



Customer Engagement

EngageOne Vault

Version 7.3

User Guide

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Preface

This guide provides introductory information about how the Vault operates and explains how to operate the various components that make up the Vault, which includes Vault server, and Vault Service.

You should refer to the Vault Installation and Vault Customizing guides for installing and configuring Vault.

Once Vault has been installed, refer to the Vault Customizing guide for detailed information on advanced features for customizing your Vault environment.

Document structure

Users responsible for configuring Vault related modules should refer to “Configuring and running the Vault” for an introduction to those processes. Once you are familiar with these methods, refer to the Vault installation and Vault Customizing guides for step-by step instruction on setting up Vault.

Novice users who require information to retrieve and view documents from the Vault should refer to “Accessing and viewing documents”.

For users who wish to work with output datastreams created outside the Generate environment, refer to “Working with output created outside Generate” in the Vault Customizing guide.

Skills and training

These products operate under Microsoft Windows and UNIX based environments. It is recommended that you have Windows OS and UNIX networking experience. It is also recommended that the Vault administrator has some understanding of your host environment and that they know how to transfer files between the host system(s) and a Windows/UNIX server environment.

Those using the Rendering Engine for web applications should be knowledgeable in HTML, the relevant web server (such as Apache, IIS, etc.) and the operating system(s) which may be in place at the installation location. It is assumed that the web developers are well-versed in the specific application environments into which the Rendering Engine is to be installed.

While every effort is made to provide sufficient information in this User Guide, it is recommended that users attend a training course covering the features of the Vault environment and the interaction of Vault products on the various supported platforms. Your Vault supplier will be able to advise you on course availability.

Typographical conventions

The following are used throughout this manual.

[...]	parameters between square brackets are optional.
{ <i>opt1</i> <i>opt2</i> }	parameters between curly braces represent a list of options, one of which must be chosen.
Text in italics	represents parameter data which should be replaced with customized values.
monospaced	text represents constant command text which should be typed exactly as written.
<drpath>	is the path name where the Vault product is installed, for example c:\Program Files\PBBI CCM\vault\...

The Vault environment

The Vault suite of products support storage, display, management and processing of composed documents in electronic environments. Many of the Vault components are optional so you should consider the information in this overview for only those licenses you own.

Vault Server

The Vault Server is a document repository and forms the hub of the Vault environment. This server component can compress, store and manage documents that have been composed in a wide range of output formats including those specifically produced by the Generate environment. The **Mobile Vault** is a Windows based component that allows documents to be read from a local copy of the document Vault.

Vault Service

The Vault Service family of products provide a comprehensive range of mechanisms for accessing and displaying documents stored in the Vault. They are primarily aimed at users within the corporate environment – typically customer service or other front-line personnel.

Vault Service Client

Vault Service Client provides an intuitive, high-performance Windows-based interface to the documents stored within the Vault. It is an executable that can be easily rolled-out to desktops as required. This can be supplemented with **Vault Service Reprint Admin** which administrators can use for compressed stream viewing and document export capabilities.

Rendering Engine

The Rendering Engine allows users to build a customized interface to the Vault and optionally allow you to integrate the document display function into an existing web server environment. This is based on a set of API functions that communicate with the Vault server and return rendered documents as required. A sample web-based client application is shipped with the Vault distribution material. This can be used to access documents stored in Vault and can be customized, if required. Refer to the “Vault Customizing guide” for further information about the ServiceWeb2 application.

Vault clients

The rollout of Vault client applications such as Vault Service Client, Vault Service Reprint Admin and the API sets (Java sample clients) involves installing the required modules from the distribution media onto the appropriate workstations.

Server Configuration

There are several server components in the Vault environment of which you may have one or more installed. Some servers have non-Vault software pre-requisites. The hardware supporting the server configuration should reflect your needs for performance and security, but all machines need to be able to communicate using TCP/IP sockets.

All installations will include:

- The **Vault Server** which compresses, stores and manages the datastreams containing the documents required for archival and display via one of the Vault Service Clients.

Your installation may have one or more Vaults. Some installations have multiple Vault Servers, some are deployed in a mirrored configuration, while some are independent data stores.

Integrating with Generate

Many of the components that form Designer and Generate are optional and can reside on a range of platforms/servers which are not necessarily connected and are easy to automate. As a result file-based methods of exchanging key information between the components are used particularly when Vault components are part of the environment.

The Document Interchange Journal

A Document Interchange Journal (DIJ) is an index of documents contained within an output datastream file created by Generate. Every output datastream created by Generate that is intended to be stored in the Vault – i.e. documents for use with Vault – must be accompanied by a DIJ file.

A DIJ is an XML file and is configured as part of a publication design in the Designer. You will need to specify parameters for the DIJ that allow the Vault to identify the intended recipient of each document using an account number and its version using a 'statement date'.



SEE "INTERFACING WITH VAULT" IN THE GENERATE USERS GUIDE FOR DETAILS ON CREATING AND CONFIGURING A DIJ FILE AS PART OF A DESIGNER APPLICATION DESIGN.

At production time, Generate writes an entry to the DIJ file for each document it processes. If you use PCE, StreamWeaver or another post-composition process to merge output datastreams or to add/remove documents, you will need to ensure that the associated DIJ is updated to reflect such changes.

Extracting application resources

The HIP file created in the Generate environment contains any resources required to render document pages that have not been embedded in the output datastream itself. As a result resources contained within the HIP file must be made available to the Vault's download directory.

Output from Generate

When working with output from Generate you must always supply the following resources to the download directory as a group:

- The output datastream file (containing the actual documents).
- The DIJ file that provides the index into the documents.
- The resource pack file (HIP) created by Generate.

Font and image resources are stored in the HIP file created by a Designer publishing task. It must be made available to the download directory where they are matched to the appropriate datastreams using internal identifiers stored in the associated DIJ. A HIP containing new or updated font and image resources can be passed to the Vault loader download location as soon as it becomes available.

NOTE: Ensure that you upload the HIP file before loading data as this avoids jobs having to wait or retry on resource packs.

NOTE: Depending on your Designer/Generate environment and the type of output, you may be able to use resources included in the job stream instead of resources in the HIP file. Refer to Enhanced Resource Deduplication in the Customizing Guide.

Managing messages with e-Messaging

e-Messaging is a complete, enterprise-class solution for managing inbound/outbound e-mail and SMS customer communications.

e-Messaging leverages Vault solutions to provide an up to the minute and customer-centric view of messages that have been exchanged with customers. Besides outbound messages, inbound messages are also auto-indexed and archived providing improved customer service and compliance with record keeping requirements. Beyond archiving messages, e-Messaging streamlines the response processing for inbound messages with its automatic content based categorization and content based routing features. This allows inbound messages to be routed to appropriately skilled teams in a contact center or be used to trigger relevant automated responses.

Configuring inbound and outbound messages

The e-Messaging solution can be configured to prepare both inbound and outbound, e-mail and SMS messages for archiving in Vault. Archive preparation functions performed by e-Messaging include:

- Automatic or minimum click indexing of e-mail and SMS content. Including the generation of journal files for Vault in the required format.
- Single instance storage of messages addressed to more than one recipient.
- Optional conversion of content including e-mail attachments to PDF or PDF/A, prior to archiving. Includes the following options:
 - Extraction of files in ZIP attachments prior to conversion, including nested ZIP files.
 - Extraction of MS Outlook rich text content (MS-TNEF / winmail.dat files) prior to conversion.
 - Conversion of HTML to MHT format – embedding images (already embedded or externally referenced) to ensure version control of complete content.
- Safely batching up content into Vault “collections” for efficient loading, compression, storage and retrieval. Please refer to the Vault Customizing Guide for additional information on the “collections” format.

For more information on configuring inbound/outbound messages, please refer to the “Vault and e-Messaging” chapter in the *Vault Customizing Guide*.

Configuring and running the Vault

Introduction

This chapter introduces the configuration processes involved when setting up the Vault. For detailed instruction on configuring the vault environment, please refer to the *Vault Installation Guide* and the *Vault Customizing Guide*.

The main component of the Vault is the document repository which compresses, stores and manages documents that have been composed in a wide range of output datastreams, including most of those produced within the Generate environment.

NOTE: Under normal circumstances the processes required by the repository are automatically invoked when the operating system is started. Before you can start loading documents into the repository you will need to define the properties of the incoming documents. Refer to *Creating application profiles* for further information.

This section is intended to provide information on configuring, loading and troubleshooting repository processing.

The **Mobile Vault** is a Windows-based application that allows documents to be read from a local copy of a Vault database. Refer to “Accessing and viewing documents” for further information.

Hardware requirements

It is recommended that the Vault is installed in its own directory on a large capacity drive, preferably on a disk other than where the operating system is installed. This ensures that the growth of operating system files, and the disk usage for the repository, do not interfere with each others disk requirements.

For more information, refer to the hardware specifications listed in the *Vault Installation guide*.

Initialization files

Customization of the Vault environment and the way client systems interact with the repository is controlled by a series of initialization files (INIs). A set of default INIs are created as part of the Vault installation and for most installations the majority of the settings within the INIs can be left at their default values.



FOR DETAILED INFORMATION AND EXAMPLES OF THE INITIALIZATION FILES THAT CONTROL THE VAULT ENVIRONMENT REFER TO THE VAULT CUSTOMIZING GUIDE.

The following summarizes the various INI files required to control the operation of the Vault. Details of the settings contained in each can be found in the *Vault Initialization Files* section in the *Vault Customizing Guide*.

server.ini

This is used to store the configuration parameters associated with the Vault. These include the location of the download directory required by the Vault loader function and the location of other working directories. The file can be found in `<drpath>\server\server.ini`

client.ini

This contains settings related to how workstations interface with the repository via the Vault Service Client. In normal operation, a copy of `client.ini` is created/updated on each client system when it logs into the repository. Copies of the `client.ini` are stored as:

- master: `<drpath>\server\distrib`
- clients: `<drpath>\desktop`, and `<drpath>\admin`
- render: `<drpath>\render`

profiles.ini

This INI contains the repository settings related to individual applications for which documents are maintained by the repository. Such application profiles are primarily used to identify the type of output datastream expected and the method by which documents are to be indexed. You can also use them to identify a specific database to hold the documents from the application and include other settings that provide formatting information not included within the datastream itself. If you wish to update `profiles.ini` it can be found in `<drpath>\server\`.



ALL INSTALLATIONS REQUIRE A PROFILES.INI FILE.

patterns.ini

When the output datastreams to be imported into the Vault environment have not been generated by Generate, this INI defines the various search patterns that are used to identify index information within the datastream themselves (generated datastreams are accompanied by a separate index file). This INI is mainly used with certain low-level automated extraction methods (generic AFP, generic TLE{AFP}, generic Metacode), and is not used with journal based hinting.

database.ini

This is used to configure databases. The list of searches available can be configured on a database-by-database basis. This allows databases with specialized indexes to show a search that would not work in another database. This file can be found in `<drpath>\server\database.ini`

e2serverd.ini, e2loaderd.ini and e2renderd.ini

In versions prior to 5.4, all processes were started under a single service. Now, the server, loader and render processes are separate services. They will appear in the services configuration as:

- Vault Server
- Vault Loader
- Rendering Engine

Each executable has a corresponding .ini file (e2renderd.exe -> e2renderd.ini).

Configuring directory paths

The Vault consists of several working directories. These include the repository itself, a log directory, diagnostic tools, various working directories and the download directory. By default these are created as subdirectories under the main installation directory name.

Defining the download directory

The download directory is a key part of the mechanism that loads document datastreams and associated resources. It is continually polled by the Vault loader for new files which are then processed and stored in the repository as appropriate.

By default the download directory will be located in `<drpath>\server\download`. You can reconfigure the download directory to any location that is directly accessible by the repository. You may, for example, want to isolate it from the rest of the repository directories as a security measure. You can then allow general access to the download directory while leaving the other directories in a more secure environment. You may also want to redirect

subdirectories to improve disk performance. For example, you can place the index directory, download directory, pagedata directory and etc., on separate drive arrays to increase the number of simultaneous operations by sending requests to different hardware subsystems.

Under normal circumstances the other directories that make up the repository are not user configurable. You should, however, ensure that these have a suitable level of protection against unauthorized access.

For instruction on moving the download directory, refer to the “Configuring and running the vault” chapter from the *Vault Installation guide*.

Handling documents

The output datastream passed to the Vault must be in one of the supported formats such as AFPDS, Metacode or Postscript. Before any datastream is usable within the Vault you must provide or create an index for the documents it contains (except for pattern modes like genericltl, genericafp, and etc).

Datastreams produced by Generate are the preferred source as the environment provides a simple method of creating an acceptable index known as a Document Interchange Journal (DIJ).

For datastreams not created by Generate you will need to configure the Vault to identify the appropriate index information directly from the contents of the datastream.



TO CREATE TEXT JOURNALS AND XML JOURNALS FOR NON-GENERATE DATASTREAMS, REFER TO “WORKING WITH OUTPUT CREATED OUTSIDE GENERATE” IN THE *VAULT CUSTOMIZING GUIDE*.

The settings related to a particular application – the expected type of output datastream and index, the name template by which files related to the application are identified by the Vault loader and document handling parameters – are stored as sections within the profiles.ini file. Each section is known as an application profile.

The documents themselves are stored and referenced using a defined file location known as the database. If required, you can move or rename the file location. In some scenarios you can configure the Vault to store documents from particular applications in different databases so that you can refine access control.

Creating application profiles

You may intend to store documents related to one or more jobs within the Vault. The settings that govern how each job is handled within the Vault environment are defined in the profiles.ini file, a default version of which is installed with the Vault software.

The profiles.ini is made up of multiple sections. There must always be a [FileMap] section plus as many 'application profiles' sections as needed by your installation. For more information on creating application profiles, refer to the “Configuring and running the Vault” chapter in the *Vault Installation guide*.

Databases and access rights

A database is a collection of documents within the vault. Documents are included in a particular database by reference names that are associated with them when they are loaded into the Vault. If no database name is specified, then the database name "default" is used..

You can apply one or more database references to documents at the application level using the profiles.ini file.

For instruction on configuring an application specific database, refer to the “Configuring and running the Vault” chapter in the *Vault Installation guide*.

To control access to databases, for the Vault client applications, you can set up Windows authentication for the databases in the server.ini. For more information, refer to the “Server initialization file” section in the *Vault Customizing guide*.

Indexing

Documents are stored in the vault in an intelligent structure that makes it easy to select and browse the required documents. This is done by organizing documents in a similar way to the traditional paper filing system – sorting documents together by a unique identifier into logical folders. Once a single customer has been selected, all the documents that have been archived for that customer can be quickly and easily browsed.

Typically the unique identifier, or primary key, would be the customer account number as this is normally a unique, non-recycled number that clearly and positively identifies a specific customer.



IMPORTANT: IF YOUR PRIMARY KEY IS NOT UNIQUE OR IS RECYCLED, CONTACT YOUR vault SUPPLIER TO RESOLVE THIS ISSUE BEFORE PROCEEDING.

Other information, or secondary keys, can be linked with the primary key, such as the customer name, address, phone number or social security number. These keys provide the index and can be used to search for a document. For example, the account number for 'Joe Smith' or the individual at '123 Water Street'. Any information can be a key, whatever helps in searching for a document.

Providing the index information

If you are creating the documents to be archived using Generate then the index information is provided in a separate file that is loaded into the vault along with the output datastream. This file is known as a standard or XML journal.

If you are using non-Generate data you will need to configure the vault to identify the appropriate index information directly from the contents of the datastream as it is loaded. Using this method may limit the flexibility of your application as redesigning a document may result in the content of the output datastream no longer being compatible with the index generation criteria specified originally. You will also need to understand the relevant datastream protocol so that you can specify the elements to be searched.

The supported non-Generate methods are as follows:

Journal: uses a text file that contains the index information that has been extracted from the datastream in a prescribed format.

GenericAFP: uses *TRN Transport Data* commands (TRN is a transparent data command) within AFPDS files to indicate the start of a command sequence which completes with the text string required for indexing.

GenericTLE: values within AFP Tag Logical Element (TLE) records provide the index information.

GenericMetacode: searches for binary patterns within Metacode streams to determine the start and end of index text. Refer to the *Vault Customizing guide* for further information on alternative methods of indexing.

Note: You specify the type of index being used for an application as part of the profiles initialization file. See “Creating application profiles” for details.

The DIJ index process

A DIJ is an XML construct that can contain all the references with which it is possible to search for documents within the Vault. The DIJ is defined as a standard Journal when creating the application using the Designer. All the indexable references can be provided using references to fields within the application data to be used in the production environment or by other objects such as constants and environment settings. One entry per document is added to the DIJ when it is created by the GEN component of Generate.

IMPORTANT: Special care is required if you intend to manipulate the order of pages within the datastream after it has been generated by GEN. You may be using PCE or a third party tool to merge or reorder pages within datastreams. Where this is the case you must ensure that a new DIJ file is created that reflects the amended datastream. PCE provides commands that allow you to read and write DIJ records and individual elements as required. If this is not feasible consider storing the documents in the vault before any such post processing.



REFER TO THE DESIGNER'S GUIDE FOR DETAILS OF CREATING A DIJ OBJECT AND TO THE PRODUCTION GUIDE FOR INFORMATION ABOUT SPECIFYING THE FILE TO RECEIVE THE DIJ OUTPUT. THE PROGRAMMERS GUIDE CONTAINS INFORMATION ABOUT CREATING A PCE APPLICATION INCLUDING THE USE OF THE DIJ RELATED COMMANDS

Once generated, the DIJ should be passed to the vault along with the datastream to which it pertains by placing both files in the Vault loader download directory. The base name of both files must match the relevant entries in the [FileMap] section of profiles.ini for this to happen.

Vault loader automatically creates the Vault index entries from the information held in the DIJ. By default the index is assumed to contain four basic referencekeys which are displayed to the end user when searching for a document. These are:

- Customer account number – the primary key
- Customer name
- Customer address
- Document date

NOTE: The various individual address elements that are configured as part of the DIJ object in the Designer (address line 1-7 and Postal Code) are concatenated together to form the single *Customer address* index element by Vault loader.

Font and image resources

If you are creating the documents using Generate the resources can be made

available by simply passing the HIP file to the Vault loader via the download folder to be loaded into the Vault.



REFER TO THE VAULT CUSTOMIZING GUIDE FOR FURTHER INFORMATION ON ALTERNATIVE METHODS OF INDEXING.

If you are using documents that were not created by Generate or where you need to supplement existing resources manually, you will need to use an alternative method for loading resources into the Vault. There are two possible routes: to extract embedded resources from a datastream or to place resource files manually in the appropriate Vault directory.

Resources can be stored either in a default resource set or a named resource set. For documents rendered by Generate, additional sub-directories are created for the resource set and are not user configurable.

NOTE: Passing font and image resources from Generate to Vault as HIP files is not supported for Postscript print streams. For Postscript information, please refer to the profiles.ini settings described in the *Vault Customization Guide*.

Storing documents

Output datastreams and their associated files are loaded into the repository by the Vault loader which polls the download directory for incoming data.

The download directory can be defined in the server.ini file.

For more information on storing documents, refer to the “Configuring and running the Vault” chapter in the *Vault Installation Guide*.

Vault Clients

The clients available within the Vault environment are described in this section. They can be categorized as applications for administrators and end-users. Depending on keycode allowances, the Vault Service Client, Vault Service and Reprint Admin can all exist under one unified user interface.

Vault Service Reprint Admin

The Vault Service Reprint Admin is a Windows-based client that enables viewing of compressed streams along with the ability to save compressed streams as an output datastream. Refer to “Accessing and viewing documents” for further information.

End-user clients

This group of client applications is intended for end-users such as customer service representatives to retrieve and view documents from the vault.

Vault Service Client

The Vault Service Client is a Windows-based client to the Vault allowing you to search, view, print and save customer statements. Refer to “Accessing and viewing documents” for further information.

Mobile Vault

The Mobile Vault is a Windows-based application that allows documents to be read from a exported subset of a Vault database. Refer to “Accessing and viewing documents” for further information.

Rendering Engine

The Rendering Engine allows you to build your own customized web based client to the Vault using the functions exposed by the rendering engine.



FOR DETAILED INFORMATION ABOUT THE RENDERING ENGINE REFER TO THE *Vault Customizing guide*.

Hardware configuration

The hardware and network configuration that supports the application environment is at the discretion of the individual installation. However in a typical configuration the Document Vault will act as a server to many end-user clients on other machines via your network infrastructure.

Refer to the *Vault Installation guide* for particular hardware and software requirements for these applications.

Accessing and viewing documents

Based on your license, the title of your Vault Service application may vary. This section describes how to view documents based on the type of license that you have:

- Vault Service Client: access documents from a local file, or from the vault.
- Vault Service Reprint Admin: access compressed datastreams from the vault.
- Mobile Vault: view documents from a local compact disc.

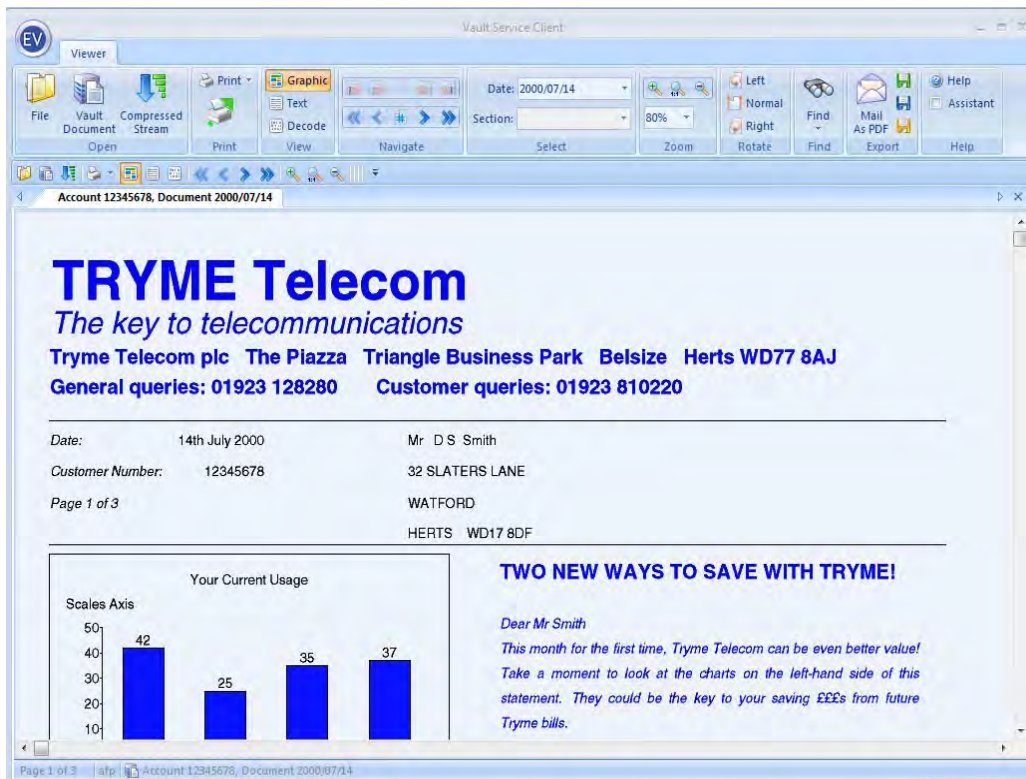
The user interface for Vault Service Client, Vault Service Reprint Admin and Mobile Vault share many common features, for example, document searching, navigation, view settings and so on.

Keycode licensing

Depending on keycode allowances, the Vault Service Client, Vault Service Reprint Admin and Mobile Vault can all exist separately or together under a unified user interface. Additionally, the menu items that are available to you are controlled by license allowances. This documentation accounts for all possible functionality.

Common features of the Vault Service interface

The diagram below illustrates the work space of this family of Windows-based applications.



Viewer tab

All document-related tasks such as accessing and viewing documents from the vault, local machine and compact/DVD disc are located under the *Viewer* tab.

The application changes its look and feel based on the access permissions of the user currently logged in. As well as based on keycode allowances.

Searching for documents

Depending on keycode allowances you may have access to any of the following four options for selecting documents from the *Open* panel:

- **File:** Retrieve single or multiple documents from your local machine.

- **Vault Document:** Retrieve single or multiple documents by searching the Vault indexes (databases).
- **Compressed Stream:** Retrieve full output datastream files (single or multiple compressed streams). This enables you to extract data based on the entire output datastream as opposed to individual documents.
- **Local Document:** Open single or multiple documents from a compact disc/DVD disc.

◀ **To open a local datastream file:**

From the *Viewer* tab, click the *Open/File* button. The *Open File* dialog is displayed. Select the datastream file that you want and click *Open*.

- AFP files: when an AFP file is chosen, an AFP Parameters dialog launches prompting you to accept or change page size dimensions and the font parameters.
- Metacode files: when a metacode file has been chosen, a Metacode Parameters dialog launches prompting you to accept or change the record format, paper type or DJDE parameters.
- Postscript files: when a postscript file has been chosen, a Postscript Parameters dialog launches prompting you to select a paper type and to specify the paper size (width and height).

◀ **To open a document from the search dialog:**

From the *Viewer* tab select *Open/Vault Document*. The *Search* dialog is displayed:

1. Select the database that you want from the *Database* list.
2. Search by the list of available indexes from the *Search* list (typically account numbers, names and addresses).
3. You can optionally refine your search by entering characters to match documents against in the *For* entry field. Entries displayed in the *results* pane will vary according to the character(s) entered here.

NOTE: Case is ignored during the matching process and characters such as a hyphen or brackets are not significant. The *Results* pane will be populated according to the index selected.

4. Select the document that you want from the *Results* pane.
5. You may refine your search further by selecting a specific option and date for the account selected in the Results box from the *For* and *Dates under this account* fields.
6. Click *OK*.

Once a document is displayed, you can refine your search within that document by searching on the date and by a section of the document (these are located in *Viewer* tab):

- *Date* – shows all the dates available for the selected account. The corresponding document is displayed when a date is selected from the drop-down list.

- *Section* – use the Section drop-down list to go to a particular section within the selected document, for example “Summary”.

Text string search

You can search for a particular text string by selecting *Find* from the *Viewer* tab.

◀ To search for a text string:

1. Enter the text string that you want to search for in the *Find* text field and click *Ok*. The page that matches that criteria appears.
2. Select *Match Case* if you want to search for the exact case of the word and/or select *Previous* if you want to go back to the previously found item.

Alternatively, to search for the next or previous text string, you can select *Find Next* or *Find Previous* from the *Find* menu. By default the text that matches is highlighted in red color. The user can change this color. The change has to be made in *client.ini*. Under the [Viewer] section set the HighlightColour option to the preferred color, like in the following example:

[Viewer]

HighlightColour=0x00ff00

NOTE: In the current version, text string search is available only for graphic view mode.

◀ To access compressed datastreams from the Vault:

1. From the *Viewer* tab click the *Open/Compressed Stream* button . The *Search for Compressed Stream* dialog launches. Search for and select compressed files loaded into the Vault.
2. Enter a text string to search in the *Starting With* field, select the file that you want and click *OK*. A status window will appear while it scans the compressed file and the compressed file will launch.

◀ To access documents from a disc:

1. Enter your username and password.
2. From the *Viewer* tab click *Open/Local Document/Open*. The *Search* dialog is displayed:
 - i. Select the database that you want from the *Database* list.
 - ii. Search by the list of available indexes from the *Search* list (typically account numbers, names and addresses).


- iii. You can optionally refine your search by entering characters to match documents against in the *For* entry field. Entries displayed in the *Results* pane will vary according to the character(s) entered here.

NOTE: Case is ignored during the matching process and characters such as a hyphen or brackets are not significant. The *Results* pane will be populated according to the index selected.

- iv. Select the document that you want from the *Results* pane.
- v. You may refine your search further by selecting a specific option and date for the account selected in the Results box from the *For* and *Dates under this account* fields.
- vi. Click *OK*.

Once a document is displayed, you can refine your search within that document by searching on the date and by a section of the document (these are located in *Viewer* tab):

- *Date* – shows all the dates available for the selected account. The corresponding document is displayed when a date is selected from the drop-down list.
- *Section* – use the Section drop-down list to go to a particular section within the selected document, for example “Summary”.

 FROM THE SECTION DROP-DOWN LIST, YOU CAN REFINE THE SEARCH WITHIN THE SELECTED DOCUMENT, BUT FROM THE DATE DROP-DOWN LIST YOU CAN REFINE THE SEARCH WITHIN THE SELECTED DOCUMENT ACCOUNT.

Print options

The print options enable you to print selected documents with or without their backgrounds. You may also choose to reprint documents or replacement documents upon customer requests.

Note: The *Reprint* option is keycode dependent, therefore you may not have this option as it only operates on documents that have been retrieved from the Vault itself.

◀ To print a document file:

From the *Viewer* tab locate the *Print* menu item and click *Print Document*. The *Print* dialog for your default printer appears. Select the appropriate settings.

◀ **To print a document's background:**

From the *Viewer* tab locate the *Print* menu item and click *Print Background*. This will ensure that the document's background will be included while printing.

◀ **To reprint a document:**

From the *Viewer* tab locate the *Reprint* menu item and click *Reprint*. The *Print* dialog for your default printer appears. Select the appropriate settings.

◀ **To print all of the documents associated with an account:**

From the *Viewer* tab locate the *Print* menu item and click *Print All*. The *Print All* dialog appears and gives you the option to choose between printing:

- All documents associated with this account:
 - Click OK and a dialog for your default printer appears.
 - Select the appropriate settings and click *Print*.
- All documents in the range:
 - Choose the date range for you documents from the *From* and *To* fields.
 - Click OK and a dialog for your default printer appears.
 - Select the appropriate settings and click *Print*.

Viewing options

There are three options for viewing your documents:

- **Graphic:** click this to view your document in graphic mode which will include all images/diagrams and so on.
- **Text:** click this to view your document in text mode only (excludes all images/diagrams).

You may right-click your mouse for further options such as the following:

- **Show ruler:** a ruler appears on the left-hand side.
- **Set font:** launches a font dialog to change the font color of the text.
- **Copy selection:** copies a selected piece of text.
- **Decode:** click this to view your document in decode mode which gives you access at the code level.





PROVIDED YOUR SYSTEM HAS BEEN CONFIGURED APPROPRIATELY, YOU CAN SUPPRESS THE APPEARANCE OF ANY BACKGROUND GRAPHIC IN THE OUTPUT BY DE-SELECTING THE PRINT BACKGROUND CHECK BOX WHICH IS LOCATED ON THE TOOL BAR. YOU WOULD WANT TO DO THIS, FOR EXAMPLE, WHEN PRINTING ON PRE-PRINTED PAPER AND YOU DO NOT WANT THE BACKGROUND FROM THE DOCUMENT PRINTED OVER IT.

You may right-click your mouse for further options. Refer to the “Text” viewing options for more information. Document navigation

The buttons in the Navigate panel enable you to search through individual documents or individual pages of documents.

Use the navigation buttons located on the ribbon to navigate through documents as follows:


Navigation	
	View the last document, return to the previously viewed document, view the next document in sequence and view the first document.
	View the last page of the document, return to the previously viewed page, go to page, view the next page in sequence and view the last page of the document.

Select options

The *Select* toolbar item enables you to choose documents based on a date and section. Zoom settings

By default, the magnification is set at 100% which is related to the larger of the standard sizes that fits your screen in portrait view of the document, this will vary with the resolution of your screen. These settings can be changed either by using the drop-down list to select from one of the predefined magnification settings or by using the magnifying glass buttons to zoom in or out. If you want to revert the magnification back to 100% select the Zoom button.

Zooming is supported for text and decode modes. Zooming in these modes changes the size of the font. Rotate document settings

	MOST COMPOSED STREAMS WILL TRY TO USE THE MOST APPROPRIATE ORIENTATION, HOWEVER SOME DATASTREAMS SUCH AS TIFF MAY NOT INDICATE THE CORRECT ORIENTATION.
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The rotation buttons available from the *Viewer* tab allow you to rotate the document displayed in the document view area:

- Left: Rotate 90° counterclockwise.
- Normal: Restore the document to the original orientation.
- Right: Rotate 90° clockwise.

Find options

To locate items within a document, from the viewer tab locate the *Find* toolbar item and click *Find*. After you have searched on the first item, you will have the option to select *Find Next* and *Find Previous*.

Export (save) options

There are four options for saving documents:

- Mail as PDF
- Save as PDF
- Save as Text
- Save as Stream

◀ To save a file as PDF and mail to a recipient:

From the *Viewer* tab locate the *Export* panel and click *Mail as PDF To*. The file will automatically be converted to PDF and your default mail program will open with the PDF file already attached.

◀ To save a file to PDF:

1. From the *Viewer* tab locate the *Export* panel and click *Save As PDF*.
2. Browse to the directory where you want to save the PDF file and click *Save*.
3. An *Export Pages to PDF* dialog appears; choose the pages that you want to save and select *Ok*.

◀ To save a file as text:

1. From the *Viewer* tab locate the *Export* panel and click *Save As Text*.
2. Browse to the directory where you want to save the text file and click *Save*.
3. Change the vertical and horizontal spacing layout using the *Text Grid* dialog. You will typically use this if you notice that after saving the text file the first time the spacing was too wide or too narrow.

NOTE: This applies to AFP and Metacode datastreams only.

4. Select an option for output character encoding and click *Ok*. The options are:
 - *Default*
 - *Western (ISO-8859-1)*
 - *Unicode (UTF-8, UTF-16LE, UTF-16BE)*

◀ To save a file as an output datastream:

1. From the *Viewer* tab locate the *Export* panel and click *Save as Stream*.
2. Browse to the directory where you want to save the output datastream file and click *Save*.

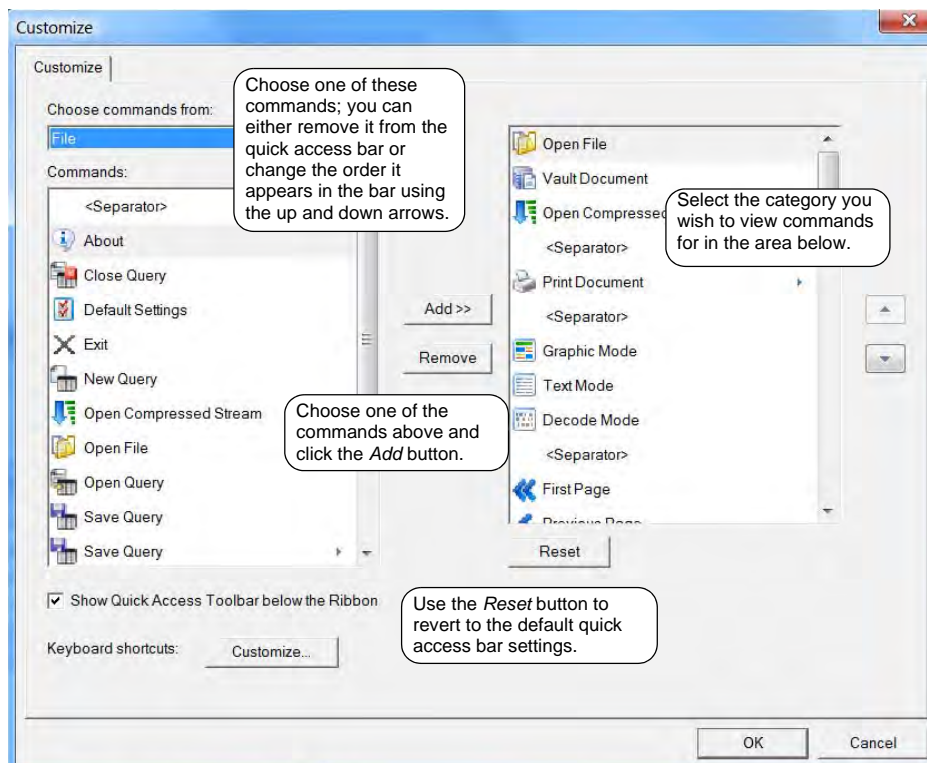
A *Save Pages to Stream* dialog appears; choose the pages that you want to save (All pages, Current page, or select the page range) and select *Ok*.

Configuring the Quick Access bar

The options presented on the Quick Access bar can be changed according to your requirements.

◀ To configure the Quick Access bar:

1. Click the "down" arrow symbol (this is the last option on the Quick Access bar).
2. Select the *More Commands...* option.
3. The Customize dialog is presented as illustrated below:

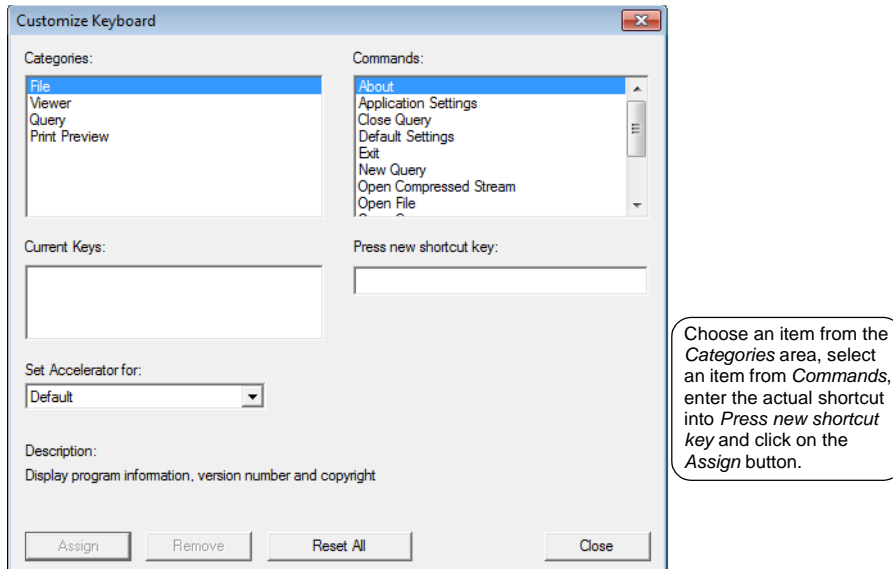


Configuring keyboard shortcuts

You can set up your own keyboard shortcuts for regularly used tasks.

◀ **To set up shortcuts:**

1. Open the Customize dialog as described in the previous section.
2. Click on the *Customize* button.
3. The Customize Keyboard dialog is presented as illustrated below:



◀ **To revert to default settings:**

Click the project menu button and select the *Default Settings* option.

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