

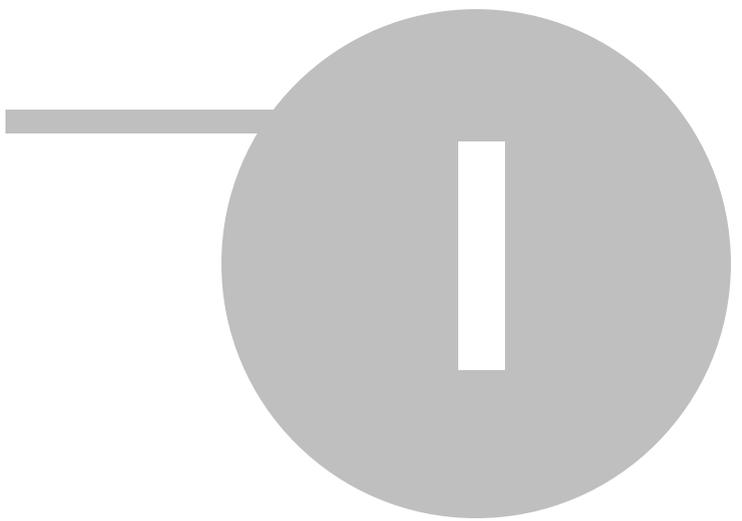
TruArchive Online Help

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1. Recording a new document

Enter data linked to documents

- 1) Click on one of the **Insert new record** buttons:  or **+**.
- 2) Or use the hotkey for this function (**Insert new record**), by default: **Ctrl + U**.



Department: **Department2**
Type: **Invoice**
Viewable: **Mindenki**
Parameter1:
Parameter2:
Parameter3:
Comment line:
Tag cloud: **toner, office**
Created: **2010.12.01. 14:35:09**
Creator: **Super User**
ID: **28** Active:

- 3) After filling in the data linked to the document, click on the **Save changes** button:  or **✓**.

- 4) If you don't want to save changes, click on the **Cancel changes** button:  or **✗**.

Attach a document to the recorded document head

- an existing file from your computer

- 1) Click on the **Computer** icon from the top menubar. 
- 2) Select the document you want to attach from the tree list.

3) Then click on the **Attach document** button.



- using scan

1) Click on the **Computer** icon from the top menubar..



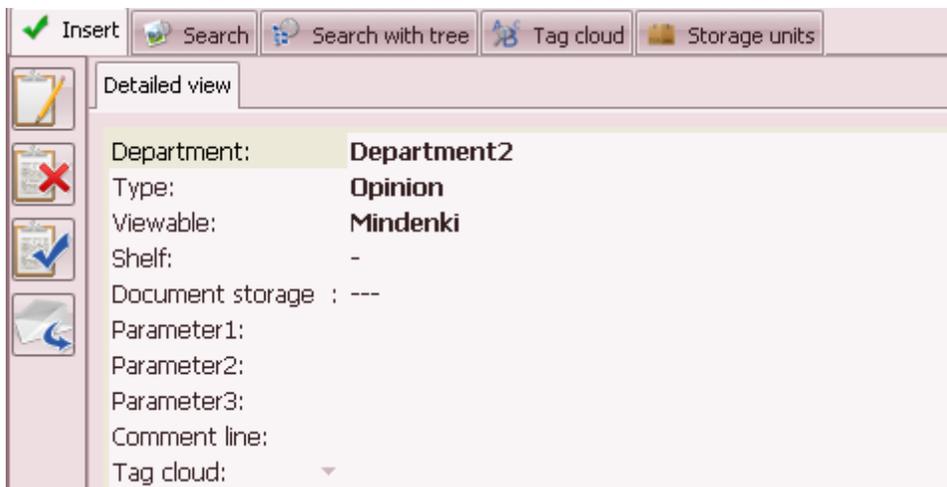
2) Or use the hotkey for this function (**Scan**), by default: **Ctrl + T**.

3) You can do the scan in the software's pop-up window belonging to the scanner.

The number you may see on the icon - representing the document - means the number of fields left blank in it (e.g. tag cloud). 

In the PRO version

In the Truarchive Pro version if using *storage units*, you need to define the *storage unit* and the *document storage* when attaching a new document.



In case of "Head-item" operating mode you need to define the *storage unit* and the *document storage* in the item itself.

The screenshot displays a software interface for document management. The top section shows a 'List view' of documents with the following data:

ID	Department	Parameter1	Parameter2	Paran
29	Department:			
28	Department:	Sample Ltd.	2010/101	
27	Department:			
25	Department:			
24	Department:	2010/0004	ABC Kft.	
23	Department:	TESZT ISTVÁN		
22	Department:	2010/0004	ABC Kft.	
21	Department:	1111111	XYZ Kft.	

The bottom section shows a 'Detailed items' view for the selected document (ID: 28):

- Type: **Invoice**
- Shelf: -
- Tag clouds: **toner, office**
- Active:
- Document storage: **nyitott pápa**
- ID: **28**

Fields description of document head

Department- Refers to the company's internal organizational unit using Truarchive. ([Read more: 6.4](#))

Parameter1, Parameter2, Parameter3 - The name of these parameters can be defined freely, e.g. partner, contract number. ([Read more: 6.4](#))

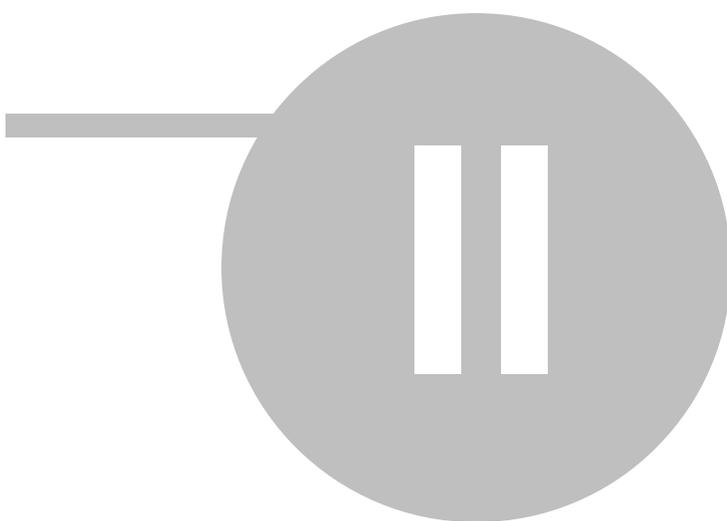
Comment - You can add comment to the recorded document.

Viewable – User groups entitled to view the document. ([Read more: 6.4](#))

Type – Type of the recorded document. ([Read more: 6.4](#))

Active – It is not possible to delete documents in the system. If you remove the tick from the checkbox, the given document will become inactive.

Tag cloud – Keywords referring to the content of documents. You can define any number of these, separating them with comma; they can be filtered. ([Read more: 5.3](#))



2. Modifying a document

Modifying document head's data

Any fields of the document head can be modified freely by a user entitled to do this.



You can save the changes by clicking on the **Save changes** button:  or .

If you want to restore the document head's content to what it was after the last save (prior to your modification), click on the **Cancel changes** button:  or .

Modifying an attached document

The documents attached as image files (*.bmp, *.tif, *.jpg, *.gif) can be rotated clockwise by using

the **Rotate** button from the *Documents* menubar.

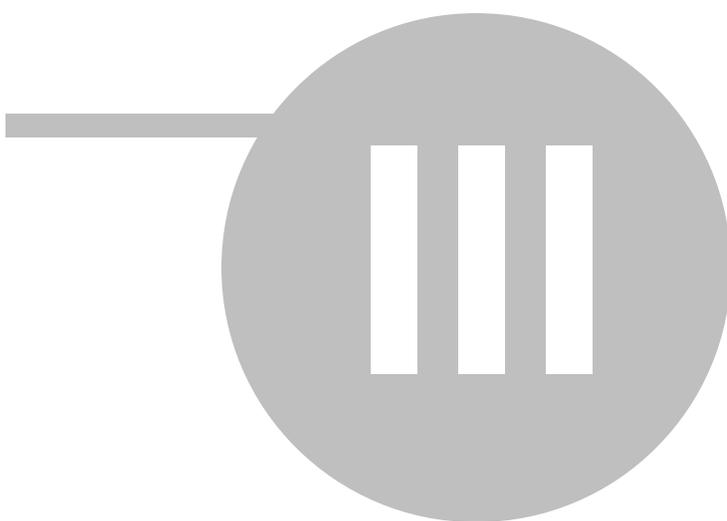


You can flip the documents' images with the **Flip vertical** and **Flip horizontal** buttons from the

Special menubar.



The program automatically saves the changes to the database.



3. Document group templates (only PRO version)

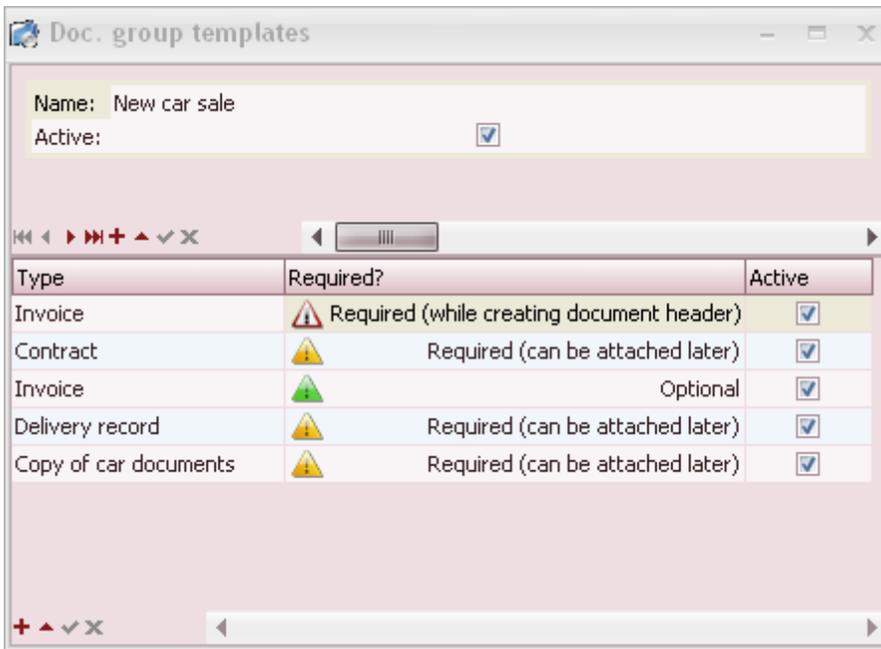
In Truarchive in "head-item" operation mode you have the possibility to create *document group templates*. In this case you can define a document group linked to a certain document head.

A document group relates to transactions, where typically documents of the same type are recorded.

You can create document groups by clicking on the **Document group templates** button from the

Settings menubar. 

You can select document types belonging to the document group from the items of **User relational tag (2)**.



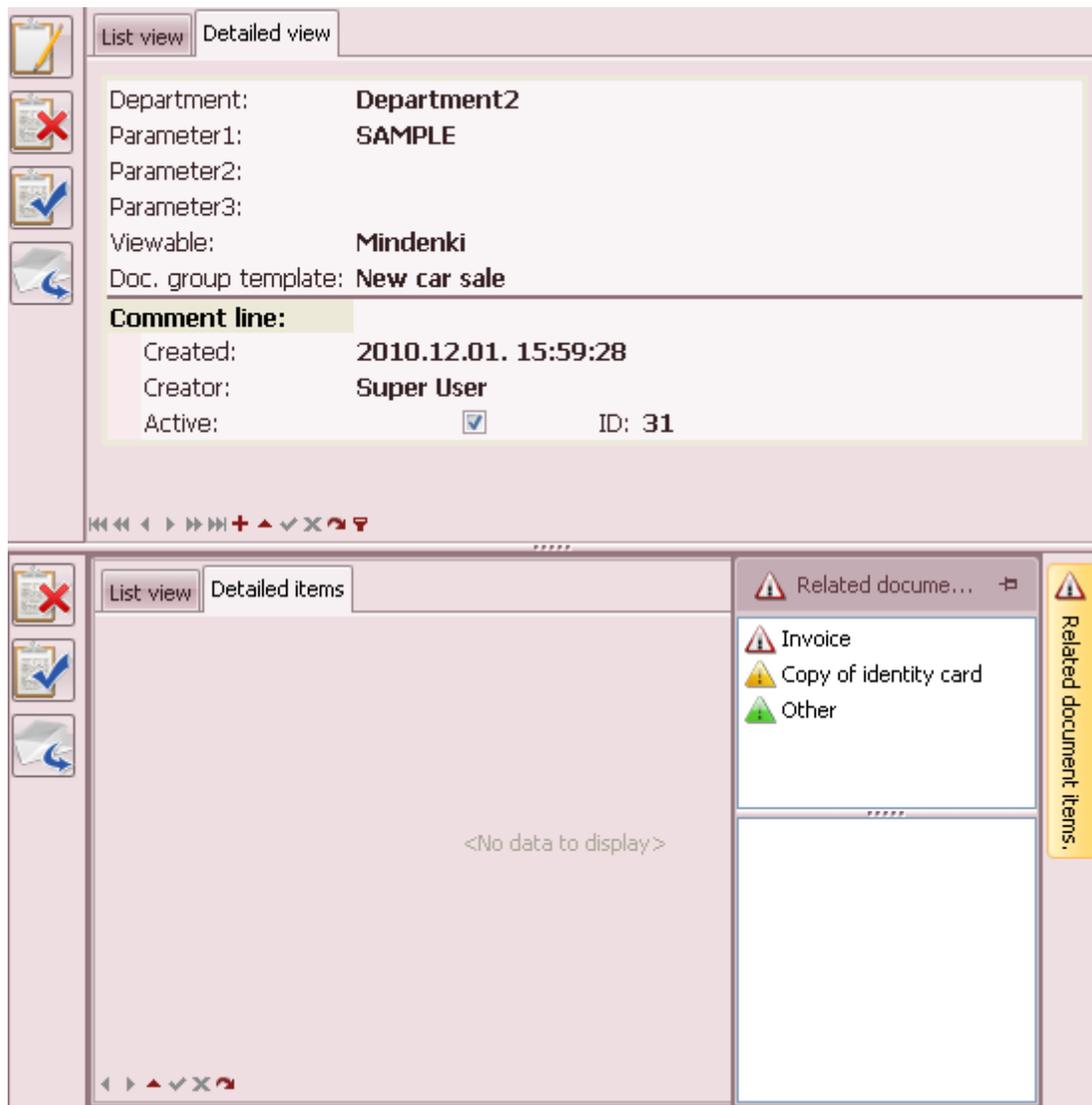
Type	Required?	Active
Invoice	 Required (while creating document header)	<input checked="" type="checkbox"/>
Contract	 Required (can be attached later)	<input checked="" type="checkbox"/>
Invoice	 Optional	<input checked="" type="checkbox"/>
Delivery record	 Required (can be attached later)	<input checked="" type="checkbox"/>
Copy of car documents	 Required (can be attached later)	<input checked="" type="checkbox"/>

You can specify for each document type if the document belonging to that certain type:

- should be scanned when being recorded
- should be scanned but not necessary at the same time as when being recorded
- scan is not mandatory

EXAMPLE

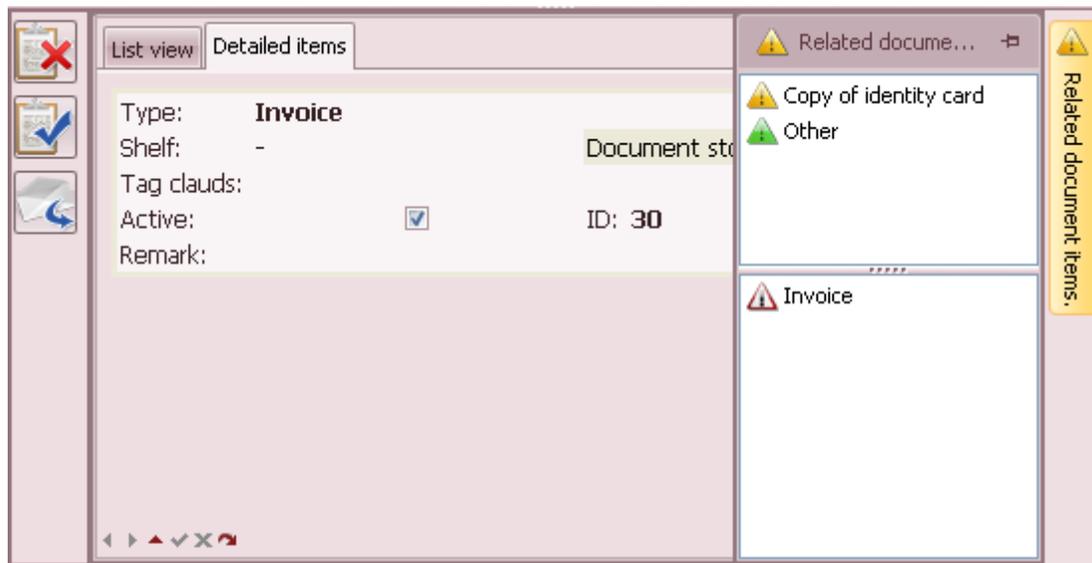
1) I opened a document head. I named the document group "new car sale"



2) The sliding window *Related document items* on the right displays what kind of document types can be attached to the transaction defined in the document head. The pictograms showing the mandatory nature of the types are also displayed here.

3) You recorded a document belonging to **Invoice** type documents. After saving you can see that

Invoice is not among the items to be recorded anymore.



4) The yellow triangle next to *Related document items* shows that you still need to attach to this document head **Copy of identity card**

The *Document group templates* appear both in the normal and the tree structured search interface.



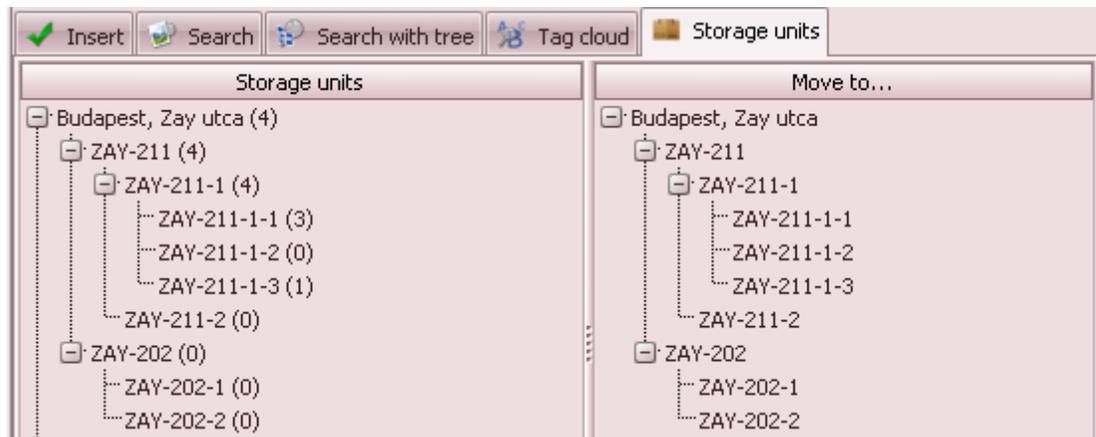




4. Moving between stores (only PRO version)

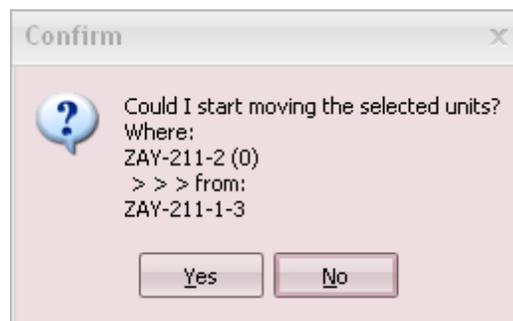
When you are moving between stores you can move the entire content of one storage unit to another in one step. To do this, click on the **Moving between stores** button from the *Settings*

menubar.  Mozgatás tárhelyek között.



On the appearing interface the complete structure of the storage system is displayed. Moving is only allowed to the lowest storage level. Thus, in the example on the screen you can move the content of a *chest* only to a *shelf*.

If you want to move the entire content of a storage unit, click on the storage unit in question, then - by holding the left mouse button pressed - "drag" it to the new storage unit in the tree structure of the right side.



The program always requires confirmation before performing the operation. By clicking on **Yes**, the moving is performed.

If you want to change the storage location of only one document, you can do this in the document

head. (In case of "Head-item" operating mode the storage unit can be modified in the item itself)

Insert Search Search with tree Tag cloud Storage units

Detailed view

Department:	Department2
Type:	Opinion
Viewable:	Mindenki
Shelf:	-
Document storage :	Store
Parameter1:	-
Parameter2:	ZAY-211-1-1
Parameter3:	ZAY-211-1-2
Comment line:	ZAY-211-1-3
Tag cloud:	x
Created:	
Creator:	Super User
ID:	2 Active: <input checked="" type="checkbox"/>

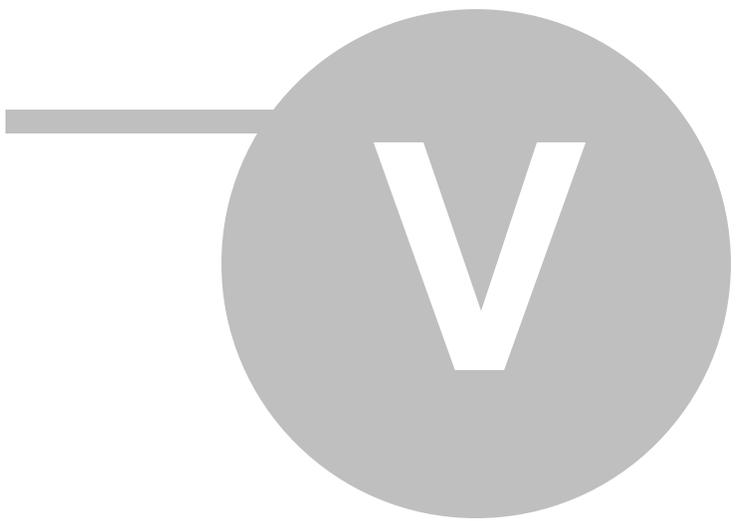
The screenshot displays a software interface with two main panels. The top panel, titled "Detailed view", shows the following information:

- Department: Department2
- Parameter1: SAMPLE
- Parameter2:
- Parameter3:
- Viewable: Mindenki
- Doc. group template: New car sale
- Comment line:
- Created: 2010.12.01. 15:59:28
- Creator: Super User
- Active: ID: 31

The bottom panel, titled "List view" and "Detailed items", shows the following information:

- Type: Invoice
- Shelf: [] Document storage : ---
- Tag clouds: Raktár
- Active: -
- Remark: ZAY-211-1-1
- ZAY-211-1-2
- ZAY-211-1-3
- x ...

The interface includes a top toolbar with "Insert", "Search", "Search with tree", "Tag cloud", and "Storage units" buttons. The left sidebar contains icons for "Detailed view", "List view", and "Detailed items".



5. Search, filter documents

5.1 Search with specified parameters

The screenshot shows a search interface with the following elements:

- Buttons: **Insert** (checked), **Search**, **Search with tree**, **Tag cloud**.
- Department:
- ID:
- Parameter1:
- Parameter2:
- Parameter3:
- Creator:
- Viewable:
- Comment line:
- Created (from):
- Tag clouds:
- Type:
- Navigation icons:

You can start a search regarding any parameter defined in the system. To start, click on the **Search** button.

The documents satisfying the selected parameters are displayed in *List view*.

The screenshot shows the search interface with the following elements:

- Buttons: **Insert** (checked), **Search**, **Search with tree**, **Tag cloud**.
- Department:
- ID:
- Parameter1:
- Parameter2:
- Parameter3:
- Creator:
- Viewable:
- Comment line:
- Created (from):
- Tag clouds:
- Type:
- Navigation icons:

Below the search interface, the **List view** is displayed with the following table:

Department	Type	Viewable	Tag cloud	Comment line	Parameter1
Department:	Invoice	Mindenki			AAA
Department:	Számla	Mindenki	k2d		AAA
Department:	Szerződés	Mindenki			AAA

You can replace the unknown characters by a % (percent sign) character.

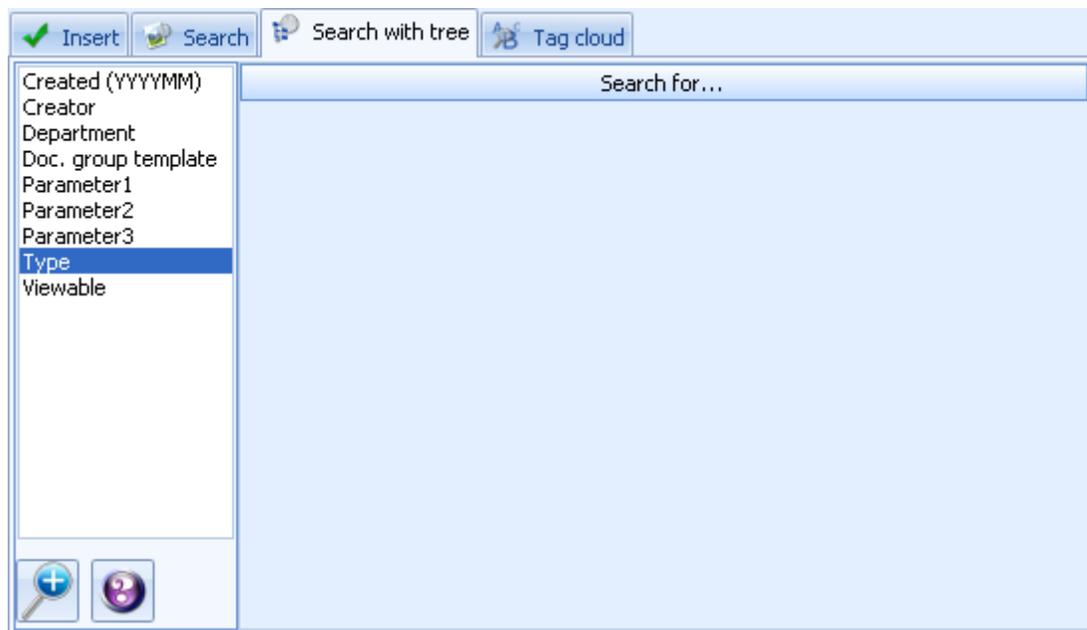
So, if you are looking for those documents, where the first two letters of the **Parameter2** field are AS, then the correct search parameter will be: AS%.

There is an **AND** relation between the defined search parameters. Thus, the system will display all documents that meet search parameters.

To start a new search click on the **Cancel search parameters** button . 

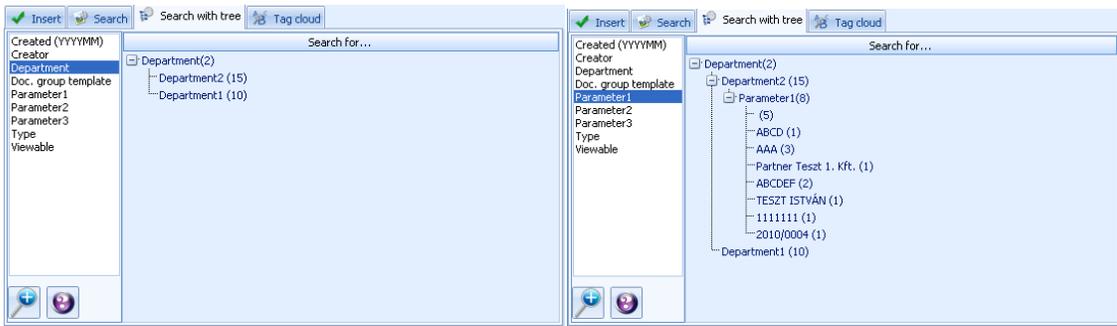
For a detailed search click on the **Detailed search** button. 

5.2 Search with tree



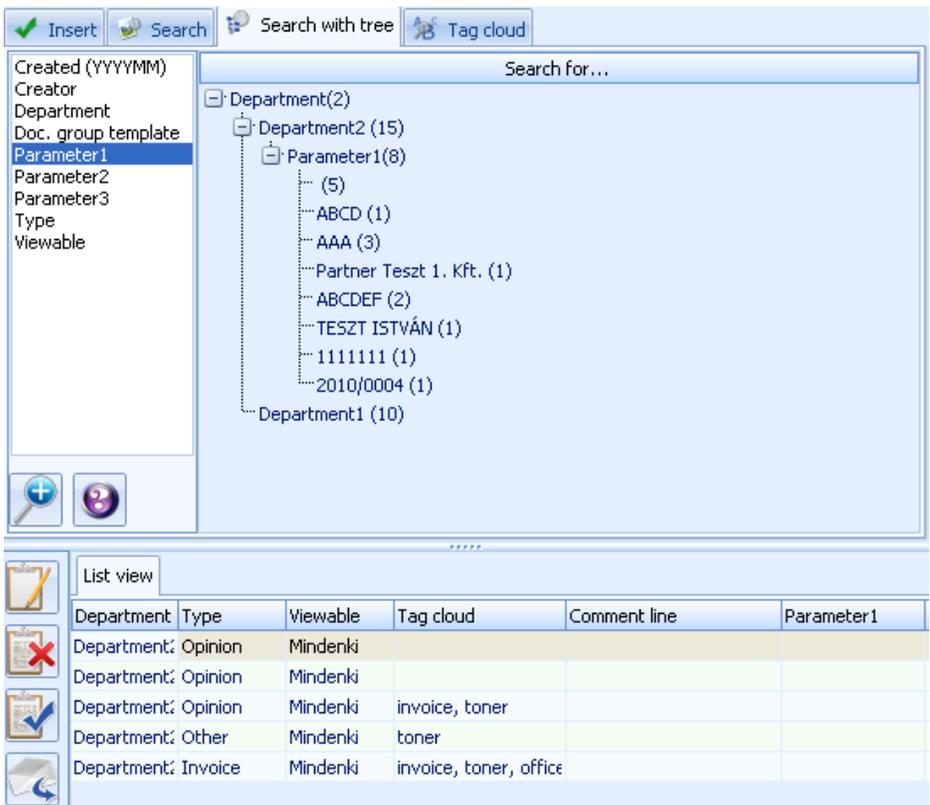
If you want to search with the so-called tree structure, you need to "drag" (by holding the left mouse button pressed) the possible search parameters in the right order to the *Search for...* part of the window.

The parameters can be embedded into one another.

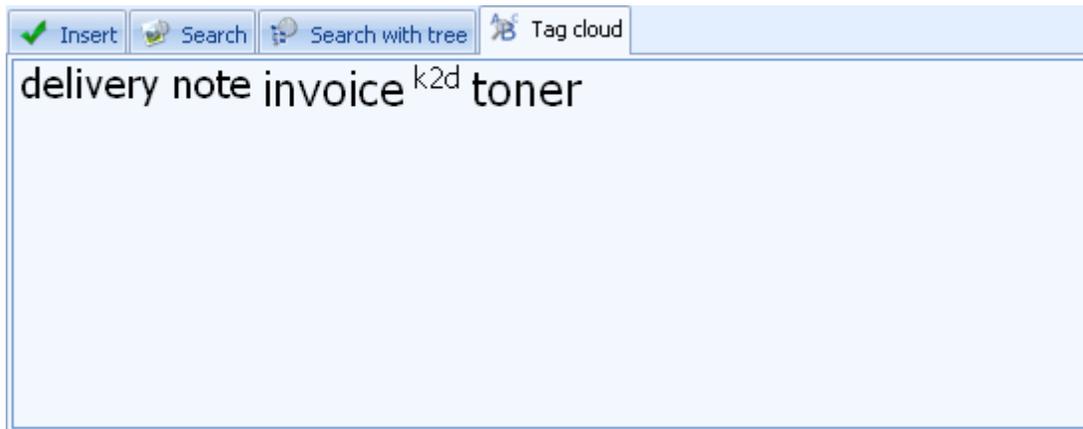


Behind the elements of the tree structure in parentheses you can see the number of documents corresponding to that specific tree branch.

The documents satisfying the defined search parameters are displayed in *List view* by clicking on a specific branch or endpoint.



5.3 Tag cloud



In the *Tag cloud* tab you can see in alphabetical order the key words given in the document head's **Tag cloud** field beforehand.

By clicking on the sought keyword, the related documents will be displayed in *List view*.

Department	Type	Viewable	Tag cloud	Comment line	Parameter1
Department: Invoice	Invoice	Mindenki	invoice		1111111
Department: Opinion	Opinion	Mindenki	invoice, toner		
Department: Invoice	Invoice	Mindenki	invoice, toner		ABCDEF

5.4 Search by storage units (only PRO version)



By clicking on the sought storage unit you will see the corresponding documents displayed in *List view*.

Insert
 Search
 Search with tree
 Tag cloud
 Storage units

Storage units

- [-] Budapest, Zay utca (4)
 - [-] ZAY-211 (4)
 - [-] ZAY-211-1 (4)
 - ZAY-211-1-1 (3)
 - ZAY-211-1-2 (0)
 - ZAY-211-1-3 (1)
 - ZAY-211-2 (0)
 - [-] ZAY-202 (0)
 - ZAY-202-1 (0)
 - ZAY-202-2 (0)
 - nyitott pápa (16)

List view

Shelf	Department	Type	Viewable	Tag cloud	Comment line
ZAY-211-1-1	Department2	Other	Mindenki	delivery note	
ZAY-211-1-1	Department2	Invoice	Mindenki	invoice, toner, office	
ZAY-211-1-1	Department2	Invoice	Mindenki		



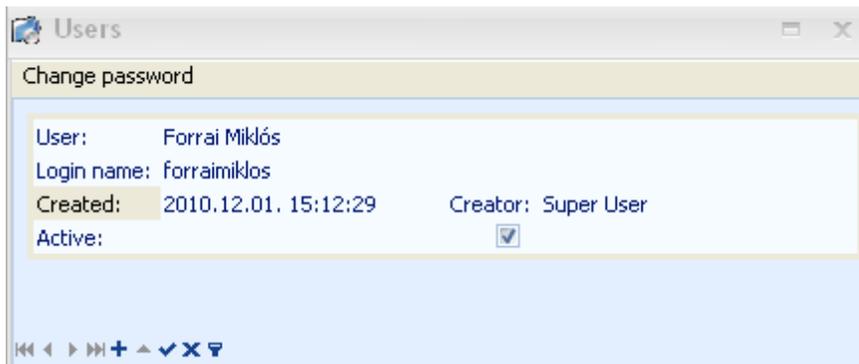
6. Settings

6.1 Users/Competences

Users

Recording users

- 1) Click on the **Users** button from the *Users* menubar. 
- 2) In the pop-up window click on the **Insert new record** button. 
- 3) After filling in the partner's data, click on the **Save changes** button. 



- 4) If you don't want to save changes, click on the **Cancel changes** button. 

Defining user groups

- 1) Click on *User groups* from the *Users* menubar , then in the pop-up window on the **Insert new record** button. 
- 2) You can choose from the drop-down list among the user groups already recorded in the system.
- 3) After defining the user groups, click on the **Save changes** button. 

ID	User group	Active
	Management	<input checked="" type="checkbox"/>

4) If you don't want to save changes, click on the **Cancel changes** button. ✕

Competences

In the lower part of the *Users* pop-up window you can add or delete competences linked to a particular user with the **Add competence** or **Delete competence** buttons. > <

Change password

User: Forrai Miklós
 Login name: forraimiklos
 Created: 2010.12.01. 15:16:15 Creator: Super User
 Active:

ID	User group	Active
7	IT	<input checked="" type="checkbox"/>
8	Management	<input checked="" type="checkbox"/>

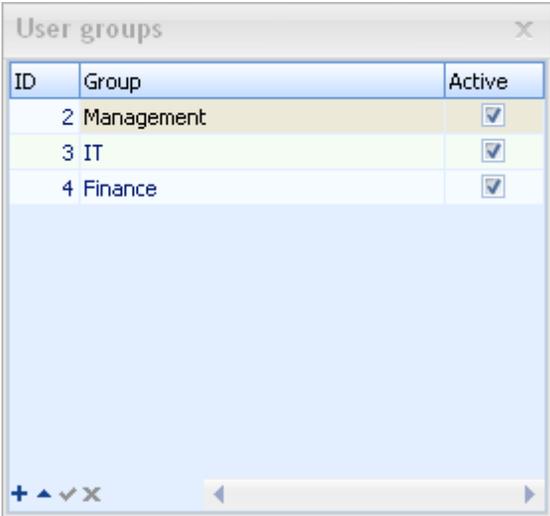
Available competence	Competences	Authorised competence
Modifying system parameters		
Creating/modifying users	>	
Creating/modifying documents		
Modifying any field		
Storage units settings	<	
Creating/modifying document group tem		

User groups

User groups are defined as such specific user circles, where the members have the same rights regarding access to documents. One user can belong to several user groups.

Recording user groups

- 1) Click on **User groups** button from the *Users* menubar. 
- 2) In the pop-up window click on the **Insert new record** button. 
- 3) Once you define the group's name, click on the **Save changes** button. 



ID	Group	Active
2	Management	<input checked="" type="checkbox"/>
3	IT	<input checked="" type="checkbox"/>
4	Finance	<input checked="" type="checkbox"/>

- 4) If you don't want to save changes, click on the **Cancel changes** button. 

6.2 Storage units (only PRO version)

Store levels

The number and name of store levels used in TruArchive can be modified by clicking on the

Parameters buttons from the *Settings* menubar.



Number of storage levels:	4
1st level of storage:	Premise
2nd level of storage:	Office
3rd level of storage:	Chest
4th level of storage:	Shelf
Connected to other applications:	<input type="checkbox"/>
Partner database:	<input type="checkbox"/>
Header-item usage (headers with multiple documents items):	<input type="checkbox"/>

For saving settings click on the **Save changes** button. 🗑️

Maintenance of storage units

You can modify the storage units used in TruArchive by clicking on the **Storage units** button from

the *Settings* menubar. .



Physical storage levels

Code	Premise	Active
ZAY	Budapest, Zay street	<input checked="" type="checkbox"/>

+ ▲ ▼ ✕

Code	Office	Active
211	ZAY-211	<input checked="" type="checkbox"/>
202	ZAY-202	<input checked="" type="checkbox"/>

+ ▲ ▼ ✕

Code	Chest	Active
1	ZAY-211-1	<input checked="" type="checkbox"/>
2	ZAY-211-2	<input checked="" type="checkbox"/>

+ ▲ ▼ ✕

Code	Shelf	Active
1	ZAY-211-1-1	<input checked="" type="checkbox"/>
2	ZAY-211-1-2	<input checked="" type="checkbox"/>
3	ZAY-211-1-3	<input checked="" type="checkbox"/>

+ ▲ ▼ ✕

Folders Blotters Storage types

Code	Documer	Name of blotter	Act
<No data to display>			

+ ▲ ▼ ✕

If you want to record a new item, click on the **Insert new record** button below the storage level in question. +

For saving settings click on the **Save changes** button. ▼

If you don't want to save the last modification, click on the **Cancel changes** button. ✕

Folders, blotters

Folders, blotters

In Truarchive a defined storage unit means a fixed storing facility, e.g. a shelf within the cabinet of an office. On the shelf so-called *document storages* can be found, e.g. folders, boxes. You have to record the document storage types among storing facilities beforehand, you'll have to place the archived documents in these document storages.

Code	Premise	Active
ZAY	Budapest, Zay street	<input checked="" type="checkbox"/>

Code	Office	Active
211	ZAY-211	<input checked="" type="checkbox"/>
202	ZAY-202	<input checked="" type="checkbox"/>

Code	Chest	Active
1	ZAY-211-1	<input checked="" type="checkbox"/>
2	ZAY-211-2	<input checked="" type="checkbox"/>

Code	Shelf	Active
1	ZAY-211-1-1	<input checked="" type="checkbox"/>
2	ZAY-211-1-2	<input checked="" type="checkbox"/>
3	ZAY-211-1-3	<input checked="" type="checkbox"/>

Code	Document st	Name of blotter	Act
D2010/02	Folder	D2010/02	
D2010/01	Folder	D2010/01	
AA2010/1	Box	AA2010/1	

To record a new document storage, click on the **Insert new record** button below the folders. **+**

For saving settings click on the **Save changes** button. **✓**

If you don't want to save the last modification, click on the **Cancel changes** button. **✗**

A document storage can be a folder or a box by default. If you want to record a new type of document storage type, click on the *Storage types* tab.

Document storage type	Active
-	<input checked="" type="checkbox"/>
Box	<input checked="" type="checkbox"/>
Folder	<input checked="" type="checkbox"/>

To record a new storage type, click on the ***Insert new record*** button below the document storage types. +

For saving settings click on the ***Save changes*** button. ▼

If you don't want to save the last modification, click on the ***Cancel changes*** button. ✕

In Truarchive you can create so-called *blotters* as well. They serve as temporary storage facilities and don't have a fixed storage location. To create a new blotter (*folder*), click on the *Blotters* tab.

Code	Document : Blotter	Active
BL01	- Temporary blotter 01	<input checked="" type="checkbox"/>

To record a new blotter, click on the ***Insert new record*** button below the blotters. +

For saving settings click on the ***Save changes*** button. ▼

If you don't want to save the last modification, click on the ***Cancel changes*** button. ✕

The scanned documents - while being recorded - can be placed in either a folder from a given shelf or in a blotter.

Any user has access only to the blotter he himself created.

6.3 User settings

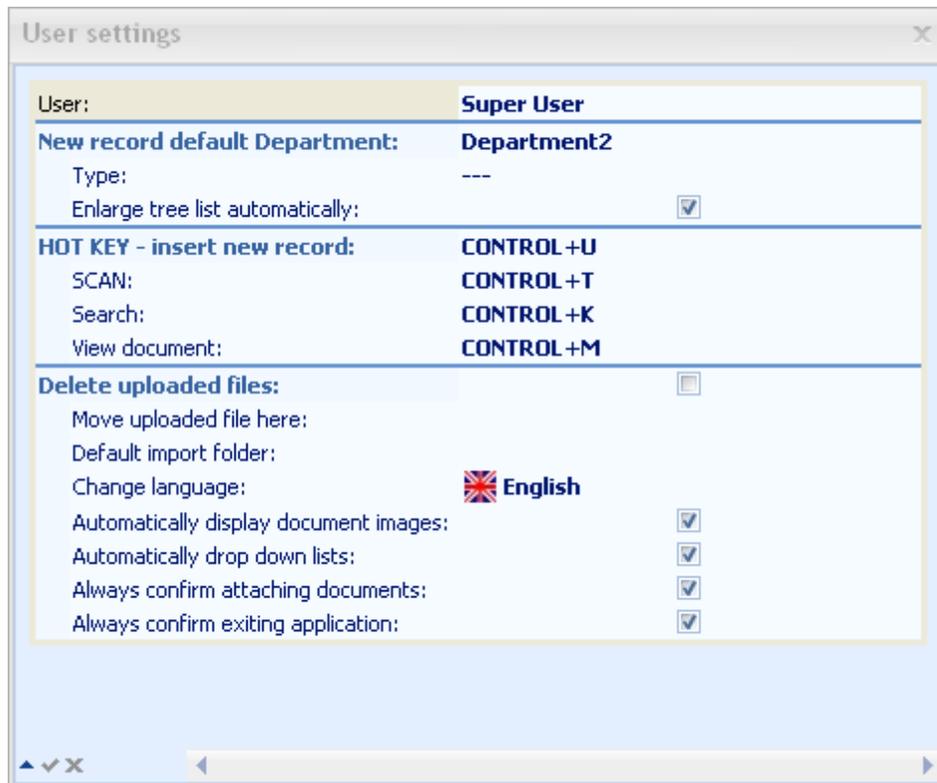
User profile

By clicking on the **User profile** button from the *Users* menubar () you can personalize Truarchive functions.

The system links the settings defined here only to your personal user profile, thus everybody can use the program in the most efficient way he has set for himself.

Modifications can be saved always by clicking on the **Save changes** button. ✓

If you don't want to save modifications, click on the **Cancel changes** button. ✕



New record default

Department

When you record a new document the company/organizational unit defined here will appear in this field by default.

Type

When you enter a new record the **Type** defined here will appear in this field by default.

HOTKEY

Insert new record, SCAN, Search, View document

You can start these operations also by using the hot key combinations defined here.

Delete uploaded file here

if the checkbox is ticked in, the files recorded in the system from an existing file are deleted from their original place.

Move uploaded file here

The original files of the recorded documents are moved to the folder defined here. If you don't set a path, the files will remain in their original place.

Default import folder

When you record a document and you click on the **Computer** button, the folder defined here will appear in the tree structure.

Change language

Truarchive can be used in Hungarian and English at the present time.

Automatically displays document images?

When selecting a document head (*or in case of head-item operating mode: an item*) or after a search query the program automatically displays the document image belonging to the document head (*or item*).

Automatically opens drop-down lists?

If the checkbox is ticked in, when changing fields regarding user relational tags the possible values appear in a drop-down list automatically.

Always confirm attaching a documents?

If the checkbox is ticked in, the system will send you a warning/confirming message before attaching every document.

Always confirm exiting the application?

When you try to exit the program, a message will always pop up asking for confirmation.

Saving screen (only PRO version)

Every user has the possibility to save his/her actual screen settings (position,size,order of fields) by clicking on the **Saving screen** button from the *Settings* menubar, thus Truarchive will start

every time with the same screen settings.



6.4 Parameters

User relational tag

In Truarchive there are three relational tags at your disposal which you can set freely. Their common characteristic (and they differ in this from the user tag fields) is that you can record their possible values - which you will be able to select from the drop-down list when recording a document - beforehand.

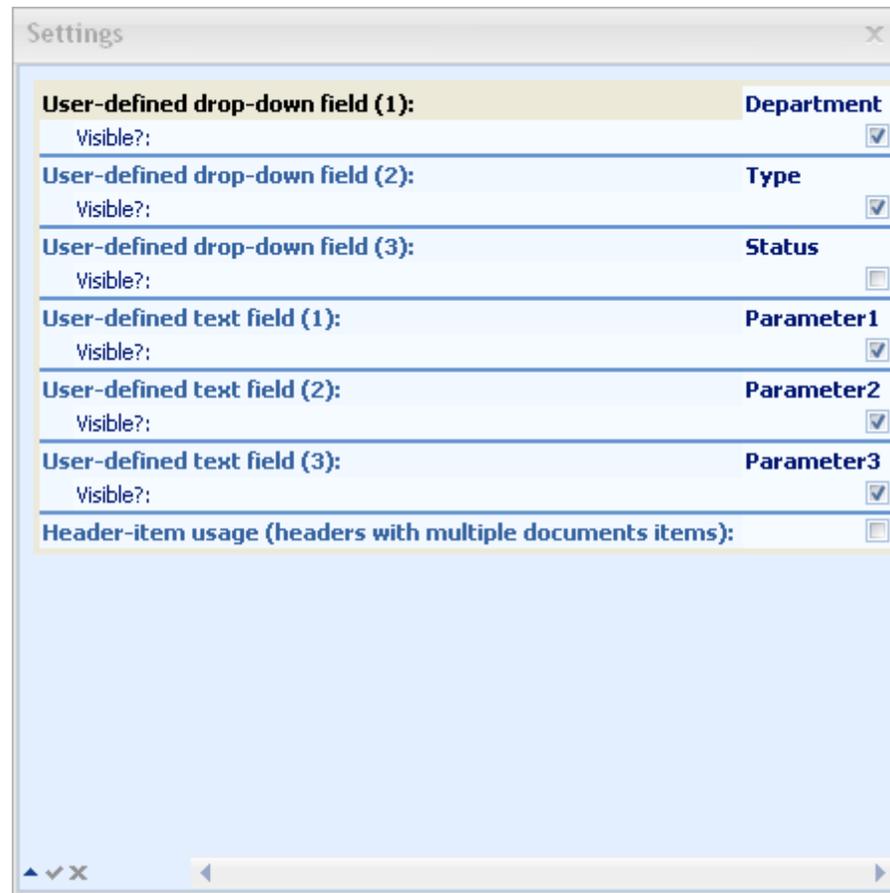
By default only two of the three relational tags are active: *Departments*.

You can modify the names of the tags by clicking on the **Parameters** button from the *Settings*

menubar.



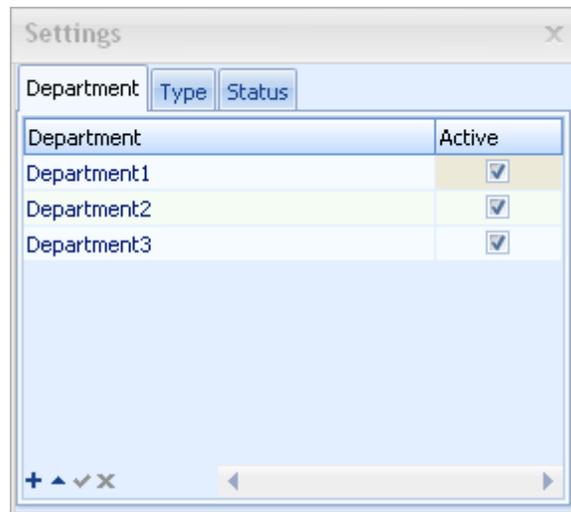
- You have only to rewrite the name in the **User relational tag (X)** row, then click on the **Save changes** button. ✓
- If you don't want to save modifications, click on the **Cancel changes** button. ✕



You can make the tags active by ticking in the checkbox next to them.

You can modify the possible values of user relational tags by clicking on the **Settings** button from the *Settings* menubar. . 

- In the *Settings* window click on the concerned tab, then on the **Insert new record** button. **+**
- After recording the possible values click on the **Save changes** button. **✓**
- If you don't want to save modifications, click on the **Cancel changes** button. **✗**



User tag fields

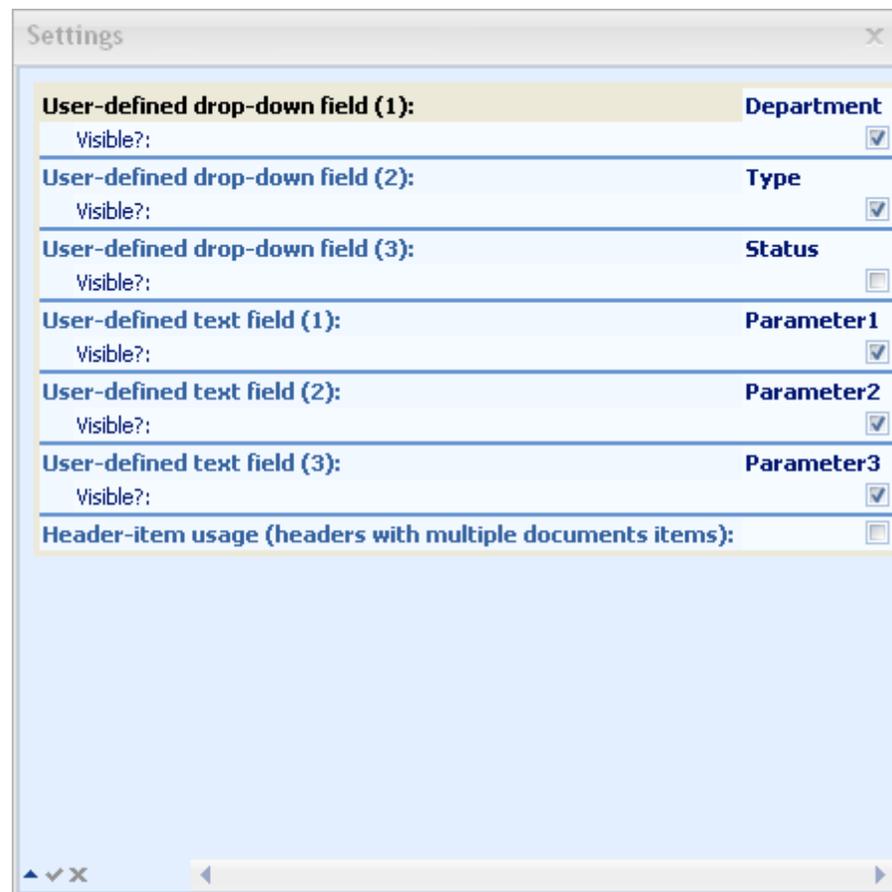
In Truarchive there are three user tag fields at your disposal which you can set freely. They differ from the user relational tags, because you cannot set their possible values in advance. They can be recorded freely while attaching a document.

By default the three tag fields are: *Parameter1*, *Parameter2*, *Parameter3*.

You can modify the names of the tags by clicking on the **Parameters** button from the *Settings*

menubar. 

- You have only to rewrite the name in the **User tag field(X)** row, then click on the **Save changes**. ✓
- If you don't want to save modifications, click on the **Cancel changes** button. ✕



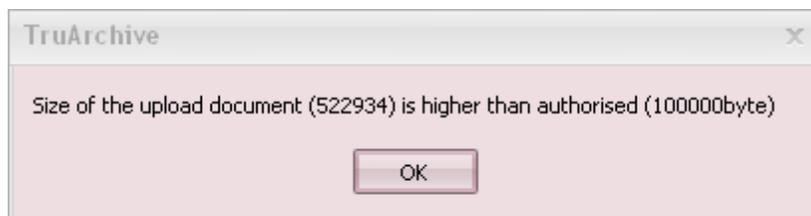
You can make the tags active by ticking in the checkbox next to them.

Maximum document size (only PRO version)

You can define in the **Max. document size (byte)** field the maximum size of a document that can be attached to a document head. Don't forget to save after setting. ❌

Max. document size (byte):	16 000 000
User-defined drop-down field (1):	Department
Visible?:	<input checked="" type="checkbox"/>
User-defined drop-down field (2):	Type
Visible?:	<input checked="" type="checkbox"/>
User-defined drop-down field (3):	Status
Visible?:	<input type="checkbox"/>
User-defined text field (1):	Parameter
Visible?:	<input checked="" type="checkbox"/>
User-defined text field (2):	Parameter:
Visible?:	<input checked="" type="checkbox"/>
User-defined text field (3):	Parameter:
Visible?:	<input checked="" type="checkbox"/>
Number of storage levels:	4
1st level of storage:	Premise
2nd level of storage:	Office
3rd level of storage:	Chest
4th level of storage:	Shelf
Connected to other applications:	<input type="checkbox"/>
Partner database:	<input type="checkbox"/>
Header-item usage (headers with multiple documents items):	<input type="checkbox"/>

If a user wants to attach a file or document larger than this, he/she will receive an error message.

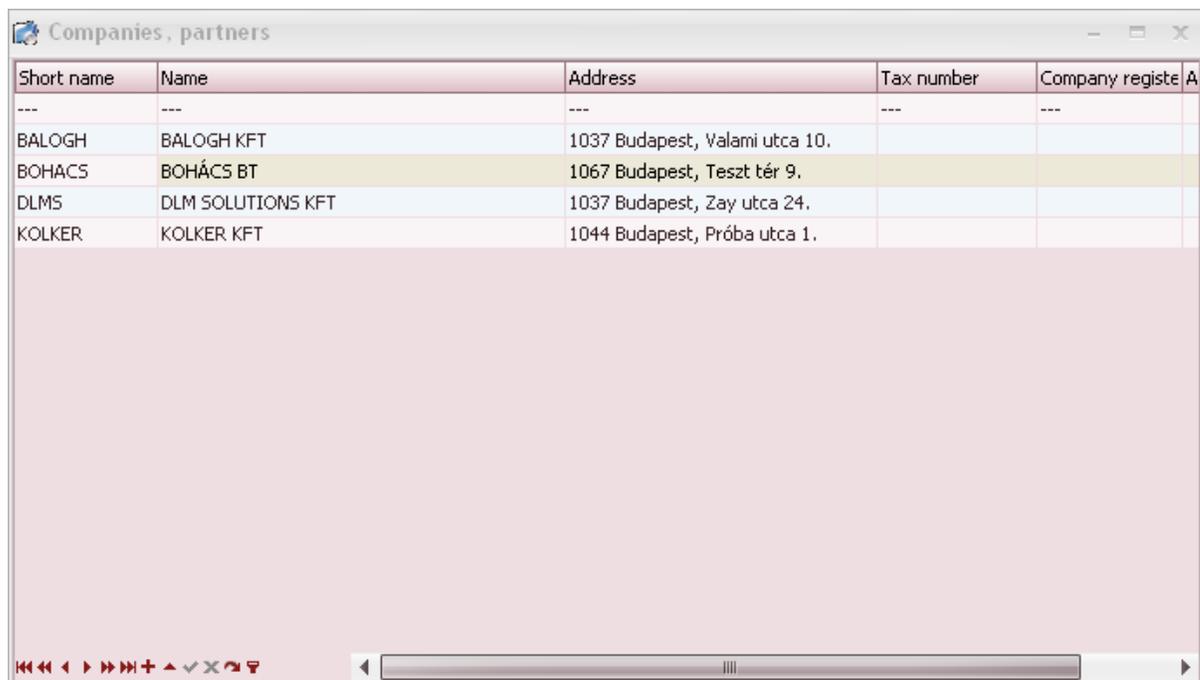


Partner database (only PRO version)

In the Pro version of Truarchive you have the possibility to record the partners linked to the documents into a specific database established for this purpose and not in any of the three parameter fields (user tag field).

You can access the partner database by clicking on the **Partners** button from the *Settings* menubar.





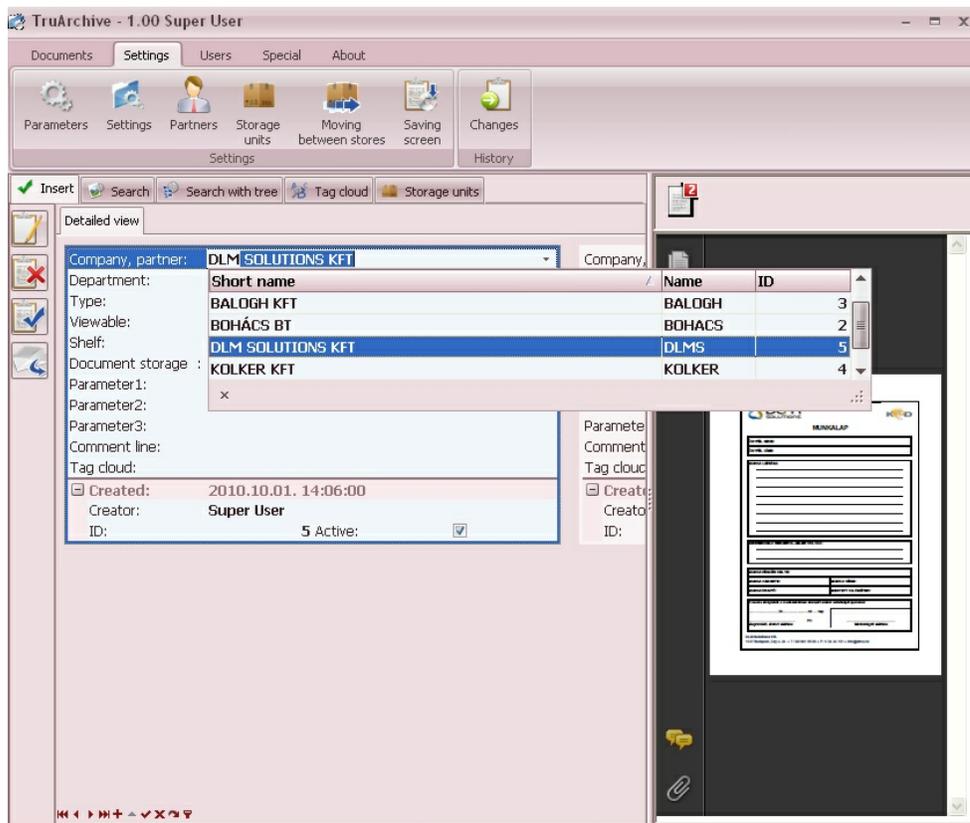
Short name	Name	Address	Tax number	Company register A
---	---	---	---	---
BALOGH	BALOGH KFT	1037 Budapest, Valami utca 10.		
BOHACS	BOHÁCS BT	1067 Budapest, Teszt tér 9.		
DLMS	DLM SOLUTIONS KFT	1037 Budapest, Zay utca 24.		
KOLKER	KOLKER KFT	1044 Budapest, Próba utca 1.		

You can add a new partner after clicking on the **Insert new record** button. **+**

For saving modifications click on the **Save changes** button. **✓**

If you don't want to save modifications, click on the **Cancel changes** button. **✗**

The partners defined in this database can be selected from the **Company,partner** field when recording a new document.



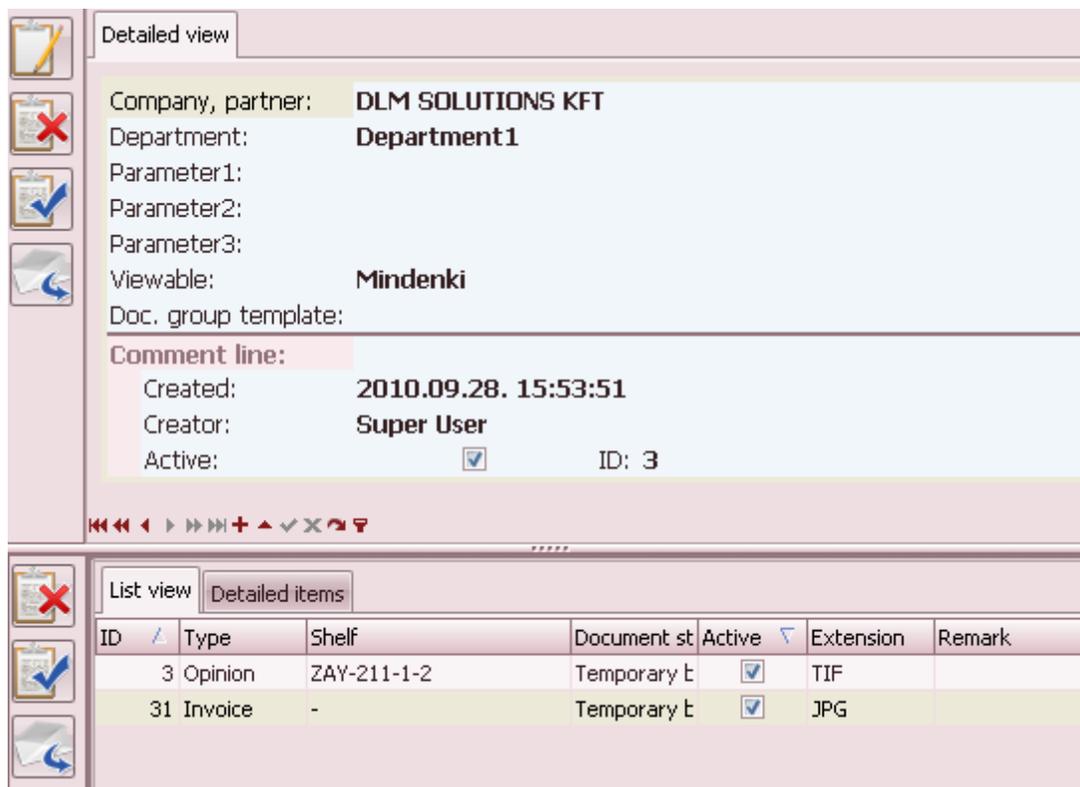
Head-item link

Truarchive works by default only in "document head" mode. This means, that only one document belongs to one document head.

But it is also possible to attach more documents to one document head.

F.e: the document head is: *Invoices of ABC Ltd., March/2010*, and the invoices related are attached one by one to document items.

In this case the storage unit, the cloud tag and the document type (*user relational tag 2*) are linked to the document item.

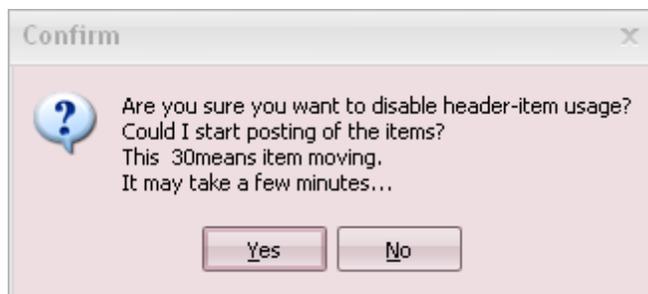


The „head-item” operating mode can be modified by clicking on the **Parameters** button from the **Settings** menu bar.



Header-item usage (headers with multiple documents items):

If you had already recorded documents to the database, the switch between the two operating modes can take several minutes.



In case of „head-item” operating mode it is possible to modify the documents' items' data in groups. To select, click on the icons indicating the items you want to modify. Selection is indicated by the black frame around the icon.



After saving the items' data , you have the possibility to post the modifications.



6.5 Scanner settings

You can define the default settings concerning scanning by clicking on the **Scanner settings** button

from the *Documents* menubar.



Default TWAIN driver

The default document scanner.

Default file type of scanned image

TIF : if you scan several pages at the same time, the system will save them in a multipage TIF, so the pages will be shown in Truarchive in one document.

JPG : if you scan several pages at the same time, the system will save them one-by-one in JPG, so the pages will be shown in Truarchive as separated documents.

Resolution of scanned image

The scanned documents - depending on setting - will appear as gray shaded or in color in the database.

The gray shaded images take up less disk space on the hard drive the database is placed.

Display scanner software

If you tick in the checkbox, then the manufacturer's software belonging to the scanner will appear when you scan, and you can make the settings directly there. In any other cases scan will be performed according to the settings defined here.

Default input

You can define whether the scan should be performed from the scanner's glass or its feeder (ADF).

X and Y resolution

You can also define the resolution of the scanned material (in dpi).