflow...

1. Documents can never be lost or misplaced.
2. Documents are always passed on to the right person. Thus, eliminating the chances of sensitive/confidential data being leaked.
3. Increased chances of the Task/Project being completed in the stipulated time.
4. Manpower requirement can be reduced.
5. Savings of time as well as money.
6. Productivity increases mean increased profit.

Related Topics
Workflow Designer 457
Workflow Monitor 457
General Activities (Tasks) 460
Conditions and Loops 483

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26.2 Workflow Designer

Globodox Workflow Designer is an application that provides a simple method to create and design powerful workflows as per your work processes.

The workflow designer window is divided into three sections the first section on the left side is the *Task* pane, the one in the center is the *Workflow Designer* pane and the section on the right side is the *Task Properties* pane.

Task pane
The *Task* pane contains all the *Tasks* that can be used to create a workflow. The *Task* pane contains, the *General Activities* section and the *Conditions And Loops* section.

Workflow Designer Pane
The *Workflow Designer* pane is used to list down the sequence of tasks involved in the business process.

Properties Pane
The *Properties* pane is used to view, enter and change the properties of the currently selected Task in the *Workflow Designer* Pane. For e.g. Approve Documents Task has properties like No of Approvals, Approvers, Max Recipients etc

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Related Topics
Workflow Monitor 457
General Activities (Tasks) 460
Conditions and Loops 483

26.3 Workflow Monitor

Globodox Workflow Monitor is an application that provides a simple interface to monitor your workflow, Using the Workflow monitor you can view the progress of the workflow, pause a workflow and cancel a workflow. You can also see the history of completed and canceled workflows.

The Workflow Monitor Window is divided into two panes the first pane is the Monitor pane and the second pane is the Display pane.

Monitor Pane

The Monitor pane is subdivided into, the *Active Workflow* section and the *History* section.

Active Work Items
The *Active Work Items* section displays all the task that are assigned to users. This section is further subdivided into *All Users, and Assigned To Me*.

All Users: Select the *All Users* option to view all the task that are assigned to all the users. Only the superadmin user is allowed to view this list.

Assigned to me: Select the *Assigned to me* option to view all the task that are assigned to you. You can double click a task to view the document attached to the task.

Active Workflow
The *Active Workflow* section monitors all the workflows which are currently in progress. This section is further subdivided into *All, Running, Paused* and *Error*.

All: Select the *All* option to view all the workflows that are running, paused or that have stopped because of an error.

Running: Select the *Running* option to view the workflows that are currently in progress.

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You can double click a workflow to view which activity of the workflow is currently in progress. The activities which have been performed will be marked with a tick, The activity that is currently in progress will be displayed in green colored text.

Paused: Select the *Paused* option to view the workflows that are currently paused. The activities which have been performed will be marked with a tick, The activity at which the workflow is paused will be displayed in green colored text. Please note the activity at which the workflow is stopped will not be shown in the users Inbox 545

Error: Select the *Error* option to view the workflows that have been stopped due to some error. You can double click a workflow to view which activity of the workflow is giving the error. The problematic activity will be displayed in green colored text.

Once you have rectified that error, you can click the *Resume* button to continue the workflow. You can click the *Task Log* tab to view the log of the activities that have been completed or still in progress for that workflow.

History:

The *History* sections displays the log of all the completed and canceled workflow. This section is further subdivided into *All, Finished* and *Canceled*.

All: Select *All* option to view the logs of all the workflows that were completed or canceled.

Finished: Select the *Finished* option to view the logs of only those workflows that were completed successfully.

Cancelled: Select the *Cancelled* option to view the logs of only those workflows that were canceled.

Display Pane:

The options that are selected in the *Monitor* pane will be displayed in the Display pane.

The Display pane has a toolbar called the Monitor toolbar. The toolbar has the following buttons...

Refresh: The *Refresh* button is used to refresh the list of items in the Display pane.

Pause: The *Pause* button is used to pause a Workflow in progress. Please note the activity at which the workflow is stopped will not be shown in the users Inbox 545

Resume: The *Resume* button is used to resume a Workflow.

Cancel: The *Cancel* button is used to cancel a *Workflow* in progress.

Delete: The *Delete* button is used to delete the logs in *History*.

Export: The *Export* button is used to export the Worflow logs.

Note: You can also double click a workflow in the Display pane. The workflow will open in a new window called the ***Workflow Properties***.

Workflow Properties: The *Workflow Properties* window displays the entire workflow in its *Status* tab. The *Status* tab also has the *Refresh*, *Pause*, *Resume* and *Cancel* button. The activities which have been performed will be marked with a tick, The activity that is currently in progress will be with displayed in green colored text.

The *Task Log* tab will display the log of the activities that have been completed or still in progress for that workflow.

Related Topics

Workflow Designer 457

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General Activities (Tasks) 460
Conditions and Loops 483

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26.4 General Activities (Tasks)

In Globodox Workflow a task can be assigned to and performed by a user or the system. Each task has a list of properties. By setting task's properties you can...

- Specify who the task will be assigned to.
- Provide information that the task needs in order to be performed.
- Control how the task will behave.

The following tasks are available currently...

Approve Documents

The *Approve Documents* Task is used for approval of documents. This task can be assigned to one or more users.

The following are the *Approve Documents* Task's properties...

Task Property	Description
Approvers*	Select the users or groups to whom the documents will be routed for approval.
Max Recipients	Specify the maximum number of users to whom the document must be routed for approval. For e.g. If you select 10 users in the *Approvers* property and set the *Max Recipients* property to 5. The workflow engine will only route the document to five of these users after determining the users who are the least busy at the time (i.e. the users who have the least number of tasks assigned to them).
Min Responses	Specify the minimum number of responses required to complete the Approval activity.
Number of Approvals	Specify the number of approvals required to approve the documents.
Name	Specify a new name for the *Approve Documents* Task. A default name is generated for the Task by the *Workflow Designer*. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Subject	Specify a subject for the task. This will be displayed to all users who receive this task in their Inbox 545.
Message	Specify a short message for the task. This will be displayed to all users who receive this task in their Inbox.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users *Inbox*.

See, Create a Workflow to approve documents 490

Send Message

The *Send Message* Task is used to send a message to any user. Messages can be sent to

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either the users *Inbox (Messages)* folder or to an Email address. This task is performed by the System.
The message appears in the *My Messages* folder of the user's Inbox 545.

The following are the *Send Message* Task's properties...

Task Property	Description
Name	Specify a new name for the *Send Message* Task. A default name is generated for the Task by the *Workflow Designer*. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also every task in the workflow design must have a unique name.
Sender List*	Select the users to whom you want the message to be sent.
Subject	Specify a subject for the message that you want to send.
Message	Specify the message that you want to send. To know the approval date of the task, type the following in this box... *%TaskName.Approval Date%* To view the comments of all the approvers type the following in this box... *%TaskName.Details%*
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.
Mode	Specify how would you like to send the message. There are two modes available... **im:** Use the im mode (Internal Messaging) to send messages using Globodox's internal messaging system. The messages sent by this mode will sent to the users Inbox (Messages) folder **email:** Use the email mode to send messages to users e-mail address. The messages sent by this mode will sent to the users e-mail address that has been specified while creating the user

See, Create a Workflow to Notify users 492

Export to folder

This activity can be used to export a document to a folder. This task is performed by the System.

The following are the *Export to folder* Task's properties...

Task Property	Description
Name	Specify a new name for the Export to Folder Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also, every task in the workflow design must

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Task Property	Description
	have a unique name.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.
Path	Specify the path in which the document should be exported. For e.g C:\Temp.
Export Document	Enter Yes to export the document in the selected folder path.
Export data	This property will be used in a later release.

To Do Activity

The *To Do* activity is used to assign a task to one or more users. Once the user has performed the assigned task, the user must click *Apply* in order for the workflow to move forward.

For example:
The Dispatch department of a company needs to ship a consignment to the customer but they must first send them an invoice for the same. The invoice has been generated and added to Globodox. After that the invoice has been routed via the *Invoice Approval* workflow setup in Globodox. After the invoice has been verified and approved, the last step of the process requires the invoice to be emailed to the customer. The *To Do* activity can be used here to assign an "*Email Invoice To Customer*" task to a specific employee. So after the invoice has been approved, the specified user would receive a task for emailing the invoice to the customer.

The following are the *To Do* Task's properties.

Task Property	Description
Name	Specify a new name for the *To Do* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also, every task in the workflow design must have a unique name.
Subject	Specify a subject for the message that you want to send.
Message	Specify the message that you want to send.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.
AssignedTo	Select the user to whom this task has to be assigned.

Delete

This activity can be used to automatically delete documents or Stacks. This task is performed by the System.

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The following are the *Delete* Task's properties...

Task Property	Description
Name	Specify a new name for the *Delete* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Delete Child items	Enter *Yes* to delete the child items of the entity being routed (for example it will delete the stack as well as all the documents related to that stack).
Reason	Please provide a reason for deleting the document/Stack.The reason will be added in the Event Log.

Wait

This activity can be used to wait for a particular time frame before the next activity can proceed.

The following are the *Wait* Task's properties...

Task Property	Description
Name	Specify a new name for the *Wait* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also, every task in the workflow design must have a unique name.
Start Date	Enter the start date for the wait to start. The Start date format would be dd/mm/yyyy hh:mm:ss AM/PM (for e.g 24/04/2013 02:30:00 AM). This field can be left blank.
Interval	Enter the interval at which the activity should wait. It should be a numeric value..
Interval Type	Please enter the type as seconds, hours, minutes, weeks, months and years.

End Workflow

This activity can be used to end a workflow after a certain task is performed. This task is performed by the System.

The following are the *End Workflow* Task's properties...

Task Property	Description
Name	Specify a new name for the *End Workflow* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain

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Task Property	Description
	alphanumeric characters (spaces are not allowed but the dot character is allowed). Also every task in the workflow design must have a unique name.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Change YesNo Field Value

The *Change YesNo Field Value* Task is used to change the value of a YesNo field. This task is performed by the System.

The following are the *Change YesNo Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Change YesNo Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to change. If this field belongs to a Document Type, enter **Self.Field Name e.g. Self.Invoice Paid** If this field belongs to a Stack Type, enter **Parent.Field Name e.g. Parent.Is Customer**
Field Value	Enter the field value for the data field whose field value you want to change. To set the value to *Yes* enter *True* To set the value to No enter False
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users *Inbox*.

See, Create a Workflow to Change the Data Field Value 494

Change DateTime Field Value

The *Change DateTime Field Value* Task is used to change the value of a *DateTime* field. This task is performed by the System.

The following are the *Change DateTime Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Change DateTime Field Value* Task. A

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Task Property	Description
	default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to change. If this field belongs to a Document Type, enter **Self.Field Name e.g. Self.Shipped On** If this field belongs to a Stack Type, enter **Parent.Field Name e.g. Parent.Delivered On**
Field Value	Enter the field value for the data field whose field value you want to change.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users *Inbox*.

Change Numeric Field Value

The *Change Numeric Field Value* Task is used to change the value of a *Numeric* field. This task is performed by the System.

The following are the *Change Numeric Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Change Numeric Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to change. If this field belongs to a Document Type, enter **Self.Field Name e.g. Self.Cheque Number** If this field belongs to a Stack Type, enter **Parent.Field Name e.g. Parent.Account Number**
Field Value	Enter a new field value for the data field whose field value you want to change.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users *Inbox*.

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Change Text Field Value

The *Change Text Field Value* Task is used to change the value of a *Numeric* field. This task is performed by the System.

The following are the *Change Text Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Change Text Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to change. If this field belongs to a Document Type, enter **Self.Field Name e.g. Self.Cheque Number** If this field belongs to a Stack Type, enter **Parent.Field Name e.g. Parent.Account Number**
Field Value	Enter a new field value for the data field whose field value you want to change.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users *Inbox*.

Get YesNo Field Value

The *Get YesNo Field Value* Task is used to get value of a data field and compare it with another value. This task is performed by the System.

The following are the *Get YesNo Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Get YesNo Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to check.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Get DateTime Field Value

The *Get DateTime Field Value* Task is used to get value of a data field and compare it with another value. This task is performed by the System.

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The following are the *Get DateTime Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Get DateTime Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to check.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Get DateTime Field Value

The *Get DateTime Field Value* Task is used to get value of a data field and compare it with another value. This task is performed by the System.

The following are the *Get DateTime Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Get DateTime Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to check.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Get Numeric Field Value

The *Get Numeric Field Value* Task is used to get value of a data field and compare it with another value. This task is performed by the System.

The following are the *Get Numeric Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Get Numeric Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also every task in the workflow design must have a unique name.

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Task Property	Description
Field Name	Enter the name of the data field whose field value you want to check.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Get String Field Value

The *Get String Field Value* Task is used to get value of a data field and compare it with another value. This task is performed by the System.

The following are the *Get String Field Value* Task's properties...

Task Property	Description
Name	Specify a new name for the *Get String Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed). Also every task in the workflow design must have a unique name.
Field Name	Enter the name of the data field whose field value you want to check.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Set YesNo Field Value

The *Set YesNo Field Value* Task is used to set a value of a data field to which the document is attached. This task is performed by a User.

The following are the *Set YesNo Field Value* Task's properties...

Task Property	Description
Editor	Specify the user who is going to edit the data field. This user will get a notification that he/she has to set a field value.
Name	Specify a new name for the *Set YesNo Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Subject	Specify a subject for the task. This will be displayed to all users who receive this task in their Inbox 545
Message	Specify a short message for the task. This will be displayed to all users who receive this task in their Inbox.
Field Name	Enter the name of the data field whose field value you want to change.

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Task Property	Description
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Set DateTime Field Value

The *Set DateTime Field Value* Task is used to set a value of a data field to which the document is attached. This task is performed by a User.

The following are the *Set DateTime Field Value* Task's properties...

Task Property	Description
Editor	Specify the user who is going to edit the data field. This user will get a notification that he/she has to set a field value.
Name	Specify a new name for the *Set DateTime Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Subject	Specify a subject for the task. This will be displayed to all users who receive this task in their Inbox 545
Message	Specify a short message for the task. This will be displayed to all users who receive this task in their Inbox.
Field Name	Enter the name of the data field whose field value you want to change.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Set Numeric Field Value

The *Set Numeric Field Value* Task is used to set a value of a data field to which the document is attached. This task is performed by a User.

The following are the *Set Numeric Field Value* Task's properties...

Task Property	Description
Editor	Specify the user who is going to edit the data field. This user will get a notification that he/she has to set a field value.
Name	Specify a new name for the *Set Numeric Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.

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Task Property	Description
Subject	Specify a subject for the task. This will be displayed to all users who receive this task in their Inbox 545
Message	Specify a short message for the task. This will be displayed to all users who receive this task in their Inbox.
Field Name	Enter the name of the data field whose field value you want to change.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

Set String Field Value

The *Set String Field Value* Task is used to set a value of a data field to which the document is attached. This task is performed by a User.

The following are the *Set String Field Value* Task's properties...

Task Property	Description
Editor	Specify the user who is going to edit the data field. This user will get a notification that he/she has to set a field value.
Name	Specify a new name for the *Set String Field Value* Task. A default name is generated for the Task by the Workflow Designer. **Note:** The Task's name cannot be empty and can only contain alphanumeric characters (spaces are not allowed but the dot character is allowed) . Also every task in the workflow design must have a unique name.
Subject	Specify a subject for the task. This will be displayed to all users who receive this task in their Inbox 545
Message	Specify a short message for the task. This will be displayed to all users who receive this task in their Inbox.
Field Name	Enter the name of the data field whose field value you want to change.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the users Inbox.

*Task Users

Certain tasks (for e.g. the Approve Documents task) need to be assigned to one or more users. Users need to be assigned so that they are asked to perform that task.

In such cases...
You can select and assign one or more specific users
You can select and assign one or more specific groups (or a mix of specific users and groups)

Workflow Initiator

When selecting users you can also choose a user called *Workflow Initiator*. The user who starts

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(or initiates) a workflow is considered to be the Workflow Initiator. So if a task was assigned to the user called *Workflow Initiator*, it would automatically get assigned to the user who started the workflow.

Related Topics
Workflow Designer 457
Workflow Monitor 457
Conditions and Loops 483

26.5 Auto Publish - Activity

This activity works with Draft Documents 278. After a draft document has been routed for approval, this activity can be used to publish the document in case all users involved in the workflow have approved the document.

How to create a workflow to add Auto Publish the document

1. Select the *Tools* tab and click the *Workflow Designer* button.
2. This will bring up the Workflow Designer 457 window and will also open a login window. Enter the username and password and click OK.
3. Click the *New* button. A new workflow designer window will open in the middle pane and will have various properties in the *Properties* pane.
4. Below are the properties for a new workflow:

Workflow Property	Description
Name	Enter a name for the Workflow.
Description	Add information about the workflow in brief.
Duration (in days)	Specify the number of days in which this activity should be completed. If this activity is not completed in the stipulated number of days, it will be marked as Red in the user's *Inbox*.

5. Drag the Auto Publish Activity from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane. New properties will open in the *Properties* pane. The Auto Publish task will have the following properties:

Property	Description
Name	Provide a name for this task

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Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.

6. Click the *Save* button to save the changes in the Workflow.
7. Click the *Publish* button to publish the Workflow.

Related Topics
Draft Documents 278
Publish 284
Route 547

26.6 Signature - Activity

This activity can be used to automatically add a signature to a document in a Globodox Workflow. This only works on file formats for which Globodox allows Annotations 248 (this includes MS Word and MS Excel files when shown via the new built-in viewer).

When this activity is triggered, it sends a task to the user whose signature is to be placed on the document. This user must then specifically allow his or her signature to be placed on the

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document. The signature activity will then place the signature will then automatically place the user's signature on the pre-determined page and position of the document.

How to create a workflow to "Add Signature" to a document

1. Select the *Tools* tab and click the *Workflow Designer* button.
2. This will bring up the Workflow Designer 457 window and will also open a login window. Enter the username and password and click OK.
3. Click the *New* button. A new workflow designer window will open in the same window in the middle pane and will have various properties in the *Properties* pane.
4. Below are the properties for a new workflow:

Workflow Property	Description
Name	Enter a name for the Workflow.
Description	Add information about the workflow in brief.
Duration (in days)	Specify the number of days in which this activity should be completed. If this activity is not completed in the stipulated number of days, it will be marked as Red in the user's *Inbox*.

5. Drag the Signature Activity from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane. New properties will open in the *Properties* pane. The Signature task will have following properties:

Property	Description
Name	Enter a name for the task (e.g. Add Signature).
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.
Subject	Specify the subject of the message to be sent to the user whose signature is to be applied.
Message	Specify the body of the message to be sent to the user whose signature is to be applied.
Signed By	Select the user whose signature is to be applied.

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Page No.	The page number on which the signature must be applied (in case of a multi-page file).
Top (Distance in inches)	Measuring from the top edge of the page, the position (in inches) where the signature must be placed. **
Left (Distance in inches)	Measuring from the left edge of the page, the position (in inches) where the signature must be placed. **
Width (in inches)	The width (in inches) of the signature.
Height (in inches)	The height (in inches) of the signature.

6. Click the *Save* button to save the changes in the Workflow.
7. Click the *Publish* button to publish the Workflow.

Related Topics

Route a document 547
Annotations 248
Signature 255

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26.7 Auto Stamp - Activity

In Globodox, users can now add a stamp to a document automatically after reviewing the document. This will only work on file formats for which Globodox allows Annotations 248 (this now also includes MS Word and MS Excel files when shown via the new built-in viewer).

How to create a workflow to add Auto Stamp in a document

1. Select the *Tools* tab and click the *Workflow Designer* button.
2. This will bring up the Workflow Designer 457 window and will also open a login window. Enter the username and password and click OK.
3. Click the *New* button. A new workflow designer window will open in the middle pane and will have various properties in the *Properties* pane.
4. Below are the properties for a new workflow:

Workflow Property	Description
Name	Enter a name for the Workflow.
Description	Add information about the workflow in brief.
Duration (in days)	Specify the number of days in which this activity should be completed. If this activity is not completed in the stipulated number of days, it will be marked as Red in the user's *Inbox*.

5. Drag the Auto Stamp Activity from the *Task* pane and drop it on the <<*Add Tasks here*>> in the *Designer* pane. New properties will be opened in the *Properties* pane. Below are the properties of the auto stamp:

Property	Description
Name	Enter the name of the task without using a space in between.
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.
Stamp Name	Enter the name of the stamp.
Page No.	The page number on which the stamp must be applied (in case of a multi-page file).

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Top (Distance in inches)	Measuring from the top edge of the page, the position (in inches) where the stamp must be placed. **
Left (Distance in inches)	Measuring from the left edge of the page, the position (in inches) where the stamp must be placed. **
Width (in inches)	The width (in inches) of the stamp.
Height (in inches)	The height (in inches) of the stamp.

6. Click the *Save* button to save the changes in the Workflow.
7. Click the *Publish* button to publish the Workflow.

Related Topics
Workflow Designer 457
Route 547
Add Stamp 255

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26.8 Apply Security Label - Activity

This activity applies the specified security label to the entity (e.g. Document, Draft Document, Stack) being routed in the workflow. E.g. After a document has been routed for approval, this activity can be used to apply a security label which allows more number of users to view the approved document.

How to create a workflow to apply security label to a routed entity

1. Select the *Tools* tab and click the *Workflow Designer* button.
2. This will bring up the Workflow Designer 457 window and will also open a login window. Enter the username and password and click OK.
3. Click the *New* button. A new workflow designer window will open in the middle pane and will have various properties in the *Properties* pane.
4. Below are the properties for a new workflow:

Workflow Property	Description
Name	Enter a name for the Workflow.
Description	Add information about the workflow in brief.
Duration (in days)	Specify the number of days in which this activity should be completed. If this activity is not completed in the stipulated number of days, it will be marked as Red in the user's *Inbox*.

5. Drag the *Apply Security Label* Activity from the *Task* pane and drop it on the <<*Add Tasks here*>> in the *Designer* pane. New properties will open in the *Properties* pane. The *Apply Security Label* task will have the following properties:

Property	Description
Name	Provide a name for this task
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.
Label Name	Specify the exact name of the security label to apply
Apply to child items	Enter *Yes* to apply the security label to the child items of the entity being routed (for example documents related to a stack).

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6. Click the *Save* button to save the changes in the Workflow.
7. Click the *Publish* button to publish the Workflow.

26.9 Share - Activity

This activity shares the entity (e.g. Document, Draft Document, Stack) being routed in the workflow. E.g. After a document has been routed for approval, this activity can be used to share the approved document with more number of users.

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How to create a workflow to share a routed entity

1. Select the *Tools* tab and click the *Workflow Designer* button.
2. This will bring up the Workflow Designer 457 window and will also open a login window. Enter the username and password and click OK.
3. Click the *New* button. A new workflow designer window will open in the middle pane and will have various properties in the *Properties* pane.
4. Below are the properties for a new workflow:

Workflow Property	Description
Name	Enter a name for the Workflow.
Description	Add information about the workflow in brief.
Duration (in days)	Specify the number of days in which this activity should be completed. If this activity is not completed in the stipulated number of days, it will be marked as Red in the user's *Inbox*.

5. Drag the *Share* task from the *Task* pane and drop it on the <<*Add Tasks here*>> in the *Designer* pane. New properties will open in the *Properties* pane. The *Share* task will have the following properties:

Property	Description
Name	Provide a name for this task
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.
Share with	Select the users with whom the entity should be shared
Apply to child items	Enter *Yes* to apply the security label to the child items of the entity being routed (for example it will apply the security label to a stack as well as all the documents related to that stack).
Allow modify	Enter Yes, if you want to allows users (with whom you are sharing) to modify this entity
Allow delete	Enter Yes, if you want to allows users (with whom you are sharing) to delete this entity

6. Click the *Save* button to save the changes in the Workflow.

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7. Click the *Publish* button to publish the Workflow.

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26.10 Review - Activity

Using the *Review Activity* in a workflow, you can route a document for review, to one or more users. These users can then review the document and provide comments (if any). Each user's comment can optionally be added to the document as a separate note. Usage scenario for this activity includes a situation where you want to send a document after it has been approved, to one or more users so that they can review the same (for e.g. review changes to a policy document).

How to create a workflow to Review a routed entity

1. Select the *Tools* tab and click the *Workflow Designer* button.
2. This will bring up the Workflow Designer 457 window and will also open a login window. Enter the username and password and click OK.
3. Click the *New* button. A new workflow designer window will open in the middle pane and will have various properties in the *Properties* pane.
4. Below are the properties for a new workflow:

Workflow Property	Description
Name	Enter a name for the Workflow.
Description	Add information about the workflow in brief.
Duration (in days)	Specify the number of days in which this activity should be completed. If this activity is not completed in the stipulated number of days, it will be marked as Red in the user's *Inbox*.

5. Drag the *Review Activity* task from the *Task* pane and drop it on the <<*Add Tasks here*>> in the *Designer* pane. New properties will open in the *Properties* pane. The *Review Activity* task will have the following properties:

Property	Description
Name	Provide a name for this task
Subject	Provide the subject of this task
Message	Enter any message you have for the user who will review this entity
Duration (in hours)	Specify the time in which this activity should be completed. If this activity is not completed in the stipulated time, it will be marked as Red in the user's *Inbox*.

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Reviewers	Select the users to whom the entity should be routed for review.
Add reviewer comments as notes	Enter *Yes*, if you want reviewers' comments to be added to the entity as notes.
Audit Activity	Enter *Yes*, if you want this activity to be recorded in the event log.

6. Click the *Save* button to save the changes in the Workflow.
7. Click the *Publish* button to publish the Workflow.

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26.11 Retention Activities

Reserved for future use

26.12 Conditions and Loops

Condition And Loops are used in a workflow to decide if a Task (or a group of Tasks) should be performed and if it should be performed multiple times.

If-Then

The *If-Then* block can be used to specify that a *Task* (or a group of Tasks) must only be performed when the specified condition is satisfied. For example you can setup a rule like...

[Send Document To John For Approval]

```
IF [Document Has Been Approved By John] THEN
   [Send Document to Mary for Approval]
END IF
```

See, Create a Workflow using the If-Then block 496

IF-Then-Else

The *If-Then-Else* block can be used to specify that a *Task* (or a group of Tasks) must only be performed when the specified condition is satisfied and another *Task* (or a group of Tasks) must be performed when the specified condition is not satisfied. For example you can setup a rule like...

[Send Document To John For Approval]

```
IF [Document Has Been Approved By John] THEN
   [Send Document to Mary for Approval]
ELSE
    [Send Document to Jack for Approval]
END IF
```

See, Create a Workflow using If-then-else block 509

If-Then-Repeat Tasks

The *If-Then-Repeat* block can be used to specify that a *Task* (or a group of Tasks) must be performed repeatedly if the specified condition is satisfied (the Workflow Engine will perform the tasks repeatedly until the specified condition is no more satisfied) . For example you can setup a rule like...

[Send Document To John For Approval]

```
IF [Document Has Not Been Approved By John] THEN
    [Send Document to Mary for Approval]
    [Send Document to John for Approval]
REPEAT TASKS
```

Note: In the example above the Workflow Engine will keep sending the document to Mary and then John for approval until the document is approved by John.

See, Create a Workflow using the If then Repeat task block 502

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Do Tasks-Repeat-If

The *Do Tasks-Repeat-If* block can be used to specify that a *Task* (or a group of Tasks) must be performed at least once and repeated if the specified condition is satisfied (the Workflow Engine will perform the tasks repeatedly until the specified condition is no more satisfied) . For example you can setup a rule like...

```
DO TASK
    [Send Document to Mary for Approval]
    [Send Document to John for Approval]
REPEAT IF [Document Has Not Been Approved By John]
```

Note: In the example above the Workflow Engine will keep sending the document to Mary and then John for approval until the document is approved by John.

See, Create a Workflow using the Do Task Repeat If block 505

Specifying Conditions for the Approve Documents Task

You can specify conditions to If block based on the result of Approve Documents task. For e.g. you can tell the Workflow to perform a certain task when the document is approved and perform another task when it is rejected.

The Approve Task has the following parameters...

Approved:	Use this parameter to check if the document has been approved or rejected by the approver and based on the result you can ask the system perform the next task
Comments:	Use this parameter to check the comment of the approver and based on the comment written you can ask the system perform the next task.
Approval Date:	Use this parameter to check the date when the document was approved and based on the date of approval you can ask the system perform the next task.
Details:	Use this parameter to check the comments of all the approvers of the document and based on the comments written you can ask the system perform the next task.

Approved Parameter: To use the Approved parameter type the following in Condition box of the If block

[Task Name].[Parameter][Operator][Field Value]

e.g. 1: ApprovalFromTheSupervisor.Approved=Yes

where, ApprovalFromTheSupervisor is the Task Name

Approved is the parameter

= is the Operator

Yes is the value

e.g. 2: ApprovalFromTheSupervisor.Approved=No

The following operators are available for the Approved task

= equal to
<> not equal to

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By default the initial value of the conditions will be set to Null.

Tip: You can also enter two conditions by using AND/OR operators. For e.g.

ApprovalFromTheSupervisor.Approved=No AND ApprovalFromJohn. Approved=Yes

ApprovalFromTheSupervisor.Approved=Yes OR ApprovalFromJohn. Approved=Yes

Approval Date Parameter: To use the Approval Date parameter type the following in Condition box of the If block

[Task Name].[Parameter][Operator][Field Value]

e.g. 1: ApprovalFromTheSupervisor.Approval Date=01/20/2009

where, ApprovalFromTheSupervisor is the Task Name

Approval Date is the parameter

= is the Operator

01/20/2009 is Value (date format mm/dd/yyyy)

e.g. 2: ApprovalFromTheSupervisor.Approval Date>=01/20/2009

The following operators are available for the Approval Date task

= Approved On
<> Not Approved On
> Approved before
>= Approved before or On
< Approved After
<= Approved After or On

By default the initial value of the conditions will be set to Null.

Details Parameter: To use the Details parameter type the following in Condition box of the If block.

[Task Name].[Parameter][Operator][Field Value]

e.g: ApprovalFromTheSupervisor.Details Like Approved

where, ApprovalFromTheSupervisor is the Task Name

Details is the parameter

Like is the Operator

Approved is Value

The following operators are available for the Approval Date Paramter

= Equal to
<> Not equal to
Like Contains

By default the initial value of the conditions will be set to Null.

Specifying Conditions for the Get YesNo Field Value and Set YesNo Field Task

You can specify conditions to If block based on the value in the field that is specified in the Get

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YesNo Field Value (or Set YesNo Field Value) task. For e.g. you can tell the Workflow to perform a certain task when the value of the field is Yes and perform another task when the value of the field No.

The Get YesNo Field Value and the Set YesNo Field Value Task has the following parameters...

Value	Use this parameter to check the value of the specified YesNo field and based on the value you can ask the system perform the next task

To use the Value parameter, type the following in Condition box of the If block

[Task Name].[Parameter][Operator][Field Value]

e.g. 1: GetInvoicePaid.Value=Yes

where, GetInvoicePaid is the Task Name
Value is the Parameter
= is the Operator
Yes is the Field Value

e.g. 2: GetAmount.Value<'800'

e.g. 3: GetAmount.Value>'=800'

The following operators are available for the Value Parameter of the Get YesNo Field Value (or Set YesNo Field Value) task.

= Equal to
<> Not equal to

By default the initial value of the conditions will be set to Null.

Specifying Conditions for the Get DateTime Field Value and Set DateTime Field Task

You can specify conditions to If block based on the value in the field that is specified in the Get DateTime Field Value (or Set DateTime Field Value) task. For e.g. you can tell the Workflow to perform a certain task when the value of the field corresponds to a certain value and perform another task when the value of the field does not correspond to that value. .

The Get DateTime Field Value and the Set DateTime Field Value Task has the following parameters...

Value	Use this parameter to check the value of the specified DateTime field and based on the value you can ask the system perform the next task

To use the Value parameter, type the following in Condition box of the If block

[Task Name].[Parameter][Operator][Field Value]

e.g. 1: GetInvoiceDate.Value=01/20/2009

where, GetInvoiceDate is the Task Name

Value is the parameter

= is the Operator

01/20/2009 is Value (date format mm/dd/yyyy)

e.g. 2: GetInvoiceDate.Value>=01/20/2009

The following operators are available for the Value parameter of the Get DateTime Field Value

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(or Set DateTime Field Value) task

= Approved On
<> Not Approved On
> Approved before
>= Approved before or On
< Approved After
<= Approved After or On

By default the initial value of the conditions will be set to Null.

Specifying Conditions for the Get Numeric Field Value and Set Numeric Field Task

You can specify conditions to If block based on the value in the field that is specified in the Get Numeric Field Value (or Set Numeric Field Value) task. For e.g. you can tell the Workflow to perform a certain task when the value of the field is equal to a certain value and perform another task when the value of the field is not equal to that value.

The Get Numeric Field Value and the Set Numeric Field Value Task has the following parameters...

Value	Use this parameter to check the value of the specified numeric field and based on the result you can ask the system perform the next task

To use the Value parameter, type the following in Condition box of the If block

[Task Name].[Parameter][Operator][Field Value]

e.g. 1: GetAmount.Value='800'

where, GetAmount is the Task Name
Value is the Parameter
=is the Operator
800 is the Field Value

e.g. 2: GetAmount.Value<'800'

e.g. 3: SetAmount.Value>'=800'

The following operators are available for the Value Parameter of the Get Numeric Field Value (or Set Numeric Field Value) task.

= Equal to
<> Not equal to
> Greater than
>= Greater than equal to
< Less than
<= Less than equal to

By default the initial value of the conditions will be set to Null.

Specifying Conditions for the Get Text Field Value and Set Text Field Task

You can specify conditions to If block based on the value in the field that is specified in the Get Text Field Value (or Set Text Field Value) task. For e.g. you can tell the Workflow to perform a certain task when the value of the text field is contains a certain value and perform another task when the value of the field is not contain that value.

The Get Text Field Value and the Set Text Field Value Task has the following parameters...

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Value	Use this parameter to check the value of the specified text field and based on the result you can ask the system perform the next task

To use the Value parameter, type the following in Condition box of the If block

[Task Name].[Parameter][Operator][Field Value]

e.g: ApprovalFromTheSupervisor.Details Like Approved

where, ApprovalFromTheSupervisor is the Task Name

Value is the parameter

Like is the Operator

Approved is Value

The following operators are available for the Value parameter of the Get Text Field Value (or Set Text Field Value) task

= Equal to
<> Not equal to
Like Contains

By default the initial value of the conditions will be set to Null.

Related Topics

Workflow Designer 457
Workflow Monitor 457
General Activities (Tasks) 460

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26.13 Create Workflows

Topics Covered

6.1 Create a Workflow to Approve Documents 490
6.2 Create a Workflow to Notify Users 492
6.3 Create a Workflow to Change a Data Field Value 494
6.4 Create a Workflow Using the If-Then Block 496
6.5 Create a Workflow Using the If-Then Else Block 509
6.6 Create a Workflow Using the Get Field Value Task Block 498
6.7 Create a Workflow Using the Set Field Value Task Block 500
6.8 Create a Workflow Using the If-Then Repeat Task Block 502
6.9 Create a Workflow Using the Do Task Repeat If Block 505
6.10 Workflow Examples 512

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26.13.1 Create a Workflow to Approve Documents

The Workflow is created based on the following scenario...

An organization called Acme Corp. generates large volumes of documents everyday. Multiple employees at Acme Corp. generate documents which must be approved by their supervisor. Acme Corp wants to implement workflow which will cut down the time spent to manage these documents and thus increase the productivity of their organization.

Acme Corp. has the following business process (for simplicity we will consider one user named John who creates the documents and then routes them to this Supervisor for approval)...

Here is the Acme Corp.'s business process...

- John creates a document
- John sends the document to his Supervisor for approval.
- The Supervisor is then notified that John has sent a document.
- The Supervisor reviews the document and approves or rejects it accordingly.

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow to Approve Documents

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. We will enter *ApproveDocuments*.
4. Enter additional information about the workflow in the *Description* box. We will enter *This workflow is used to approve the documents*
5. In the *Duration (in days)* box enter the number of days in which this workflow should be completed . If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
6. Drag the *Approve Documents* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
7. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.

   a) Select the users that are going to approve the documents by clicking the **[...]** button next to the *Approvers* box. Here, we will select the *Supervisor*.
   b) Enter the maximum number of users that are going to approve the documents in the *Max Recipients* box. Here, we will enter 1, as only 1 user will approve this document.
   c) Enter the minimum number of approvals that are required to approve the document in the Min Responses box. Here, we will enter 1, as only 1 approval is required.
   d) Enter the number of approvals required for the document to be approved in the *No of Approvals* box. We will enter 1, as only 1 approval is required.
   e) The *Name* box will have a pre-existing name generated by the Workflow Designer. We, will change the name to ApprovebySupervisor.
   f) Enter a subject for the task in the *Subject* box. We will enter *Approve Documents*.
   g) Enter a short message to be sent to the users (Approvers) in the *Message* box. We will

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enter *Approval required for the attached documents*.

h) Enter the time in which this activity should be completed in the *Duration* (in hours) box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox.

8. Click the *Save* button to save the workflow.
9. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

Notes:

- You can also create workflows using conditions and loops. For more info see, Conditions and Loops 483

Related Topics

Create a Workflow to Notify Users 492
Send a Document for Approval 549
Approve a Document 551

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26.13.2 Create a Workflow to Notify Users

The Workflow is created based on the following scenario...

Mary regularly sends documents for review (and not approval) to her Supervisor. She wants the supervisor to be informed whenever documents needs to be reviewed.

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the Create Workflows... and Examples sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow to Notify Users

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. We will enter *SendMessage*.
4. Enter additional information about the workflow in the *Description* box. We will enter *This workflow is used to notify users*.
5. Enter the no of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
6. Drag the *Send Message* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
7. The *Send Message* properties will now be displayed in the *Task Properties* pane.

   a) Enter a name for the task in the *Name* box. We will enter *NotifySupervisor*.
   b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Supervisor's* name.
   c) Enter a subject for the notification in the *Subject* box. We will enter *Documents to be reviewed*
   d) Enter a short message to be sent along with the documents in the *Message* box. We will enter *Please review these documents*.
   e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox* 545.
   f) Specify the mode to send the message. By default messages are sent using the im mode (internal messaging). The messages sent by this mode will sent to the users Inbox (Messages) folder

      If you wish to send the message to a user's email address then type *email* in the Mode box. (Note: You will need to configure Workflow to send messages to a user's email address For more info see Configure Workflow to send messages to users E-mail address 535)

8. Click the *Save* button to save the workflow.
9. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

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Notes:

- You can also create workflows using conditions and loops. For more info see, Conditions and Loops 483

Related Topics

Create a Workflow to Approve Documents 490
Send a Message to Globodox Users 550

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26.13.3 Create a Workflow to Change a Text Field Value

The Workflow is created based on the following scenario...

The Supervisor regularly receives documents for review. Once a document has been reviewed by the Supervisor, the Supervisor then wants to change the value of the Status data field to Reviewed in the Globodox DB.

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow to Change a Text Field Value

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the ***Properties*** pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in Name box. We will enter *ChangeTextFieldValue*.
4. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Enter additional information about the workflow in the *Description* box. We will enter *This workflow is used to change the text field value*.
6. Drag the *Change Numeric Field Value* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
7. The *Change Numeric Field Value* properties will now be displayed in the *Task Properties* pane.
   a) Enter a name for the *Task* in the *Name* box. We, will enter *ChangeStatusValue*.
   b) Specify the field name whose data you want to change, in the *Field name* box.
   This should be in exactly the format below…
   self.Status
   i.e. self.[FieldName]

   Where **Field Name** is the name of the field whose data you want to change.
   The word **self** specifies that the field belongs to a document type.
   If this field belonged to a Stack, then replace **self** with **parent**.
   c) Enter the new value for the data field in the *Field value* box. We will enter *Reviewed*.
   d) Enter the time in which this activity should be completed in the *Duration (in hours)* box.
8. Click the *Save* button to save the workflow.
9. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

Notes:

- You can also create workflows using conditions and loops. For more info see, Conditions and Loops 483

Related Topics

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Create a Workflow to Approve Documents 490
Create a Workflow to Notify Users 492

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26.13.4 Create a Workflow Using the If-Then Block

The Workflow is created based on the following scenario...

John regularly sends documents to the Supervisor for approval. If the Supervisor approves the documents then the value of the Status data field in the Globodox DB is changed to Approved.

John sends document to the Supervisor for Approval]
If [Document Has Been Approved By Supervisor]
Then [Change the value of Status data field to Approved]
End If

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow using the If-Then block:

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. You can also enter additional information about the workflow in the *Description* box.
4. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Drag the *Approve Documents* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
6. The *Approve Documents* properties will now be displayed in the *Properties* pane.
   a) Select the Supervisor's name in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval is required.
   d) Enter *ApprovalfromtheSupervisor* in the *Name* box.
   e) Enter 1 in the *Number of approvals* box, as we need the *Supervisor's* approval.
   f) Enter *Approve Documents* in the *Subject* box.
   g) Enter *Please have a look at the Documents* in the *Message* box.
   h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox* 545.
7. Click the Condition And Loops 483 bar at the bottom of the *Task* pane and drag the the *If-Then* block and drop it below the *Approve Documents* task.
8. Select *If* block in the *Designer* pane. Now, the *Condition* property will be displayed in the *Properties* pane.
9. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
10. Enter a condition for the *If* block in this window. We will enter *ApprovalfromSupervisor. approved=Yes*.
11. Click the *OK* button to save this condition.
12. Drag the *Change Text Field Value* task from the *Task* pane and drop it on *<<Add Tasks*

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here>> below the *Then* block.

13. The *Change Text Field Value* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task tin the *Name* box. We will enter *ChangeStatusValue*.
    b) Specify the field name whose data you want to change, in the *Field name* box.
       This should be in exactly the format below…
       self.Satus
       i.e. self.[FieldName]

       Where **Field Name** is the name of the field whose data you want to change.
       The word **self** specifies that the field belongs to a document type.
       If this field belonged to a Stack, then replace **self** with **parent**.
    c) Enter the new value for the data field in the *Field value* box. We will enter Approved.
    d) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.
14. Click the *Save* button to save the workflow.
15. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

Notes:

- To create more complex workflows see, the More Examples 509 section.

Related Topics

Create a Workflow using the If-Then Else block 509
Create a Workflow using the If-Then Repeat Task block 502
Create a Workflow using the Do Task Repeat If block 505

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26.13.5 Create a Workflow Using the Get Numeric Field Value Task

The Workflow is created based on the following scenario...

Mary sends an Invoice for Approval.

If the Invoice Amount is less than US $850 the Invoice will go to John for approval Else Mary is notified about the policy, i.e. Invoice Amount greater than US $850 will not be approved.

John receives the Invoice which meets the policy, i.e. Invoice Amount is less than US $850.

John sends document to Mary for Approval
If [Invoice Amount is less than 850]
Then [Send document to John for approval]
Else
[Notify Workflow Initiator i.e. Mary about the rejection]
End If

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow using the Get Numeric Field Value Task:

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. We will enter *WorkflowForApproval*.
4. You can also enter additional information about the workflow in the *Description* box. We will enter *This workflow is used to approve the documents*.
5. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
6. Drag the *Get Numeric Field Value* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
7. The *Get Numeric Field Value* properties will now be displayed in the *Task Properties* pane.
   a) Enter a name for the task in the *Name* box. We will enter *GetInvoiceAmountValue.*
   b) Specify the field name whose value you want to know, in the Field Name box.
   This should be in exactly the format below…
   self.Invoice Amount
   i.e. self.[FieldName]
   The word **self** specifies that the field belongs to a document type.
   If this field belonged to a Stack, then replace **self** with **parent**.
   c) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.
8. Click the Conditions And Loops 483 bar at the bottom of the *Task* pane and drag the the *If-*

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Then-Else block and drop it on the *Designer* pane below the *Get Field Value* task.

9. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
10. Click the **[...]** box next to the Condition box to enter a condition. This will bring up the *Condition* window.
11. Enter a condition for the *If* block in this window. We will enter *GetInvoiceAmountValue. Value < 850*.
12. Click the *OK* button to save this condition.
13. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
14. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the users that are going to approve the documents by clicking the **[...]** button next to the *Approvers* box. Here, we will select *John*.
    b) Enter the maximum number of users that are going to approve the documents in the *Max Recipients* box. Here, we will enter 1, as only 1 user will approve this document.
    c) Enter the minimum number of approvals that are required to approve the document in the Min Responses box. Here, we will enter 1, as only 1 approval is required.
    d) Enter the number of approvals required for the document to be approved in the *No of Approvals* box. We will enter 1, as only 1 approval is required.
    e) The *Name* box will have a pre-existing name generated by the Workflow Designer. We, will change the name to *ApprovebyJohn*.
    f) Enter a subject for the task in the *Subject* box. We will enter *Approve Documents*.
    g) Enter a short message to be sent to the users (Approvers) in the *Message* box. We will enter *Approval required for the attached documents*.
    h) Enter the time in which this activity should be completed in the *Duration* (in hours) box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
15. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
16. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the *Task* in the Name box. We will enter *NotifyMary*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender list* box. We will select the *Workflow Initiator* user i.e. Mary.
    c) Enter a subject for the notification in the *Subject* box. We will enter *Rejected Documents*
    d) Enter a short message to be sent along with the documents in the *Message* box. We will enter The Invoice is rejected since the amount is greater than US $850.
    e) Enter the time in which this activity should be completed in the Duration (in hours) box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
17. Click the *Save* button to save the workflow.
18. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

Notes:

- To create more complex workflows see, the More Examples 509 section.

Related Topics

Create a Workflow using the If-Then Else block 509
Create a Workflow using the If-Then Repeat Task block 502
Create a Workflow using the Do Task Repeat If block 505

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26.13.6 Create a Workflow Using the Set Numeric Field Value Task

The Workflow is created based on the following scenario...

John regularly sends Invoices to the Supervisor for approval.

If the Supervisor approves the Invoice then the Mary gets a notification asking her to enter the Amount of the Invoice in the *Invoice Amount* field and then issue a check for the Invoice.

If the Supervisor rejects the Invoice then the Workflow Initiator i.e. John gets a notification about the rejection.

John sends document to Supervisor for Approval
If [Supervisor approves]
Then [Mary Sets Field Value of the Invoice Amount field]
Else
[Notify Workflow Initiator i.e. John about the rejection]
End If

Notes:
1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow using the Set Numeric Field Value Task:

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. You can also enter additional information about the workflow in the *Description* box.
4. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Drag the *Approve Documents* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
6. The *Approve Documents* properties will now be displayed in the *Properties* pane.
   a) Select the Supervisor's name in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval is required.
   d) Enter *ApprovalfromtheSupervisor* in the *Name* box.
   e) Enter 1 in the *Number of approvals* box, as we need the *Supervisor's* approval.
   f) Enter *Approve Invoices* in the *Subject* box.
   g) Enter *Please have a look at the Invoices* in the *Message* box.
   h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox* 545.
7. Click the Condition And Loops 483 bar at the bottom of the *Task* pane and drag the the *If-Then Else* block and drop it below the *Approve Documents* task.
8. Select *If* block in the *Designer* pane. Now, the *Condition* property will be displayed in the

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Properties pane.

9. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
10. Enter a condition for the *If* block in this window. We will enter *ApprovalfromSupervisor. approved=Yes*.
11. Click the *OK* button to save this condition.
12. Drag the *Set Numeric Field Value* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
13. The *Set Numeric Field Value* properties will now be displayed in the *Task Properties* pane.
    a) Select Mary's name in the *Editor* box, as she is going to edit the field.
    b) Enter a name for the task in the *Name* box. We will enter *SetAmountValue*.
    c) Enter a subject for this task. We will enter *Approved Invoices*
    d) Type a short message in the Message box. We will enter, *Please issue a check for this Invoice and enter the make a note of the Invoice Amount.*
    e) Specify the field name whose data you want to change, in the *Field name* box.

       If this field belongs to a Document Type 126, enter **Self.Field Name**
       If this field belongs to a Stack 137, type **Parent.Field Name**

       Where **Field Name** is the name of the field whose data you want to change.
    f) Enter the new value for the data field in the *Field value* box. We will enter Approved.
    g) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.
14. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
15. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the *Task* in the Name box. We will enter *NotifyJohn*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender list* box. We will select the *Workflow Initiator* user i.e. John.
    c) Enter a subject for the notification in the *Subject* box. We will enter *Rejected Documents*
    d) Enter a short message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.
    e) Enter the time in which this activity should be completed in the Duration (in hours) box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
16. Click the *Save* button to save the workflow.
17. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

Notes:

- To create more complex workflows see, the More Examples 509 section.

Related Topics

Create a Workflow using the If-Then Else block 509
Create a Workflow using the If-Then Repeat Task block 502
Create a Workflow using the Do Task Repeat If block 505

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26.13.7 Create a Workflow Using the If-Then Repeat Task Block

The Workflow is created based on the following scenario...

John regularly sends documents to his Supervisor for reviewing. The Supervisor forwards the documents (after editing them if required), to the Manager for approval. The documents rejected by the Manager are returned to Supervisor so that she can modify and re-submit the same. If the Manager approves the documents the value of the Status data field is changed to Approved in the Globodox DB and the Supervisor is notified about the rejected documents.

```
John sends document to his Supervisor for Approval
If [Manager has not approved the documents]
Then
      [Send the documents to the Supervisor for Approval]
      If [Documents have been approved by the Supervisor]
        Then [Send the documents to the Manager for Approval]
             If [Documents have been approved by the
Manager]
               Then [Change the value of Status data field to
Approved]
                Else [Notify Supervisor about the rejection]
              End If
         End If
Repeat Tasks
```

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow using the If-Then Repeat block:

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. You can also enter additional information about the workflow in the *Description* box.
4. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Click the Conditions And Loops 483 button and drag the *If-Then-Repeat Tasks* block and drop it on *<<Add Tasks here>>* in the *Designer* pane.
6. Drag the *Approve Documents* task from the *Task* pane and drop it in the *Then-Repeat Tasks* block.
7. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
   a) Select the Supervisor's name in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval is required.
   d) Enter 1 in the *Number of approvals* box, as we need the Supervisor's approval.
   e) Enter *ApprovalfromSupervisor* in the *Name* box.
   f) Enter *Review Documents* in the *Subject* box.

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g) Enter *Please have a look at the Documents* in the *Message* box.
h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.

8. Click the Condition And Loops 483 button and drag the the *If-Then* block and drop it below the *Approve Documents* task.
9. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
10. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
11. Enter a condition for the *If* block in this window. We will enter *ApprovalfromSupervisor. approved=Yes*.
12. Click the *OK* button to save this condition.
13. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
14. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Manager's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1 in the *Number of approvals* box, as we need the Manager's approval.
    e) Enter *ApprovalfromManager* in the *Name* box.
    f) Enter *Documents Approved* by the *Supervisor* in the *Subject* box.
    g) Enter *Please approve these documents* in the *Message* box.

       If you want to view Supervisor's comments, type the following syntax after the message *%ApprovalfromSupervisor.Details%*.

    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
15. Click the *Conditions And Loops* button and drag the *If-Then-Else* block and drop it below the *Approve Documents* task.
16. Select the *If* block. Now, the *Condition* property will be displayed in the *Properties* pane.
17. Click the **[...]** box next to the Condition box to enter a condition. This will bring up the *Condition* window.
18. Enter a condition for the *If* block in this window. We will enter *ApprovalfromManager. approved=Yes*.
19. Click the *OK* button to save this condition.
20. Drag the *Change Text Field Value* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
21. The *Change Text Field Value* properties will now be displayed in the *Task Properties* pane.
    a) Enter *ChangeStatusValue* in the *Name* box.
    b) Specify the field name whose data you want to change, in the *Field name* box. This should be in exactly the format below…
       self.Invoice Amount
       i.e. self.[FieldName]

       Where **Field Name** is the name of the field whose data you want to change.
       The word **self** specifies that the field belongs to a document type.
       If this field belonged to a Stack, then replace **self** with **parent**.
    a) Enter the new value for the data field in the *Field value* box. We will enter *Approved*.
    c) Enter *Approved* in the *Field value* box
    d) Enter the time in which this activity should be completed in the *Duration (in hours)* box.

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If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

22. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
23. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifySupervisor*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender list* box. We will select the *Supervisor*.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected Documents*.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

       If you want to view Supervisor's comments, type the following syntax after the message *%ApprovalfromSupervisor.Details%*.

    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
24. Select the *Repeat Task* block. Now, the *Condition* property will be displayed in the *Properties* pane.
25. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
26. Enter a condition for the *Repeat Task* block in this window. We will enter *ApprovalfromManager.approved=No*.
27. Click the *OK* button to save this condition.
28. Click the *Save* button to save the workflow.
29. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

Notes:

- To create more complex workflows see, the More Examples 509 section.

Related Topics

Create a Workflow using the Do Task Repeat If block 505

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26.13.8 Create a Workflow Using the Do Task Repeat If Block

The Workflow is created based on the following scenario...

Mary regularly sends documents to John for approval. If John rejects the documents, the documents are returned to Mary so that she can modify and re-submit the same. If John approves the documents, they are sent to the Supervisor for approval. If the Supervisor rejects the documents, the documents are returned to Mary so that she can modify and re-submit the same. If the Supervisor approves the documents, the Manager is notified that the documents have been approved.

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

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To Create a Workflow using the Do Task Repeat If block:

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in Name box. You can also enter additional information about the workflow in the *Description* box.
4. Enter the number of days in which this Workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Drag the *Approve Documents* task from the *Task* pane and drop it it on *<<Add Tasks here>>* in the *Workflow Designer* pane.
6. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
   a) Select John in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval is required.
   d) Enter 1 in the *Number of approvals* box, as we need John's approval.
   e) Enter *SendToJohn* in the *Name* box.
   f) Enter *Approve Document* in the *Subject* box.
   g) Enter *Please have a look at the Document* in the *Message* box.
   h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.
7. Click the Conditions And Loops 483 button and drag the *If-Then* block and drop it below the *Approval* task.
8. Select *If* block. Now, the *Condition* property will be displayed in the *Properties* pane.
9. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
10. Enter a condition for the If block in this window. We will enter *SendToJohn. approved=Yes*.
11. Click the *OK* button to save this condition.
12. Drag the *Approve Documents* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
13. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Supervisor's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1 in the *Number of approvals* box, as we need the Supervisor's approval.
    e) Enter *SendToSupervisor* in the *Name* box.
    f) Enter *Approve Document* in the *Subject* box.
    g) Enter *Please approve the Document* in the *Message* box.

       If you want to view John's comments, type the following syntax after the message *% SendToJohn.Details%*.

    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
14. Click the *Conditions And Loops* button and drag the the *Do-Tasks Repeat If* block and drop it below the *Approve Documents* task.
15. Now, click the *Conditions And Loops* button and drag the *If-Then* block and drop it below the *Approval* task.

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16. Select *If* block. Now, the *Condition* property will be displayed in the *Properties* pane.
17. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
18. Enter a condition for the *If* block in this window. We will enter *SendToJohn.approved=No OR SendToSupervisor.approved=No*.
19. Click the *OK* button to save this condition.
20. Drag the *Approve Documents* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
21. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the *Worflow Initiator* i.e. Mary's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1 in the *Number of approvals* box, as we need the Supervisor's approval.
    e) Enter *ApprovalbyWorkflowInitiatorMary* in the *Name* box.
    f) Enter *Review the Document* in the *Subject* box.
    g) Enter *Please have a look at the Document* in the *Message* box. You can view comments of both *John* and *Supervisor* enter the following syntax after the message...
    %SendToJohn.Details%
    %SendToSupervisor.Details%

    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
22. Now, click the *Conditions And Loops* button and drag the *If-Then* block and drop it below the *Approval* task.
23. Select *If* block. Now, the *Condition* property will be displayed in the *Properties* pane.
24. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
25. Enter a condition for the If block in this window. We will enter *ApprovalbyWorkflowInitiatorMary.approved=Yes*.
26. Click the *OK* button to save this condition.
27. Drag the *Approve Documents* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
28. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select John in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1 in the *Number of approvals* box, as we need John's approval.
    e) Enter *SendToJohnAgain* in the *Name* box.
    f) Enter *Approve Document* in the *Subject* box.
    g) Enter *Please have a look at the Document* in the *Message* box.
    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
29. Again, click the *Conditions And Loops* button and drag the *If-Then* block and drop it below the *Approval* task.
30. Select *If* block. Now, the *Condition* property will be displayed in the *Properties* pane.
31. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
32. Enter a condition for the *If* block in this window. We will enter *SendToJohnAgain. approved=Yes*.
33. Click the *OK* button to save this condition.

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34. Drag the *Approve Documents* task from the *Task* pane and drop it on <<*Add Tasks here*>> below the *Then* block.
35. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Supervisor's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1 in the *Number of approvals* box, as we need the Supervisor's approval.
    e) Enter *SendToSupervisorAgain* in the *Name* box.
    f) Enter *Approve Document* in the *Subject* box.
    g) Enter *Please approve the Document* in the *Message* box.
    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
36. Select the *Repeat If* block. Now, the *Condition* property will be displayed in the *Properties* pane.
37. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
38. Enter a condition for the *Repeat If* block in this window. We will enter *SendToSupervisorAgain.approved=No OR SendToJohnAgain.approved=No*.
39. Drag the *Send Message* task from the *Task* pane and drop it below the *Repeat If* block.
40. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyManager*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the Manager's name.
    c) Enter a subject for the notification in the *Subject* box. We will enter *Documents Approved.*
    d) Enter a short message to be sent along with the documents in the *Message* box. We will enter *Document Has been Approved by the Supervisor*.
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
41. Click the *OK* button to save this condition.
42. Click the *Save* button to save the workflow.
43. Click the *Publish* button to publish the workflow to all the users.

Notes:

- To create more complex workflows see, the More Examples 509 section.

Related Topics

Create a Workflow using the If-Then Repeat Task block 502

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26.13.9 Workflow Examples

Example1 512
Example 2 517
Example 3 522
Example 4 526

26.13.9.1 Create a Workflow Using the If-Then Else Block

The Workflow is created based on the following scenario...

Mary regularly receives documents from John for approval. If Mary approves the documents then the Manager must be informed about the approval. If Mary rejects the documents then John must be informed about the rejection.

John sends document to Mary for Approval
If [Documents have been approved by Mary]
Then [Notify the Manager about the approval]
Else
[Notify John about the rejection]
End If

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

To Create a Workflow using the If-Then Else block:

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. We will enter *WorkflowForApproval*.
4. You can also enter additional information about the workflow in the *Description* box. We will enter *This workflow is used to approve the documents*.
5. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
6. Drag the *Approve Documents* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
7. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
   a) Select Mary in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval is required.
   d) Enter 1 in the *Number of approvals* box, as we need Mary's approval.
   e) Enter *ApprovalfromMary* in the *Name* box.
   f) Enter *Approve Documents* in the *Subject* box.

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g) Enter *Please have a look at the Documents* in the *Message* box.
h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.

8. Click the Conditions And Loops 483 bar at the bottom of the *Task* pane and drag the the *If-Then-Else* block and drop it on the *Designer* pane below the *Approve Documents* task.
9. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
10. Click the **[...]** box next to the Condition box to enter a condition. This will bring up the *Condition* window.
11. Enter a condition for the *If* block in this window. We will enter *ApprovalfromMary. approved=Yes*.
12. Click the *OK* button to save this condition.
13. Now, drag the *Send Message* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
14. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the *Task* in the *Name* box. We will enter *NotifyManager*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender list* box. We will select the *Manager*.
    c) Enter a subject for the notification in the *Subject* box. We will enter *Approved by the Supervisor*.
    d) Enter a short message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

       If you want to view Mary's comments, type the following syntax after the message *% ApprovalfromMary.Details%*
       If you want to know the Date and time when Mary approved the document, type the following syntax after the message *%ApprovalfromMary.Approval Date%*
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.
15. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
16. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the *Task* in the Name box. We will enter *NotifyJohn*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender list* box. We will select the *Workflow Initiator* user i.e. John.
    c) Enter a subject for the notification in the *Subject* box. We will enter *Rejected Documents*
    d) Enter a short message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.
    e) Enter the time in which this activity should be completed in the Duration (in hours) box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
17. Click the *Save* button to save the workflow.
18. Click the *Publish* button to publish the workflow to all the users. This workflow will now be available for the Globodox user from the *Route* 547 option.

Notes:

- To create more complex workflows see, the More Examples 509 section.

Related Topics

Create a Workflow using the If-Then Repeat Task block 502

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Create a Workflow using the Do Task Repeat If block 505

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26.13.9.2 Example 1

John regularly sends documents to the Supervisor for approval.. If Supervisor approves the documents then the Manager will receive this documents for final approval. If Supervisor rejects the documents then John must be informed about the rejection. The Manager reviews these documents once again. If the Manager approves the documents then the value of the Status data field in the Globodox DB is changed to Approved. If the Manager rejects the documents then Supervisor must be informed about the rejection.

John sends documents to the Supervisor for approval.
The Supervisor will then approve/reject these documents accordingly.
The approved document will go to the Manager for final approval and the rejected documents will go back to John for revaluation.
The Manager will approve/reject the documents.
The Status data field value changes to Approved in the Globodox DB for the Approved documents.
The Supervisor is notified about the rejected documents.

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the *Create Workflows...* and *Examples* sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

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1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. You can also enter additional information about the workflow in the *Description* box.
4. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Drag the *Approve Documents* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
6. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.

   a) Select the Supervisor's name in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval is required.
   d) Enter 1 in the *Number of approvals* box, as we need the Supervisor's approval.
   e) Enter *ApprovalfromSupervisor* in the *Name* box.
   f) Enter *Approve Documents* in the *Subject* box.
   g) Enter *Please have a look at the Documents* in the *Message* box.
   h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.

7. Click the *Conditions And Loops* button and drag the the *If-then-else* option and drop it below the *Approve Documents* task.
8. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
9. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
10. Enter a condition for the *If* block in this window. We will enter *Approval from Supervisor. approved=Yes*.
11. Click the *OK* button to save this condition.
12. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
13. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.

    a) Select the Manager's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1 in the *Number of approvals* box, as we need the Manager's approval.
    e) Enter *ApprovalfromManager* in the *Name* box.
    f) Enter *Documents Approved by the Supervisor* in the *Subject* box.
    g) Enter *Please approve these documents* in the *Message* box.

       If you want to view Supervisor's comments, type the following syntax after the message *%ApprovalfromSupervisor.Details%*.

    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

14. Drag the the *If-then-else* option and drop it on the *Designer* pane below the *Approve*

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Documents task.

15. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
16. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
17. Enter a condition for the *If* block in this window. We will enter *ApprovalfromManager. approved=Yes*.
18. Click the *OK* button to save this condition.
19. Drag the *Change Text Field Value* task from the *Task* pane and drop it in the *Then* block.
20. The *Change Text Field Value* properties will now be displayed in the *Task Properties* pane.

    a) Enter *ChangeStatusValue* in the *Name* box.
    b) Specify the field name whose data you want to change, in the *Field name* box. This should be in exactly the format below…
    self.Invoice Amount
    i.e. self.[FieldName]

    Where **Field Name** is the name of the field whose data you want to change.
    The word **self** specifies that the field belongs to a document type.
    If this field belonged to a Stack, then replace **self** with **parent**.

    We will enter *Self.Status* in the *Field name* box.
    c) Enter *Approved* in the *Field value* box
    d) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
21. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
22. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifySupervisor*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Supervisor*.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Manager*.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

    If you want to view Manager's comments, type the following syntax after the message *%ApprovalfromManager.Details%*
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
23. Now, drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
24. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyJohn*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Workflow Initiator* user i.e.John.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Supervisor*
    d) You can type in a message to be sent along with the documents in the Task Message box. We will enter Please review these documents once again.

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If you want to view Supervisor's comments, type the following syntax after the message %ApprovalfromSupervisor.Details%

e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

25. Click the *Save* button to save the workflow.
26. Click the *Publish* button to publish the workflow to all the users.

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Related Topics
Start a Workflow 534
Monitor a Workflow 537

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26.13.9.3 Example 2

The Loan officer collects the documents required for the loan from the Borrower.
The Loan officer sends these documents to the Loan Processor.
The Loan Processor verifies the documents.
The Loan Processor then sends the documents rejected by him to the Loan officer and sends the documents approved by him to the Loan Underwriter.
The Loan Underwriter then approves/rejects the documents required for the loan accordingly.
The Loan officer is notified about the rejected documents.
The approved documents is sent to the Cashier.

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the Create Workflows... and Examples sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

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1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. You can also enter additional information about the workflow in the *Description* box.
4. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Drag the *Approve Documents* task from the *Task* pane and drop it on the *<<Add Tasks here>>* in the *Designer* pane.
6. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
   a) Select the Loan Processor's name in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval.
   d) Enter 1 in the *Number of approvals* box, as we need the Loan Processor approval.
   e) Enter *ApprovalfromLoanProcessor* in the *Name* box.
   f) Enter *Approve Documents* in the *Subject* box.
   g) Enter *Please have a look at the Documents* in the *Message* box.
   h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
7. Click the *Conditions And Loops* button and drag the the *If-then-else* option and drop it below the *Approve Documents* task.
8. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
9. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
10. Enter a condition for the *If* block in this window. We will enter *ApprovalfromLoanProcessor.approved=Yes*.
11. Click the *OK* button to save this condition.
12. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
13. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Loan Underwriter's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1in the *Number of approvals* box, as we need the Loan Underwriter's approval.
    e) Enter *ApprovalfromLoanUnderwriter* in the *Name* box.
    f) Enter *Documents Approved by the Loan Processor* in the *Subject* box.
    g) Enter *Please approve these documents* in the *Message* box.

       If you want to view Loan Processor's comments, type the following syntax after the message *%ApprovalfromLoanProcessor.Details%*
    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
14. Drag the the *If-then-else* option and drop it below the *Approve Documents* task.
15. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
16. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the

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Condition window.

17. Enter a condition for the *If* block in this window. We will enter *ApprovalfromLoanUnderwriter.approved=Yes*.
18. Click the *OK* button to save this condition.
19. Drag the *Send Message* Task from the Task pane and drop it on *<<Add Tasks here>>* below the *Else* block.
20. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter Cashier.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the Cashier
    c) You can enter a subject for the notification in the *Subject* box. We will enter Loan Approved.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Loan Approved by the Loan Underwriter*.

       If you want to view Loan Underwriter's comments, type the following syntax after the message *%ApprovalfromLoanUnderwriter.Details%*
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
21. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
22. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Workflow Initiator* user i.e. the Loan Officer.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Loan Underwriter.*
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

       If you want to view Loan Underwriter's comments, type the following syntax after the message *%ApprovalfromLoanUnderwriter.Details%.*
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
23. Now, drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
24. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Workflow Initiator* user i.e. the Loan Officer.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Loan Processor*.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

       If you want to view Loan Processor's comments, type the following syntax after the message *%ApprovalfromLoanUnderwriter.Details%*
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
25. Click the *Save* button to save the workflow.

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26.Click the *Publish* button to publish the workflow to all the users.

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Related Topics
Start a Workflow 534
Monitor a Workflow 537

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26.13.9.4 Example 3

Mary regularly sends documents to John for approval. If John rejects the documents, the documents are returned to Mary so that she can modify and re-submit the same. If John approves the documents, they are sent to the Supervisor for approval. If the Supervisor rejects the documents, the documents are returned to Mary so that she can modify and re-submit the same. If the Supervisor approves the documents, the Manager is notified that the documents have been approved.

Mary sends documents to John for approval.
John will then approve/reject these documents accordingly.
The approved document will go to the Supervisor for approval and Mary will be notified about the rejected documents.
The Supervisor will approve/reject the documents accordingly.
The Manager will be notified about the approved document and Mary will be notified about the rejected documents.

Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the Create Workflows... and Examples sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow the instructions below.

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1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. You can also enter additional information about the workflow in the *Description* box.
4. Drag the *Approve Documents* task from the Task pane and drop it on *<<Add Tasks here>>* in the *Designer* pane.
5. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
   a) Select John in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there is only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval is required.
   d) Enter 1 in the *Number of approvals* box, as we need John's approval.
   e) Enter *SendToJohn* in the *Name* box.
   f) Enter *Approve Document* in the *Subject* box.
   g) Enter *Please have a look at the Document* in the *Message* box.
   h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.
8. Click the Conditions And Loops 483 button and drag the the If-Then-Else block and drop it on the Designer pane below the Approve Documents task.
9. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
10. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
11. Enter a condition for the *If* block in this window. We will enter *SendToJohn.approved=Yes* .
12. Click the *OK* button to save this condition.
13. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
14. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Supervisor's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1 in the *Number of approvals* box, as there's only 1 approver.
    e) Enter *SendToSupervisor* in the *Name* box.
    f) Enter *Documents Approved by John* in the *Subject* box.
    g) Enter *Please approve these documents* in the *Message* box.
    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
15. Click the *Condition And Loops* button and drag the the *If-Then* block and drop it below the *Else* block.
16. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
17. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
18. Enter a condition for the *If* block in this window. We will enter *SendToJohn.approved=No*.
19. Click the *OK* button to save this condition.
20. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
21. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the *Task* in the *Name* box. We will enter *NotifyMary*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender*

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list box. We will select Mary i.e. the *Workflow Initiator*.
c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected Documents*.
d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.
e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

22. Click the *Conditions And Loops* button and drag the the *If-Then-Else* block and drop it on the *Designer* pane below the *End If*.
23. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
24. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
25. Enter a condition for the *If* block in this window. We will enter *SendToSupervisor. approved=Yes*.
26. Click the *OK* button to save this condition.
27. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
28. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyManager*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender list* box. We will select the Manager.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Approved Documents*.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Documents Approved by Supervisor*.
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
22. Again, drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
23. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyMaryAgain*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender list* box. We will select Mary i.e. *Workflow Initiator*.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected Documents by the Supervisor*.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please have a look once again*.
    e) Enter the time in which this activity should be completed in the Duration (in hours) box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox.
26. Click the *Save* button to save the workflow.
27. Click the *Publish* button to publish the workflow to all the users.

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Related Topics
Start a Workflow 534
Monitor a Workflow 537

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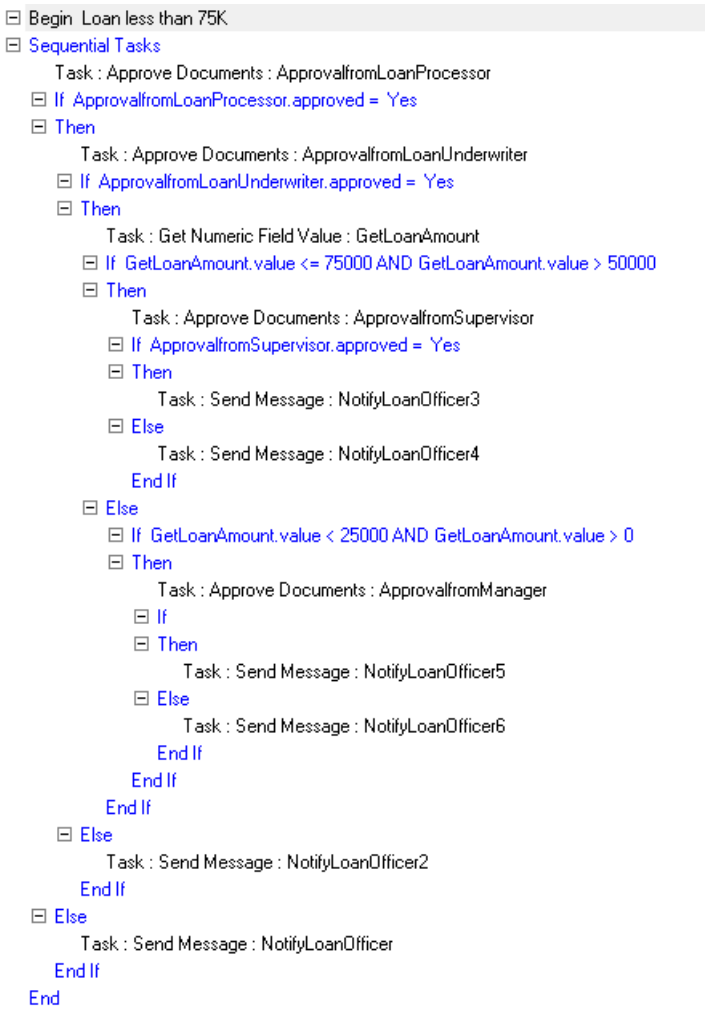
26.13.9.5 Example 4

The Loan officer (John) collects the documents required for loans from the Borrowers.
The Loan officer then forwards the loans request to the Loan Processor (Mary).
The Loan Processor (Mary) verifies the documents.
The Loan Processor then notifies the Loan officer about the rejected loans and forwards the approved loans to the Loan Underwriter (Jack).
The Loan Underwriter (Jack) then approves/rejects the loans accordingly.
The Loan Underwriter is notified about the rejected loans.
If the approved loan is between US $50K to $75k then forward the loan to the Supervisor for approval else forward it to the Manager.
The Supervisor approves/rejects loan and notifies the Loan Officer about the same.
The Manager approves/rejects loan and notifies the Loan Officer about the same.



Notes:

1. To create a good workflow it is important to document the business process before designing the workflow in the workflow designer.
2. All instructions in the Create Workflows... and Examples sections of this help file assume that you have five users called Supervisor, Manager, John, Mary and Jack. It is highly recommended that you create these Globodox users. This will make it easier for you follow

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the instructions below.

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1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *New* button to create a new workflow. The *Designer* pane and the *Properties* pane will now be activated.
3. In the *Properties* pane enter a name for the workflow in *Name* box. You can also enter additional information about the workflow in the *Description* box.
4. Enter the number of days in which this workflow should be completed in the *Duration (in days)* box. If the workflow is not completed in the given time it will be marked as Red in the Workflow monitor 457.
5. Drag the *Approve Documents* task from the Task pane and drop it it on *<<Add Tasks here>>* in the *Designer* pane.
6. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
   a) Select the Loan Processor's name in the *Approvers* box.
   b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
   c) Enter 1 in the *Min Responses* box as only 1 approval.
   d) Enter 1 in the *Number of approvals* box, as we need the Loan Processor approval.
   e) Enter *ApprovalfromLoanProcessor* in the *Name* box.
   f) Enter *Approve Documents* in the *Subject* box.
   g) Enter *Please have a look at the Documents* in the *Message* box.
   h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
7. Click the *Conditions And Loops* button and drag the the *If-then-else* block and drop it below the *Approve Documents* task.
8. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
9. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
10. Enter a condition for the *If* block in this window. We will enter *ApprovalfromLoanProcessor.approved=Yes*.
11. Click the *OK* button to save this condition.
12. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
13. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Loan Underwriter's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1in the *Number of approvals* box, as we need the Loan Underwriter's approval.
    e) Enter *ApprovalfromLoanUnderwriter* in the *Name* box.
    f) Enter *Documents Approved by the Loan Processor* in the *Subject* box.
    g) Enter *Please approve these documents* in the *Message* box.

       If you want to view Loan Processor's comments, type the following syntax after the message *%ApprovalfromLoanProcessor.Details%*
    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
14. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
15. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender*

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List box. We will select the *Workflow Initiator* user i.e. the Loan Officer.

c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Loan Processor.*

d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

If you want to view Loan Processor's comments, type the following syntax after the message *%ApprovalfromLoanProcessor.Details%.*

e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

16. Drag the the *If-then-else* block and drop it below the *Approve Documents* task.
17. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
18. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
19. Enter a condition for the *If* block in this window. We will enter *ApprovalfromLoanUnderwriter.approved=Yes*.
20. Click the *OK* button to save this condition.
21. Drag the *Get Numeric Field Value* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block..
22. The *Get Numeric Field Value* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *GetLoanAmount.*
    b) Specify the field name whose value you want to know, in the Field Name box. This should be in exactly the format below…
    self.Loan Amount
    i.e. self.[FieldName]
    The word **self** specifies that the field belongs to a document type.
    If this field belonged to a Stack, then replace **self** with **parent**.
    c) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users Inbox 545.
23. Drag the *Send Message* Task from the Task pane and drop it on *<<Add Tasks here>>* below the *Else* block.
24. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer2*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the Loan Officer
    c) You can enter a subject for the notification in the *Subject* box. We will enter Loan Rejected by Loan Underwriter.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Loan Rejected by the Loan Underwriter*.

    If you want to view Loan Underwriter's comments, type the following syntax after the message *%ApprovalfromLoanUnderwriter.Details%*
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

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25. Drag the *If-then-else* block and drop it below the *Get Numeric Field Value* task.
26. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
27. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
28. Enter a condition for the *If* block in this window. We will enter *GetLoanAmount.value<= 75000 AND GetLoanAmount.value> 50000*.
29. Click the *OK* button to save this condition.
30. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
31. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Supervisor's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1in the *Number of approvals* box, as we need the Loan Underwriter's approval.
    e) Enter *ApprovalfromSupervisor* in the *Name* box.
    f) Enter *Approve Loan* in the *Subject* box.
    g) Enter *Please approve these documents* in the *Message* box.
    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
32. Drag the the *If-then-else* block and drop it below the *Approve Documents* task.
33. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
34. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
35. Enter a condition for the *If* block in this window. We will enter *ApprovalfromSupervisor. approved=Yes*.
36. Click the *OK* button to save this condition.
37. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the Then block.
38. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer3*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Workflow Initiator* user i.e. the Loan Officer.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Supervisor.*
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

       If you want to view Supervisor's comments, type the following syntax after the message *%ApprovalfromSupervisor.Details%.*
    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
39. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
40. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer4*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Workflow Initiator* user i.e. the Loan Officer.
    c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Supervisor.*
    d) You can type in a message to be sent along with the documents in the *Message* box.

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We will enter *Please review these documents once again*.

If you want to view Supervisor's comments, type the following syntax after the message *%ApprovalfromSupervisor.Details%.*

e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

41. Drag the the *If-then* condition and drop it below the *Else* block.
42. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
43. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
44. Enter a condition for the *If* block in this window. We will enter *GetLoanAmount.value< 25000 AND GetLoanAmount.value> 0*.
45. Click the *OK* button to save this condition.
46. Now, drag the *Approve Documents* task again from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Then* block.
47. The *Approve Documents* properties will now be displayed in the *Task Properties* pane.
    a) Select the Manager's name in the *Approvers* box.
    b) Enter 1 in the *Max Recipients* box as there's only 1 approver.
    c) Enter 1 in the *Min Responses* box as only 1 approval is required.
    d) Enter 1in the *Number of approvals* box, as we need the Manager's approval.
    e) Enter *ApprovalfromManager* in the *Name* box.
    f) Enter *Approve Loan* in the *Subject* box.
    g) Enter *Please approve these documents* in the *Message* box.
    h) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
48. Drag the the *If-then-else* block and drop it below the *Else* block.
49. Select *If* block. Now, the *Condition* property will be displayed in the *Task Properties* pane.
50. Click the **[...]** box next to the *Condition* box to enter a condition. This will bring up the *Condition* window.
51. Enter a condition for the *If* block in this window. We will enter *ApprovalfromManager. Approved=Yes*.
52. Click the *OK* button to save this condition.
53. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the Then block.
54. The *Send Message* properties will now be displayed in the *Task Properties* pane.
    a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer5*.
    b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Workflow Initiator* user i.e. the Loan Officer.
    c) You can enter a subject for the notification in the *Subject* box. We will enter Loan Approved by Manager.
    d) You can type in a message to be sent along with the documents in the *Message* box. We will enter Loan Approved.

    If you want to view Manager's comments, type the following syntax after the message *%ApprovalfromManager.Details%.*

    e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.
55. Drag the *Send Message* task from the *Task* pane and drop it on *<<Add Tasks here>>* below the *Else* block.
56. The *Send Message* properties will now be displayed in the *Task Properties* pane.

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a) Enter a name for the task in the *Name* box. We will enter *NotifyLoanOfficer6*.
b) Select the users that you want to notify by clicking the **[...]** button next to the *Sender List* box. We will select the *Workflow Initiator* user i.e. the Loan Officer.
c) You can enter a subject for the notification in the *Subject* box. We will enter *Rejected by the Manager.*
d) You can type in a message to be sent along with the documents in the *Message* box. We will enter *Please review these documents once again*.

   If you want to view Manager's comments, type the following syntax after the message *%ApprovalfromManager.Details%.*
e) Enter the time in which this activity should be completed in the *Duration (in hours)* box. If the activity is not completed in the given time it will be marked as Red in the Users *Inbox*.

57. Click the *Save* button to save the workflow.
58. Click the *Publish* button to publish the workflow to all the users.

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Related Topics
Start a Workflow 534
Monitor a Workflow 537

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26.14 Start a Workflow and Perform a Workflow Task

We have used the workflow that was created using the If-then-else block. See, Create a Workflow using the If-then-else block 509

We are assuming that you have three users called Manager, John and Mary. It is highly recommended that you create these users using Globodox User Manager. This will make it easier for you follow the instructions below.

Starting a workflow is a very simple process. However the step-by-step instructions below are long and detailed because they are written for users who will be starting the workflow for the first time.

To Start a Workflow

1. In Globodox, Select a document that needs to be approved. (You can select any document for this tutorial).
2. Click the *Route* option of the *Home* tab. The route window will now be launched. (You can also right click the selected document and click the *Route* option).
3. Select the WorkflowForApproval workflow from the Select Workflow drop down.
4. Now, enter a Name for this process. Specify the importance of this approval from the Priority drop down. Specify the due date and time to complete this approval in the Due box. Enter comments (if any) in the Comments box.
5. Now, click the *Apply* button to start the workflow. The document that you selected will now has its *In Workflow* field checked, indicating that it is in a workflow. Repeat steps 3-6 to choose another document for approval.
6. Click the Globodox button and select the Logout option to logout user John.
7. Click the Globodox button and select the Login option. A login box will be displayed. Login to Globodox workflow as user Mary.
8. Click the *Task and Messages > Inbox (Tasks)* in the *Workspace*. Mary's tasks will now be displayed in the right pane i.e. the List View. There will be two tasks in her folder that were generated by the Workflow Engine when John initiated the workflow for the two documents.
9. Double click the first task to open it in a new window. The task will now be opened in a new window and the Information tab will be displayed.
10. The *Information* tab will display the *Subject* and the *Message* of the task. Click the *Attachment* tab to view the attached document. Double click the document to view it in the Document Details window 165.
11. In the right section of the task select a action for the task from the *Approved* drop-down. Select *Yes/No* option from drop-down to approve/reject the document. Enter your comments in the *Comments* box. Click the *Apply* button to complete the task.
12. Lets assume you want to approve this document. For this select the *Yes* option from the *Approved* drop-down. Click the *Apply* button to complete this task.
13. Now, you open the other task to view it. Click the *Attachment* tab to view the attached document.
14. Lets assume you want to reject this document. For this select *No* option from the Approved drop-down and click the *Apply* button to complete this task.
15. Logout user Mary and login as user Manager.
16. Click the *Tasks and Messages* node of the *Workspace* and select the *Inbox (Messages)* folder. The Manager's Inbox will now be displayed.
17. There will be one message in his folder notifying him about the documents approved by Mary. Double click the message to view it. The message will be opened in a new window displaying the Message tab.
18. The *Message* tab will display the *Subject* and the *Message*. Click the *Attachment* tab to view the attached document. If you want to reply/forward this message you can do so by

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clicking the *Reply/Forward* button.
19. Now, logout user Manager and login as user John.
20. Click the *Tasks and Messages* node of the *Workspace* and select the *Inbox (Messages)* folder. John's Inbox will now be displayed.
21. There will be one message in his folder notifying him about the documents rejected by Mary.
22. The WorkflowForApproval workflow is now completed.

Notes:

- You can monitor a Workflow by using the Workflow monitor 457.

Related Topics
Task and Messages 545
Create Workflows 489
Monitor a Workflow 537

26.15 Configure Workflow to Send Messages to User's Email Address

You can configure workflow to send messages to a user's email address by modifying the config file.

To Configure workflow to send messages to users E-mail address

1. Open the folder in which Globodox is installed. This is usually

   For Vista/ 2008/Windows 7/Windows 10, this will be the C:\ProgramData\ITAZ\Globodox folder.
   For 2000/XP/2003 this will be C:\Documents and Settings\All Users\Application Data\ITAZ\Globodox

2. Now, locate the *config.ini* file in the folder.
3. Open this file in Notepad. You can also drag and drop this file in notepad to open it.
4. Now, locate the following lines in the file.

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```
[Smtp]
ServerName=
ServerPort=
UserName=
Password=
```

5. Use this to configure the SMTP server (outgoing mail server) settings used to send e-mail.

   ServerName: Specify the name of the server used for outgoing messages.
   ServerPort: Specify the port number you connect to on your outgoing e-mail server. This port number is usually 25.
   UserName: Enter the user name used to logon to the SMTP server.
   Password: Enter the password used to logon to the SMTP server.

6. Save the settings and close the config file. Workflow is now configured to send messages to the users E-mail address
7. Now, while creating a Workflow, you will need to specify that the messages should be sent to the users e-mail address.
8. To do this, you will need to type *email* in the Mode box property of the Send Message task.

For more info see, Create a Workflow to Notify Users 492

Related Topics
Configure workflow to send task to users E-mail Address 536
Attach Document to external Email when routing 549

26.16 Configure Workflow to Send Task to User's Email Address

You can configure workflow to send tasks to a user's email address by modifying the config file.

To Configure workflow to send task notifications via E-mail

1. Open the folder in which Globodox config file is located. This is usually the C:\ProgramData\ITAZ\Globodox folder.
2. Open this file in Notepad. You can also drag and drop this file in Notepad to open it.
3. Now, locate the following line in the file.

   TaskNotification=im

4. Remove *im* and type *email*. It should like this...

   TaskNotification=email

5. You will also need to configure the AdminName and AdminEmailID. This information represents the From field (where AdminName represents the FromName and FromEmailID represents the email ID of the Sender)
   E.g . If your company name is Acme Corp...

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AdminName=Acme
AdminEmailID=admin@acme.com

6. Save the settings and close the config file. Workflow is now configured to send tasks to the users E-mail address.

Related Topics
Configure Workflow to send messages to users E-mail address 535

26.17 Configure placeholders in workflow messages

You can use placeholders in Workflow Activities. A placeholder helps you include the information of a document, a user or workflow status in the messages that Workflow sends to the user. Placeholders can be used in the Message property for the Approval or Send Message Activity.

The following placeholders can be used...

1. %workflowcomments%

   Use this placeholder to see the comments entered by all other users when approving/ rejecting a task.

2. %ActivityName.Details%

   Use this placeholder to know the Approval details of a particular activity. The details displayed are the Task Name, Approver Name, Approval Status and Comment.

3. %attachmentlist:Field1|Field2|Field3%

   Use this placeholder to use the indexing information of a document in a tabular format when it is being routed.

26.18 Monitor a Workflow

You can monitor a Workflow by using the Workflow Monitor 457

To Monitor a Workflow

1. In Globodox, select the *Tools* tab and click the *Workflow Monitor* button on the desktop. The *Globodox Workflow Monitor* will now be launched.
2. Click the *Active Workflow* node to view all the workflows which are currently in progress. This section is further subdivided into *All, Running, Paused* and *Error.*
   a) **All:** Select the *All* option to view all the workflows that are running, paused or that have stopped because of an error.
   b) **Running:** Select the *Running* option to view the workflows that are currently in progress. You can double click a workflow to view which activity of the workflow is currently in progress. The activities which have been performed will be marked with a

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tick. The activity that is currently in progress will be displayed in green colored text.

c) **Paused:** Select the *Paused* option to view the workflows that are currently paused. The activities which have been performed will be marked with a tick, The activity at which the workflow is paused will be displayed in green colored text. Please note the activity at which the workflow is stopped will not be shown in the users Inbox 545

d) **Error:** Select the *Error* option to view the workflows that have been stopped due to some error. You can double click a workflow to view which activity of the workflow is giving the error. The problematic activity will be displayed in green colored text. Once you have rectified that error, you can click the *Resume* button to continue the workflow.

3. Click the *History* node to view the log of all the completed and canceled workflow. This section is further subdivided into *All, Finished* and *Canceled*.

a) **All:** Select *All* option to view the logs of all the workflows that were completed or canceled.
b) **Finished:** Select the *Finished* option to view the logs of only those workflows that were completed successfully.
c) **Canceled:** Select the *Canceled* option to view the logs of only those workflows that were canceled.

4. You can pause or cancel a workflow that is in progress by using the Monitor toolbar.

a) **Pause:** The *Pause* button is used to pause a Workflow in progress. Please note the activity at which the workflow is stopped will not be shown in the users *Inbox*
b) **Resume:**The *Resume* button is used to resume a paused Workflow.
c) **Cancel:** The *Cancel* button is used to cancel a *Workflow* in progress.

Notes:

- You can export the Workflow logs by clicking the *Export* button.
- For more information on workflow monitoring see, Workflow Monitor 457.

Related Topics

Start a Workflow and perform a workflow task 534
Export a Workflow log to a CSV file 542

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26.19 Workflow Management Console

From v11, a new Workflow Management Console is introduced to monitor Workflows. It is a more advanced version of the Workflow Monitor. You can view running, finished, cancelled workflows and workflows with errors. You can also Pause, Resume and Terminate workflows using this Console.

To open the Workflow Management Console

1. In Globodox, select the *Tools* tab and click the *Workflow Management Console* button. This will bring up the *Workflow Management Console* window.
2. Select the workflow in the Select Workflow drop-down.
3. You can search for a Display Name. Display Name is the name you specified when routing a Document or Stack.
4. Select a State for the workflow in the State drop-down. The following States are available... ***Running Finished, Paused, Cancelled*** and ***Error***.
5. Select the date range for the search.
6. Click on Search. A list of workflows will be displayed satisfying the criteria.
7. You can use the Find in Results box to search for text present in the Subject column or User column.
8. You can Pause, Resume and Terminate workflows.
9. You can also Export/Print the Workflow results to a PDF or Excel file using the Export button.

Note: This feature is a part of Globodox Suite and not a part of Globodox Standard. This feature is available if you purchase the Globodox Workflow Module.

Users who have the permissions "Monitor All Workflows" or "Monitor Owned Workflows" can use this feature.

26.20 Modify a Workflow

You can modify an existing workflow by using the Workflow Designer.

To Modify a Workflow

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the *Open...* button. This will bring up the *Open Workflow* window.
3. Select the workflow you want to modify from the list.
4. Click the *Open* button to open the workflow for modifications.

Notes:

- For more information see, Create a Workflow 490

Related Topics

Monitor a Workflow 537
Delete a Workflow 540

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26.21 Clone a Workflow

Normally when you want to create a new workflow that is similar to an existing one in Globodox, you would perform the steps to creating it all over again. However, using Workflow Cloning, you need not perform all the steps. You can simply select the workflow you want to clone and in a few clicks, your new workflow is ready! You simply need to modify some information like the user's name etc. The new workflow will bear the same name as the one that was cloned, but will be suffixed with '1'.

For example:
If the workflow you are cloning is named "Agreement Approval", its clone will be named "Agreement Approval 1".

Below are the steps to Clone a Workflow:

To Clone a Workflow

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the Workflow Designer 457 window.
2. Click the drop down arrow next to the *New* button.
3. Click *New based on existing workflow*. This opens the *Select Workflow* box.
4. From the list of existing workflows, select the workflow you want to clone and click *Select*.
5. A new workflow gets created which has the same activities and properties as the workflow you selected.

   Note:
   As stated above, the new workflow will bear the same name as the one that was cloned, but will be suffixed with '1'.

6. You can modify (edit) the information as needed.
7. Once the changes have been made, click *Save* to save the workflow and then *Publish* to activate it. Now you can close the *Workflow Designer* window.

Related Topics
Create Workflows 489
Monitor a Workflow 537

26.22 Delete a Workflow

You can delete a Workflow from the Workflow Designer 457

To Delete a Workflow

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. This will bring up the *Workflow Designer* window.
2. Click the *Open*... button. This will bring up the *Open Workflow* window.
3. Select the workflow you want to delete from the list.
4. Now, click the *Delete* button to delete the workflow.

Notes:

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- For more information see, Modify a Workflow 539

Related Topics
Create Workflow 489
Start a Workflow and perform a workflow task 534

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26.23 Export a Workflow Log to CSV File

You can export the Workflow logs from the Workflow Monitor[457]

To Export a Workflow log to a CSV file

1. In Globodox, select the *Tools* tab and click the *Workflow Designer* button. The Globodox Workflow Monitor will now be launched.
2. Click the *Export* button to export the workflow log. The *Export Report* window will now be launched.
3. Specify a name and location to save the file. Click the *Save* button to save the file.

Notes:

- For more information on creating Workflows see, Create Workflows[489]

Related Topics

Monitor a Workflow[537]
Delete a Workflow[540]

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26.24 Allow document actions during Workflow

You can choose to disable certain user actions on a document when the document is being routed in a workflow. This is controlled via the "Allow document actions during Workflow" privilege available in the Other Privileges section of the Role. This privilege is allowed by default. If this privilege is denied (unchecked) then the user cannot perform the following actions on a document when the document is being routed in a workflow.....

- Check-in
- Check-in as draft
- Publish draft
- Cancel Checkout
- Promote Version
- Relate to Stack
- Unrelate from Stack
- Delete Document
- Edit Field Values
- Extract and Index Document
- Block Indexing
- Reset Index Status
- Apply Zone Maps
- Replace from Disk
- Scan and Replace
- Print Document
- Fax Document
- Email Document
- Export
- Share Document
- Restrict Document
- Assign
- Route Document
- Encrypt
- Decrypt
- Set Folder
- Remove from folder
- Apply tags
- Remove tags
- Link to document or stack

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- Unlink from document or stack
- Delete Version
- Add Annotation
- Modify Annotation
- Delete Annotation

26.25 Task and Messages

Topics Covered

1. Introduction 545
2. Route 547
3. Send a Document for Approval 549
4. Send Message to Globodox Users 550
5. Approve a Document 551

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26.25.1 Introduction

The *Task and Messages* node in the *Workspace* provides an easy to use way to view and perform tasks assigned to you as well as to view messages sent by you and to you. It consists of the following sub-nodes...

Inbox (Messages)

All the messages sent to you will be listed here. When you select the *Inbox (Messages)* node the *Inbox (Messages)* tab will appear in the Ribbon bar. The *Inbox (Messages)* tab has the following buttons...

- **Message:** Click this button to create a new message.
- **Open:** Click this button to open a message.
- **Delete:** Click this button to delete a message from your *Inbox (Messages).*
- **Reply:** Click this button to reply to a message.
- **Forward:** Click this button to forward a message to another user.
- **Mark as Read:** Click this button to mark a message as *Read.*
- **Mark as Unread:** Click this button to mark a message as *Unread*.
- **Print List:** Click this button to print the data displayed in the List View pane.
- **Export List:** Click this button to export the data displayed in the List View pane.
- **Refresh:** Click this button to refresh your *Inbox (Messages).*

You can view a message by selecting it in the List View pane, the message will be displayed in the *Details* pane. You can also double click it to open it in a new window.

The above section of the message displays the subject, senders information, date and time of the message. The lower section of the message is divided into tabs called *Message* and *Attachments*. The *Message* tab displays the message and the *Attachment* tab contains the attached documents (if any). Double-click on any document to view it in the Documents Details window 165.

You can reply/forward a message by clicking the *Reply/Forward* button on the message toolbar. You can delete a message by clicking the *Delete* button.You can use the *Previous Message* and the *Next Message* button on the top right corner of the window to navigate between the messages sent to you in the same window.

Inbox (Tasks)

All the tasks sent to you will be listed here. When you select the *Inbox (Tasks)* node the *Task* tab will appear in the Ribbon bar. The *Task* tab has the following buttons...

- **Print List:** Click this button to print the data displayed in the List View pane.
- **Export List:** Click this button to export the data displayed in the List View pane.
- **Refresh:** Click this button to refresh your *Inbox (Tasks).*

You can view a task by selecting it in the List View pane, the task will be displayed in the *Details* pane.

The left section of the task window is divided into tabs called *Information* and *Attachments*. The *Information* tab will show you the message and the comments of the user who has assigned the task. The *Attachment* tab contains documents (if any) that have been attached to the task. Double-click on any document to view it in the Document Details window. The right section of the task can be used to select a action for the task and enter your comments about the task. Select *Yes/No* option from the *Approved* drop-down to approve/reject the document. Enter your comments in the *Comments* box. Click the *Apply* button to complete the task.

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You can use the *Previous Task* and the *Next Task* buttons on the top right corner of the window to navigate between the tasks assigned to you in the same window.

Sent Messages

All the messages that were sent by you will be listed here. When you select the *Sent Messages* node the *Sent Messages* tab will appear in the Ribbon bar. The *Sent Messages* tab has the following buttons...

- **Message:** Click this button to create a new message.
- **Open:** Click this button to open a message.
- **Delete:** Click this button to delete a sent message.
- **Forward:** Click this button to forward a message to another user.
- **Print List:** Click this button to print the data displayed in the List View pane.
- **Export List:** Click this button to export the data displayed in the List View pane.
- **Refresh:** Click this button to refresh your *Sent Messages.*

You can view a sent message by selecting it in the *List View* pane, the message will be displayed in the *Details* pane. You can also double click it to open it in a new window.

The above section of the message displays the subject, date and time of the message. The lower section of the message is divided into tabs called *Message* and *Attachments*. The *Message* tab displays the message and the *Attachment* tab contains the attached documents (if any). Double-click on any document to view it in the Documents Details window.

You can forward a message by clicking the *Forward* button on the message toolbar. You can delete a message by clicking the *Delete* button.You can use the *Previous Message* and the *Next Message* button on the top right corner of the window to navigate between the messages sent to you in the same window.

Drafts

All the messages that are created and saved will be listed here. When you select the *Drafts* node the *Draft Messages* tab will appear in the Ribbon bar. The *Draft Messages* tab has the following buttons...

- **Message:** Click this button to create a new message.
- **Open:** Click this button to open a message.
- **Delete:** Click this button to delete a message from your *Inbox (Messages).*
- **Send:** Click this button to send a message.
- **Print List:** Click this button to print the data displayed in the List View pane.
- **Export List:** Click this button to export the data displayed in the List View pane.
- **Refresh:** Click this button to refresh your *Inbox (Messages).*

Completed Tasks

The *Completed Tasks* node will have all the tasks that were completed by you. When you select the *Completed Tasks* node the *Task* tab will appear in the Ribbon bar. The *Task* tab has the following buttons...

- **Print List:** Click this button to print the data displayed in the List View pane.
- **Export List:** Click this button to export the data displayed in the List View pane.
- **Refresh:** Click this button to refresh your *Completed Tasks.*

You can view a completed task by selecting it in the *List View* pane, the task will be displayed in the *Details* pane. You can also double click it to open it in a new window.

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The left section of the task window is divided into tabs called *Information* and *Attachments*. The *Information* tab will show you the message and the comments of the user who assigned you the task. The *Attachment* tab contains documents (if any) that have been attached to the task. Double-click on any document to view it.

You can use the *Previous Task* and the *Next Task* buttons on the top right corner of the window to navigate between the tasks completed by you in the same window.

Related Topics
Send a Message to Globodox Users 550
Approve a Document 551

26.25.2 Route

Globodox lets you to route documents owned by you to other user(s) based on a Workflow 455. Workflow are automated, logical and rule based procedures that are similar to those used by your organization to do the same task in real life scenario. For e.g. You can use a Workflow to send your documents for approval, or send notification or assign a task to someone, with a click of a button.

When you start a process using a Workflow the user who you have routed the documents, receives them as tasks in their Inbox 545. Once they have completed their task you will be notified about it.

You can route a document by right clicking it and choosing the *Route...* option.

To Route Documents

1. In Globodox, select the document(s) to route to another user, from the List View 35 pane.
2. Click the *Route* option of the *Home* tab. You can also right click the selected document and choose the *Route...* option. The *Route* window will be launched.
3. Select a workflow to route the document(s) from the *Select Workflow* drop down.
4. Enter a unique name for this process in the *Display* name box. This name will be used to identify and monitor the process in Workflow Monitor 457.
5. Select the priority of the Workflow from the *Priority* drop down. There are three levels of priority: *Low, Normal, and High* which can be used to emphasize the importance of the process.
6. Set a due *Date* and *Time* to complete the process by using the *Due* option. If this process is not completed in the stipulated time by the user to who it is assigned to, then the entire process will be marked as red in their *Inbox*.
7. Enter a short description or any notes about the selected documents the *Comments* box.
4. Click the *Apply* button to begin the Workflow.

To Route Stacks

1. In Globodox, select the stack to route to another user, from the List View 35 pane.
2. Click the *Route* option of the *Home* tab. You can also right click the selected stack and choose the *Route...* option. The *Route* window will be launched.
3. Select a workflow to route the Stack from the *Select Workflow* drop down.
4. Enter a unique name for this process in the *Display* name box. This name will be used to identify and monitor the process in Workflow Monitor 457.

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5. Select the priority of the Workflow from the *Priority* drop down. There are three levels of priority: *Low, Normal, and High* which can be used to emphasize the importance of the process.
6. Set a due *Date* and *Time* to complete the process by using the *Due* option. If this process is not completed in the stipulated time by the user to who it is assigned to, then the entire process will be marked as red in their *Inbox*.
7. Enter a short description or any notes about the selected stack in the *Comments* box.
8. Click the *Apply* button to begin the Workflow.

To Route a folder

1. In Globodox, select the folder you want to route.
2. Right the folder and click the Route option. The Route window will be launched
3. Select a workflow to route the folder from the *Select Workflow* drop down.
4. Enter a unique name for this process in the *Display* name box. This name will be used to identify and monitor the process in Workflow Monitor 457.
5. Select the priority of the Workflow from the *Priority* drop down. There are three levels of priority: *Low, Normal, and High* which can be used to emphasize the importance of the process.
6. Set a due *Date* and *Time* to complete the process by using the *Due* option. If this process is not completed in the stipulated time by the user to who it is assigned to, then the entire process will be marked as red in their *Inbox*.
7. Enter a short description or any notes about the selected stack in the *Comments* box.
8. Click the *Apply* button to begin the Workflow.

To Route a tag

1. In Globodox, select the tag you want to route.
2. Right the tag and click the Route option. The Route window will be launched
3. Select a workflow to route the folder from the *Select Workflow* drop down.
4. Enter a unique name for this process in the *Display* name box. This name will be used to identify and monitor the process in Workflow Monitor 457.
5. Select the priority of the Workflow from the *Priority* drop down. There are three levels of priority: *Low, Normal, and High* which can be used to emphasize the importance of the process.
6. Set a due *Date* and *Time* to complete the process by using the *Due* option. If this process is not completed in the stipulated time by the user to who it is assigned to, then the entire process will be marked as red in their *Inbox*.
7. Enter a short description or any notes about the selected stack in the *Comments* box.
8. Click the *Apply* button to begin the Workflow.

Notes:

- You can also monitor the status of the Workflow that you have initiated by using the *Workflow Monitor*. However, you will need privileges to access the *Workflow Monitor*.
- You can also Subscribe to the Workflow that you have initiated. By doing this you will get notification on its status.

Related Topics

Email a Document 177
Send a Document for Approval 549

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Approve a Document 551

26.25.3 Send a Document for Approval

You can send documents for Approval from by using the *Route* option.

To Send a Document for Approval

1. In Globodox, select the document(s) that you want to send to another user for approval.
2. Click the *Route* option of the *Home* tab. You can also right click the selected document and choose the *Route...* option. The *Route* window will be launched.
3. Select the workflow that is created to approve document(s) from the *Select Workflow* drop down.
4. Enter a unique name for this approval process in the *Display* name box. This name will be used to identify and monitor the approval process in Workflow Monitor 457.
5. Select the priority of the Workflow from the *Priority* drop down. There are three levels of priority: *Low, Normal, and High* which can be used to emphasize the importance of the process.
6. Set a due *Date* and *Time* to complete the process by using the *Due* option. If this process is not completed in the stipulated time by the user to who it is assigned to, then the entire process will be marked as red in their Inbox 545.
7. Enter a short description or any notes about the selected documents or Stack items in the *Comments* box.
4. Click the *Apply* button to begin the Workflow.

Related Topics
Send a Message to Globodox Users 550
Approve a Document 551

26.25.4 Attach Document to external Email when routing

Starting from v11, Workflow can now attach the actual documents (instead of just including their links) to the external email being sent. This way users can review documents offline and go online only to approve them or even approve via replying to the email.

By default documents are not attached to the external email when routed

To enable this option...

1. Login with a user with Superadmin Role.
2. Click the GLOBODOX button (the round button on the top left) >> Options.
3. The Options dialog will be launched.
4. In System Options, scroll to the section Workflow. (This option will only be visible to users with Superadmin Role)
   The options are...
   Yes - Documents will always be attached based on the size of attachments specified.
   No - Documents will not be attached to the email. (Links of the document will be added to the email so that each document can be opened using the Web Client for viewing.)
   Always ask - The option will be displayed in the Workflow Route dialog every time a document is routed.

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You can also specify the maximum size of documents to be attached in the external email notifications. The value can be a minimum of 1 MB and a maximum of 10 MB.

Note: The size is calculated based on the number of documents attached when routing them. Suppose we set the option to 10 MB, and if the total size of all documents in within 10 MB, the documents will be attached in the email. Else all the documents will appear as links in the email.

Related Topics
Configure Workflow to send messages to users E-mail address 535

26.25.5 Send a Message to Globodox Users

You can send a message from Globodox to other users by clicking the *New* drop-down of the *Home* tab and selecting the *Messages* option.

To Send a Message to Globodox Users

1. In Globodox, select the *Task and Messages* > *Inbox (Messages)* in *Workspace*. The *Inbox (Messages)* tab will now appear on the Ribbon bar.
2. Click the Message button of the *Inbox (Messages)* tab to create a new message. A new message window will now be launched.
3. Click the *To* button to select a user to send the message. This will bring up the *Look Up* window.
4. Select the *Users* option from the *Look for* drop-down and enter the either the first or last name of the user in the *Look for* box.
5. Now, click the *Find* button to find the user. Users with the same first or last name will be displayed in the *Available Data* list. For e.g. Lets say you had entered '*john'* in the *Look for* box, then all users that contain '*john'* in their first or last name will be displayed in the *Available Data* list.
6. Select the user(s) in the *Available Data* list to add to the *Send To* list. Use this >> button to add the selected user(s) to the *Selected Data* list and use this << button to remove the user(s) from the *Selected Data* list and move them back to the *Available Data* list.
7. Click the *OK* button to add the selected users to the *Send To* list.
8. Enter a subject for the message in the *Subject* box.
9. Type the message in the *Message* box.
10. Click the *Attachments* tab and click the *Attach* button to attach documents to this message
11. Select the priority of the message from the *Priority* drop down. There are three levels of priority: *Low, Normal, and High* which can be used to show the importance of the message.
12. Click the *Send* button to send the message.

Notes:

- All the messages that are created and saved will be displayed in the *Drafts* List pane.
- You can reply/forward a message by clicking the *Reply/Forward* button on the message toolbar.

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Related Topics
Email a Document 177
Route 547

26.25.6 Approve a Document

All the documents that are sent to you for approval will be listed as task for you in the *Inbox (Tasks)* folder.

To Approve a Document

1. In Globodox. click the *Task and Messages* > *Inbox (Tasks)* in the *Workspace*. All the task assigned to you will now be displayed in the right pane i.e., the *List View* pane.
2. Select a task from the list that needs your approval. The task will now be displayed in the *Details* pane.
3. The *Information* tab will show you the *Subject*, *Message* and *Comments* of the task.
4. Click the *Attachment* tab to view the documents that are attached to the task. Double click the document to view it in the Document Details window 165.
5. The right section of the *Task* pane has the options to approve the document(s). Select *Yes/No* option from the *Approved* drop-down to approve/reject the document. You can enter your comments in the *Comments* box.
6. Click the *Apply* button to complete your task.

Related Topics
Send a Document for Approval 549
Send a Message to Globodox Users 550

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26.25.7 Approve Documents over Email

You can now approve or reject a task just by replying to the Task email notification received. A new Workflow service is installed which will look for specific words in the received email and process the workflow accordingly.

This feature is part of Globodox Suite. This is not part of Globodox Standard. But if you purchase the Workflow module, you can use this feature.

To enable this option...

1. Login to Globodox.
2. Click the Tools Tab >> Workflow Email Config
3. The 'Configure Workflow Email Service' dialog will be launched.
4. In the 'Incoming Mail Server' section, click the 'Configure' button to specify the IMAP settings of your Mail Server.
5. A list of folders will be populated related to the Email Account.
6. Select the folder to be watched.
7. Select the time interval to process the messages.
8. In the Workflow Tab of the same dialog, you can specify the Approval or Rejected words that need to be used when replying to a Workflow Task Notification received via email.

   For e.g. You can use approval words like Approved, Approve, Yes, OK, Fine.

   Lets assume you are using the word OK.

   Your reply can be ....
   OK / The document was OK. / I am OK with the document.
   (Your comment) - if you need to add a comment.

   If a reply is sent ...
   The document is not acceptable
   (Your comment)

   The approved or rejected words must occur in the first line of your message, If your messages does not contains these words, you will get a notification email that the reply was invalid. (with a list of words that can be used)

9. Select the pattern in which the comment has to be entered.

   Appears on the second line in the message
   OR
   Starts with ... Ends with...

10. Click OK.

Note: For the above to work, the service 'ITAZ Globodox Workflow Service' should be running on the server machine.

This feature is part of Globodox Suite. This is not part of Globodox Standard. But if you purchase the Workflow module, you can use this feature.

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27 Customizing Globodox

Topics Covered

1. Options Window 554
2. Add Buttons to Quick Access Toolbar 563
3. Change Globodox Main View Layout 559
4. Customize List View Pane 560
5. Hide Details Pane 562
6. Specify the Node to be Selected on Startup 563

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27.1 Options Window

Use this window to set the various options available in Globodox. 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 165 on the main screen

Auto-show preview of documents in the Details Pane
Select this option to preview the documents in the Details Pane.

Default Checkout Folder.

Select this option to specify the *Default Checkout* folder for the user. The Checkout folder is the default folder in which documents checked out by you will be placed. Each user must have their own checkout folder.

Extract & index

Use built-in OCR engine
Select this option to use the built-in OCR engine of Globodox

Use Microsoft Office OCR engine
Select this option to use the OCR engine of Microsoft Office

File Type Viewer Options...

Use this dialog to change viewers for PDF,WORD,EXCEL and other popular file format files.

From v11, preview of AUTOCAD files is also supported. This is an additional module and needs to be purchased separately.

Select the file types you want to automatically preview
The list displays the file types that can be viewed in the display pane in Globodox. 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.

File Addition

After adding files...

Use this option to select what needs to be done after the document is added in Globodox.

Delete files from the original location
Leave the files in the original location
Ask Me

AutoSave

Automatically save changes to indexing information

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Globodox gives you the option to automatically save the changes made to a document's or stack's indexing information when navigating to another document (i.e. no message will be displayed prompting you to save the changes). You must check this option to use the autosave feature.

Other User Options

Navigate documents in a Stack in continuous mode
Check this option to navigate between documents related to a Stack in a continuous mode.

On enabling this option, you will be able to navigate between the pages as well as documents by using the Navigation buttons on the Preview pane. For a single page document when you click the Next button, the next document in the list will be displayed. For a multi-page document, when you click the next button the next page of that document will be displayed. On the reaching the last page of that multi-page document, if you click the Next button, the next document will be displayed.

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 Globodox will automatically select the device you last used to scan documents.

Logout mode

When Desktop Client exits...

Always prompt before Logout

Select this option if you want to be prompted with Logout options when you exit from Globodox Desktop Client.

Always Logout

Select this option if you want to be logged out from Globodox Desktop Client and all other companion apps when you exit from Globodox Desktop Client.

Never Logout

Select this option if you want to be remain logged in to Globodox Desktop Client and all other companion apps when you exit from Globodox Desktop Client.

Capture Folder notification

Show notification for Capture folder.
Select this option if you want to receive a notification in the System Tray when a document is queued to be added to Globodox when using the Send To and Virtual printer option.

Email

Include Document metadata in Email.
Use this option to include the document metadata when it is emailed.

DB Options

On startup select...

Last selected node
Select this option if you want the last used node of the Workspace 34 to be displayed when a DB opens.

Specific node

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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 Versioning

Enable document versioning
Check this option to enable the document versioning feature. If this option is unchecked then the document versioning feature is disabled.

Always create a new version on document check-in
This option is only available if the check-in/checkout feature has been enabled. Check this option if you want a new version of a document to be automatically created when the document is checked in.

Retain up to [__] versions for each document on check-in
Check this option and specify the number of older version document copies that you want Globodox to retain. If this option is unchecked then Globodox will retain an unlimited number of older version copies for a document.

Document Encryption

Enable document encryption
Check this option to enable the document encryption feature. If this option is unchecked then the document encryption feature is disabled.

Always encrypt on documents check-in
Select this option if you want the documents to be automatically encrypted when they are checked in.

Document Text Extraction

Automatically extract/OCR text from documents on check in
Select this option if you want the text from a document to be automatically extracted and indexed when the document is checked-in. This option can only be selected if the Document Check-in/Checkout feature has been enabled. Please note that selecting this option can significantly slow down the process of adding/checking in of documents.

Maximum size of documents to extract text from
Specify the file size that should be indexed in this box. Please note that this option is only available for MS Access DB. By default the limit of the file size is set to 1 mb. This means that files larger then 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.

Event Auditing

Enable Event Auditing
Check this option to enable the Event Auditing feature. If this option is unchecked then the event auditing feature is disabled.

Thumbnails

Create thumbnail on Check-in
Check this option to generate thumbnails of documents, as soon as they are added to

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Globodox. 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...

1) You often use the thumbnail view instead of the list in the List View pane,

And

2a) You use an FTP based file store

Or

2b) You store document in an encrypted form

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.

Allow page navigation
Normally Globodox displays a navigation bar for any thumbnail of a multi-page file. Due to performance reasons, this option is disabled by default for files which are stored in encrypted form and for files which are located on a FTP based File Store.

Enable this option to display the thumbnail navigation for files.

Customize Navigation Pane

Customize
Click this button to customize viewing of Document Types based on Group based security.

System Options

Navigation Pane

All documents
Use this option to hide or unhide the All documents node for non-superadmin users.

Settings
Use this option to hide or unhide the Settings node for non-superadmin users.

Enable/Disable Features

Draft Documents
Click this checkbox if you want to enable checked-in documents to be saved as drafts *Under Review* for review by a group of users, for commenting etc. Note that you will be able to use this option only if you have installed the Draft Documents module. If you have not installed the Draft Documents module but you click the checkbox, Globodox will display a pop-up box advising you of the same, along with further instructions.

Language

Enable right to left mode if support is available
Click this checkbox if you want to enable the right to left mode, if the language version of Globodox you have downloaded supports this mode.

Additional language support

Folders

Allow one documents to reside in multiple folders
Click this checkbox if you want a document to be part of multiple folders.

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Search in Documents

Automatically Search and highlight text in documents on quick search
Click this checkbox if you want the search term to be highlighted in the Document preview pane.

Annotation

Show User name below annotation
Click this checkbox if you want show the name of the user below an annotation.

Show timestamp below annotation
Click this checkbox if you want show the timestamp below an annotation.

Workflow

Attach documents in external email notifications.

Yes - Documents will always be attached based on the size of attachments specified.
No - Documents will not be attached to the email. (Links of the document will be attached to the email so that each document can be opened using the Web Client for viewing.)
Always ask - The option will be displayed in the Workflow Route dialog every time a document is routed.

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27.2 Change Globodox Main View Layout

You can change the layout of Globodox Main View to horizontal or vertical by using the *Layout* button.

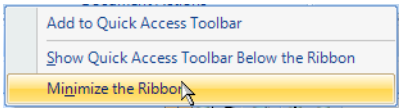
To Change the Layout

1. In Globodox, 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.

Notes:

- 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 176

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27.3 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

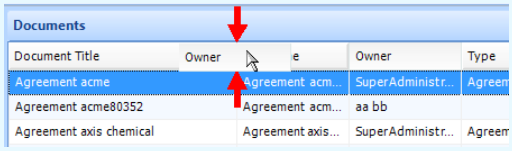
1. In Globodox, click the Globodox button.
2. Click the *Options* button. The *Options* window will now be launched.
3. From the *User Options* node select the *Specific node* option.
4. Specify the number of items to be displayed in the *Items per page* box.
5. Click the *OK* button to apply the settings.

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.

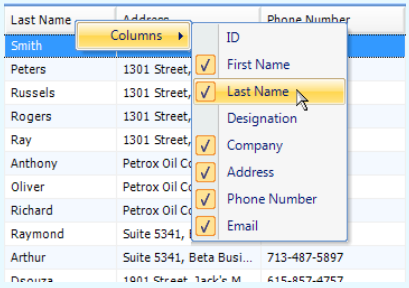
To Change the order of the columns being displayed in the List View pane

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.



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.



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Related Topics

View Documents as Thumbnails 176
Hide Details pane 562

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27.4 Hide Details Pane

You can hide the *Details* pane which displays the details of documents and Stacks by using the *Options* window.

To Hide the Details pane

1. In Globodox, click the Globodox button 33.
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
Change the Default Checkout folder 277
Customize List View Pane 560

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27.5 Specify the Node to be Selected on Startup

You can hide the *Details* pane which displays the details of documents and Stacks by using the *Options* window.

To specify the Node to be selected on Startup

1. In Globodox, click the Globodox button 33.
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.

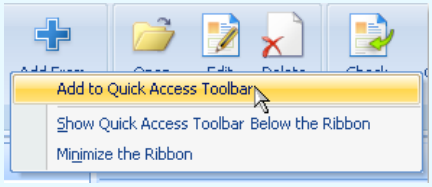
Related Topics
Hide Details pane 562
Customize List View Pane 560

27.6 Add Buttons to Quick Access Toolbar

You can add the frequently used buttons to the *Quick Access* toolbar. The *Quick Access* toolbar is located besides the Globodox button 33. For e.g. lets say you frequently use the *Save*, *Add* and *Scan* buttons. So you can add these buttons to the *Quick Access* toolbar to quickly access them.

To Add buttons to Quick Access Toolbar

1. Select the button you want to add to the *Quick Access* toolbar.
2. Now, right click that button and select the *Add to Quick Access Toolbar* option.



3. The button will now be displayed on the *Quick Access* toolbar.

Notes:

- An entire group of buttons can be added to the *Quick Access* toolbar. For e.g. Lets say you use the *Add* group of buttons frequently. To add it to the *Quick Access* toolbar right click the *Add* bar and select the *Add to Quick Access Toolbar* option.
- To remove a button from the *Quick Access* toolbar, right click the button and click the

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Remove from the Quick Access toolbar option.

- The *Quick Access* toolbar can also be moved below the Ribbon bar. To do this right click the *Quick Access* toolbar or click the drop down arrow of the *Quick Access* toolbar and select *Show Below the Ribbon* option.

Related Topics

Change Globodox Main View layout 559
View documents as Thumbnails 176

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28 Globodox Companion Apps

28.1 Globodox Server

The Globodox Server gets installed when you install Globodox 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 Globodox application to work.

By default the Globodox Server runs on port 5511. You must ensure that on the machine on which Globodox Server is installed, the firewall is configured to allows connections on port 5511.

Globodox Server can be configured to run on any other port. For this...

- On the Windows Start menu, click on Globodox Admin Tools > Globodox Server
- On your Windows System Tray, right click the icon for Globodox Server
- Click on *Settings...*
- *Globodox Server Settings* Dialog will be displayed
- In the text box labeled *Port*, enter the new port number and click on the *Check* button
- Globodox will confirm if the new port can be used
- Now click on *OK*

The Globodox 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.

28.2 Globodox Web Client

Globodox Web Client allows you to access your Globodox DBs via any desktop web browser such as Chrome, Firefox, Internet Explorer or Safari. As long as the server portion of Globodox Web Client is installed on a machine running Windows, you can access documents in Globodox via any of the listed browsers running on any operating system (e.g. Windows, Linux, Max OS)

Almost any task that can be performed using Globodox Desktop Client can also be performed via Globodox Web Client. More information about the web client is available at...

http://www.globodox.com/globodox-modules/web-client/

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28.3 Globodox Mobile App

The Globodox Mobile App lets you access documents in your Globodox DBs via your mobile devices. iOS devices such as iPhone, iPad, iPod Touch as well as Android phones and tablets are supported.

The Globodox 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 Globodox Mobile is available at…

https://www.globodox.com/globodox/mobile-client-info/

28.4 Capture Folders

Capture Folders provide a quick and easy way to add documents to Globodox while also categorizing/indexing them.

Capture Folders are folders which Globodox monitors for new files. Each capture folder is linked to a Destination Profile in Globodox. Whenever Globodox finds a new file in a capture folder it is monitoring, it adds that file to the Globodox 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 Globodox and they will also be used by features planned for the future. The current features which use Capture Folders include Globodox Printer, Globodox Send To and Globodox Drive.

Capture Folders are two types...

- Local Capture Folders
- Global Capture Folders

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 Globodox.

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

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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 Globodox. This is because any documents you add to a Global Capture Folder on a client machine are first stored in 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 Globodox.	Documents are added almost immediately to Globodox.
Can be used with an internet hosted installation of Globodox Web Client	Cannot be used with a internet installation of Globodox Web Client

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. Globodox 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 Globodox MainDB.

If no Default Capture Folder has been set, then when needed Globodox 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 Globodox 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

28.5 Globodox Drive

Note: When the text below uses the term Globodox Document it is referring to any document that you have stored in Globodox.

Globodox Drive lets you access Globodox documents via the familiar Windows Explorer interface. Globodox Drive appears like any other drive under My Computer in Windows Explorer. Globodox Drive also lets you add documents to Globodox via drag and drop in Windows Explorer.

Apart from this, Globodox 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

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Globodox. You can also easily access all your checked out documents via Globodox Drive.

Since Globodox 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 Globodox 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 Globodox Document for viewing from any Windows application, editing the document and saving it back to Globodox (which would require the document to be checked-out and then checked back in) 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 Globodox is not currently supported.

28.6 Globodox Virtual Printer

The Globodox Printer allows you to print a document from any Windows application and automatically add the printed document as a searchable PDF file in Globodox. Example of some types of documents you may want to print via the Globodox 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 Globodox 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 Globodox and hit *Print*.

The document will be printed to the Globodox Printer which will convert the printout into a searchable PDF file and add it to Globodox.

If a Default Capture Folder* has been set for the machine, then the Globodox Printer will add the PDF to that folder. If no capture folder has been set as default then Globodox will display a list of all your Local and Global Capture Folders. You can then choose the capture folder you want.

***Note:** Globodox ships with one Global Capture Folder 566 called MainDB which is set as default. Documents added to this capture folder are added to the Globodox MainDB.

28.7 Globodox Send To

The Send To feature in Globodox allows you to quickly select one or more documents in Windows Explorer or your Windows Desktop and add them to Globodox.

The Send To feature in Globodox integrates with the Send To right-click menu option in Windows Explorer by adding Globodox and Globodox… 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 > Globodox menu option
3. The selected documents will be added to the default Globodox Capture Folder*

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4. If no capture folder has been set as default then Globodox will display a list of all your Local and Global Capture Folders.

If in step 2 above, if you chose the Send To > Globodox... option instead of the Send To > Globodox option,then Globodox 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 Globodox as per the Destination Profile linked to the selected Capture Folder.

*Note: Globodox ships with one Global Capture Folder called MainDB which is set as default. Documents added to this capture folder are added to the Globodox MainDB.

28.8 Globodox Login Manager

Globodox Login Manager lets you specify the location of the Globodox server. It also lets you control when and how often Globodox Desktop Client and other Globodox Apps should ask you to login before allowing access. By default if after Windows startup you have logged in once to Globodox Desktop client then Globodox Drive will not prompt you to login.

Using the Login Manager you can configure Globodox to...

- Automatically login as a specific user when Windows starts
- Prompt for login to Globodox only once per Windows session
- Prompt for login every time access is required to a Globodox application such as the Desktop Client, Globodox Drive, Send To or Globodox Printer.

29 Report Generator

Introduction

Globodox 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 Globodox.

User Role Map
Use this to generate a report of all the users and their assigned roles.

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 defaults documents added in the last 3 months are included in the report.

Documents Modified - Grouped by user
Use this to generate a report of all the documents modified between two given dates grouped by user. By default documents modified in the last 7 days are included in the report.

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Documents Modified - Daily report
Use this to generate a report of all the documents modified between two given dates grouped by day. By default documents modified in the last 7 days are included in the report.

Documents Modified - Monthly report
Use this to generate a report of all the documents modified between two given dates grouped by month By defaults documents modified 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.

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30 Manage Email Messages in Globodox

Introduction

Email Capture in Globodox, downloads email messages from any POP3 mail server and adds them to Globodox.This module will automatically extract fields (To:, From; Subject etc.) from the email message and enter them in Globodox. This makes all email messages immediately searchable.

Globodox Email Capture runs as a Windows service and can download messages and add them to Globodox even when Globodox is not running.

In simple words you can automatically download and add to Globodox, 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 Globodox.

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.

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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

  Globodox 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 Globodox Email Capture Service* and click on *Start*

- Stop capturing email

  To stop capturing email, you need to stop the Globodox 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 Globodox 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 Globodox 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 DB, the entity and 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, Globodox will create two documents, the email message itself and the attached file. Both the documents will be linked

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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 or stack 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\Globodox 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\Globodox Email Capture Data folder.

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

  These messages are removed from the folder as soon as they are processed and added to Globodox. If you wish you 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 *Globodox 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.

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31 Command Line Options

You can now run Globodox in maintenance mode

Commands

1. **/resetdbprofile /dbid=1**

   This option resets the specified DB's profile

   where, dbid is the ID of the DB.
   To get a DB's ID go to Settings and select the DB List node, right-click the column header and check ID. The DB's ID will now be displayed.

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.

   The 'dbid' is the ID of the DB. To get a DB's ID go to *Settings --> System Settings --> DB List*, then right-click the column header and check *ID*. The DB's ID will now be displayed. If it is not the MainDB, the dbid will be different.

4. **/resetcachedb /dbid=1**

   This options resets the cache of the specified DB.

5. **/ignoredefaultdb**

   This option ignores the default DB set by the user and opens the MainDB.

6. **/reconfiguremaindb**

   Sometimes the connection details for the MainDB can change (for e.g. the SQL Server password is changed etc.). In that case you can update the connection details in Globodox via this command line option.

7. **/reconfigureaccessmaindb /dbname=MainDB.gxdb** or **/reconfiguremssqlmaindb /dbname=MainDB** or **/reconfiguremysqlmaindb /dbname=MainDB**

   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 or

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/reconfiguremysqlmaindb commands for MS Access, MS SQL Server and MySQL 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...

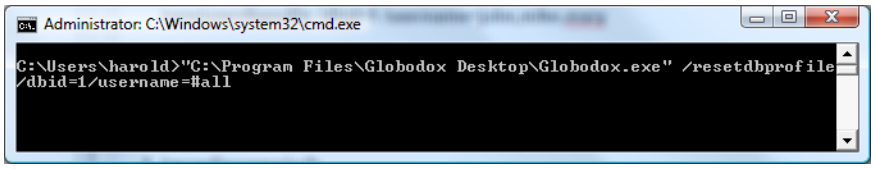
1. When you are navigating a Document type or a Stack Type and you get the following error "The given key was not present in the dictionary". Then follow the steps below...

Close Globodox and Open the Command Line Window.
In the Command Line window type the following at the cursor...

"C:\Program Files\Globodox Desktop\Globodox.exe" /resetdbprofile /dbid=1 /username=#all

(Assuming that Globodox is installed in the default location.)

Now, hit the Enter key.



Globodox should now launch and you should not get any errors.

If you still get the same error then follow the steps below...

Close Globodox and Open the Command Line Window.
In the Command Line window type the following at the cursor...

"C:\Program Files\Globodox Desktop\Globodox.exe" /resetdbprofile /dbid=1

(Assuming that Globodox is installed in the default location.)

Now, hit the Enter key.

Globodox 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 Globodox and Open the Command Line Window on the machine on which Globodox is installed in Server mode.
In the Command Line window type the following at the cursor...

"C:\Program Files\Globodox Desktop\Globodox.exe" /reconfiguremaindb

(Assuming that Globodox is installed in the default location.)

Now, hit the Enter key.

Globodox will now launch. If the Main DB is MS Access then specify the location where the Main DB is located. (It is usually located in the C:\Globodox Databases folder)

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If your Main DB is MS SQL DB then a window will be launched, where you have to specify the MS SQL Server details. For more info, see Create a MS SQL based DB 314
If your Main DB is MySQL DB then a window will be launched, where you have to specify the MySQL Server details. For more info, see Create a MySQL based DB 316

After this is configured, you will get a message confirming that Command Line action has been completed. Globodox will now close.

Copy the multi-user.gdx file from the ITAZ\Globodox folder located on the machine on which Globodox is installed in the Server mode. Now paste the copied multi-user.gdx file in the ITAZ\Globodox folder on all the machines on which Globodox is installed.

3. When you want to reset the cache for a specified DB, follow the step below...

Close Globodox and Open the Command Line window on the machine on which Globodox is installed in Server mode.
In the Command Line window type the following at the cursor...

"C:\Program Files\Globodox Desktop\Globodox.exe" /resetcachedb /dbid=1

(Assuming that Globodox is installed in the default location.)

The 'dbid' is the ID of the DB. To get a DB's ID go to *Settings --> System Settings --> DB List*, then right-click the column header and check *ID*. The DB's ID will now be displayed. If it is not the MainDB, the dbid will be different.

Now, hit the Enter key.

Globodox 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. Globodox will now close.

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