



Ulti-Cabinet / Ulti-Client

User Manual

rev 2.0.0



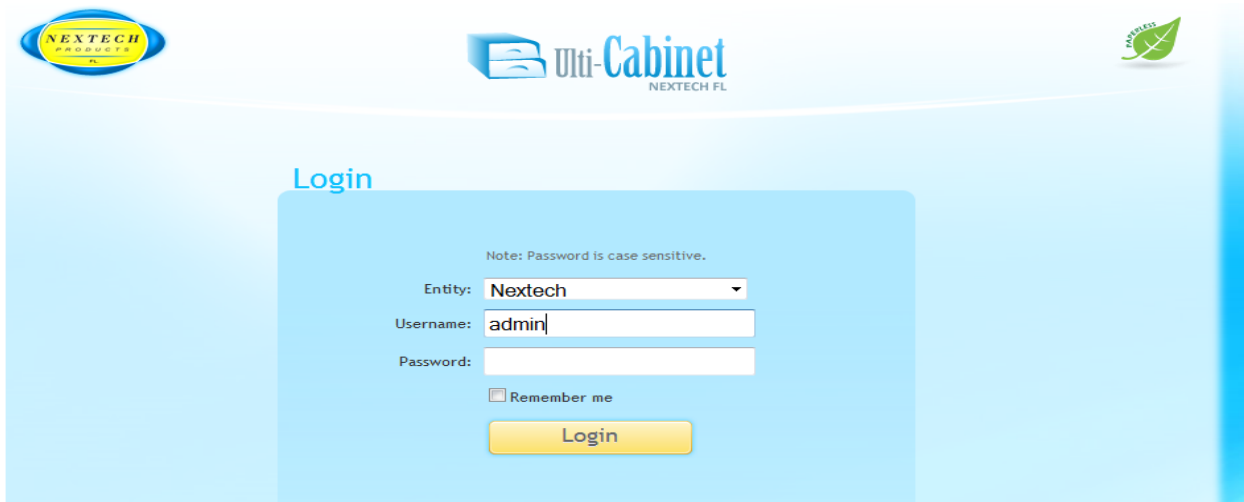
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Ulti-Cabinet

Overview




The Ulti-Cabinet product is a Web based, user friendly, easy to use, document repository, designed to replace the current physical filing cabinet. It's Web based nature enables secured storing, sharing and downloading of documents via a local, wide or public network connection. The product has a variety of cost cutting capabilities such as:

- 📁 Drastic reduction in paper usage.
- 📁 Reduction in clerical help for filing.
- 📁 Reduction in printer consumables and printer wear.
- 📁 Significant improvement in document security.
- 📁 Improvement in document sharing.
- 📁 Increase efficiency in document handling.


Product Features


- 📁 Complete Administrator's menu capabilities
- 📁 Create public and private electronic cabinets
- 📁 Create users and groups: login, password, language settings
- 📁 Upload documents using several different methods:
 - Email attachment
 - Print using Windows print driver
 - Upload document from your own desktop
 - Fax into the Cabinet
 - Scan document from network or local scanner


- Shared directory on the network


 Download documents in several ways


- Email single or multiple documents
- Download single or multiple documents
- Fax single or multiple documents.
- Print single or multiple documents to any configured network printer.
- Download document(s) into desktop.
- XML SDK to integrate with existing application software.


 Simple or Advanced document search query capability using several categories.


 Elegant and user friendly user interface with flip page technology.


 Table of content, including rapid document display feature.

 Online document notes view/add.

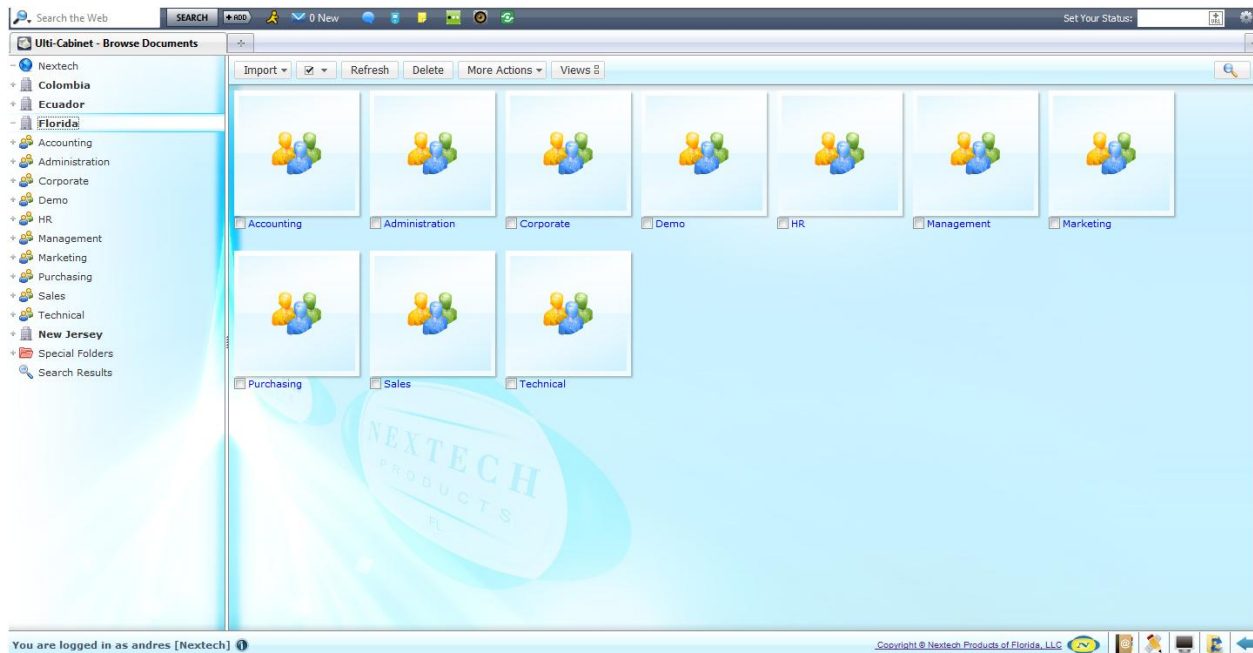
 Complete document audit trail.

 Internal document encryption.

 Ability to create different categories databases (Customer, Vendor, Patient, etc...)

 Remote FTP documents backup based on schedule

The Ulti-Cabinet product is a Web server based product coupled with Microsoft SQL server which allows an unlimited database size.

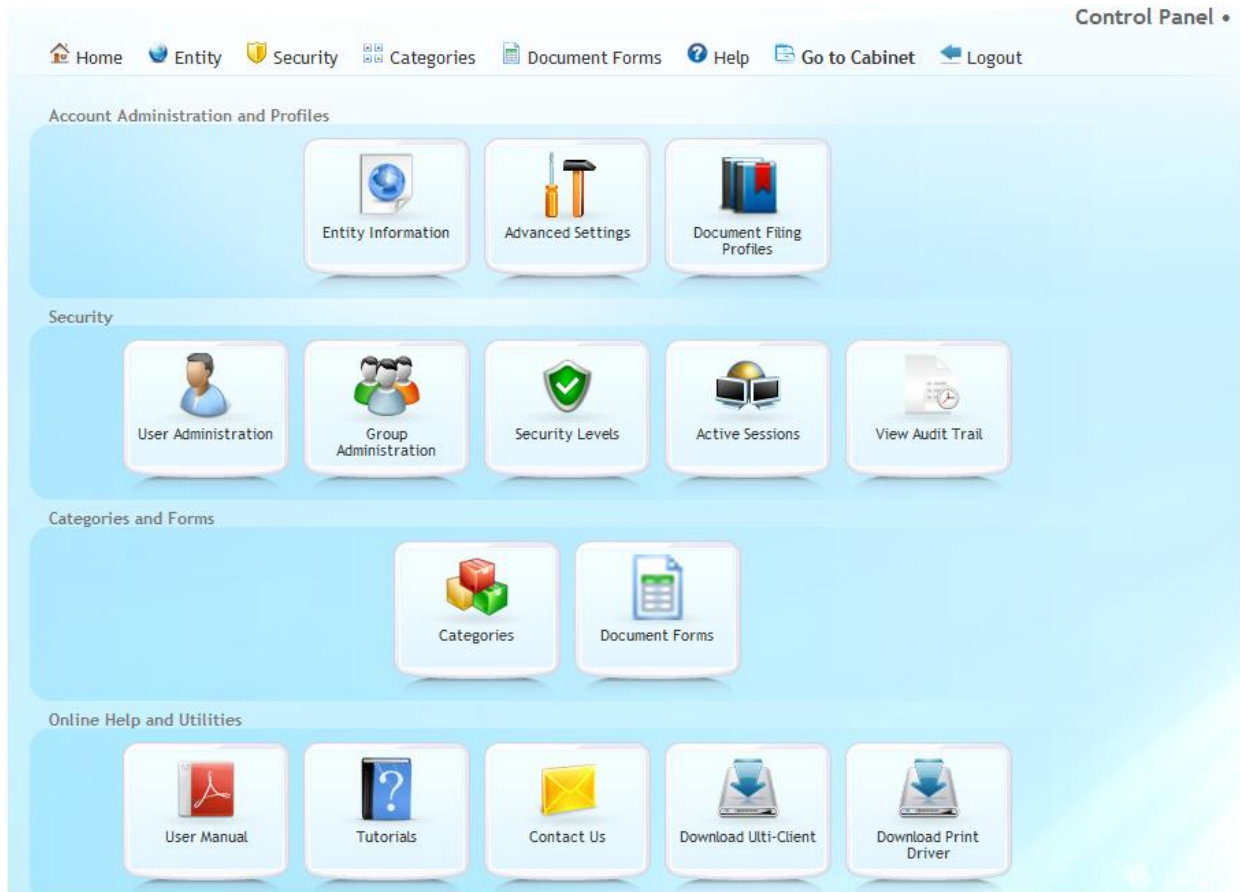


**** User Interface - Screenshot ****

Enterprise Capabilities

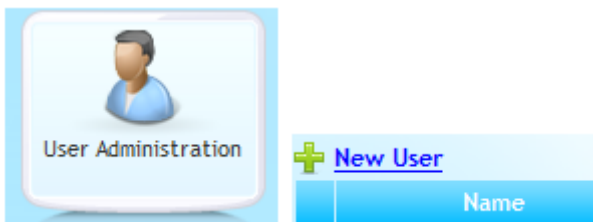
- Ability to view/access any virtual cabinet server within the wide area network.
- Access any virtual cabinet server from Blackberry capable device.
- Language based on user settings.

Admin Controls



Creating Users

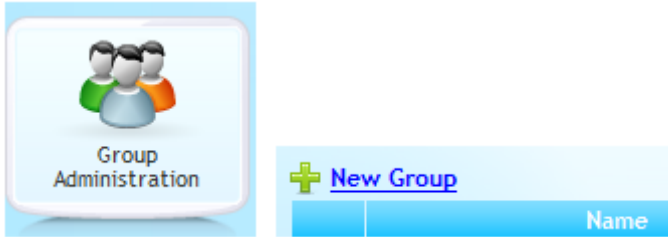
The 'User Administration' section allows you to add, edit, or delete users. Click 'Add New User' at the bottom of the page then fill out the simple user information form. Once a user has been added it will appear under the users list. To edit a user click edit, modify the available properties then click 'Update'.



Location: »

Creating Groups

Organize your users in Groups (ex: Accounting, Management, Employees). To create a group, enter the new group name and click 'Add'. Once the group is added, you can manage the users within a group by selecting 'Members'.



Location: »

Security Levels

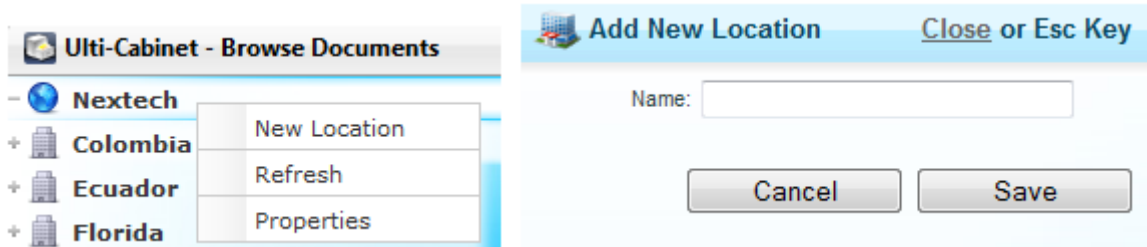
Security levels are used to manage user restrictions of documents. Some documents may require more protection than others and may only be available to administrators while other documents may be available to the entire department. Security levels can be customized by adding or deleting levels.



Location: »

Locations

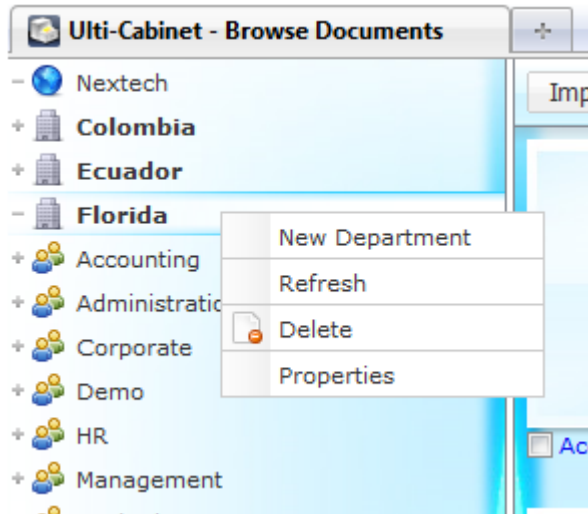
Locations are the top tier of document organization and are ordered in the following form: Location» Departments » Cabinets » Folders » Documents. Locations are organized by Site. To add a Location, right click "The desire Site" then click 'New Location' and follow the screen instructions, then click 'Save'.



Location: »

Departments

Departments are the 2nd tier of document organization and are ordered in the following form: Departments » Cabinets » Folders » Documents. Cabinets are organized by departments and users belong to a specific department. Users can see cabinets in other departments but by default they see the cabinets in the department they belong to. To add a department, right click “The desire Location” then click ' New Department' and follow the on screen instructions.

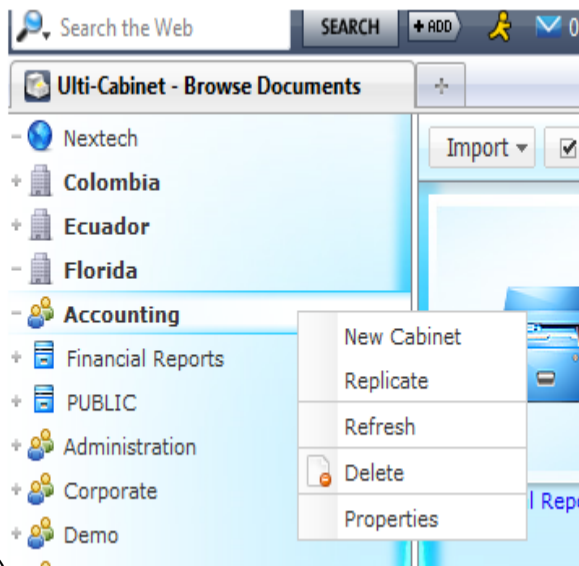


The "Add New Department" dialog box has a title bar with "Add New Department" and "Close or Esc Key". It contains a "Location:" dropdown menu with "Florida" selected, and a "Name:" text input field. At the bottom, there are "Cancel" and "Save" buttons.

Location: »

Public Cabinets

Public cabinets are designed to be accessible by everyone. To create a new public cabinet right click the 'Department ', fill in the fields then click 'Save'. The new cabinet is added to the list of Public cabinets. From here you can edit, add folders, or delete the cabinet. Once the Folder is setup, you can manage the files by clicking 'Files'. See the 'Inserting Documents' section to learn how to add files.

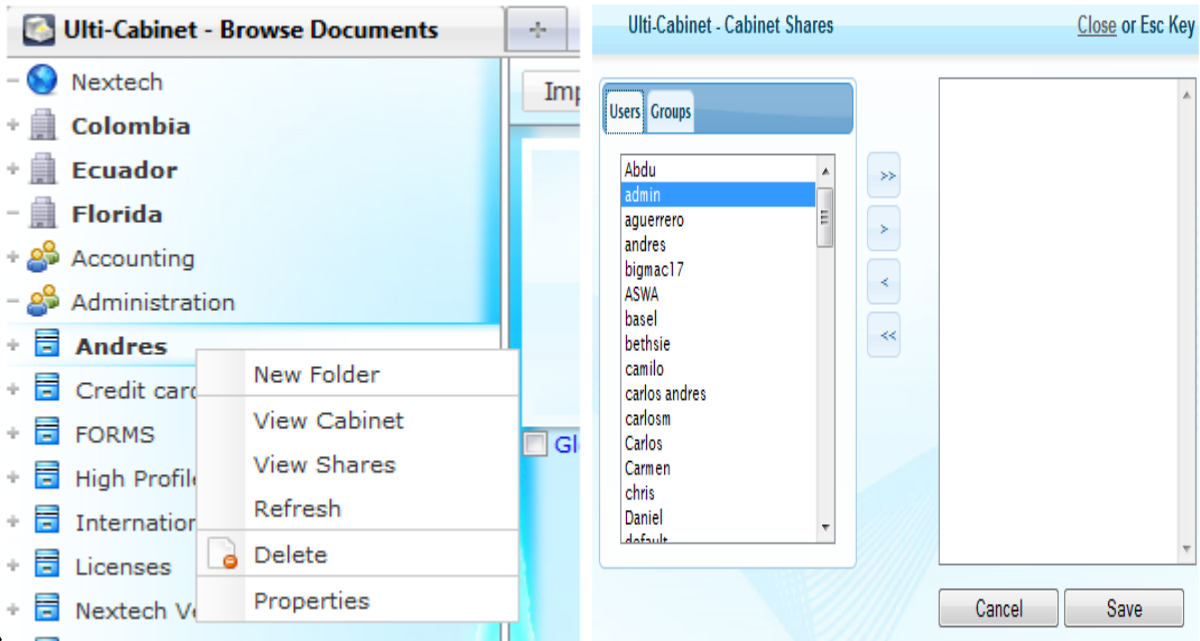


The "Add Cabinet" dialog box has a title bar with "Add Cabinet" and "Close or Esc Key". It contains a "Name:" text input field, a "Type:" dropdown menu with "General Use" selected, and two radio buttons: "Private" and "Public" (which is selected). At the bottom, there are "Cancel" and "Save" buttons.

Location: »

Private Cabinets

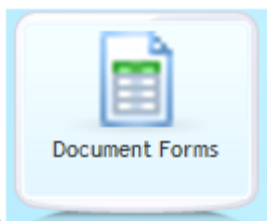
Private cabinets are designed only to be accessible by the user who created it by default. This is useful for keeping important personal documents that you want protected from everyone else. Follow the same guide under 'Public Cabinets' to learn how to manage cabinets, folders, and files. You can share a private cabinet by right clicking on the cabinet and select 'View Shares'. Select the users you wish to share with then click '>' to add the user or group and click 'Save'.



Location: »

Default Forms

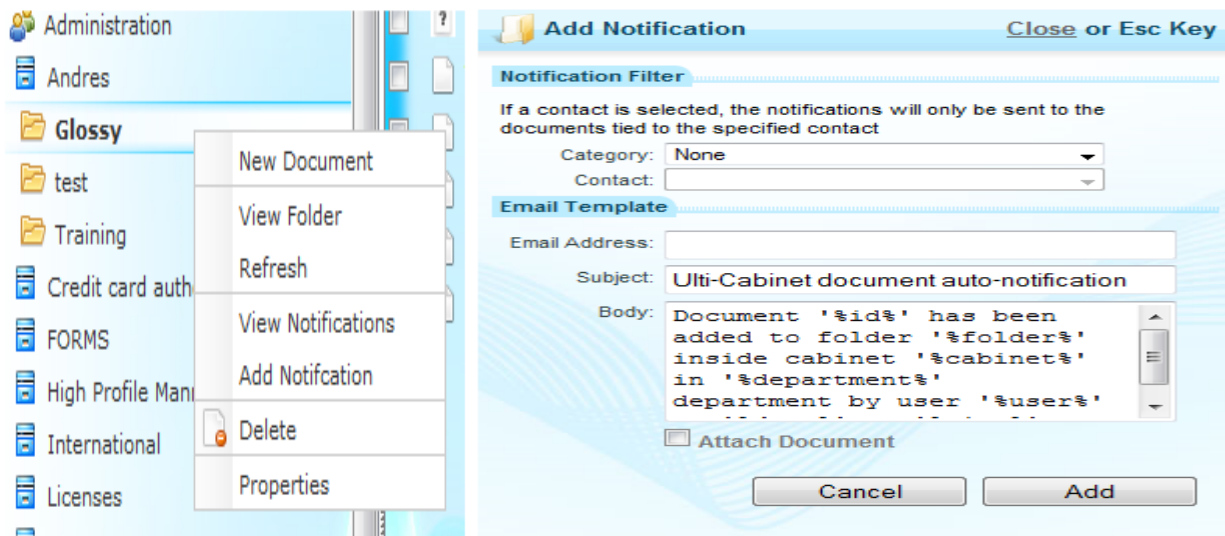
When creating a folder in either a Public or Private cabinet you can assign a default form. A form is used to specify certain values in a document such as an invoice number which can be used for querying documents. (Ex: You have an Invoice folder and you assign the 'invoice form' as its default form. You can now store important values in the invoices you import.)



Location: »

Email Notifications

With email notifications you can track the activity of documents within a folder. To setup an email to receive notifications select a public or private cabinet, right click 'Folders', then click 'Add Notification'. Enter the email address in the field then click 'Add'. When documents come in and out this folder, a notification will be sent to the email address. Multiple email addresses can be added to receive notification.



Categories

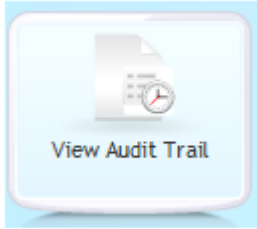
Use categories to organize your contacts. (Ex: Employees, Distributors, Suppliers). To add a category, click on 'Add Category'. Enter the new category and click 'Save'. To add contacts click on 'Add Contact', enter the information for the contact and click 'Save'.



Location: »

Audit Trail

An audit trail allows you to track the activity of documents flowing in/out of the cabinet. You can filter the results by selecting a particular user, date range, type of document, or action.



Location: »

Category	All	Action	All		
User	Andres Morillo	Date >=	01/25/2011	Date <=	01/28/2011
<input type="button" value="Search"/>					
User	Category	Description	Date	Action	View/Restore
Andres Morillo	Application Setting	LISTVIEW_VIEW	1/27/2011 10:29:04 AM	Added	
Andres Morillo	Login	UCWeb(Firefox3.6.13):72.17.173.2 -> 72.17.173.6 [ULTICABINET] Nextech	1/27/2011 10:20:43 AM	Successful Login	
Andres Morillo	Login	UCWeb(Firefox3.6.13):72.17.173.2 -> 72.17.173.6 [ULTICABINET] Nextech	1/26/2011 1:23:37 PM	Successful Login	

Changing your Password

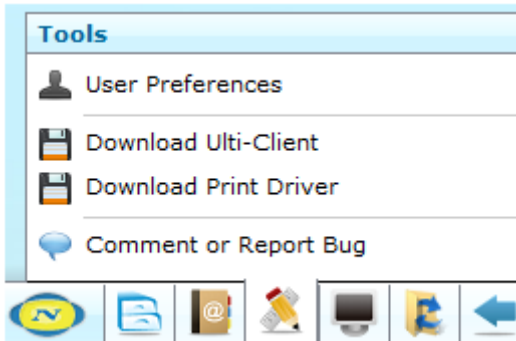
To change your password, go to the Administration Menu click on the 'User Administration' icon. Select the user and change your password and click 'Update'.

User ID:	andres
Name:	Andres Morillo
Email:	amorillo@nextechfl.com
Location:	Florida
Department:	Accounting
Security Level:	III - Administrative
Password:	
User Type:	Administrador
Language:	English
Allow Email:	<input checked="" type="checkbox"/>
Allow Print:	<input checked="" type="checkbox"/>
Allow Download:	<input checked="" type="checkbox"/>
Allow Fax:	<input checked="" type="checkbox"/>

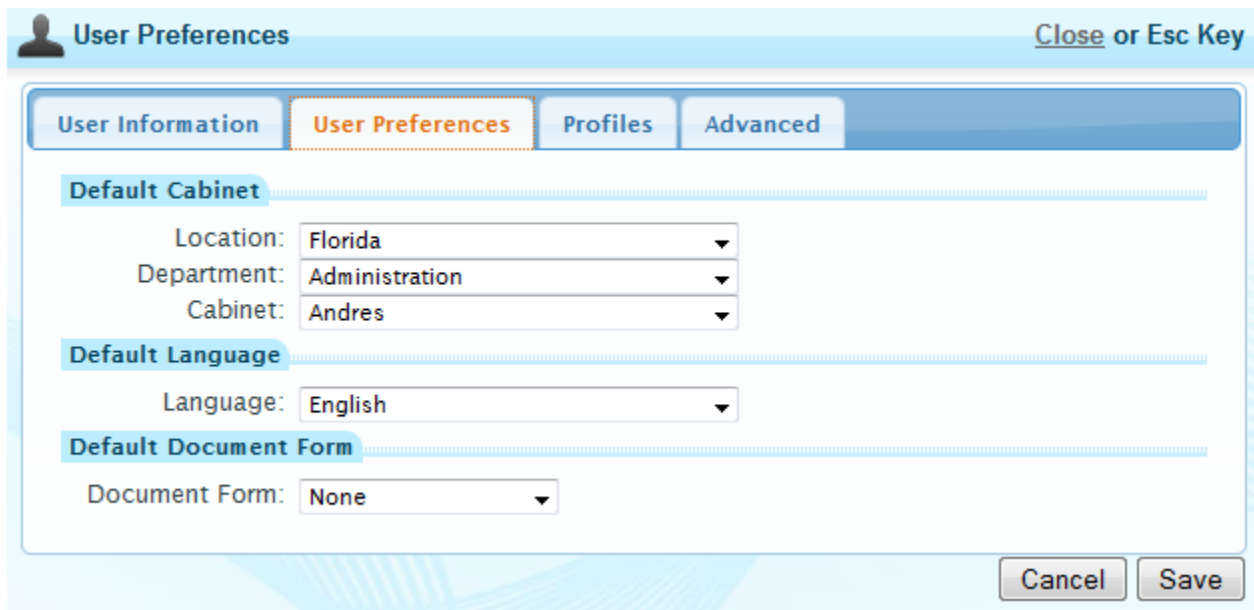
Location: »

Preferences

This section allows you to manage the preferences of your site. Here you can define the default Location, Department, Cabinet, Language and Document Form.



Location: »



Download Print Driver

Install the print driver to expand the capabilities of inserting documents. Click on 'Download Print Driver' under the 'Administration' tab, 'Management Menu' then run the easy 1 minute installation. Location: »



Location: »

Download Ulti-Client

Manage Ulti-Cabinet with the Ulti-Client application. Click on 'Download Ulti-Client' under the 'Administration' tab, 'Management Menu' to download. *Make sure you enter the site key after installing the application (ex: NEXTECH).





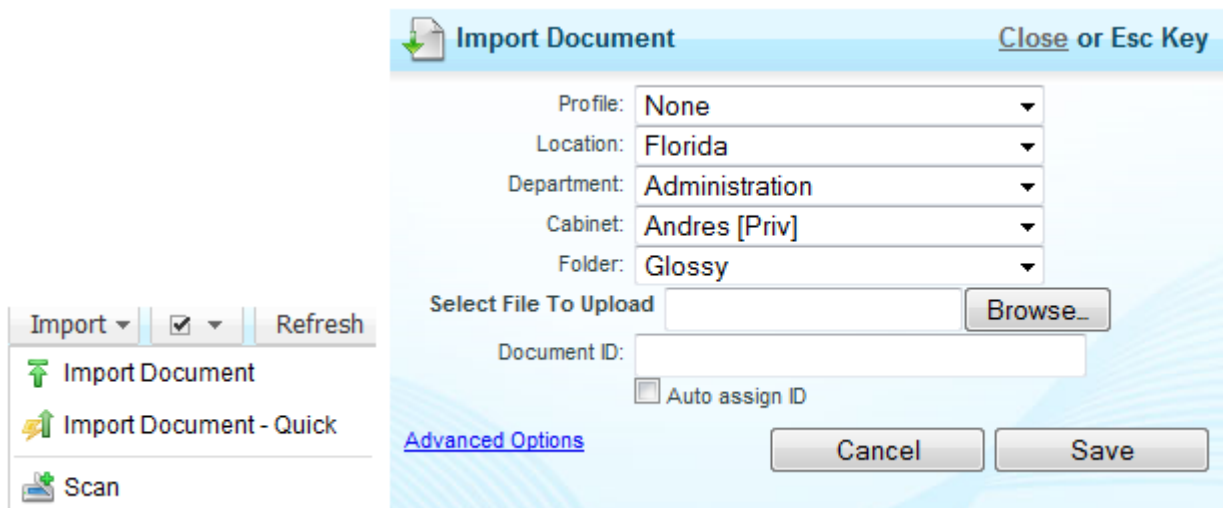
Location: »

User Controls

Inserting Documents

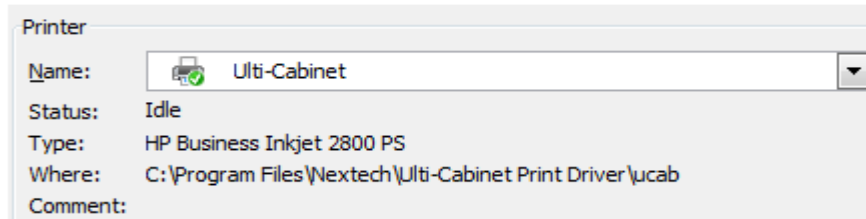
You can insert documents using five different methods:

-  **Upload:** To upload a document directly from your computer to the cabinet click the 'Import' tab , select 'Import Document', specify the cabinet, folder, and category you want to file under and complete all other required fields then click the 'Save'.

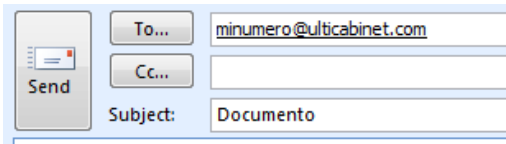


The image shows a screenshot of the 'Import Document' dialog box and its menu. The dialog box has a title bar with a document icon and the text 'Import Document' and 'Close or Esc Key'. It contains several dropdown menus: Profile (None), Location (Florida), Department (Administration), Cabinet (Andres [Priv]), and Folder (Glossy). Below these is a 'Select File To Upload' field with a 'Browse...' button. There is also a 'Document ID' field and an 'Auto assign ID' checkbox. At the bottom, there are 'Advanced Options' (a link), 'Cancel', and 'Save' buttons. To the left of the dialog box is a menu with the following items: 'Import' (dropdown), a checked checkbox, and 'Refresh'. Below this menu are three options: 'Import Document' (with a green arrow icon), 'Import Document - Quick' (with a green arrow icon), and 'Scan' (with a scanner icon).

- Print:** To print a document to the cabinet you first need to install the Ulti-Cabinet Printer Driver. Once the driver is available use the standard 'File > Print' option from the application you are using and select the Ulti-Cabinet printer. Login using your User Name and Password, fill in the required fields, then click 'Import' to print to the cabinet.



- E-mail:** You can insert a document by attaching it to an email and sending it to a specific email address assigned to an ulti-cabinet installation. To specify where you want to file the document, in the subject



line, specify the following using this format:

department;cabinet;folder (mandatory parameters) or..

department;cabinet;folder;title;id;category_name (additional optional parameters)

(using a semicolon between parameters).

- Fax:** Use any fax machine to fax documents to the cabinet. The cabinet will have its own specified fax number for receiving the faxes/documents.



- Scan:** To import scanned documents into the cabinet, first select the 'Scan' tab then place your documents into the scanner and hit the scan button on the machine. Your documents will be scanned into a 'shared folder' which has been specified in the system administrator control panel.




- Directory Sharing:** Display documents in a shared directory across the local area network.








- XML API:** An application programming interface that enables the product to receive documents generated from mission critical application software residing anywhere in the world.



Downloading Documents


You can download documents using four different methods available under the 'Share' tab: 







-  **Download:** Use the download option to select a range of documents to store directly onto the user's computer.
-  **E-mail:** Send documents to one or more email accounts by filling out the email form then clicking 'Send E-mail'.
 - You have the option to consolidate documents into 1 PDF, compress them into a Zip file, Request Read Receipt, and Flag as important.
-  **Fax:** Send documents to any fax machine by filling out the fax form then clicking 'Send Fax'.
-  **Print:** Use the print form to print a range of documents to any available printer.
-  **Email Share Link:** Sends a link to a document that resides in the cabinet to be viewed.



Using Queries

Queries are used to request information from the database. More simply, it is the search feature within the cabinet that allows you to retrieve specific documents. Advance search can be made in the top-right corner,

click on the  tab. Use this form to specify your query range by Date, Location, Department, Cabinet, Folder, Document Id, etc.

-  Select a Location, Department, Cabinet, Folder, and Category (optional).
-  Select a Form if you wish to query specific fields within a form (invoice) such as the Invoice #.
 - When a form is selected, User Defined Fields will appear below. Here you can set a range for the search criteria. The logic is as follows: (Field1 or Field2 _and_ Field3 or Field4).
-  Enter the Document ID or Title.
-  Select a date range to help narrow the results.
-  Specify the owner of the document(s).
-  Enter a keyword that may be helpful in your search.

Search Documents Close or Esc Key

Search Criteria

Keyword Search inside documents

Advanced Search Options

Document Location

Location
 Department
 Cabinet
 Folder

Document Attributes

Owner
 Category
 Contact

Document Properties

Document ID
 Title
 Description
 Body/Notes

Document Date

Specify date range
 Date >=
 Date <=

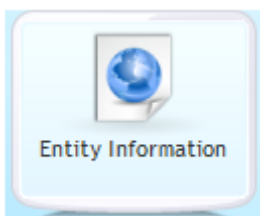
Document Forms

Document Form
 User Defined Fields

Additional Admin Controls

Entity Information

Select this icon to see all the information pertaining to your Entity.



Location: »

General Information	
Entry	Nextech
Name	Nextech
Site	NEXTECH
URL	http://www.ulticabinet.com/nextech/ULTICAB_WS.aspx
Ulti-Cabinet Server Information	
Version	2.2.0.3
Web Version	1.2.0.41
Licences	Unlimited
Disk Space Information	44.51 GB of 90.09 GB available. 3.79 GB used.
Disk space quota	Unlimited
Maximum number of cabinets	Unlimited
Maximum number of connections	Unlimited
Maximum number of users	Unlimited
Document Statistics	
Number of documents	7367
Total number of pages	18939
Total size of documents	3.62 GB
Total Size of Supporting Documents	168.75 MB

Advance Settings

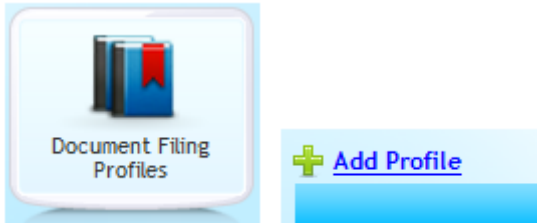
Select, this icon to define personalize controls for every use. This option is only for advance users. We recommend not changing or modifying any values without consulting Nextech Product of Florida LLC.



Location: »

Document Filing Profiles

Select this icon to create a document profile that will be use to file the documents to a desire location. Click on 'Add Profile', give a name to your profile, specify the fields where you want this document to loaded in the cabinet and then click 'Save'



Location: »

Ulti-Cabinet - Add Profile Close or Esc Key

Profile Information

Name:

Document Filing Location

Location:

Department:

Cabinet:

Folder:

Document Filing Options

Document Form:

Category:

Stamp:

Auto assign ID

Encrypt document

Document Filing Security

Digital:

Signature:

Modifiers:

Sec. Level:

Does not expire

Expiration: day(s)

Days:

Printing Options

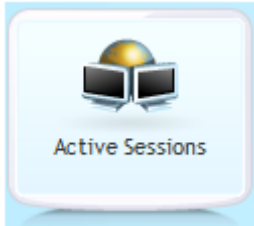
This option applies to the Ulti-Cabinet Print Driver only

Print a copy of the document to the following printer

Printer:

Active Sessions

Select this icon to see all the active sessions in the system. From this view you can see all the users that are currently connected to the cabinet.



Location: »

Entity	User ID	Login Time	Last Activity	IP	Client	
Nextech	Kim	9:31 AM	1/27/2011	72.17.173.2	Ulti-Client v.2.2.0.51	Close Session
Nextech	max jr.	1:50 PM	1/27/2011	72.17.173.6	m.UCWeb(Desktop):131.91.71.249	Close Session
Nextech	admin	1:33 PM	1/27/2011	72.17.173.6	UCWeb(Firefox3.6.13):72.17.173.2	Close Session
Nextech	frank	11:12 AM	1/27/2011	186.42.91.179	Ulti-Client v.2.2.0.59	Close Session

User Manual

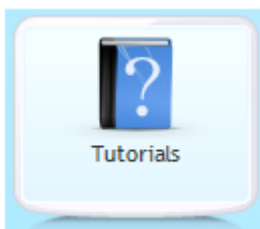
Select this icon to get a see the User Manual on line in pdf format.



Location: »

Tutorials

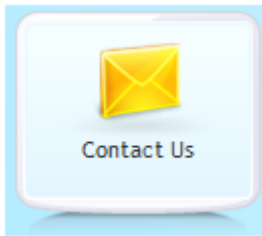
Select this icon to view all the on line tutorial for Ulti-Cabinet.



Location: »

Contact Us

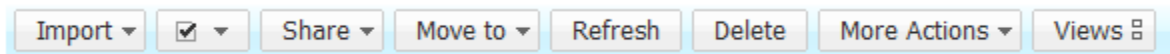
Select this icon to send a message to the technical support department.



Location: »

Tools

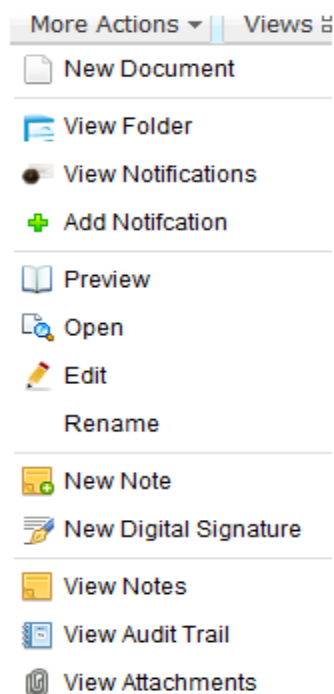
Main Console
















The Main Console allows you to perform all the basic functions of Ulti-Cabinet

- Import** ▾ Allows you to select one of 3 options of importing a document into the cabinet.
- ▾ Allows you to select one or more elements in the cabinet (ie: Locations, Departments, Cabinets, Folders or Files)
- Share** ▾ Allows you to share any documents by using any of the methods supported by Ulti-Cabinet.
- Move to** ▾ Allows you to move the selected file to a new destination.
- Refresh** Allows you to refresh screen to show the latest changes.
- Delete** Allows you to delete the selected item.
- Views** ▮ Allows you to change the view from a 'List' to 'thumbnails'.

 **More Actions** ▾ Shows all the general Options of Ulti-Cabinet.



-  **New Document:** Allows you to load a new document into the cabinet.
-  **View Folder:** Allows you to view the folder using the Flash Viewer included in Ulti-Cabinet.
-  **View Notifications:** Allows you to view all the notifications that the selected folder has.
-  **Add Notification:** Allows you to add a new notification to a folder.
-  **Preview:** Allows you to preview the selected document.
-  **Open:** Opens the selected document in its original format.
-  **Edit:** Allows you to modify the destination where you want to store the document and its details.
-  **Rename:** Allows you to rename the document.
-  **New Note:** Allows you to add a new note to an existing document.
-  **New Digital Signature:** Allows you to add a digital signature to a document.
-  **View Notes:** Allow you to view all the notes added to a document.
-  **View Audit Trail:** Allows you to view the audit trail related to a document.
-  **View Attachments:** Allows you to view documents attached to an email that were loaded in the cabinet.

Troubleshooting

Reporting Issues/Comments

If you encounter an error, please use the 'Report Issues/Comments' link at the bottom of the home page.

Ulti-Client

Overview: A New Window into Ulti-Cabinet

Ulti-Client is a Windows based thin client module that can be downloaded from the Ulti-Cabinet administration menu. Ulti-Client elegantly complements Ulti-Cabinet with user level functions that greatly enhance the product capabilities.










Administration Tab

This menu allows the user to manage users, groups, cabinets, categories security levels, and access the audit trail, similar to the Administration Menu in Ulti-Cabinet. Additionally the user is enabled to define specific fields for plug in applications and search active users. Under “Document Transfer” the administrator will be able to transfer documents from one site to another and schedule backups and replication for the entire site. Finally, the user will also be able to manage defined forms created for installed plug ins.

Creating Forms

A form is a set of User Defined fields that are linked to a particular folder. User Defined fields give a user the ability to specify custom document fields that can be indexed and used for querying. (Ex: invoice#)

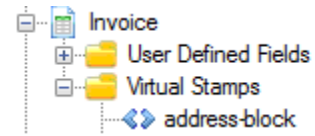
How to create a form:

-  Click (Administration > Management Menu)
-  Select 'Document Forms' then select '+ Add'
-  Enter the form name (Ex: Invoice)
-  Default XML is the xml structure for your User Defined fields. The first node is labeled as the form name 'Invoice' then followed by the nested nodes labeled as the user defined fields.
 - Example: `<Invoice><InvoiceNo /><Date /></Invoice>`
-  Click 'OK'
-  You should now see 'Invoice' on the tree menu, expand it and select 'User Defined Fields', then '+ Add'
-  Enter the name of the User Defined field 'InvoiceNo'
-  Enter the XPath `*/InvoiceNo`. The asterisk (*) indicates the root node.
-  Click 'OK'

Now when you query an invoice, you can input data for 'InvoiceNo' to easily track down documents.

Virtual Stamps

This is an innovative feature that allows you to block out certain areas of a document that may contain sensitive information. To apply a virtual stamp, go to Administration > Management Menu, select 'Document Forms', select a form, right-click the 'Virtual Stamps' subdirectory then click 'Add virtual stamp'. A new window will appear. Select a template, enter the document name, and then click 'Open'.



You are now in the virtual stamp creation screen. To add a stamp, click and drag your cursor over the section you wish to block. Enter the stamp name on the top-left, enter the security settings (default is Apply to All), and then click 'Save' on the top-right.

Linked Sites

Here is where you specify the site names with their corresponding links. Go to Administration > Management Menu, and select 'Linked Sites'. To add a site, select '+Add' at the top, enter the Site ID, Site name, and Site URL and then click 'OK'

Documents Tab

This tab will allow the following tasks:

Document Browse

This function enables users to look for documents based on specific criteria without the need to login to Ulti-Cabinet. It would also allow you to log in into multiple servers as part of the Enterprise Version.

Import Document(S)

This function enables users to import single or multiple documents from their desktop/laptop into a specified cabinet/folder into Ulti-Cabinet. This function is really helpful when you want to load multiple electronic documents into the cabinet from your PC.

View Un-routed Faxes

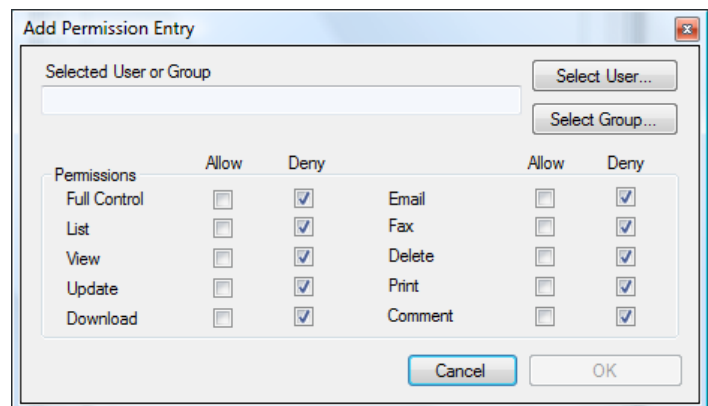
This function allows the user to view and route incoming faxes to the cabinet.

Register Existing Barcode

This function is helpful when the user wants to file a document with a pre-existing barcode into Ulti-Cabinet. User must be aware that on multiple pages documents the barcode must exist in every page.

Print and Register New Barcode

This function is for batch scanning and enables the user to register the barcode to be used. Ulti-Client can print the barcode on an existing printer and, once the user registers the barcode, the user can place the batch of documents on the local scanner



preceded by the printer barcode to file into a specific cabinet/folder. This feature is very helpful to electronically archive historical documents.

Advanced Security Settings





Advanced security settings allow you to customize security policies even further by restricting access to cabinets/folders/documents for a particular user or group. To access these settings, click Documents > Browse, then find a **cabinet, folder, or document** you wish to work with. Right-click it, then click 'Properties'. A new window will appear, click the 'Security' tab. From here you can add custom user or group policies. Select 'Add', select a user or group, mark off the permission settings, then click 'Ok'.

Ulti-Scan Tab

By selecting this tab the user will be prompted to:

New Scan Job

It will open a window to the scanning menu and enable the user to select the scanner in his/her system to use for scanning from Ulti-Client. It is important to know that the local scanner **MUST** work on Windows before Ulti-Client could use it.

-  **SCAN:** The user can select installed scanners, destination and type of scanning job from a drop down menu.
-  **SCAN TO:** Select between the Cabinet and an Outbound Folder as destination of the scanned documents.
-  **SCAN TYPE:** Select between REGULAR scanning to scan individual documents into Ulti-Cabinet but they will be prompted on each individual page. BARCODE READING NO GUIDE PAGE to batch scan with a previously registered barcode. BARCODE READING WITH GUIDE PAGE to batch scan with a newly registered and printed barcode page. The difference is that when batch scanning without guide, the user will be prompted after every document is scanned. This function includes the ability to receive scanned documents from a shared folder on the local area network. In each case the user will be prompted to specific Ulti-Cabinet parameters such as cabinet name, folder name, and security level to assign.
-  **OPTIONS** (Max, please describe)

Ulti-Id Tab



Comprises plug-ins that have been customized for different tasks in specific corporate segments.

Calibrate Scanner

Certain specialty scanners require periodic calibration; we have included the calibration process in Ulti-Client for user convenience.

Specific Customizations

Depending on the purchase license, the user will have access to Ulti-Id modules such as:

-  **Bank Edition**
-  **Hospital Edition**
-  **Human Resources**
-  **Ulti-3047**
-  **Ulti-Mailroom**
-  **Ulti-AGS**

Tools Tab

The user can also select the OPTIONS MENU and LANGUAGE of preference.

Windows Tab

Similar to WINDOWS the user can choose icon display preferences.