



TERTUS DOCUMENT

Tertus Document Viewer

User`s Guide


Release date: October 22, 2014

Copyright
AEON Co. Ltd, Warsaw, Poland, 2014
www.aeon.pl

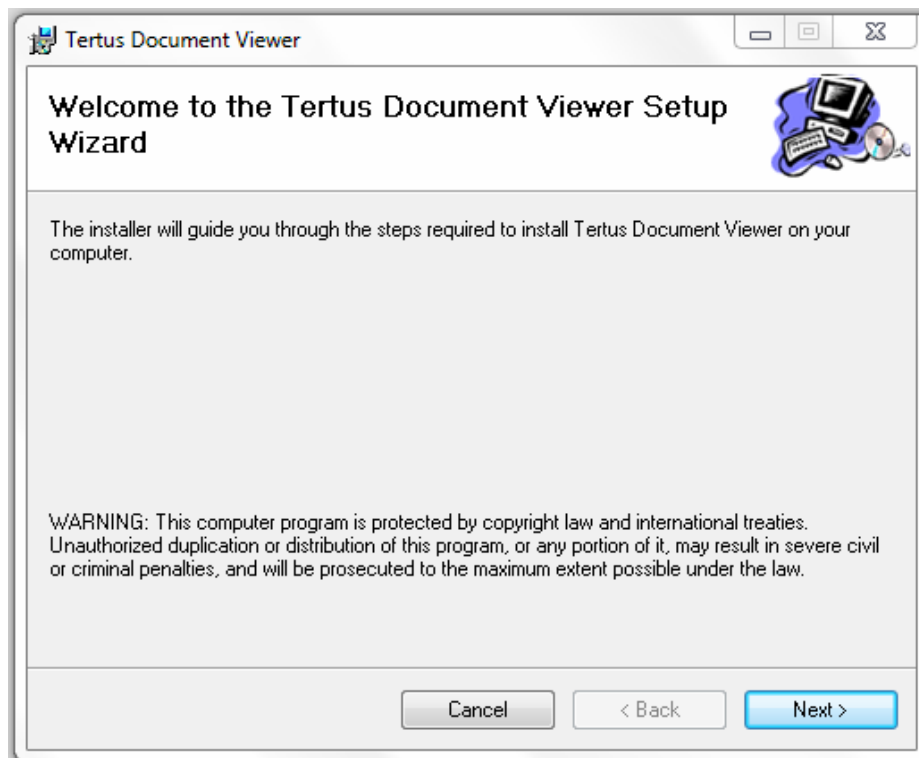
Tertus Document Viewer	3
Installation of the Tertus Document Viewer.....	3
Navigating in the Tertus Document Viewer	6
Working with Tertus Services	7
Connecting to Tertus Service.....	7
Displaying Contents of Tertus Service	10
Refreshing view of Tertus Service.....	11
Changing view of the main window	12
Preview of documents in service	14
Rename of service.....	15
Removing service.....	17
Customization of Tertus Document Viewer	18
Finding help	24
Opening Tertus User`s Guide	24
Checking the Licence Status	25
Managing Document Types	26
Viewing Document Types	26
Adding New Document Type	28
Modifying Document Type.....	29
Deleting Document Type	30
Navigating in TDV	31
Changing view of icons	31
Language script.....	33
Managing Folders	35
Creating Folders and Documents.....	35
Adding new Documents to Folder	37
Setting Properties of documents	38
Decapsulation of documents	41
Opening documents	42
Setting properties of documents.....	43
Searching for documents.....	44
Navigating within the folders.....	49
Moving to Home Folder.....	49
Setting new Home Folder	50
Cutting, Copying, Pasting and Deleting Folders	51
Sorting documents	55
Navigating from the level of files and folder tree previews	56
Sending documents via E-mail	59
Drag and drop function	60
Setting Drag & Drop options	61
Add URL function	64
Refresh	66

Tertus Document Viewer

Installation of the Tertus Document Viewer

In order to start installation choose the following icon from the installing package:  Setup.Exe

The following window of TDV setup wizard will appear:



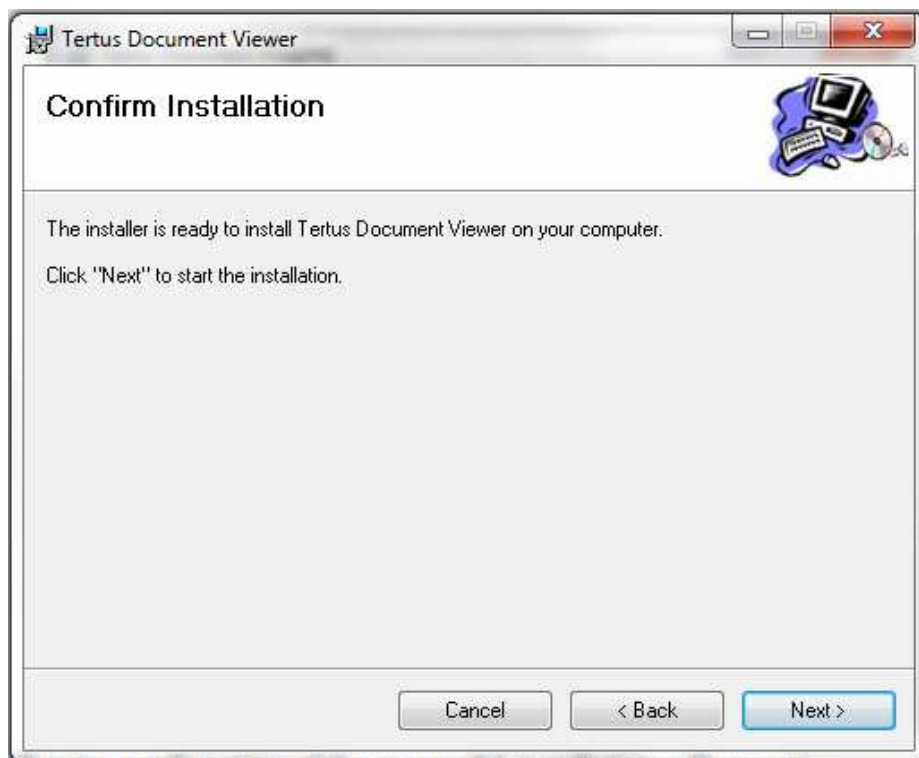
When you want to cancel click Cancel. In order to accept click Next button.

Following window will appear:

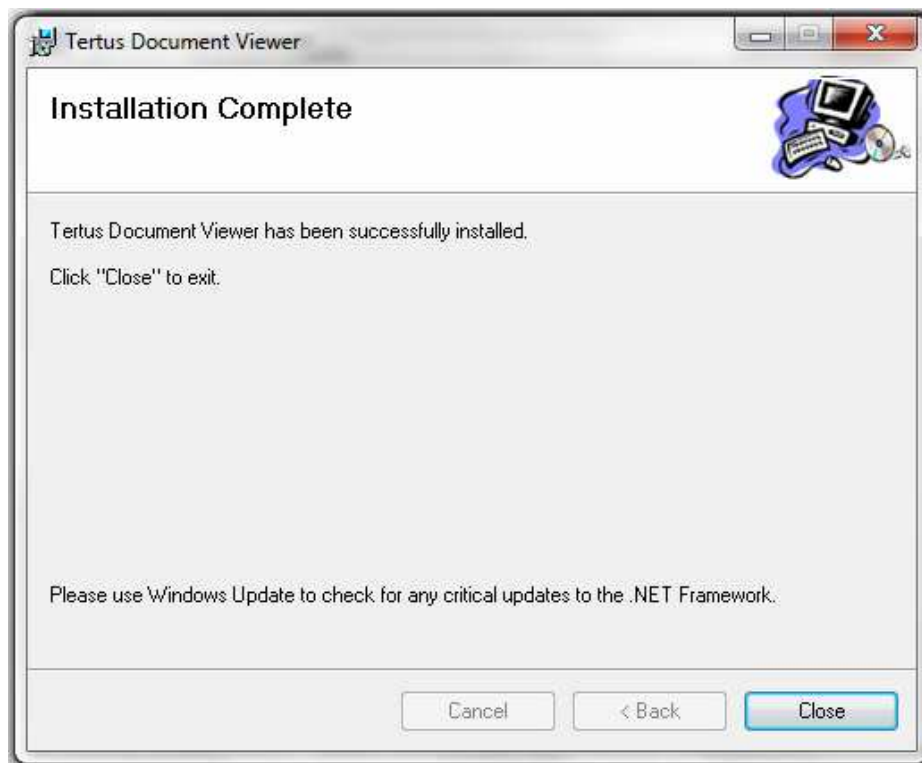


After choosing folder in which TDV will be installed and adding if just you or every user of the computer can use TDV, click Next button to accept. If you want to make changes use Back button. To stop installation click Cancel.

If you decide to continue the following window will appear:

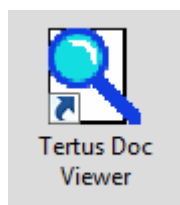


The following confirmation of the successful installation will appear.

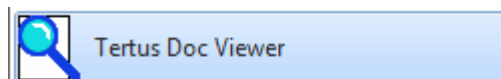


Choose Close to close the window.

You will see the shortcut icon on the desktop:



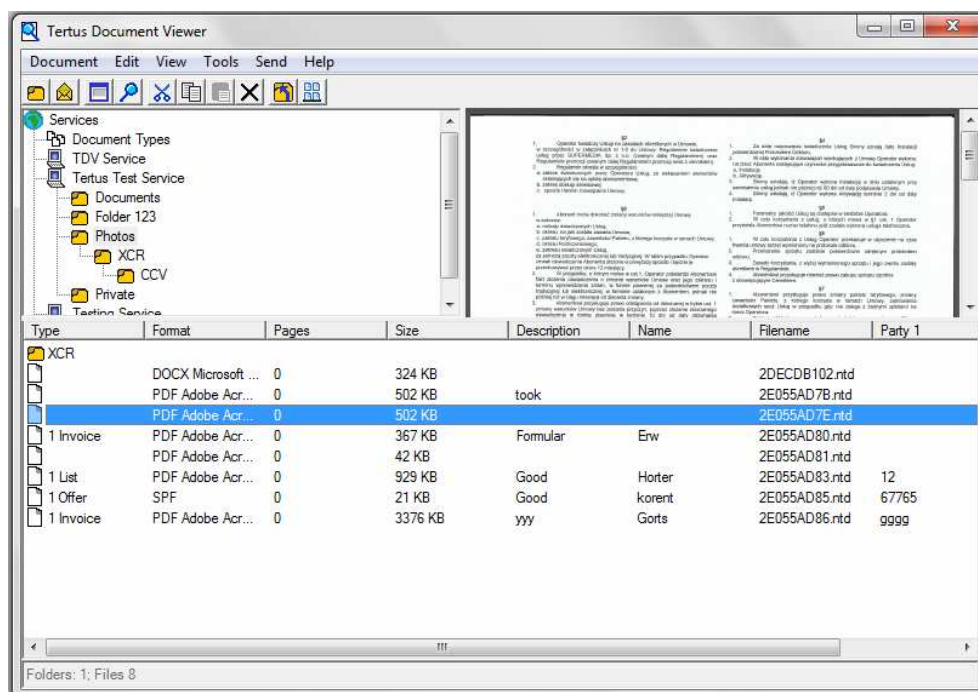
Also the following icon will be visible in the Start Panel:



After first starting of TDV you will be asked to insert the code which you will receive from the supplier.

Navigating in the Tertus Document Viewer

Open Tertus Document Viewer. You will have a following view.



There is a tree of the Tertus services on the left. The tree of the TDV can be expanded and collapsed by double click the name of a service or a folder.

Meaning of the icons:



name of the Tertus Services;



name of documents types;



service's name;



folder icon;

On the right you can see a preview of the selected document and under it the list of the documents. You can also modify the general view – exchange document preview location with list of documents.

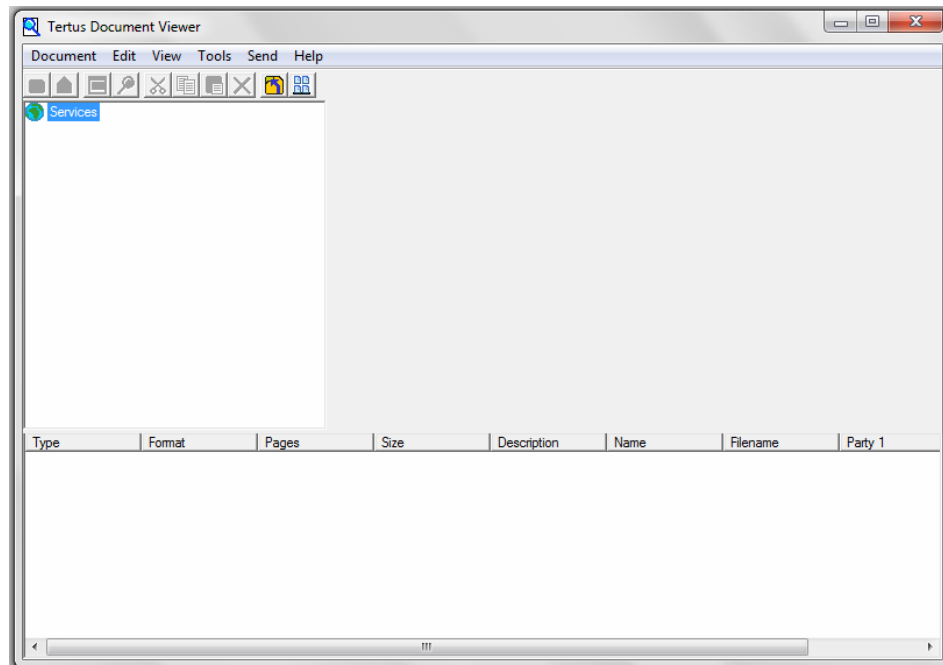
The main window will open with the folder that was opened as the last one.

Notice that there is a counter on the toolbar. It shows number of documents in selected folder.

Working with Tertus Services

Connecting to Tertus Service

Open Tertus Document Viewer. If you are using the TDV for the first time you will not see any service. You will see the window as it is shown below.



From the level of view of service you can do several actions:

- Adding New Services (in Document menu) – this function let you to add service from which you will have a possibility to open gathered documents all types.

In View menu:

- Refresh View – in case you are adding new folders or documents by using this command you have a possibility to see new structure of e.g. the service tree or the lists of attached documents.
- Changing view from 2 to 3 panes and other way around – with this command you have a possibility to adapt the view of the main window for your needs. You will decide if you want to see the preview of the folder or document or not. In this case use visibility in 2 panes.
- Adjust the visibility of the folders (small icons, large icons and view with details and in the list) – this option gives you possibility to adjust the visibility of icons for your needs. With this command you can choose the size of the

icons and you can switch on the visibility of document details or just simply the list of them.

In Tools menu:

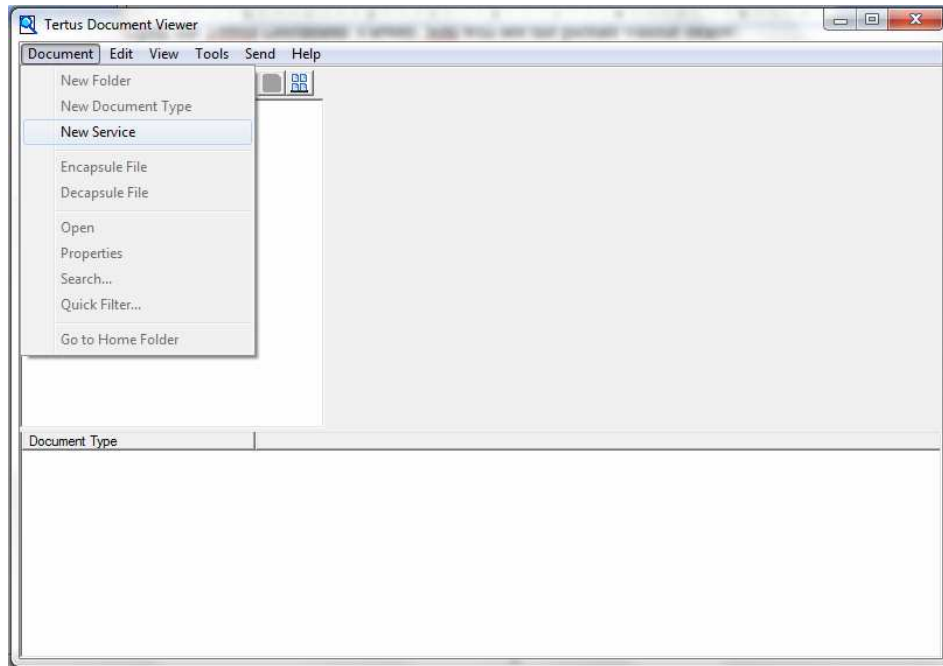
- Customize - this function gives you opportunity to customize program in area of Application Preferences, Tool Bar and arranging Panes. That makes the program more adjust to your personal preferences of working with folders and documents.
- Save layout on Exit – this command opens dialog window in which you have a possibility to set up the customization you have chosen within whole program and folders and remember it after closing the TDV
- Font – with this option you will change font and adjust it to your preferences
- Auto Refresh – when you tick TDV will automatically refresh the view of the windows after several time
- Set Document Types File – this function helps to storage the definitions of the document types. When you choose the document Type in properties of the file there will be this list downloaded from this folder. If you do not choose any TDV will use default settings.
- Select Default Files Editors – with this function you can decide which program will open document chosen by you. You have a possibility to point more than one program which will open the document and choose default.
- Set Working Directory – assign the catalog in which TDV will store the document file e.g. during encapsulation or decapsulation. Thanks to this function you can have a control at place where exactly the files will be saved.

In Help Menu:

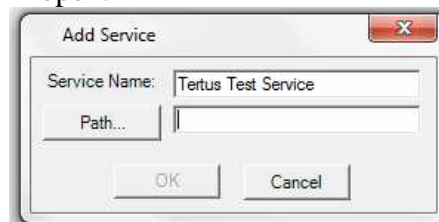
- Find User's Guide – in case of any doubts how to use TDV, use this command to display full User's Guide
- Get information about the TDV – using this command you will get information about version and copyright owner.
- Get information about Licence – by using command Display Licence the dialog window will appear in which you can check the number of your licence and get to know information about its validity. This information is shown in days.

In order to use all opportunities of the program you should create your own services' tree.

You can start adding New Services by opening Document menu and choosing “New Service” as shown below.



Add service dialog box will open.

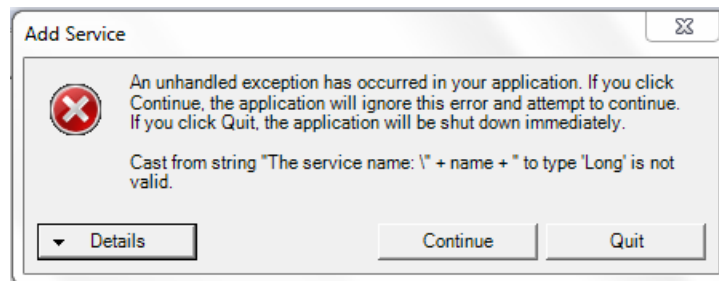


Add New Service Name and choose Path by clicking the “Path” button or insert it manually. You will see the following window.

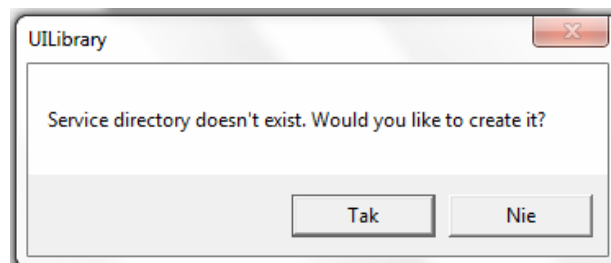


Choose the right folder and click OK.

NOTE!!! You cannot use the same name of the service more than once. Otherwise you will see the following dialog window.

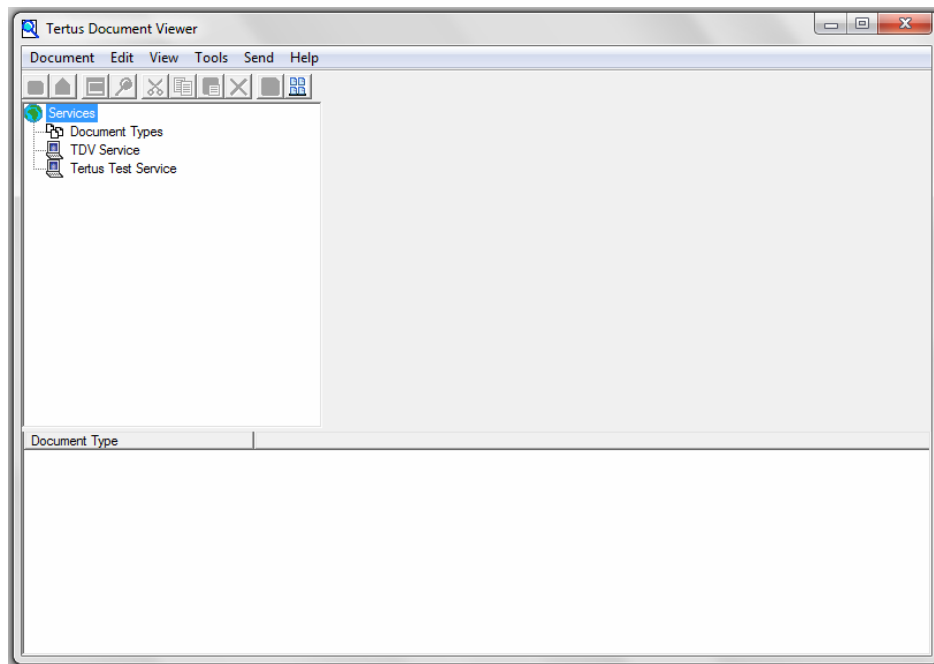


NOTE!!! In case of inserting wrong path you will see the following message.



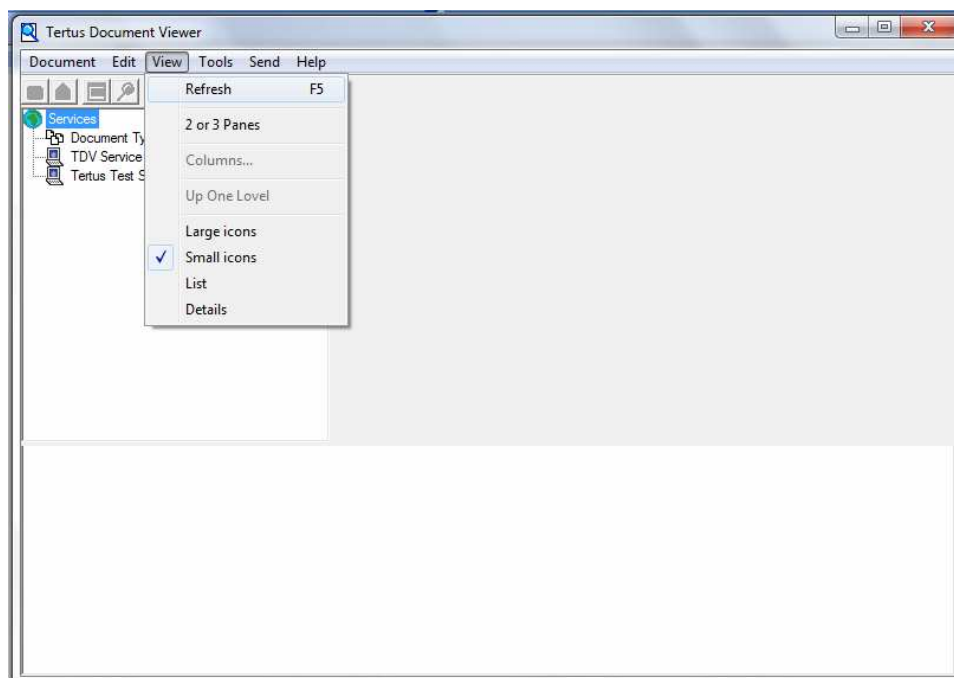
Displaying Contents of Tertus Service

After that there is a tree of the Services on the left. The tree of the TDV can be expanded and collapsed by double click the name of a service . After double click at Service you will have a following view.

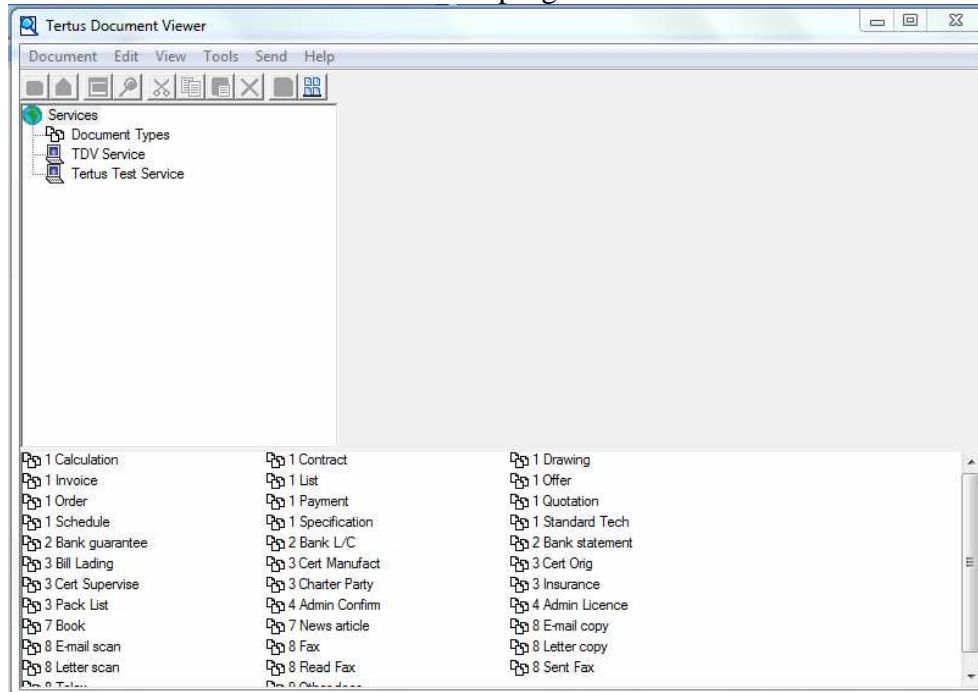


Refreshing view of Tertus Service

If you want to refresh the view choose the Refresh button from View menu or use F5 button on the keyboard.

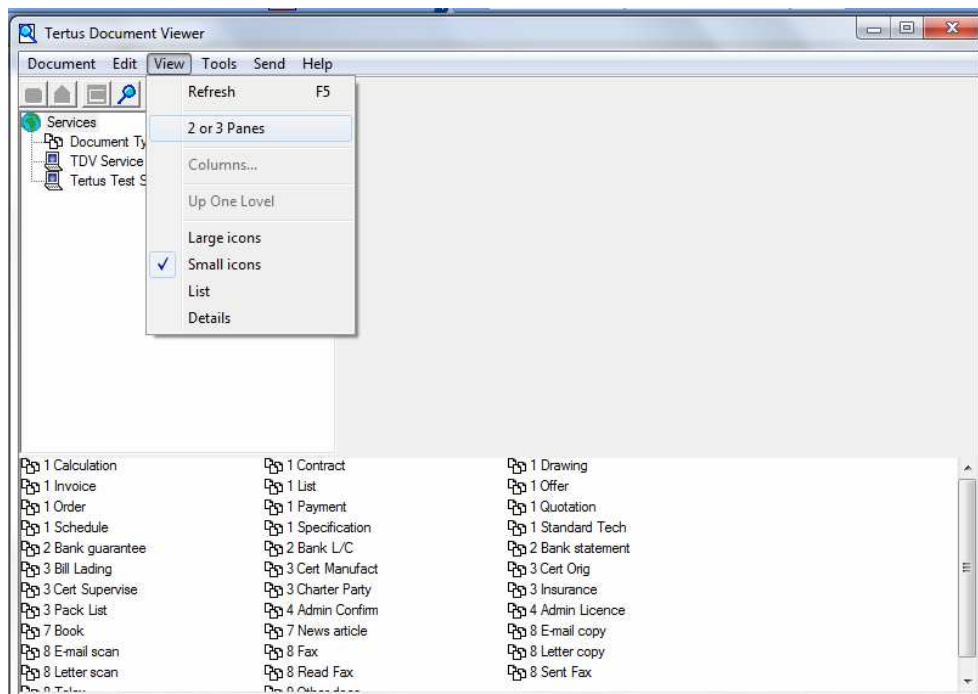


You will receive the refreshed view on the program. You can see it below.

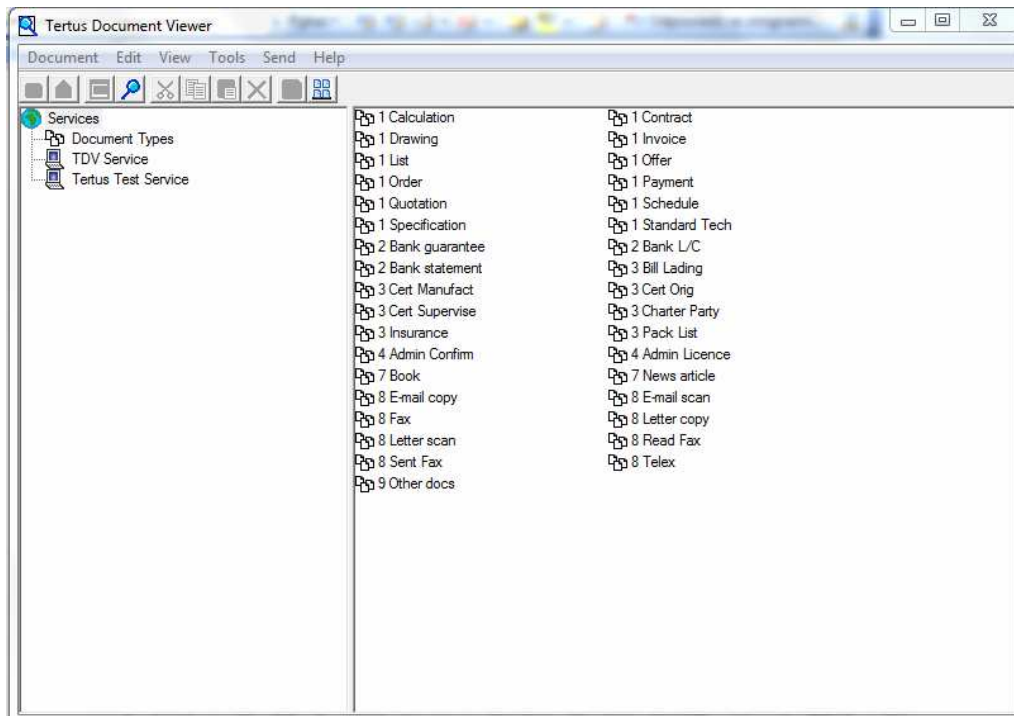


Changing view of the main window

In case you want to change view from 3 to 2 panes you can use the command: 2 or 3 Panes from the View menu.

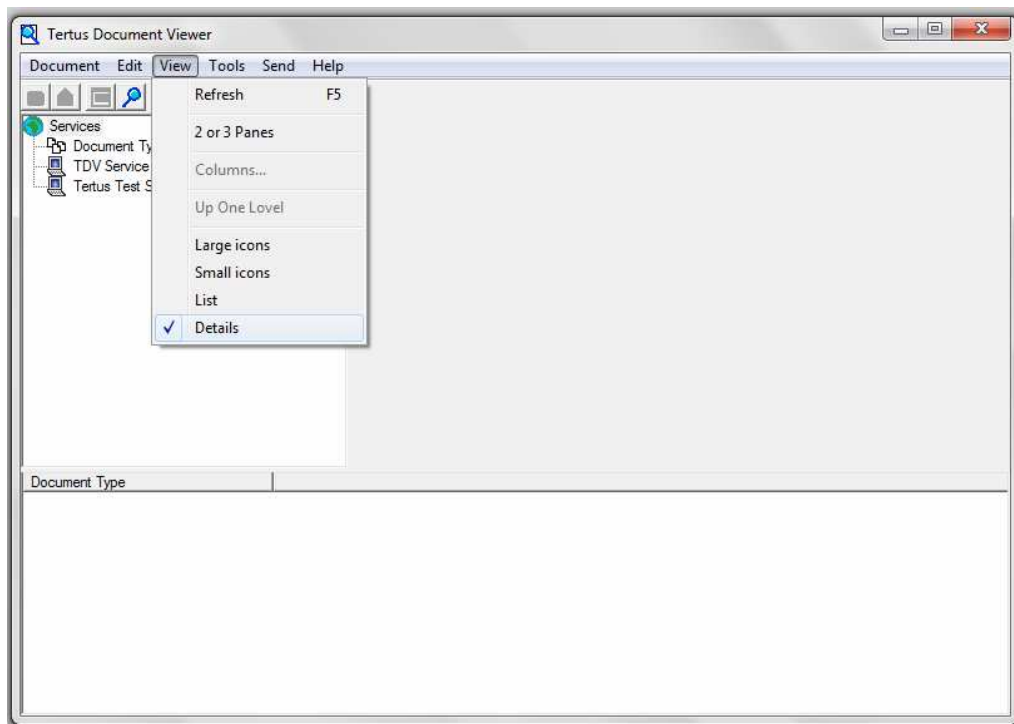


You will receive the view of the system window in 2 panes visible below.



The same effect you can attain by using View 2 or 3 Panes icon from the context menu ( View 2 or 3 Panes button).

In the View menu you can also change the view of documents in the main window. You can choose Large icons, small icons, List or Details. On the example below you can observe the view with option showing Details.



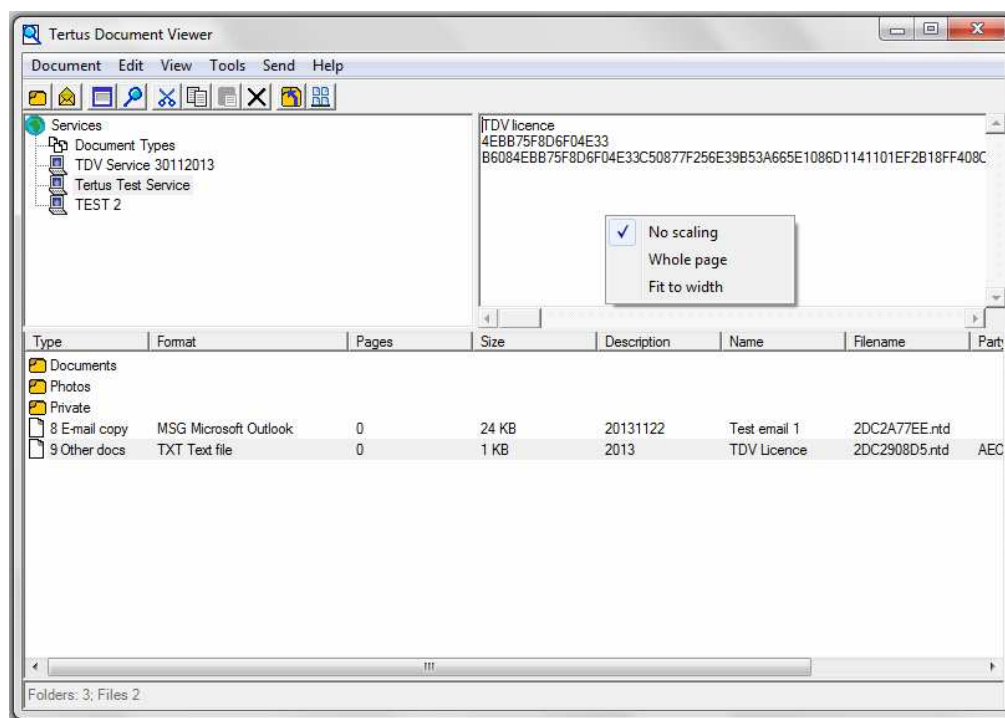
Preview of documents in service

You can also change the preview of the documents in main window. You can do that by clicking once with right button on mouse or touchpad. Depending on the document type you will see different possibilities of adapting document preview. In first case visible below you can choose one of three options preview of the document:

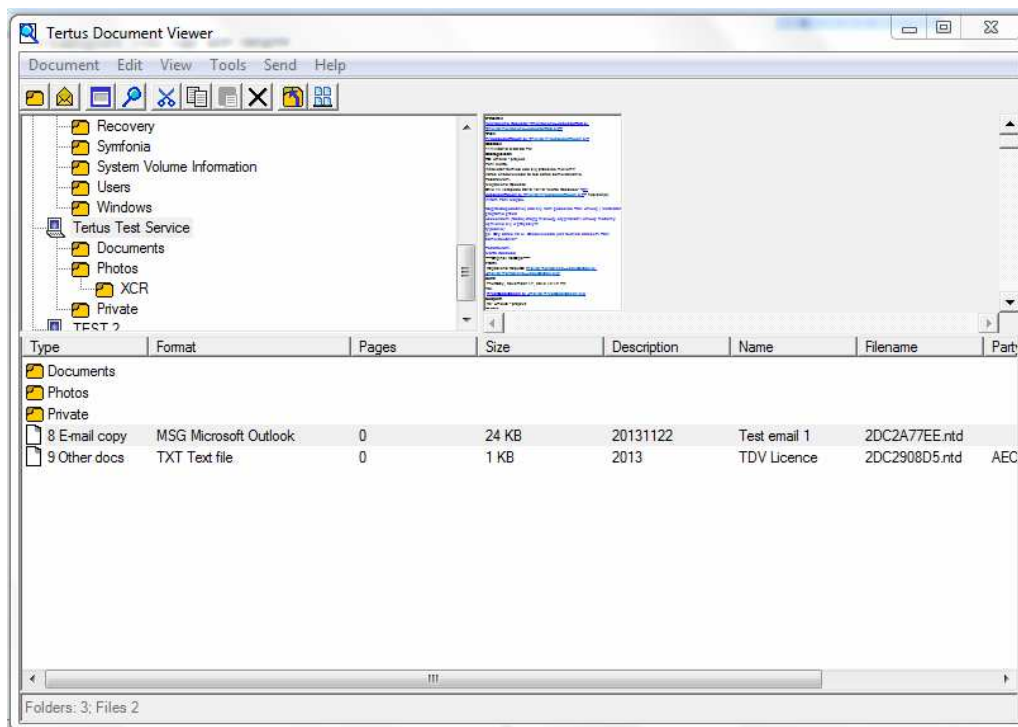
- No scaling – with this option of preview you will see just a part of the document
- Whole page – will give you possibility to see the whole document at once in small window
- Fit to width – with this option you will see document preview attached to the width of it.

Examples you can see below.

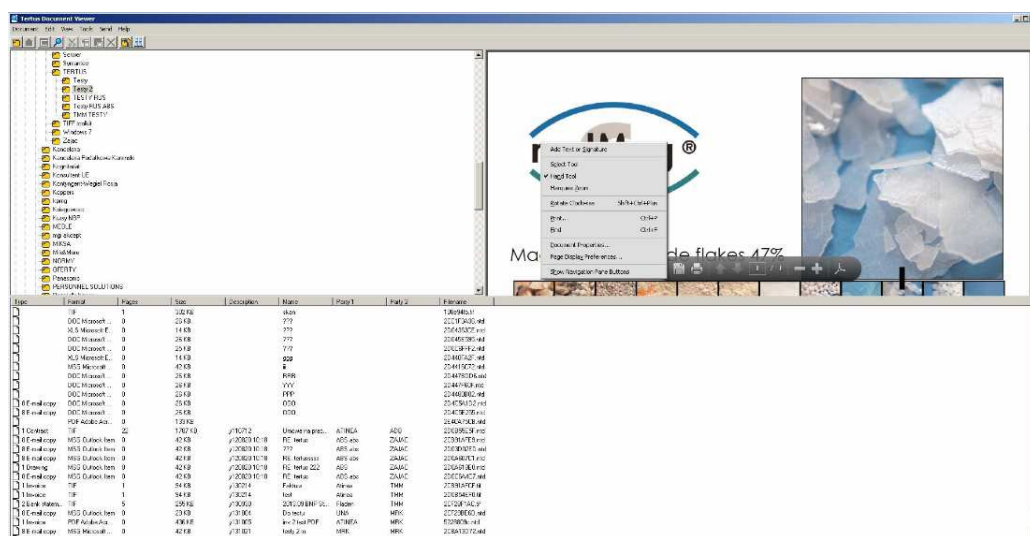
No scaling example:



Whole page example:




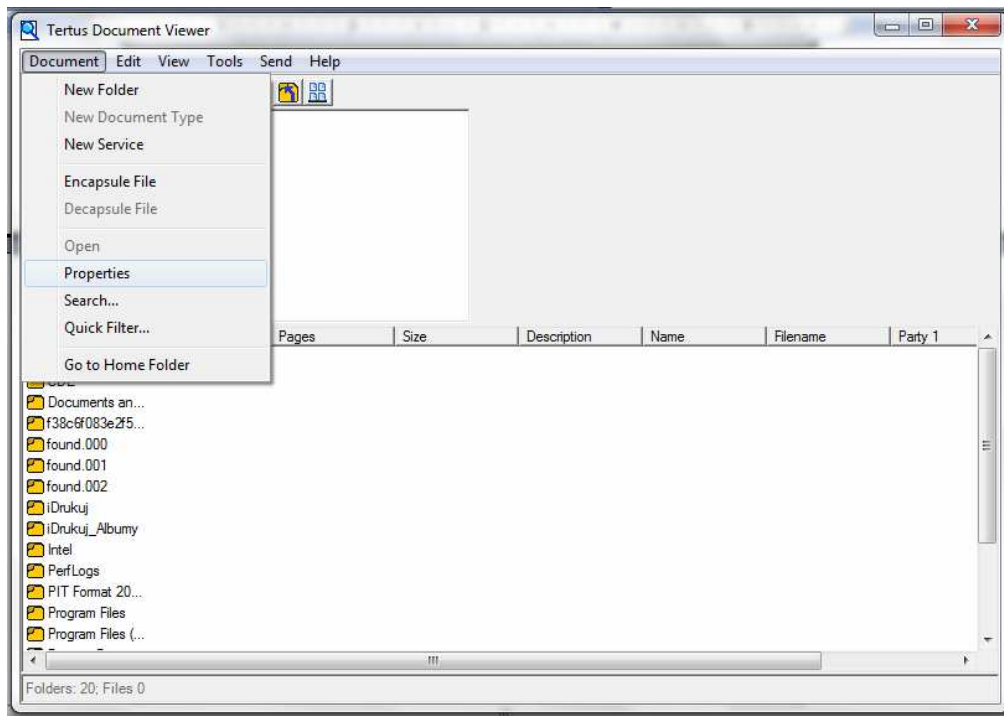
Fit to width example:



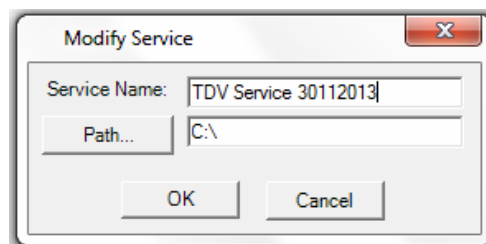
Rename of service

If you want to rename one of the services you can do it by using:

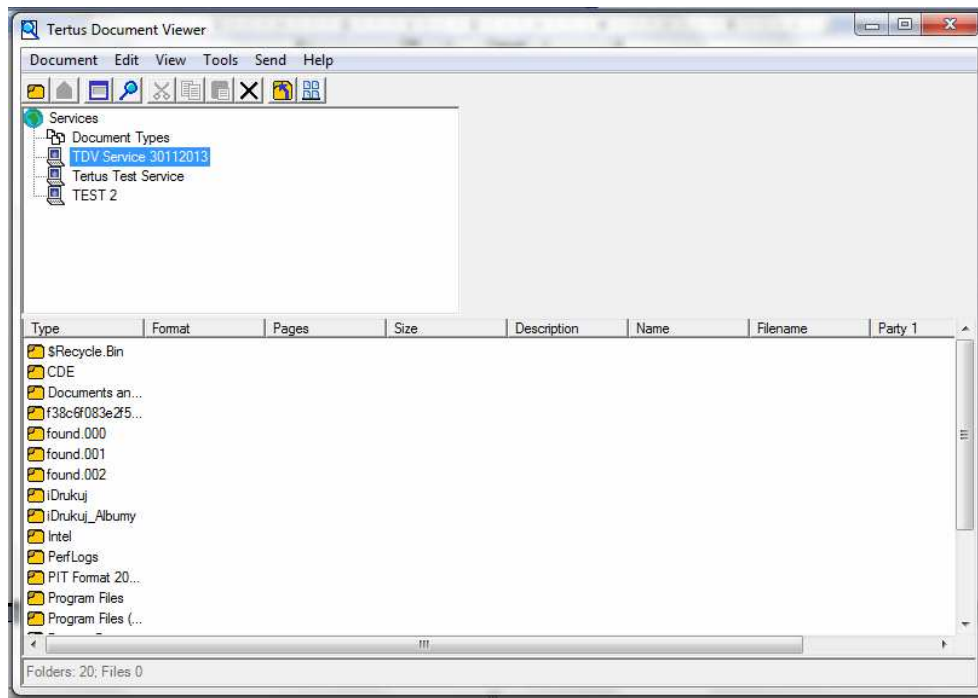
- ▶ Properties command from Document menu
- ▶ Properties button from context menu ( Properties button)



The following dialog window will open:



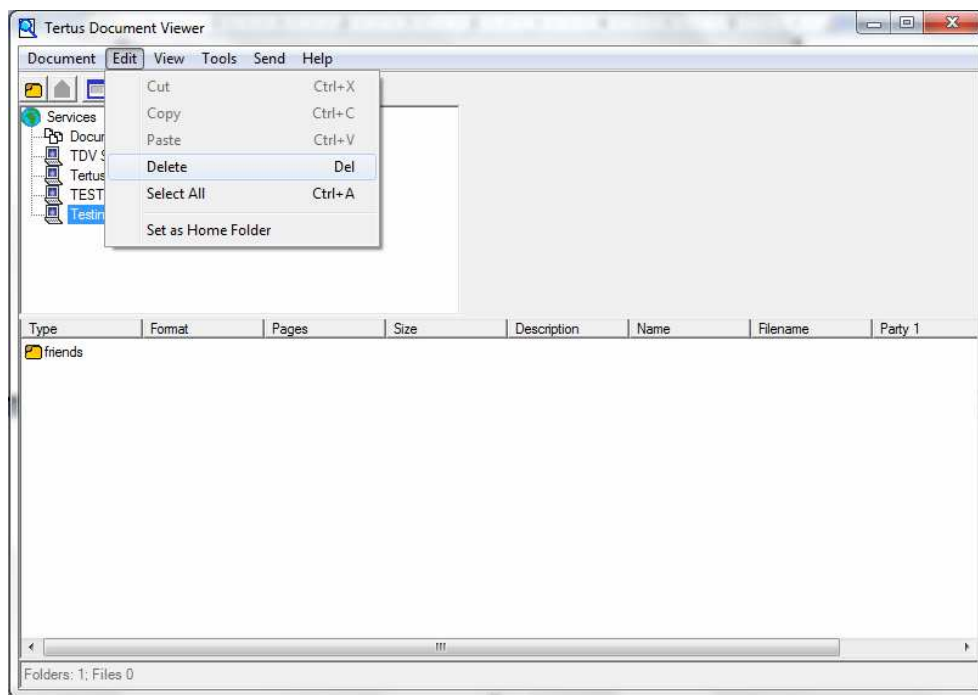
In Service Name window you can change the name of the selected service and confirm by clicking OK button. You do not have to make any changes in Path... If you do not want to accept changes click Cancel. After accepting you will see that there is name changed.



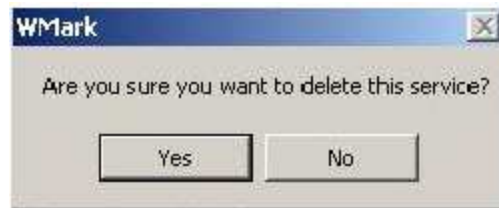
Removing service

If you want to remove existing service you can do that after choosing the service with:

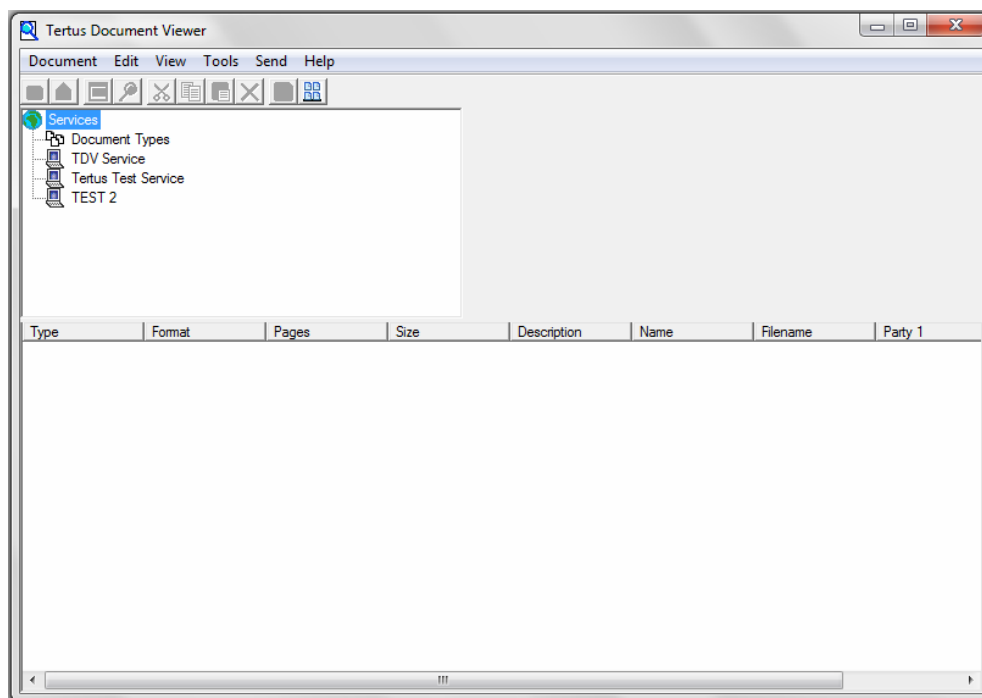
- Delete command from Edit menu
- Delete button from context menu (X delete button)
- Delete key, on keyboard



After using one of the ways mentioned before TDV will ask you if you are sure of your decision by showing following dialog window:

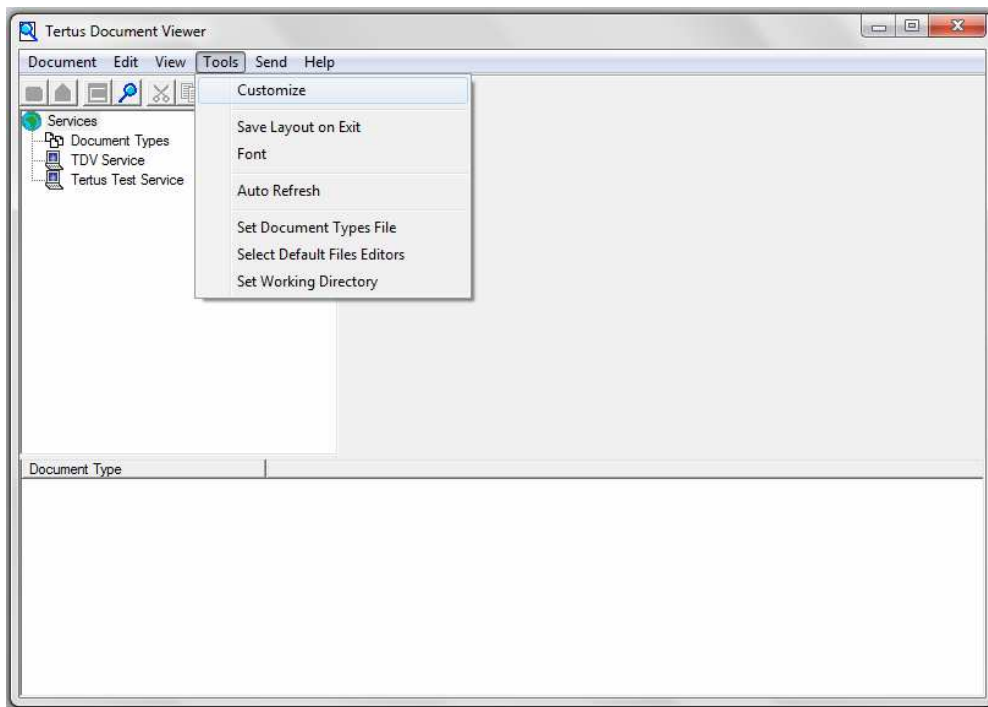


Click yes if you are sure, if not click No. After accepting the removal you will see that selected service was removed.

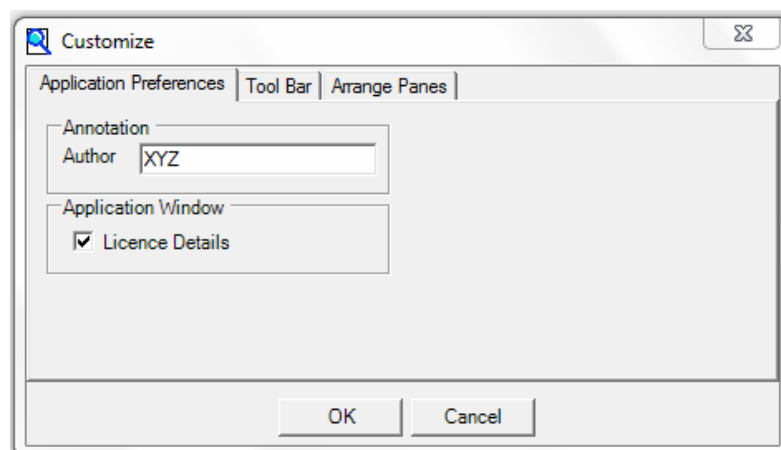


Customization of Tertus Document Viewer

You also have a possibility to customize the program for your needs. To do that, choose the Customize command from Tools menu as showed at the picture below.



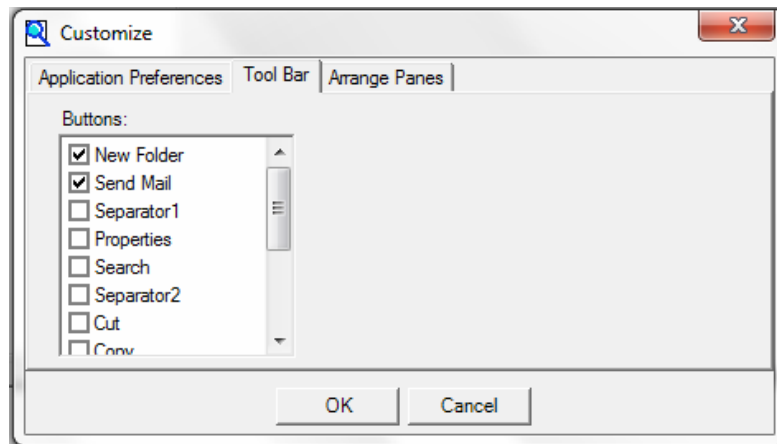
The following dialog window will appear.



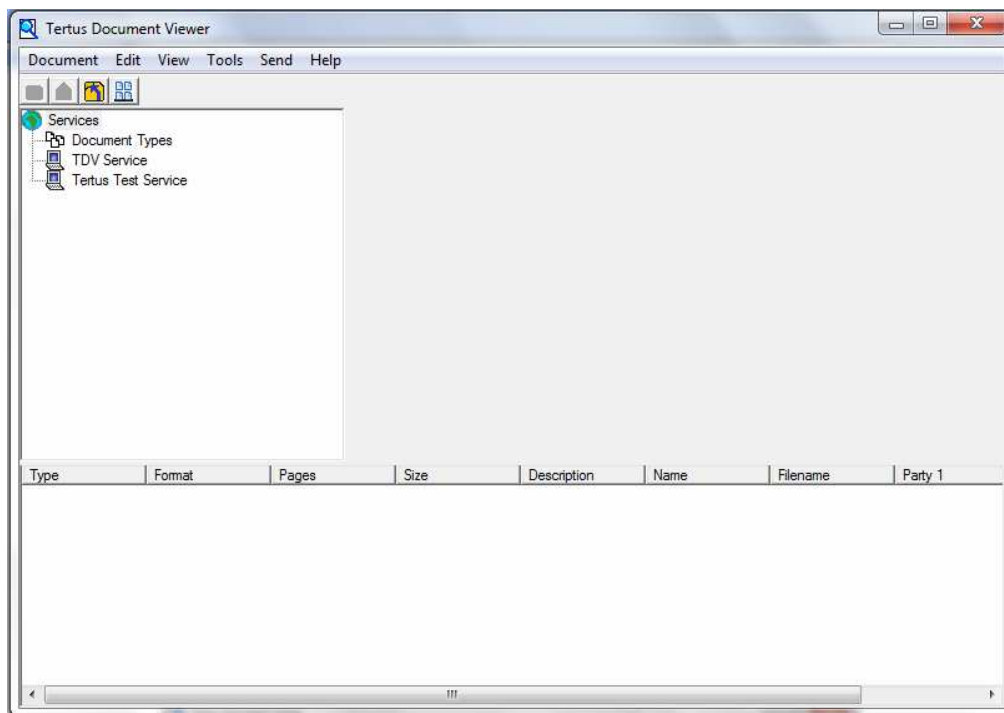
You have a possibility to adjust the view of the program within tree areas:

- Application Preferences
- Tool bar
- Panes

In Application Preferences menu you can change name of Author and tick off the visibility Licence Details. To confirm changes click OK.

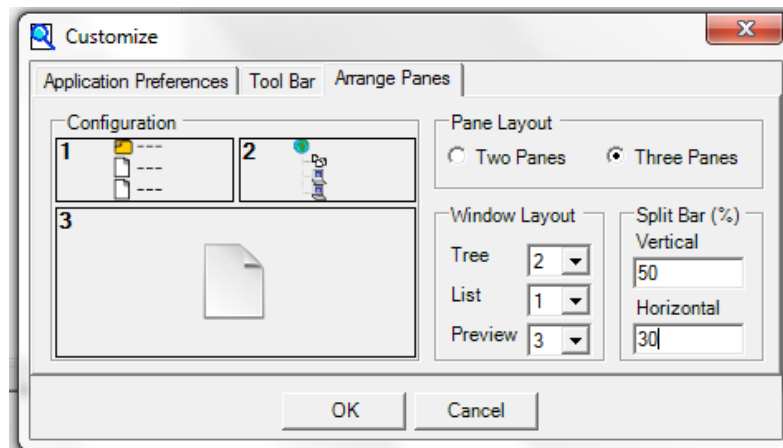


In Tool Bar menu you can add or remove the functional button from the main view of the program. After accomplishment, click OK button. The following view of Tertus main window will be received.

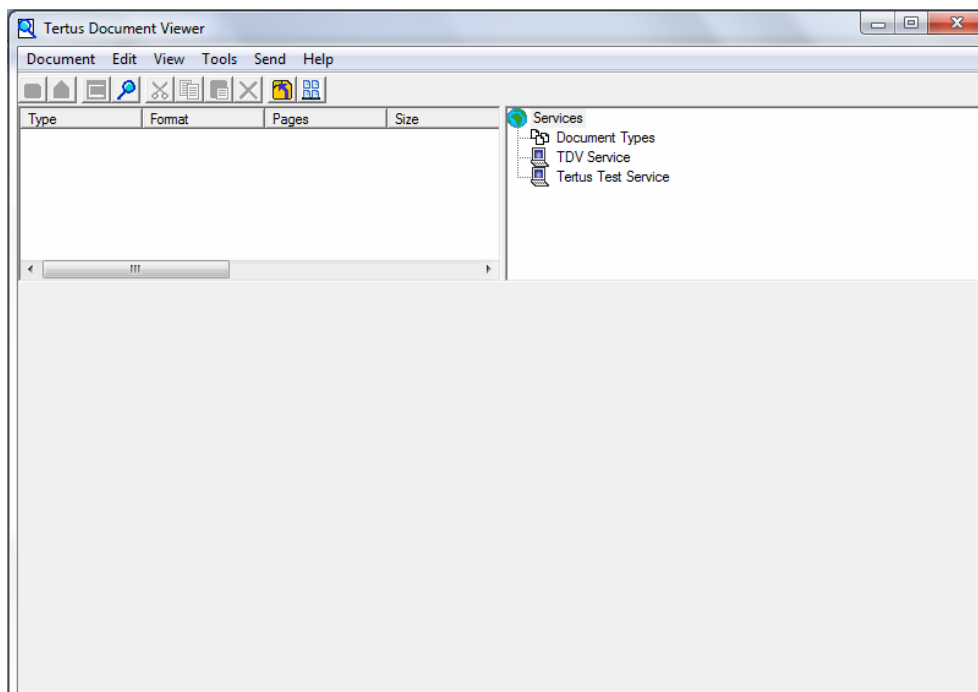


Last functionality you can customize for your personal needs and preferences is view of system in panes. In this case you are able to change:

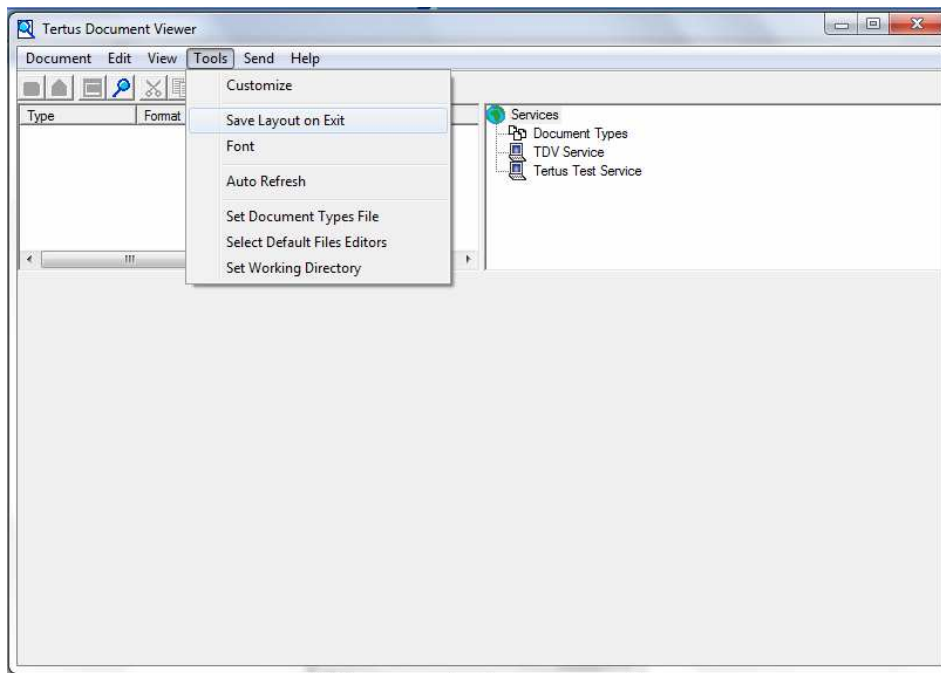
- configuration of windows layout
- panel layout
- and splitting bars for each of the window



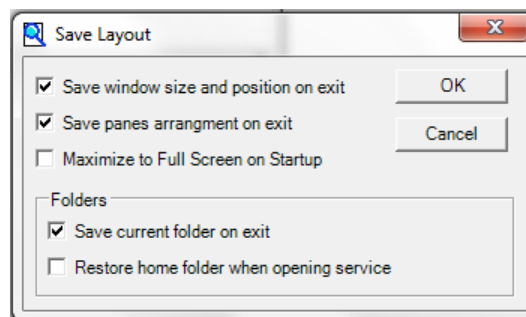
After making changes confirm by clicking OK button. You will receive the following view.



In Tools menu you are also allowed to save changed layouts. In order to do this, choose Save layout on Exit command from Tools menu.



The following dialog window will appear.

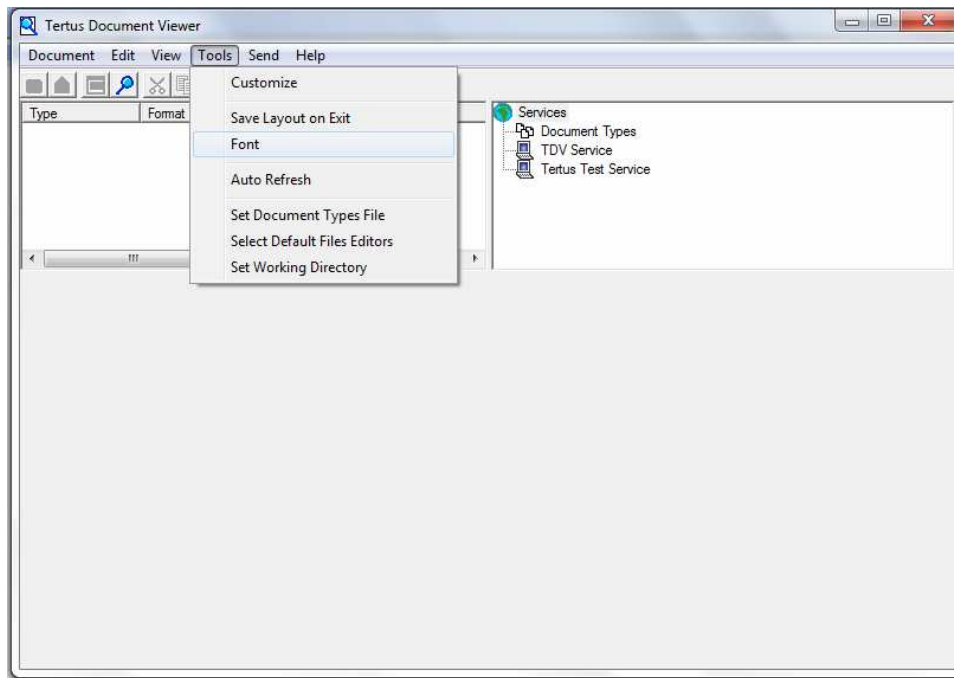


For finding a meaning of the commands please see below:

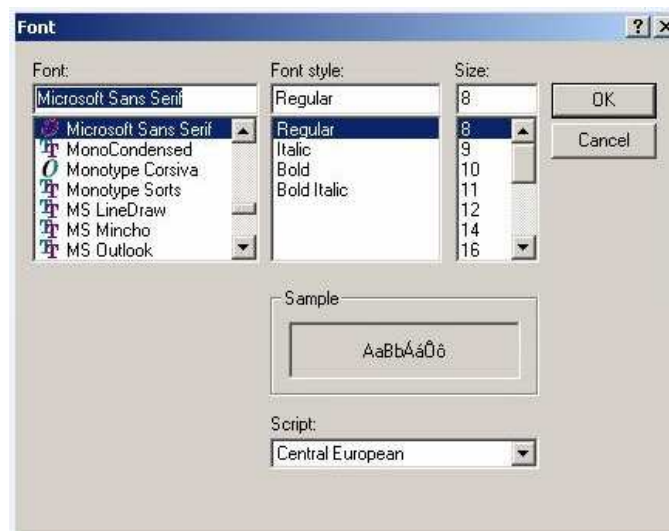
- Save window and position on exit
- Save panes arrangement on exit
- Maximize to Full Screen on Startup
- Save current folder on exit
- Restore home folder when opening service

Tick off the command you want to save and confirm by clicking OK button.

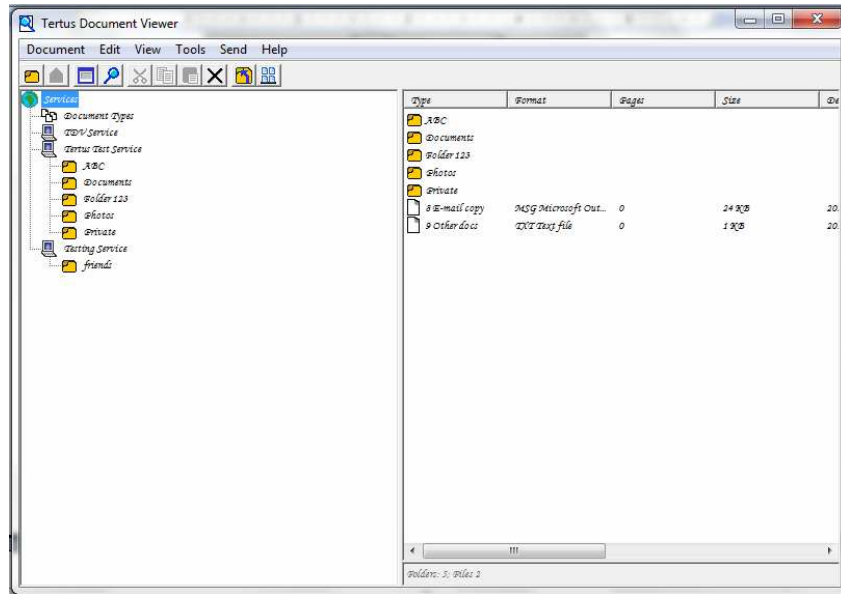
In Tools menu you can also change font. Choose Font command in the Tools menu as shown.



The following dialog window will appear.



After choosing preferable font confirm it by clicking OK button. You will receive the program window view with new adjustments.



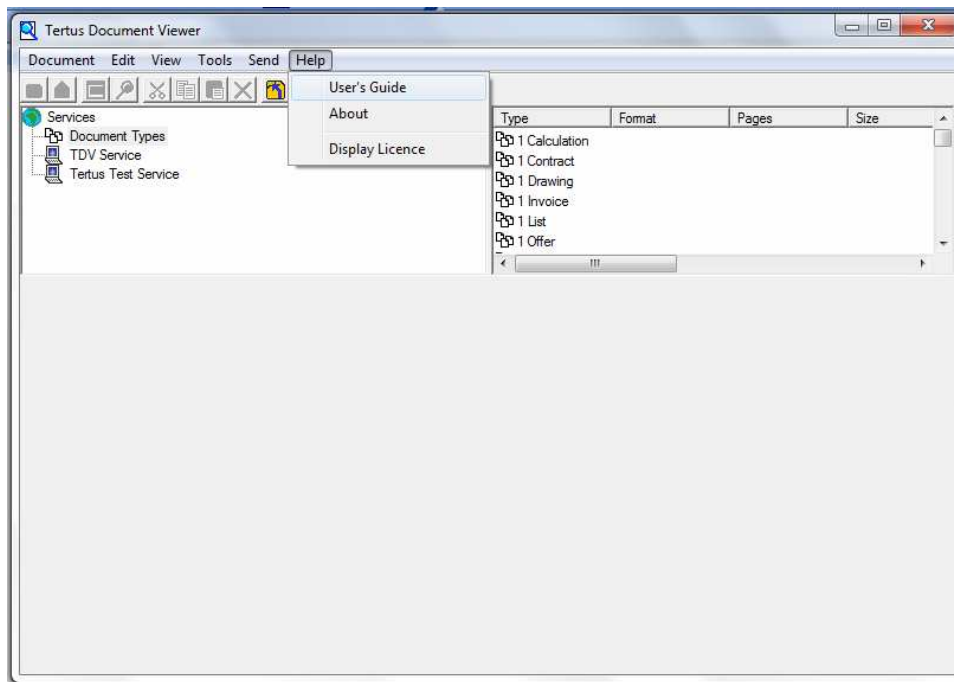
In Tools menu you can also choose the Auto Refresh command.



Finding help

Opening Tertus User's Guide

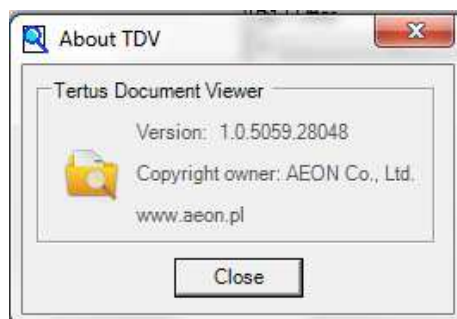
When you do not know how to use Tertus Document Viewer or have any doubts referring to functionality, you should use the User's Guide command from Help menu.



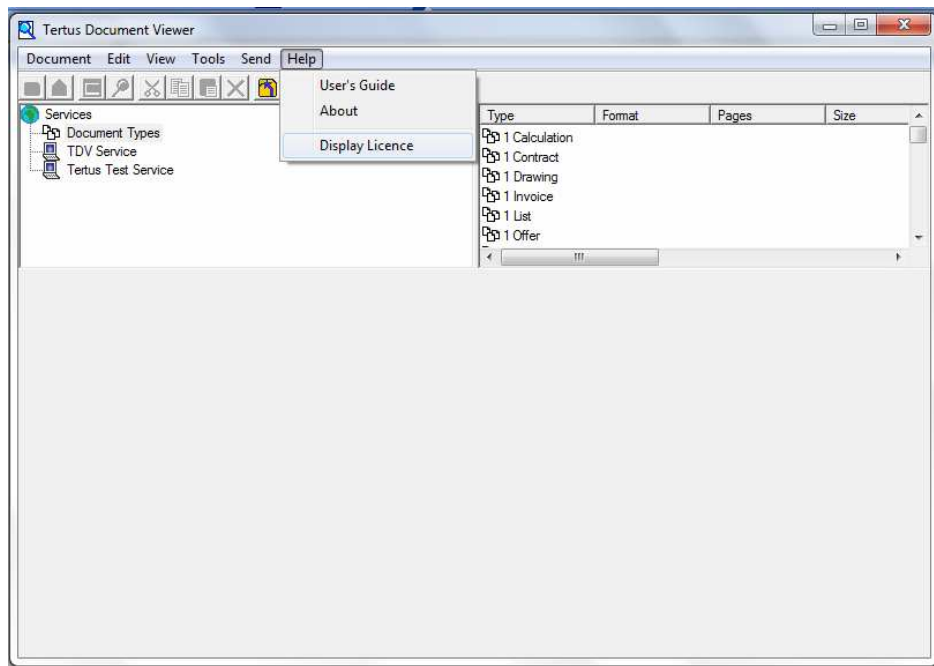
TDV will open automatically the User's Guide.

Checking the Licence Status

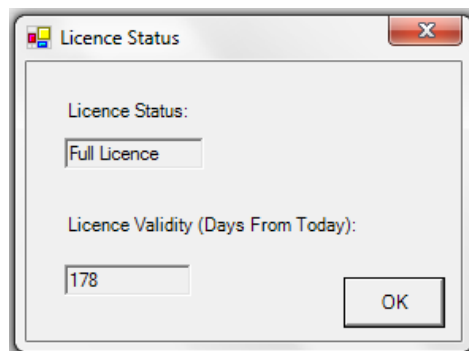
By choosing "About" command from Help menu, you will see the following dialog box with detailed information about your version of the Tertus Document Viewer.



The last command in Help menu is Display Licence.



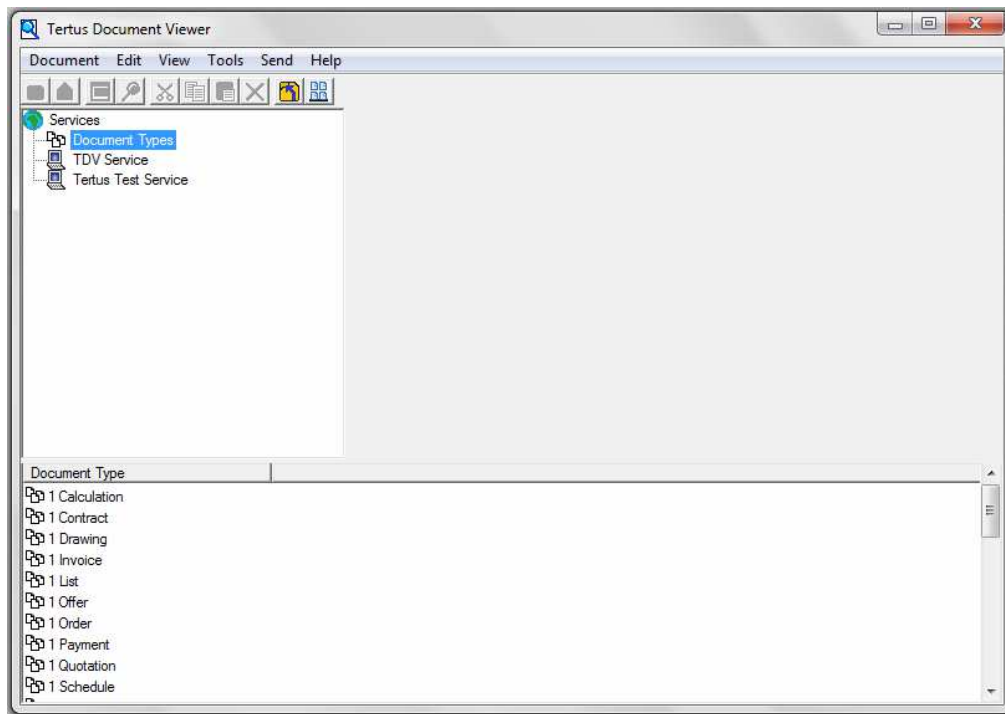
By clicking it you will receive information about licence status and validity. The details you can find in picture below.



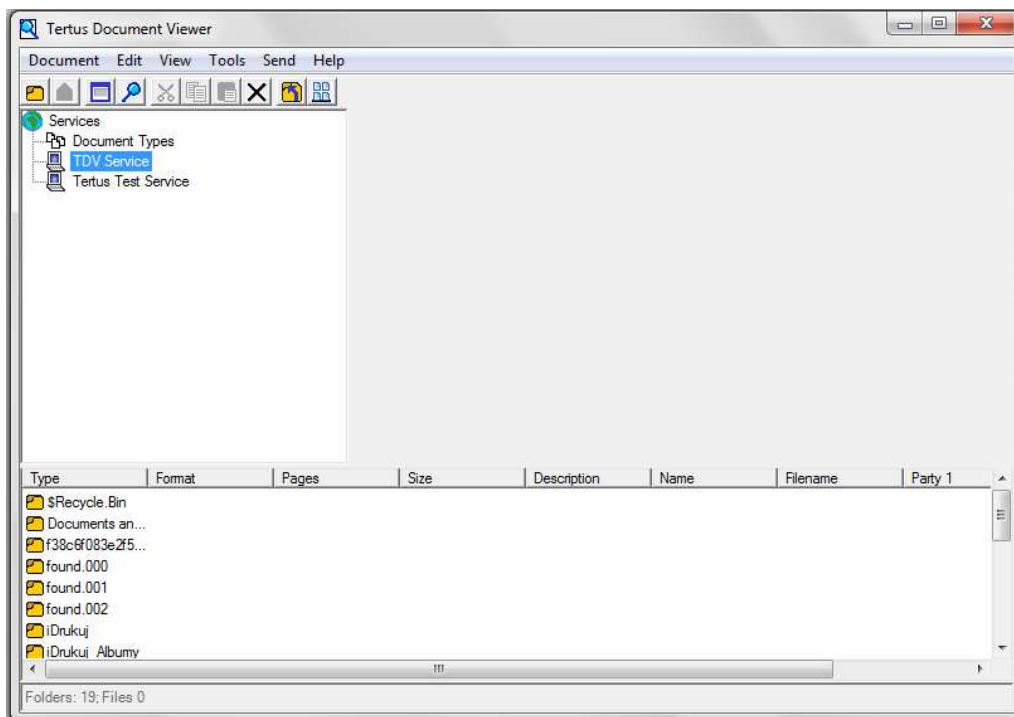
Managing Document Types

Viewing Document Types

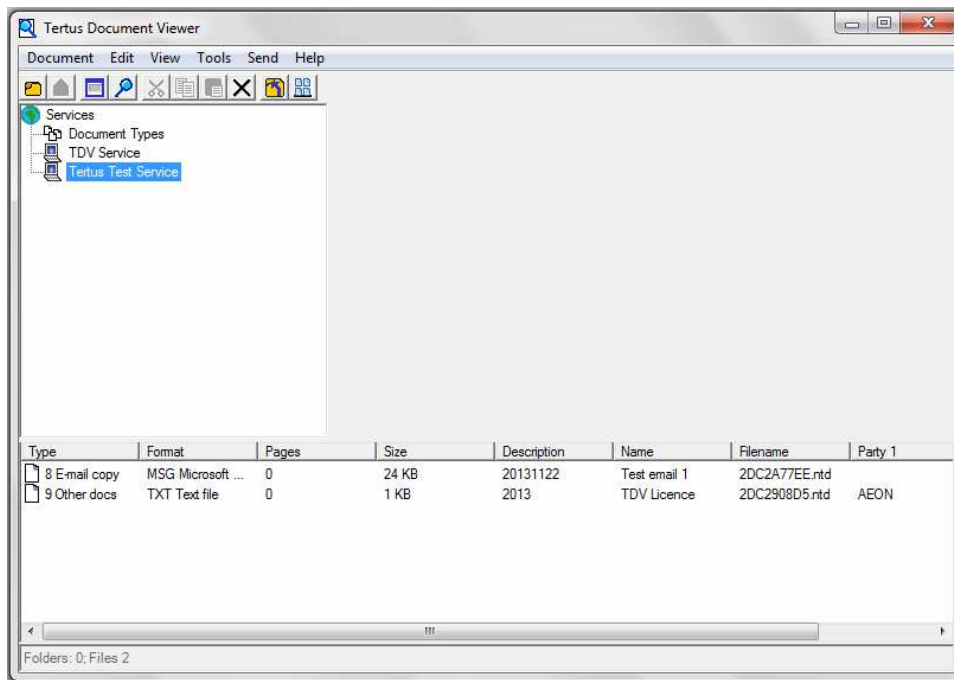
After clicking once on the Document Type icon, you will see possible documents type in the bottom window.



By clicking once on TDV Service icon the list of folders in the Service will show up. You can also see it in the bottom window.

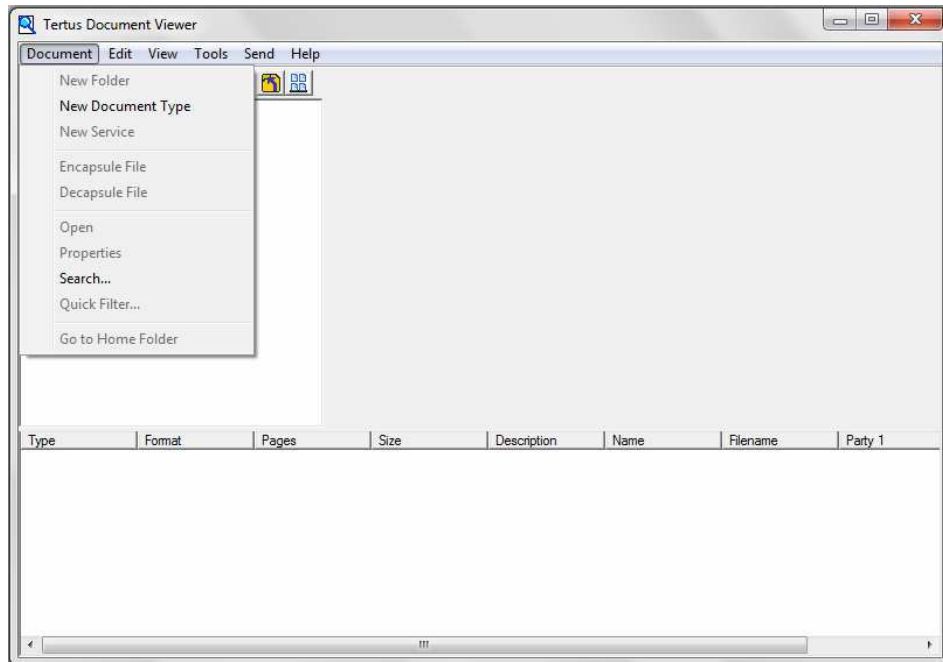


By clicking once on the icon of Tertus Test Service you will get the possibility to see attached documents. You can see it in the picture below.

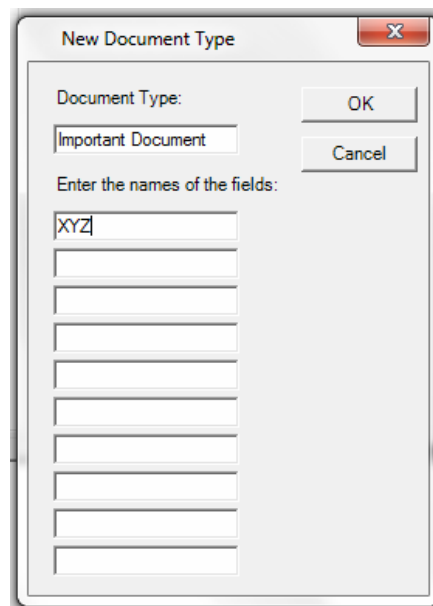


Adding New Document Type

If you want to add New Document Type, choose New Document Type command from the Document menu.



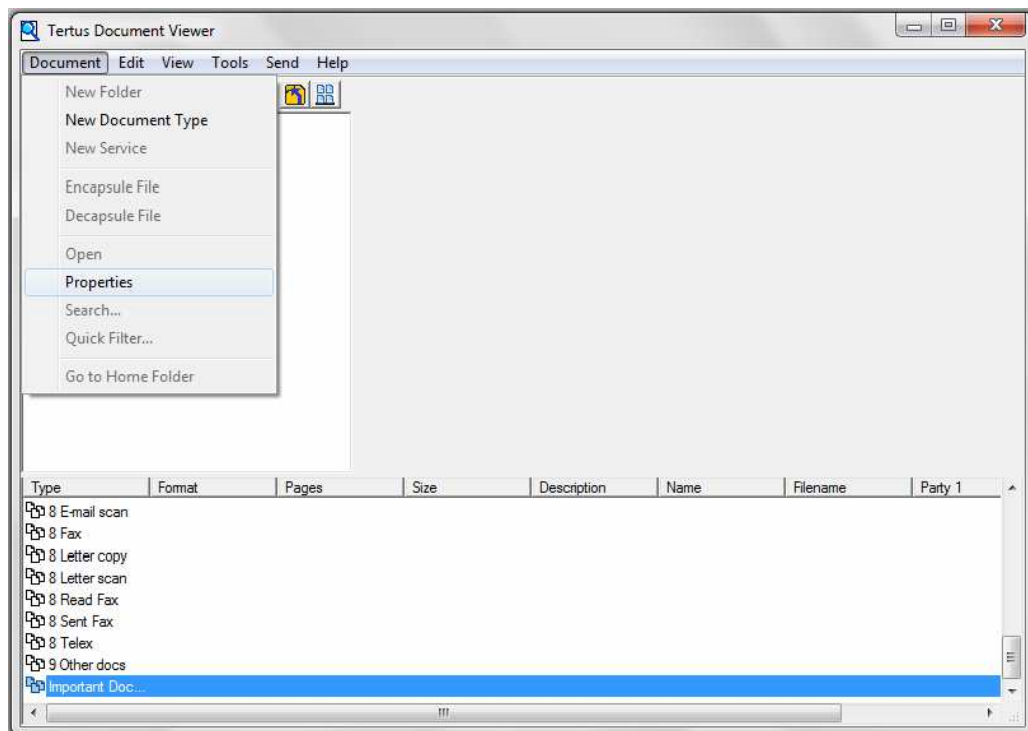
The following dialog box will open.



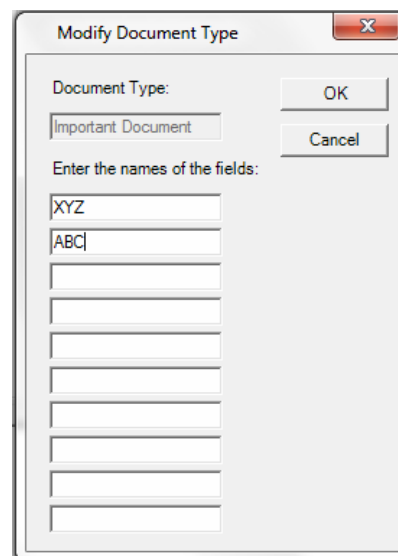
Fill in the Document Type Name and enter the names of the fields. Click OK. You will see added type in bottom window.

Modifying Document Type

In case you want to modify the Document Type choose Properties from the Document menu.



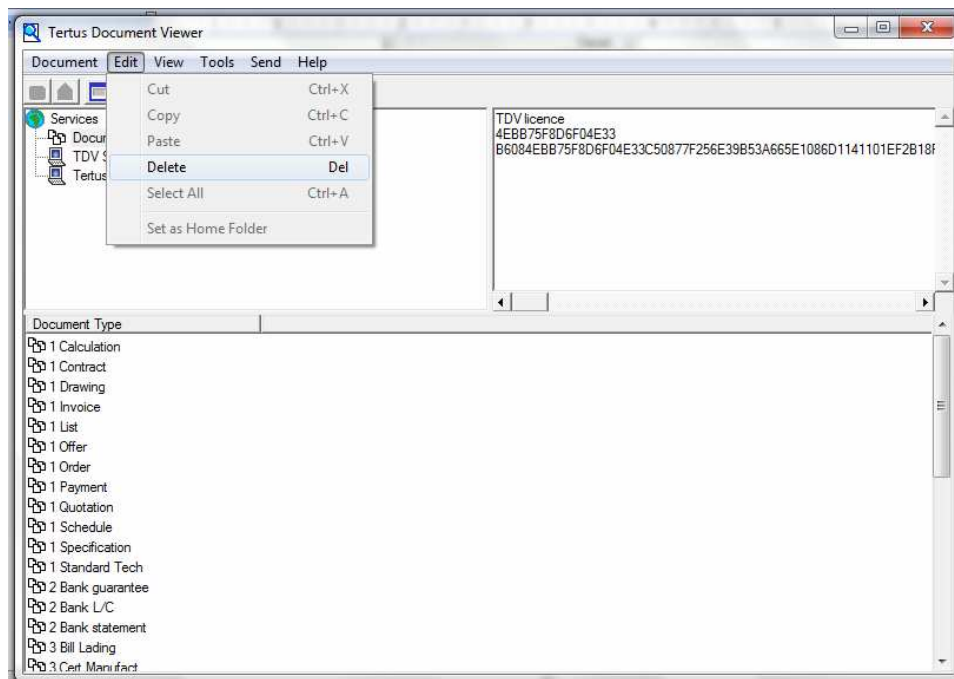
The following dialog box will open where you can modify the names of fields.




You can attain the same effect by using Item Properties button from the context menu ( Item Properties button).


Deleting Document Type

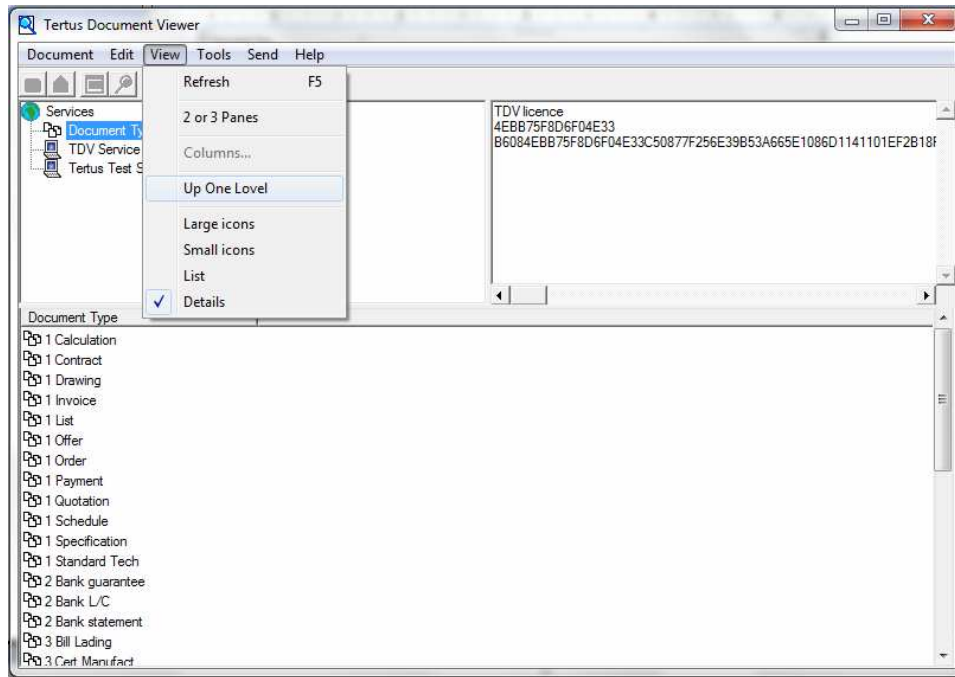
If you want to delete the Document Type which you do not need you can do that by using Delete command from Edit menu.



The second way you can do is to use Delete button from context menu ( Delete button).

Navigating in TDV

In case you want to move quickly one level up in the tree use the Up One Level command in View menu or use Up One Level button from the context menu ( Up One Level button).



Program will automatically move you one level up in the tree.

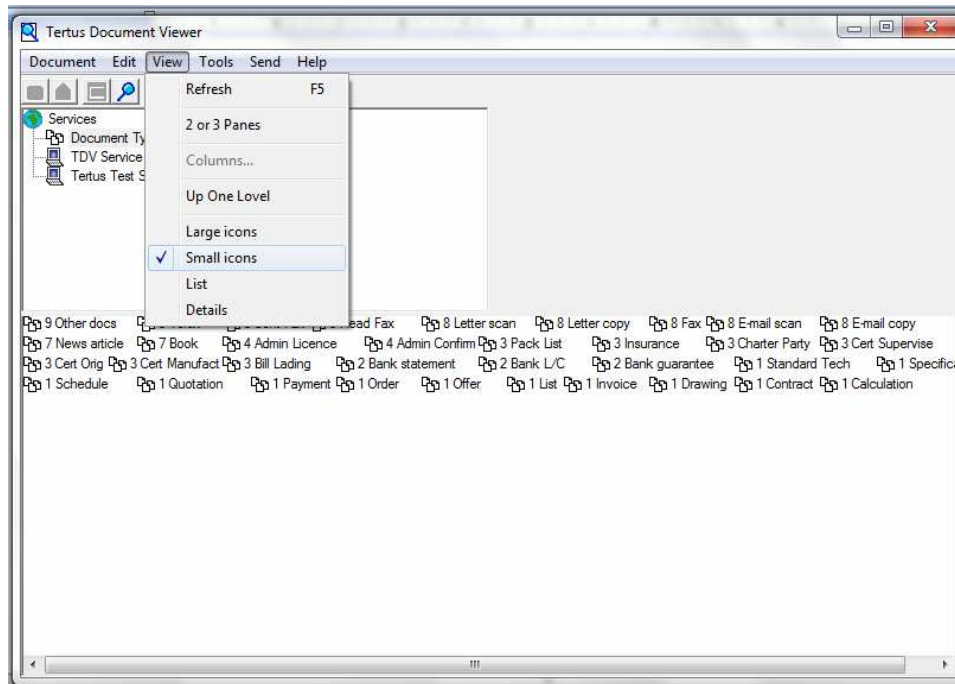
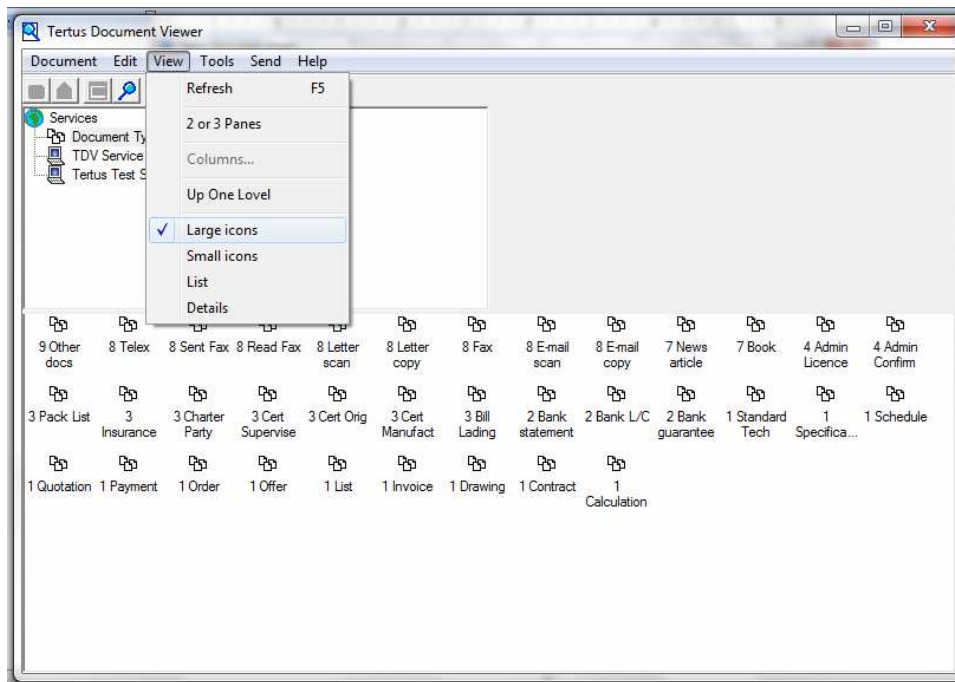
Changing view of icons

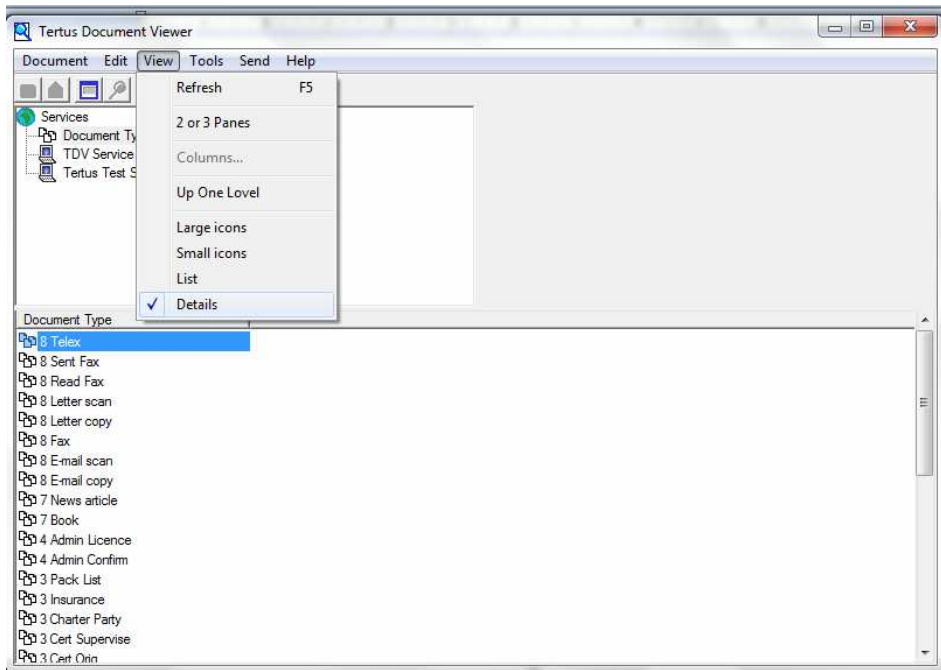
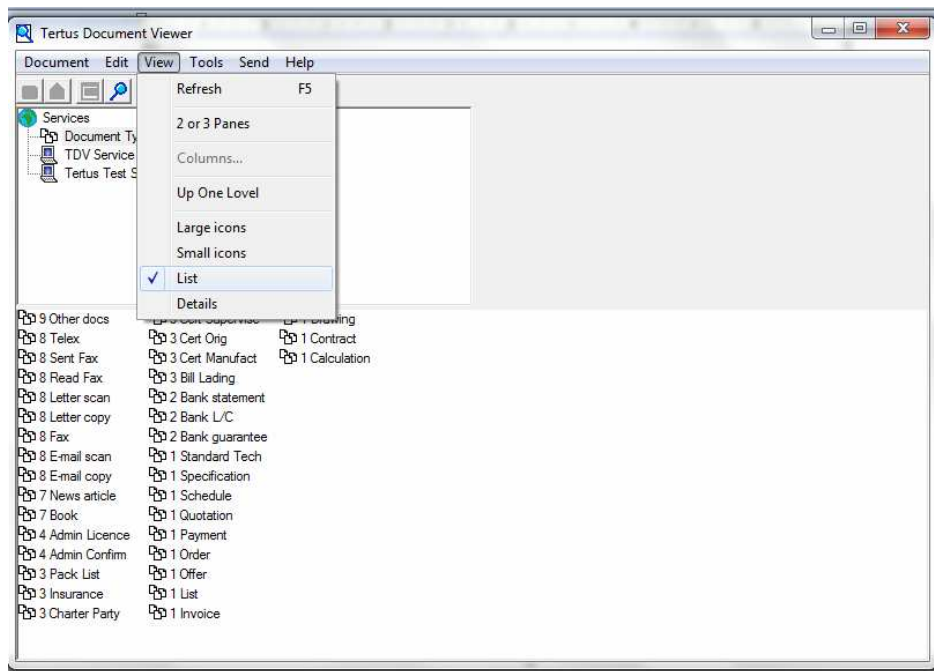
Also from view menu you are able to change the View of icons of documents' types.

You have four different possibilities to choose:


- Large icons
- Small icons
- List
- Details

You will see them in mentioned order, in the pictures below:





Language script

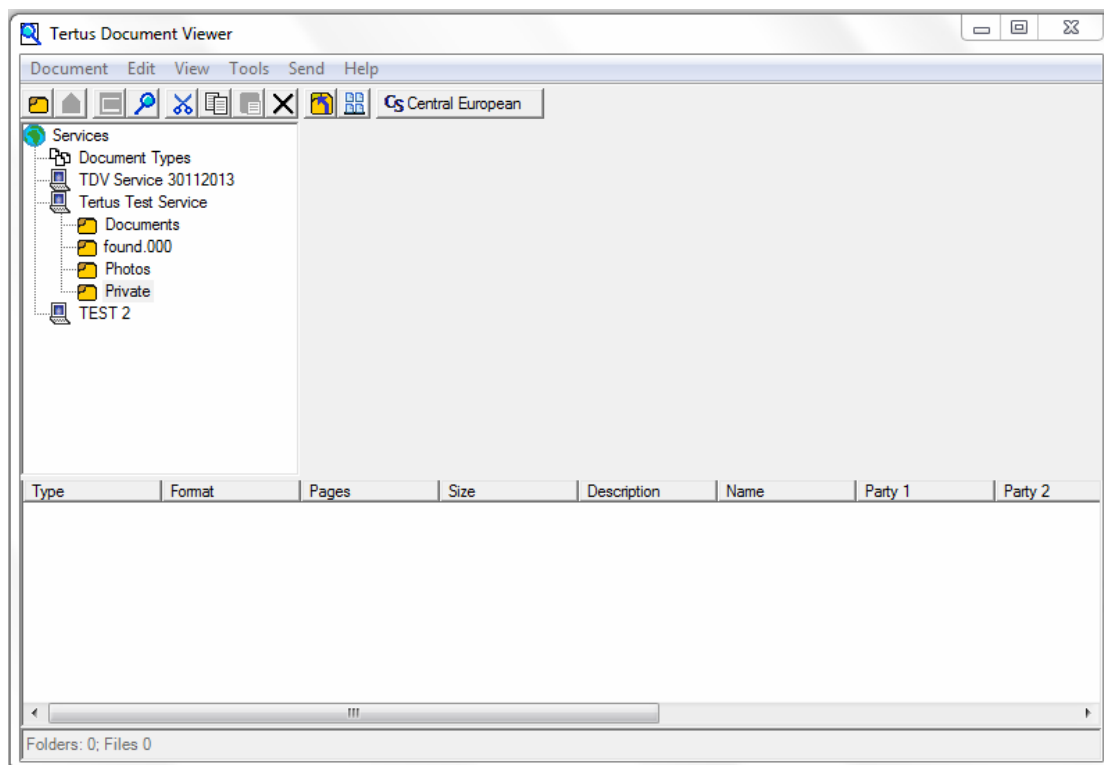
In context menu you will find language script function button. This option let to display in the correct way the specific signs of font in different languages. This option can be activated by clicking Current Charset button (button Current Charset in context menu  Central European).

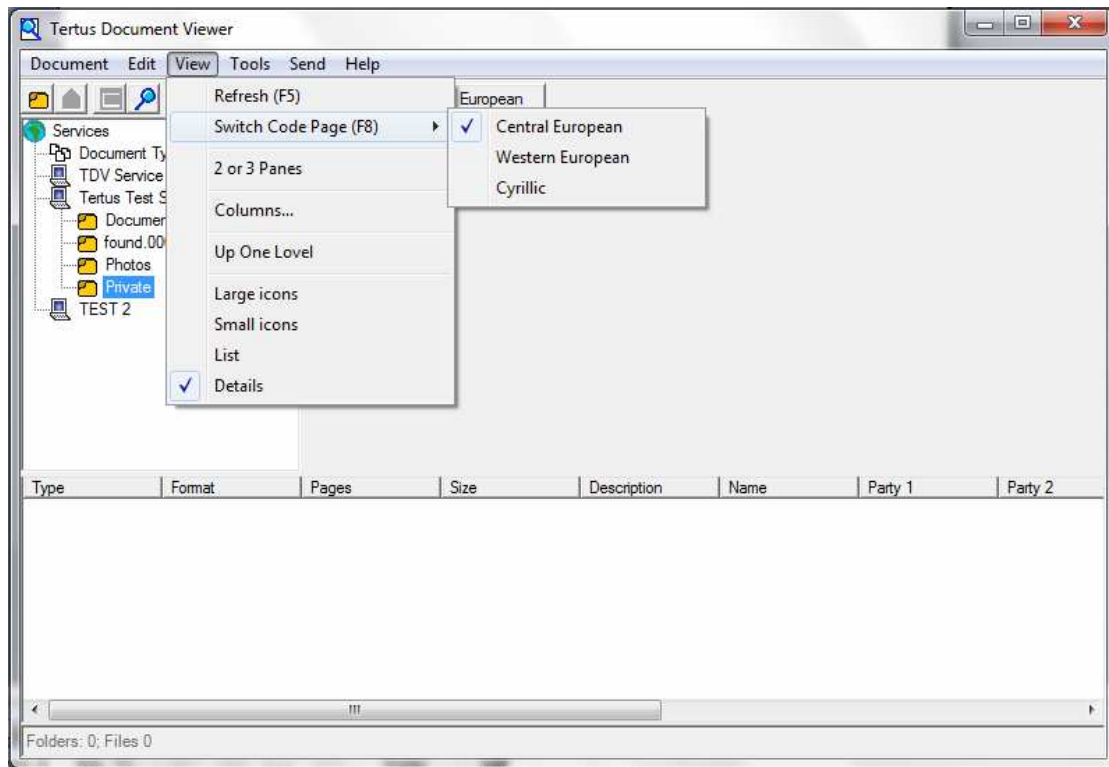
From the level of context menu or by using command Switch Code Page in menu View you can choose one of three types of font:

- Central European
- Western European
- Cyrillic

Third way that gives you possibility to change fonts is F8 button on the keyboard.

Examples of each mentioned action you can see in the pictures below.




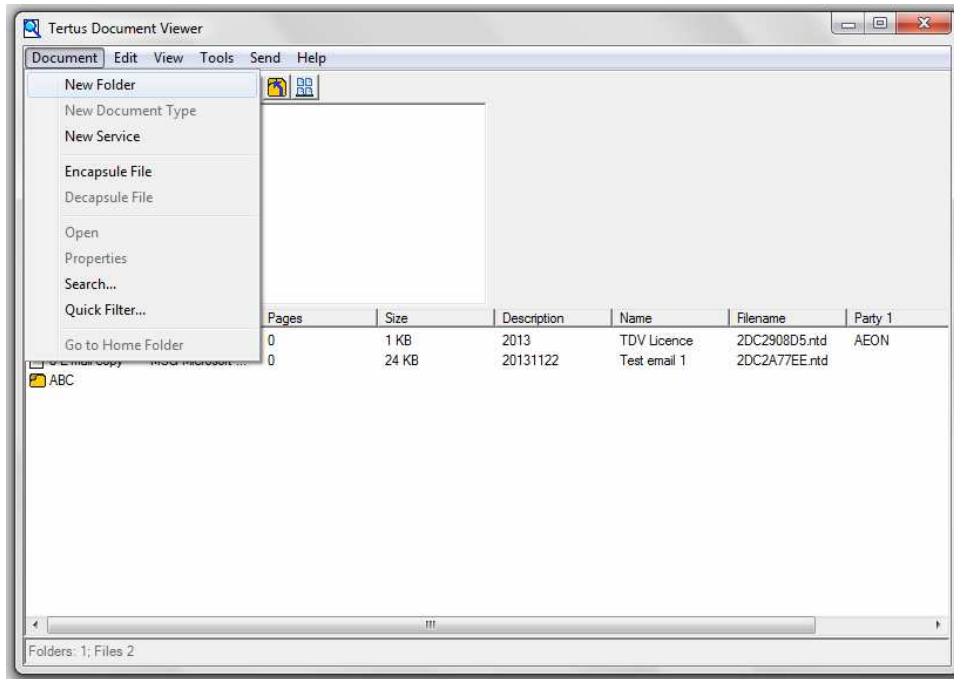


Managing Folders

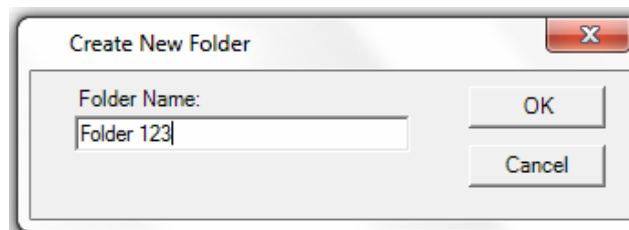
Creating Folders and Documents

If you want to create a New Folder you can do that using two ways:

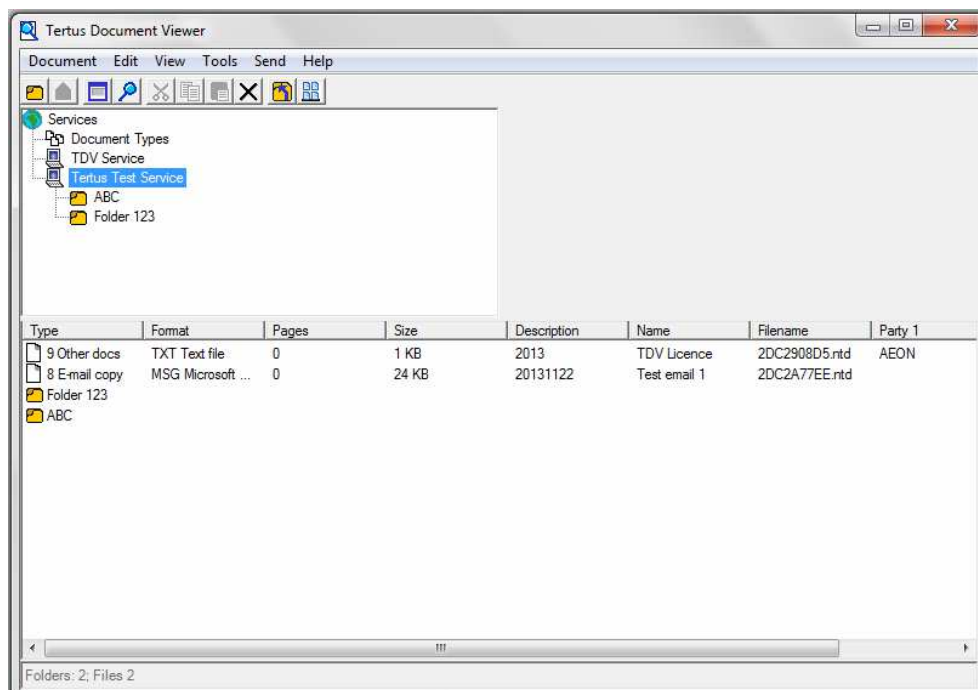
- by choosing the New Folder command from Document menu
- by clicking the New Folder button from context menu ( New Folder button)



After using one of mentioned option the following dialog window will appear:

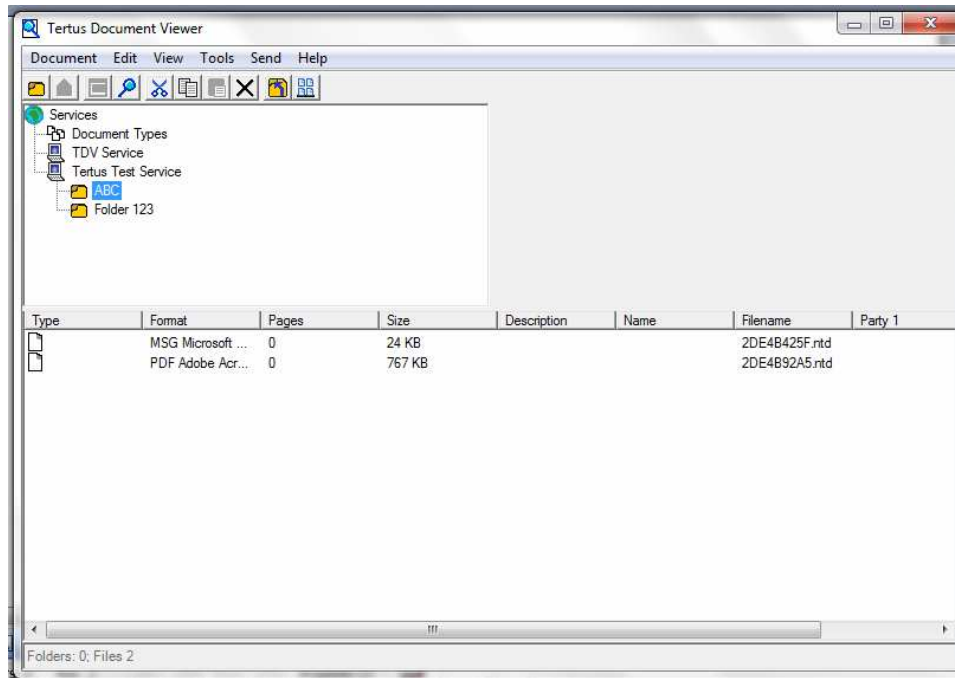


Key in the Folder Name in the free space and click OK to confirm or Cancel to interrupt the action. After confirming and refreshing of the view new folder will be visible on the list.

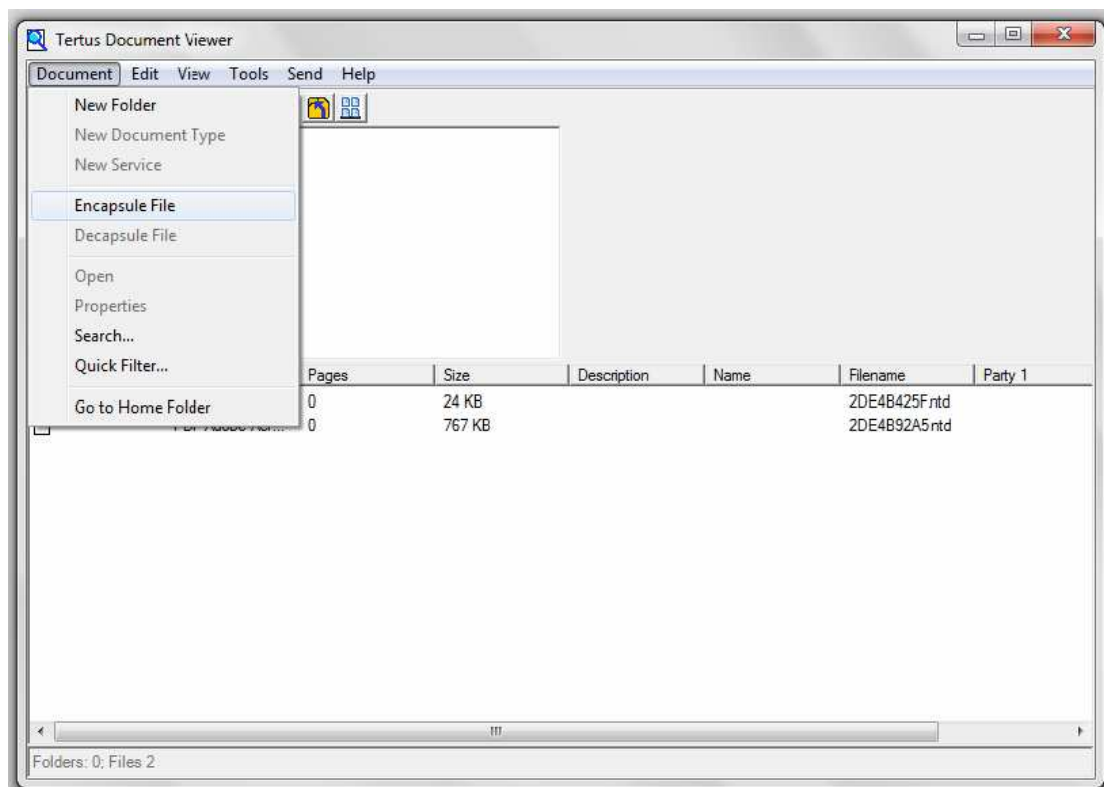


Adding new Documents to Folder

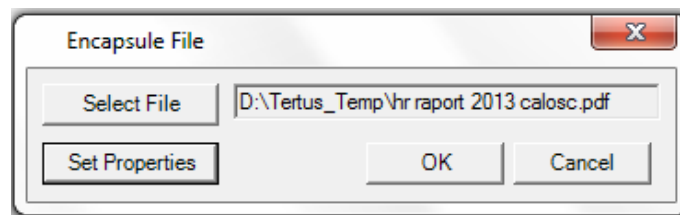
Now you can add documents to selected folders. If you want to encapsulate folder you have to select desired folder by clicking once on it till it is highlighted with blue color what is visible in the picture below.



To add new file you should choose the Encapsulate File command from Document menu.



The following dialog window will appear.



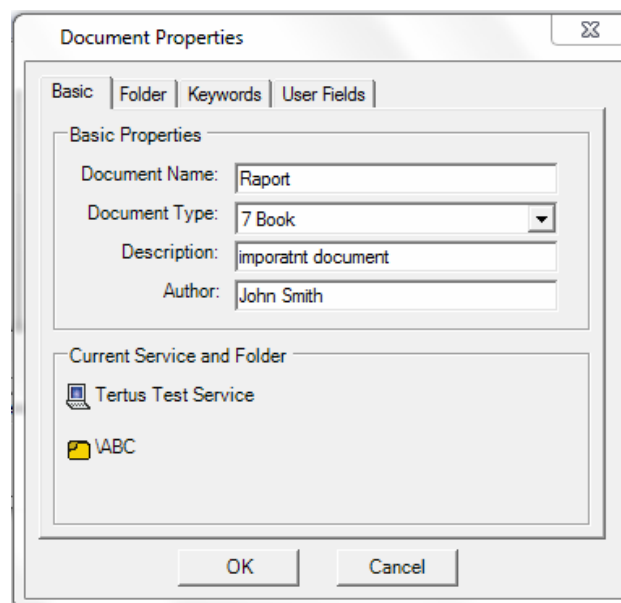
In order to find file you want to add click the Select File button which will let you to choose the right document from folders localized on your computer.

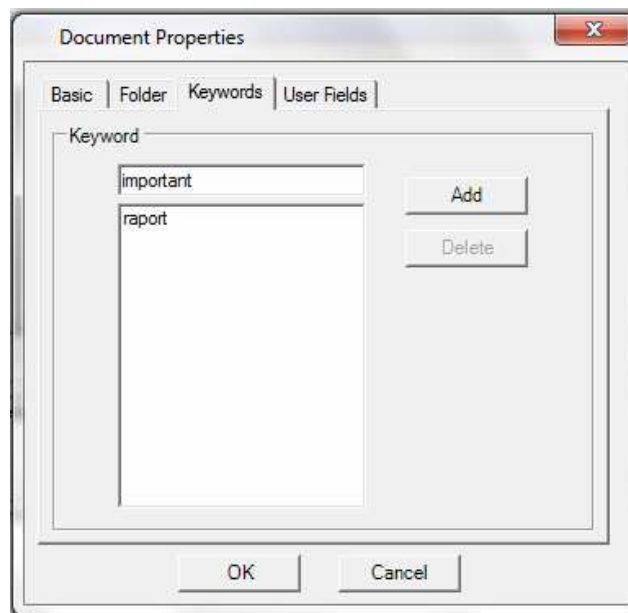
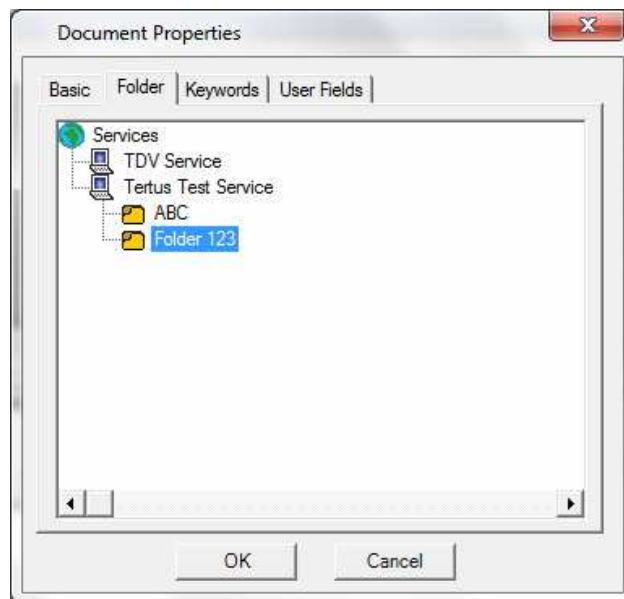
Setting Properties of documents

At this level you also have a possibility to Set Properties by clicking mentioned button. You will see the following dialog window where you can change the following properties of the Document:

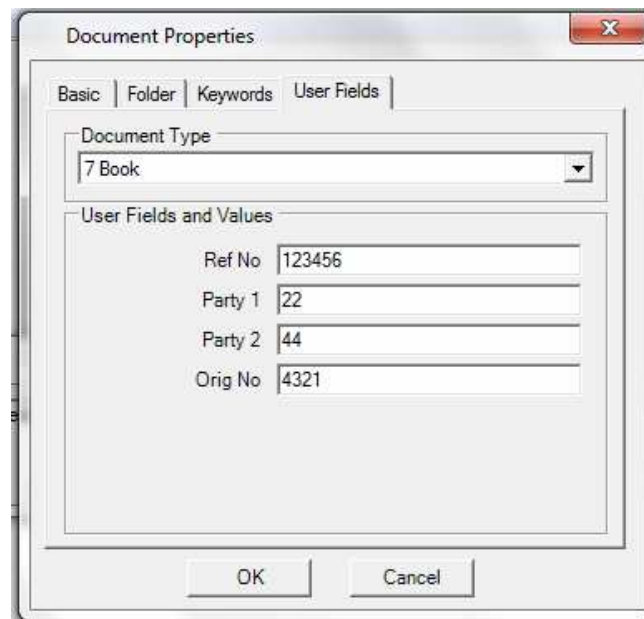
- basic properties
- final destination of document
- keywords
- user fields and values

Fill in required data as shown at the examples.





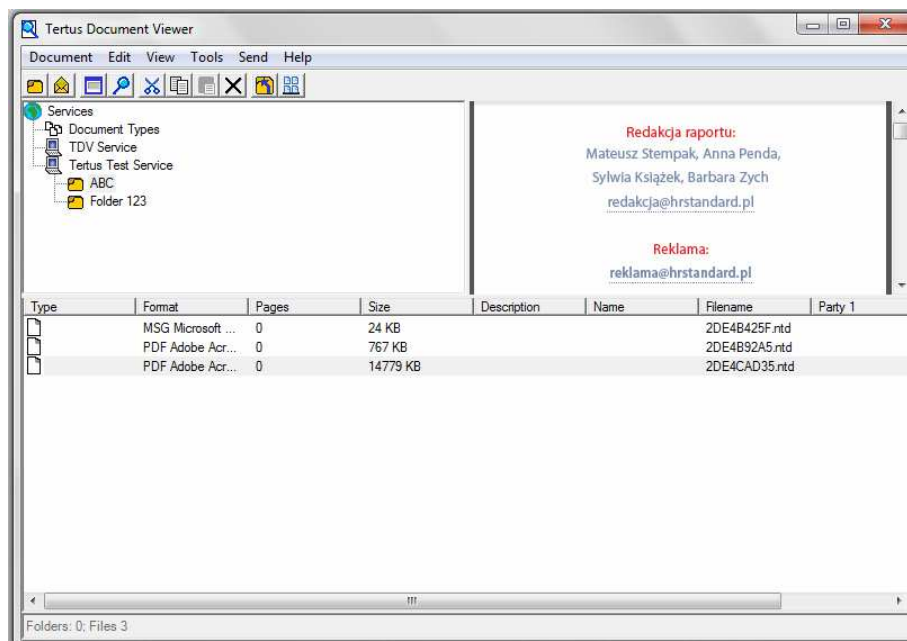
Confirm the Key Words by clicking Add button.



The 'Document Properties' dialog box has four tabs: 'Basic', 'Folder', 'Keywords', and 'User Fields'. The 'User Fields' tab is selected. It contains a 'Document Type' dropdown menu set to '7 Book'. Below this is a section titled 'User Fields and Values' with four input fields: 'Ref No' (123456), 'Party 1' (22), 'Party 2' (44), and 'Orig No' (4321). At the bottom are 'OK' and 'Cancel' buttons.

Confirm changes of Document Properties by clicking OK button. If you do not want to accept click Cancel.

If you want to confirm encapsulation, click OK button. If you want to interrupt the action, click Cancel. If you accepted action you will see that folder was successfully encapsulated.



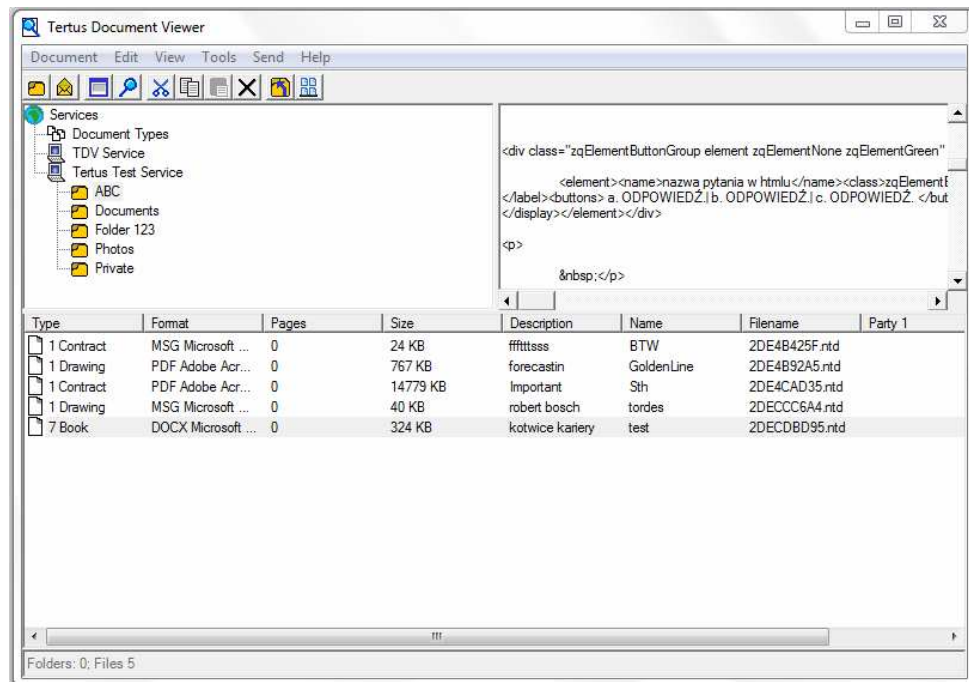
The 'Tertus Document Viewer' window shows a file tree on the left with 'Folder 123' selected. The main area displays a document with two sections: 'Redakcja raportu:' and 'Reklama:'. Below the document is a table with document details.

Type	Format	Pages	Size	Description	Name	Filename	Party 1
	MSG Microsoft ...	0	24 KB			2DE4B425F.ntd	
	PDF Adobe Acr...	0	767 KB			2DE4B92A5.ntd	
	PDF Adobe Acr...	0	14779 KB			2DE4CAD35.ntd	

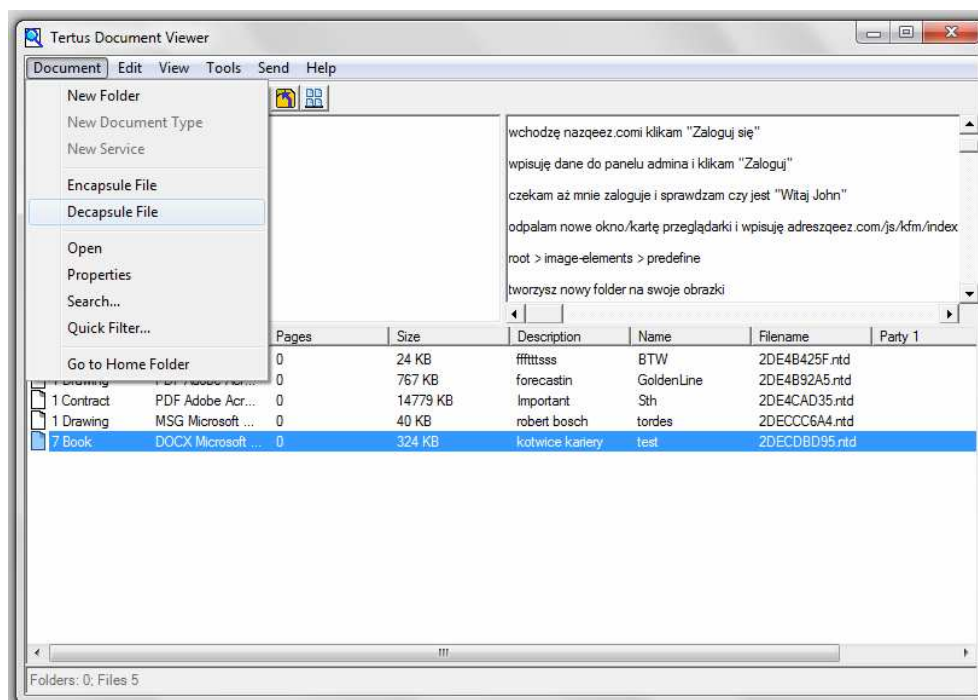
At the bottom, it says 'Folders: 0; Files 3'.

Decapsulation of documents

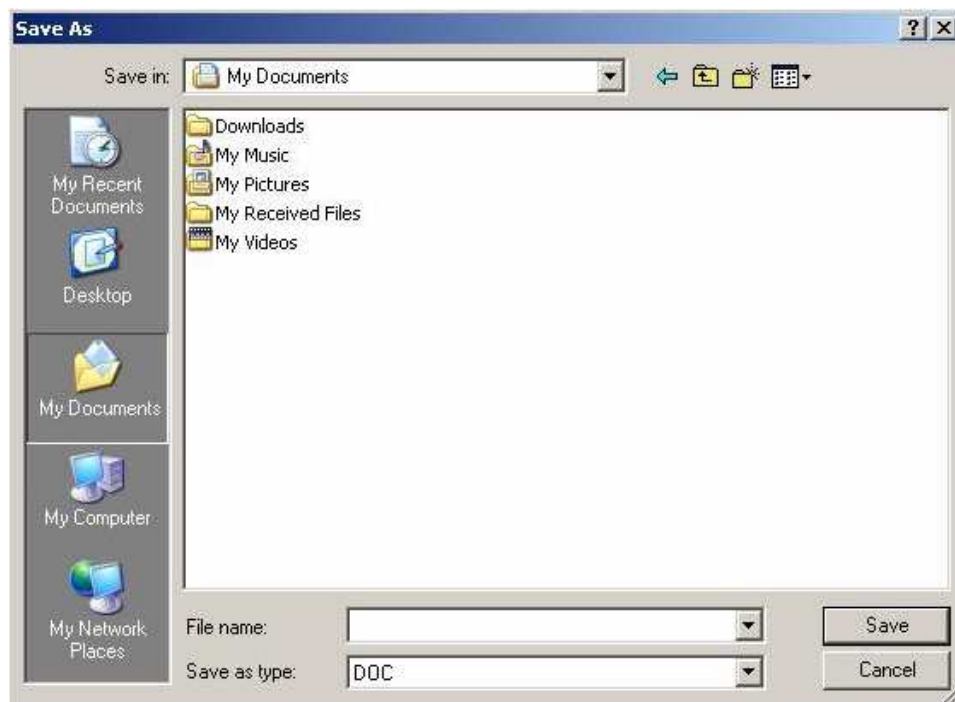
In order to decapsulate the file you should firstly highlight the document you want to save. You can see it in the following picture:



Now choose Decapsulate File from the Document menu.



Following window will appear:

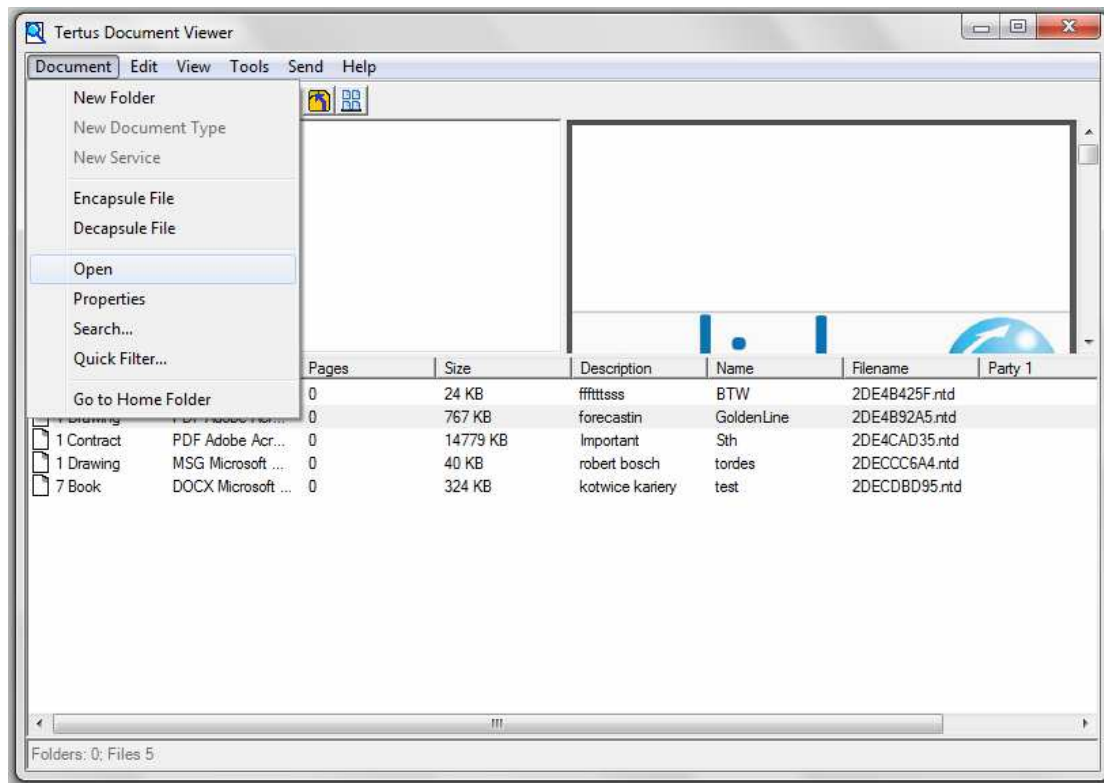


You should find the folder where you want to save the document and accept. Saved document will be shown as following icon in folder chosen by you.



Opening documents

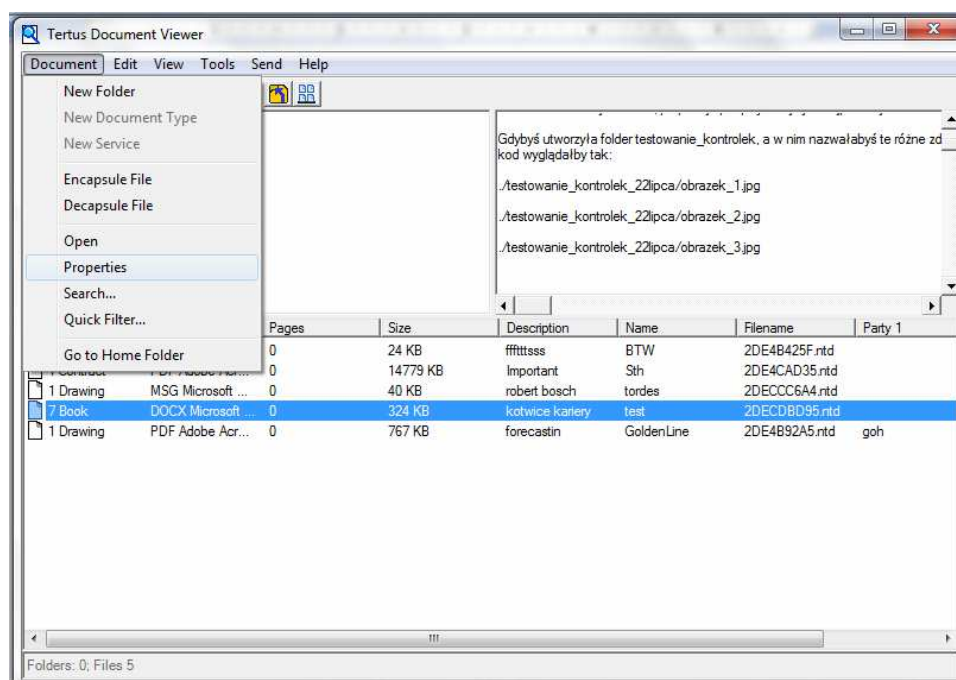
In order to open document directly from the program highlight document that needs to be open and choose Open command from Document menu. The second option to open document in quick way is by double click on the selected document.



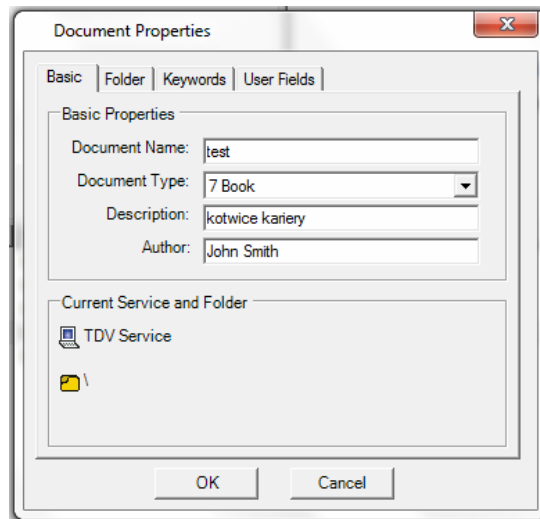
Chosen document will open in adequate program.

Setting properties of documents

Setting properties of document is possible from level of Document menu. To open dialog window use Properties command from Document menu.



After the dialog box, you can choose the properties of the document you want to change. The following dialog window will appear. You can move between four bookmarks: Basic, Folder, Keywords and User Fields. The example of the first one you can see below.



Searching for documents

In case you want to find quickly document you should use Search command in Document menu by clicking once on the command you will open the dialog window with searching criteria. You can search by:

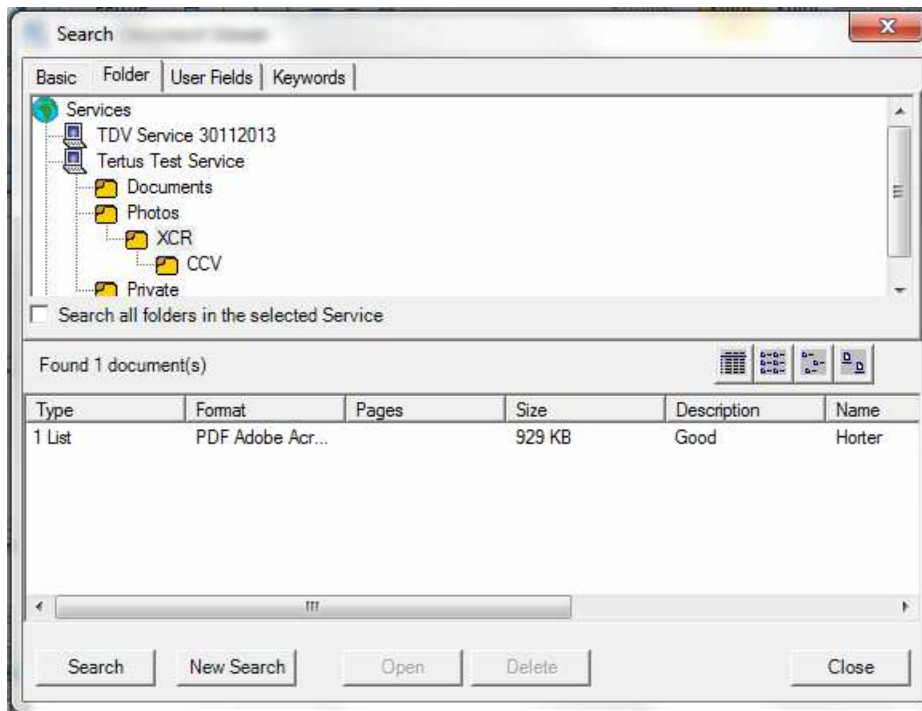
- basic criteria as properties and filename:
 - Document Name – easy searching for the specific documents
 - Document Type – with this function you will find just one type of documents
 - Description – you have a possibility to describe each document you are saving to the TDV, what helps later, while searching for it
 - Author – with this criteria you will find all documents created by one person.
 - Filename – here you can type in the file name you are searching for
- Folder – in this bookmark you can choose the Folder which will be taken into consideration while searching for the document with criteria pointed in Basic bookmark
- User fields – to choose the document type or other attributes of searched document types.

- keywords – for each document you can add Keywords with which the document will be searched for.

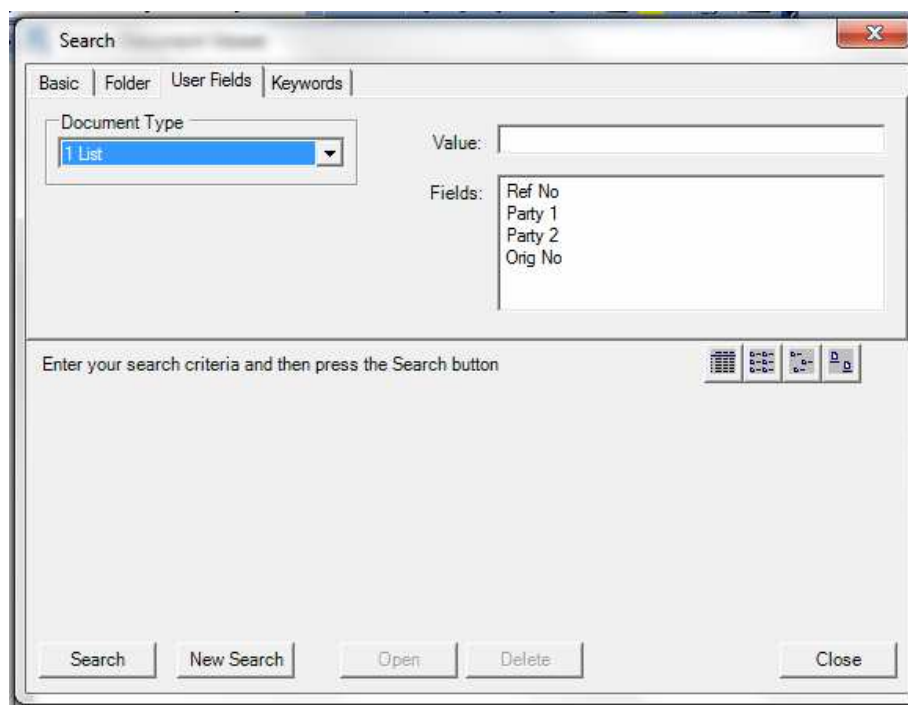
After choosing criteria, accept them by clicking Search button. You will receive a list of folders which lived up to the criteria.

Type	Format	Pages	Size	Description	Name
1 Contract	MSG Microsoft ...		24 KB	fftttsss	BTW
1 Contract	PDF Adobe Acr...		14779 KB	Important	Sth
1 Drawing	PDF Adobe Acr...		767 KB	forecastin	GoldenLine
1 Drawing	MSG Microsoft ...		40 KB	robert bosch	tordes
7 Book	DOCX Microsoft ...		324 KB	kotwice kariery	test

You can also manually choose the folder in which searching with following criteria is suppose to be done. You can see the example in the following picture.



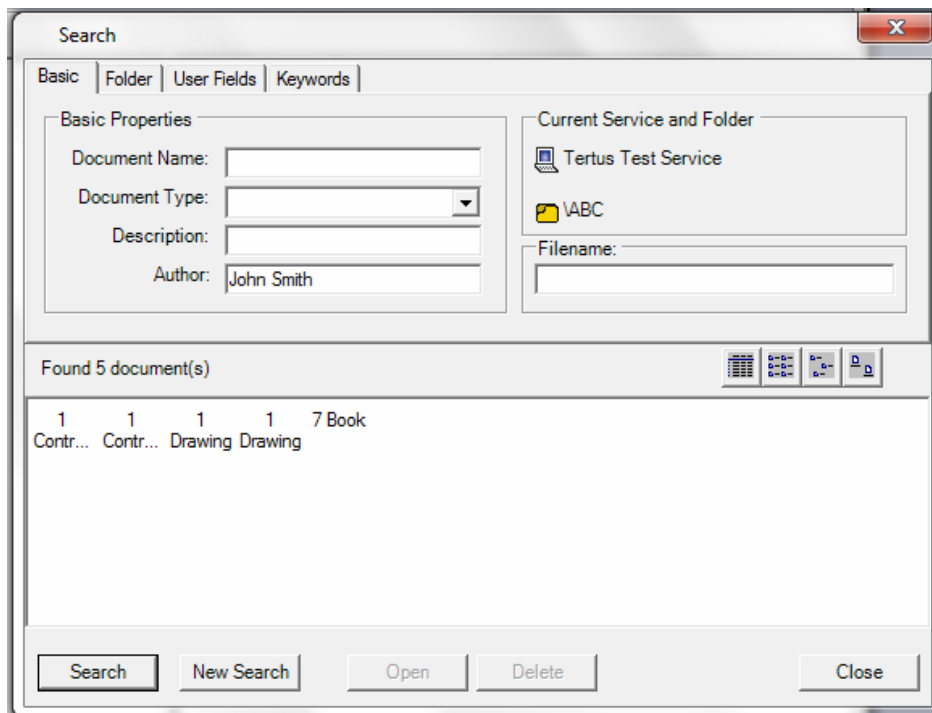
In User Fields bookmark you can choose the Document Type and in Fields window you will see the elements of the archived document.




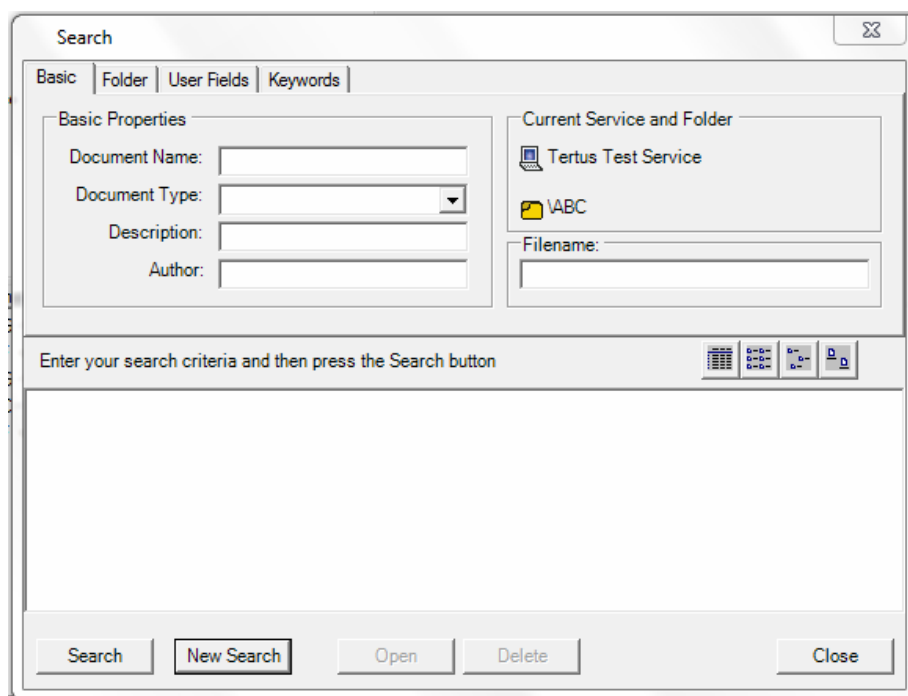
You can also change the view of found documents if you prefer e.g. icons instead of list. To attain this effect click one of the buttons:



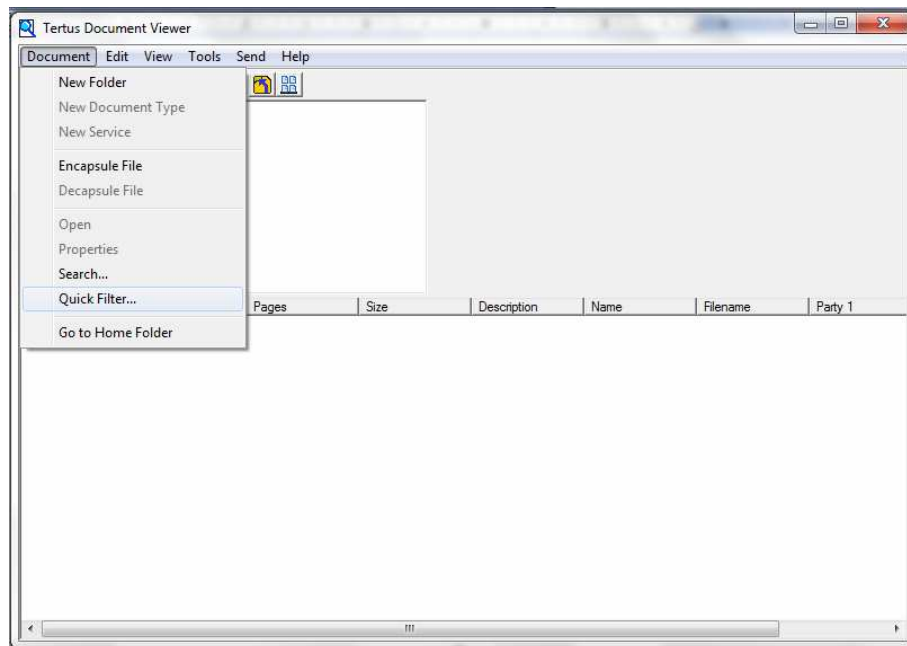
You can see example of the result, in the window below.



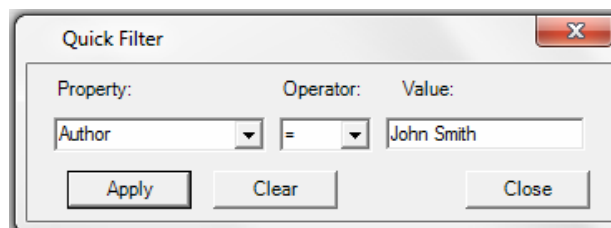
In case you want to start to search for a new document use New Search button. After clicking it you will have clear window prepared to insert new searching criteria. There is also Search button from the context menu ( Search button).



To make a quick search you can also use Quick Filter in the Document menu. Choose the command from the menu by one click.

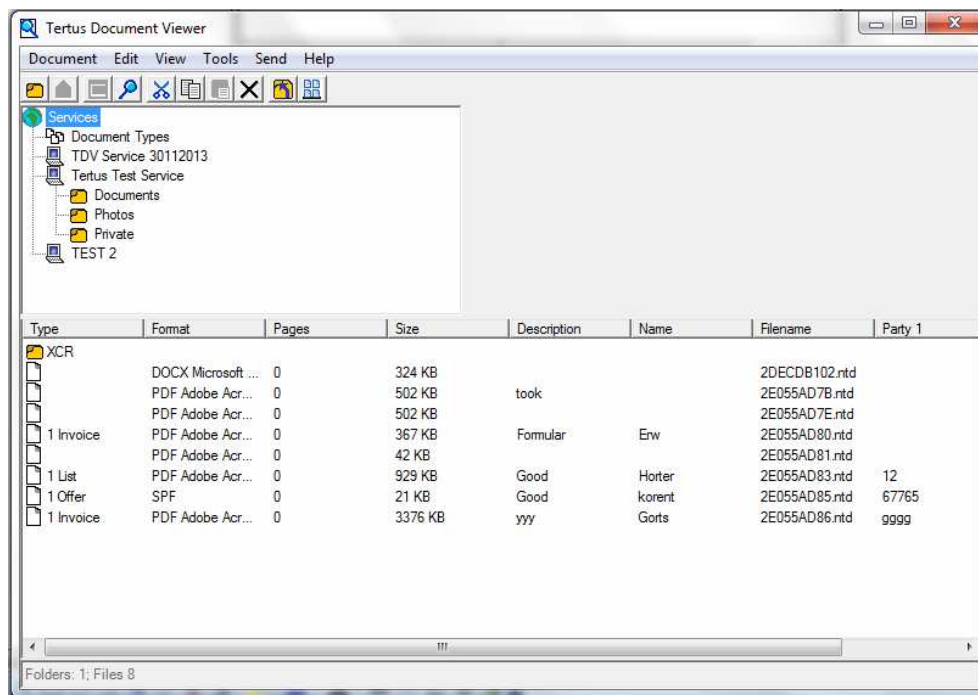


The following dialog window will open:



Type in required criteria: choose property from the list, choose operator and insert value.

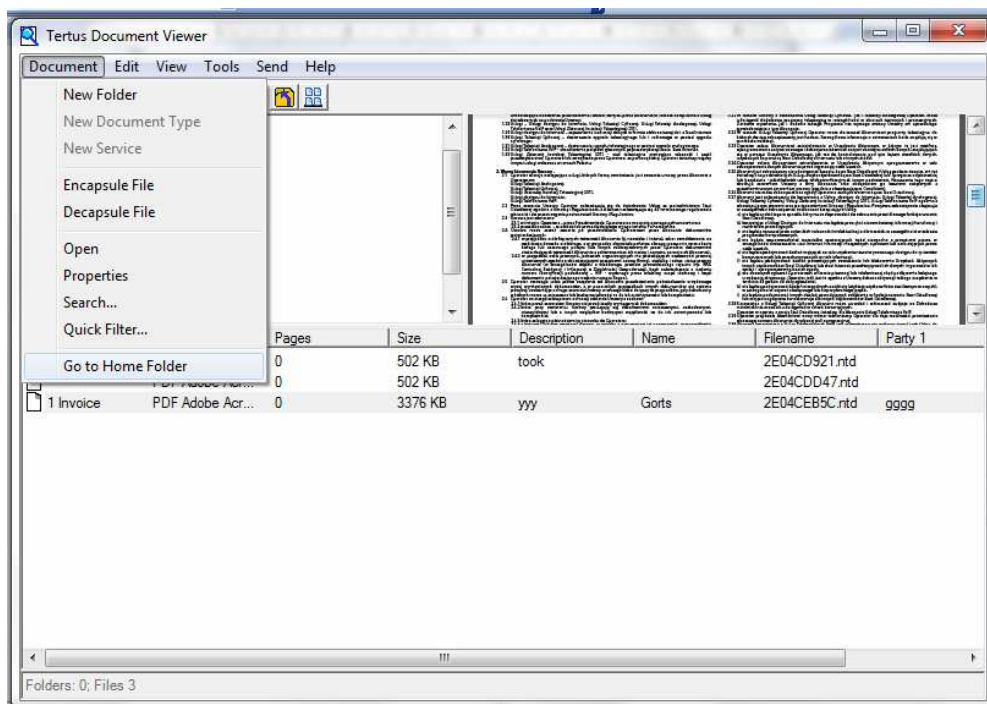
To accept click Apply. In case you want to change criteria click Clear button. When you do not need the window anymore click Close button. The effect of this searching you will see below.



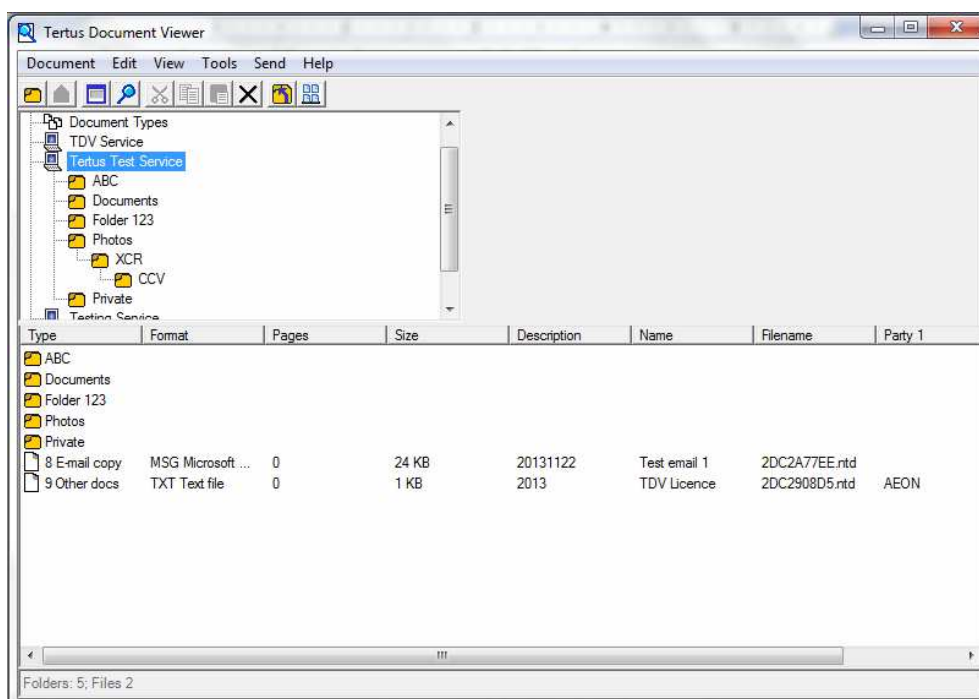
Navigating within the folders

Moving to Home Folder

You have a possibility just with one click to move back to Home Folder.

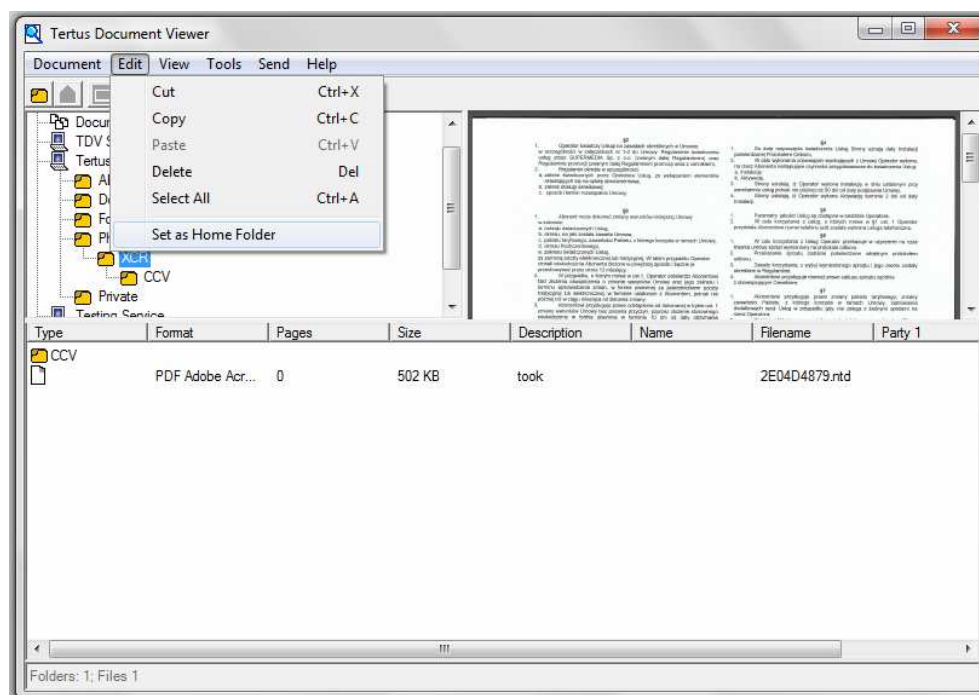


You will be automatically moved to the main folder.



Setting new Home Folder

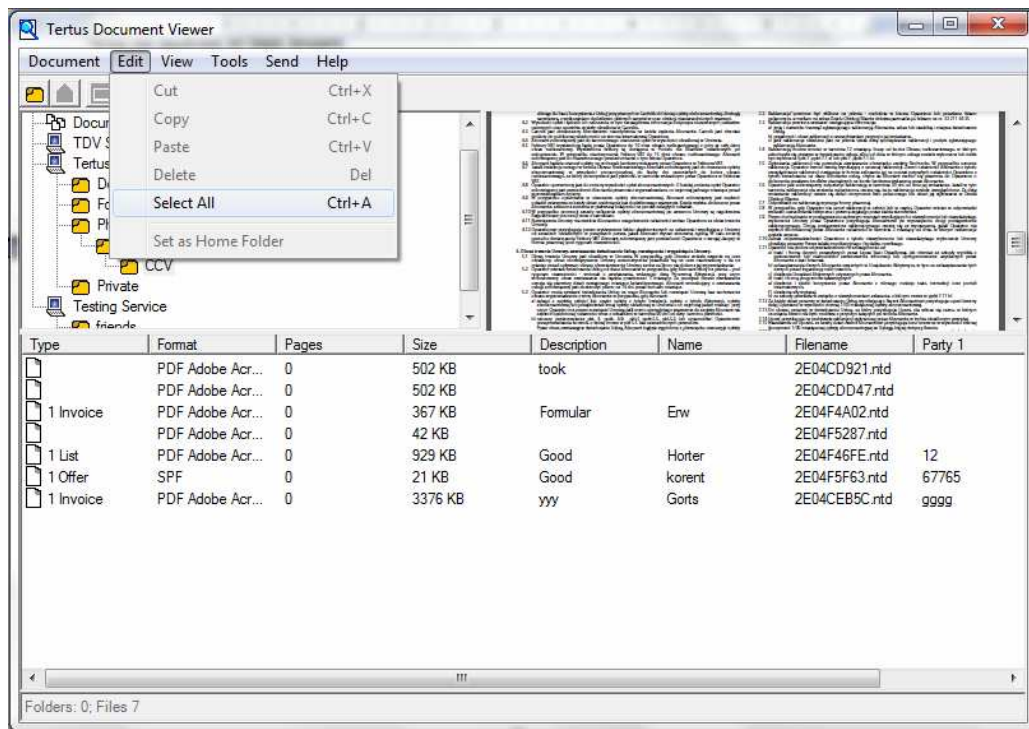
In case you want to set other folder than this as Home Folder you can do it from Edit menu level. By clicking once, on the folder, you want to set as new Home folder, highlight this folder and then choose Set as Home Folder command from the menu.



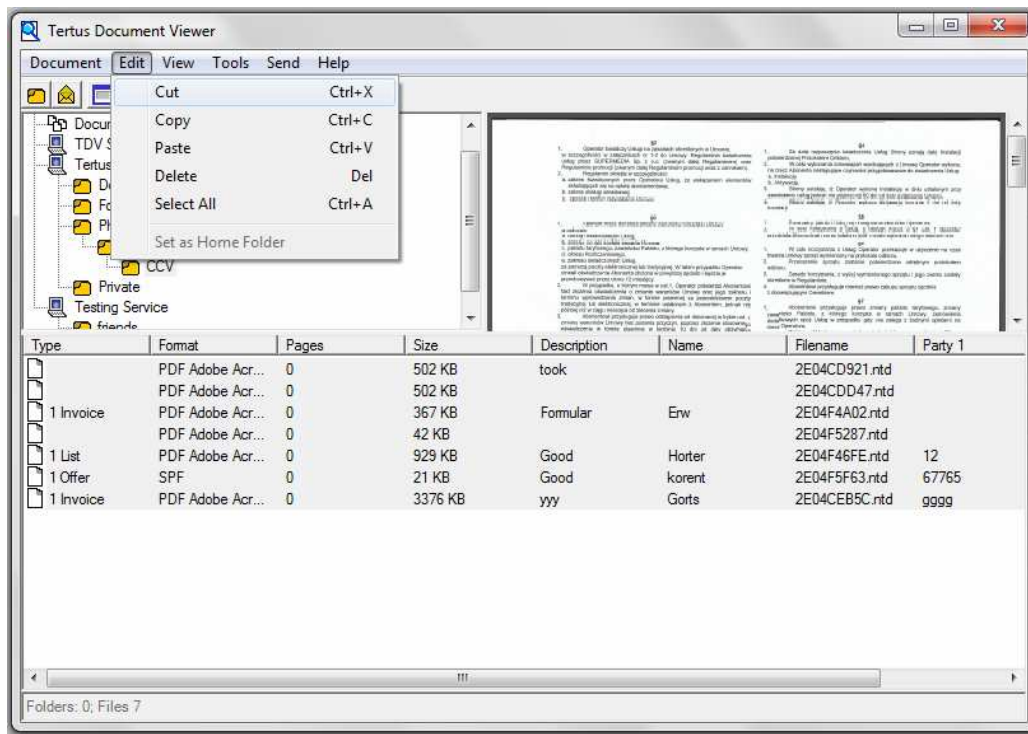
After this operation, using Go to Home Folder command from Document menu you will be moved to this folder.


Cutting, Copying, Pasting and Deleting Folders

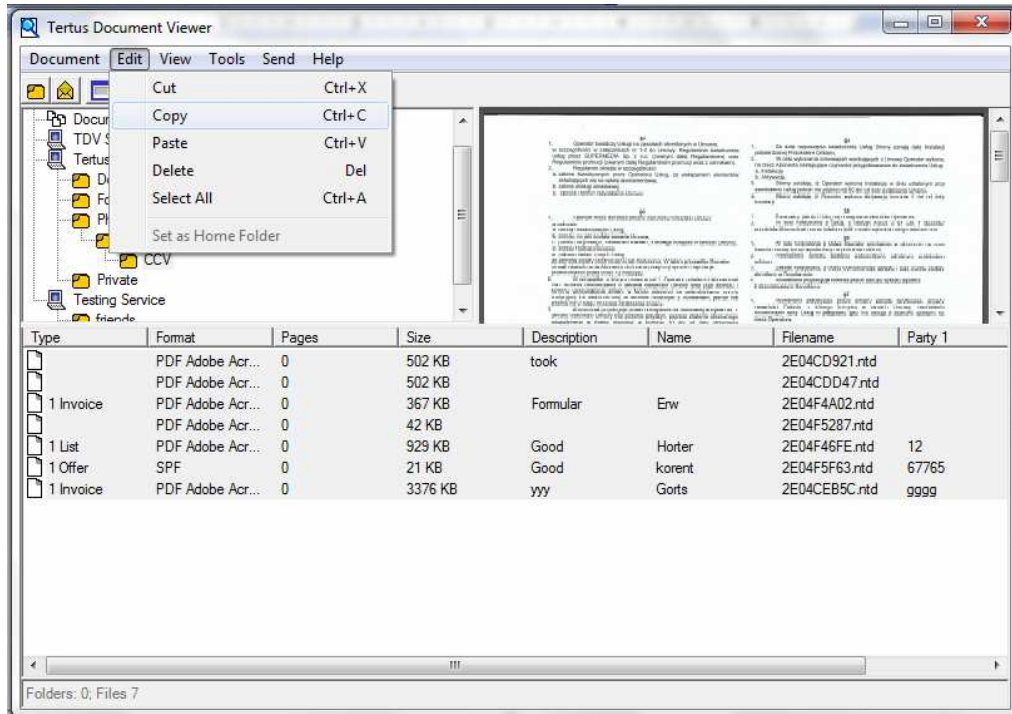
There is possibility to cut, copy, paste or delete selected folders in very quick way. In order to do that, use Select All command from Edit menu. By this command you will select all documents in folder.



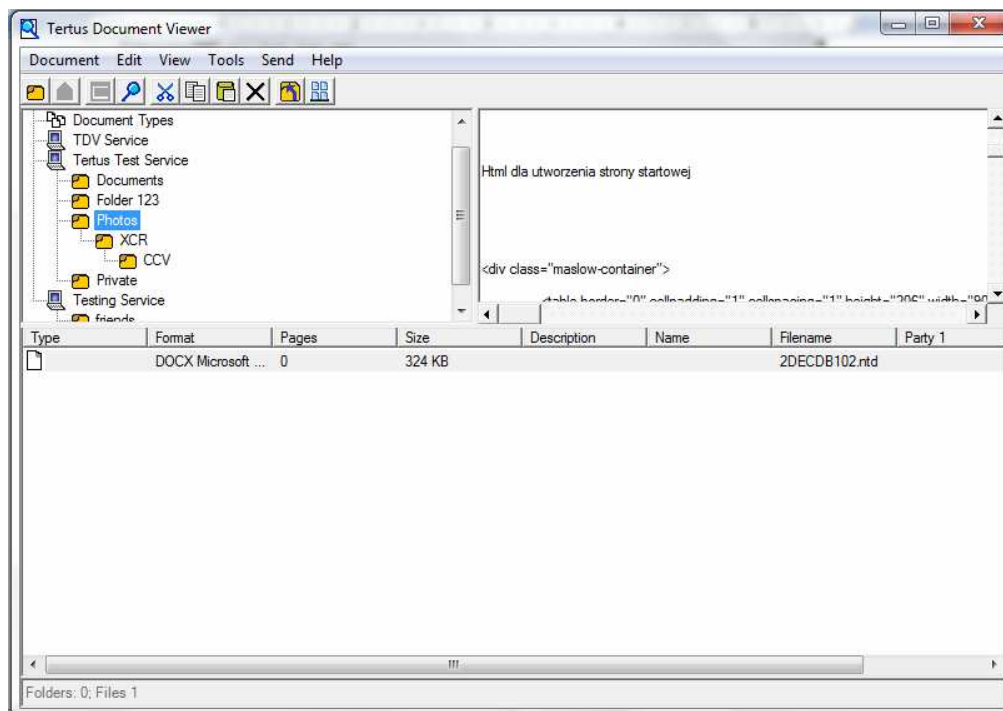
Now you can decide what to do with selected documents. In order to cut use the Cut command from Edit menu, click Cut button from context menu (✂ Cut button) or use hotkey Ctrl+X.




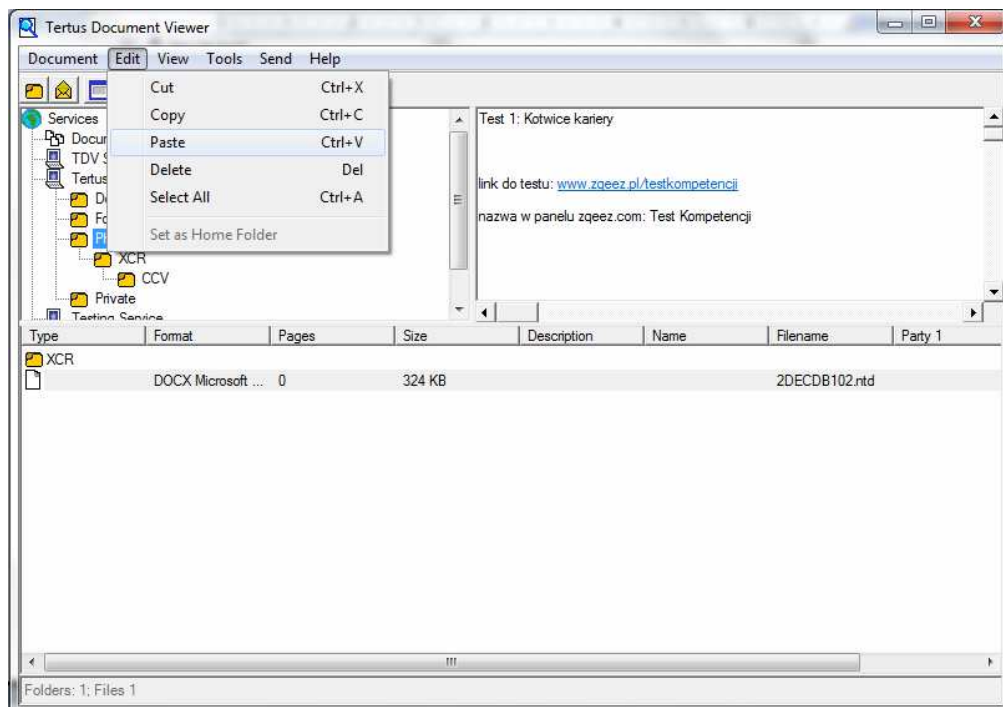
Other option is to copy documents and later to paste them in selected folder. To do that so firstly to copy document you should use Copy command from Edit menu, Copy button from context menu ( Copy button) or use the hotkey Ctrl+C.



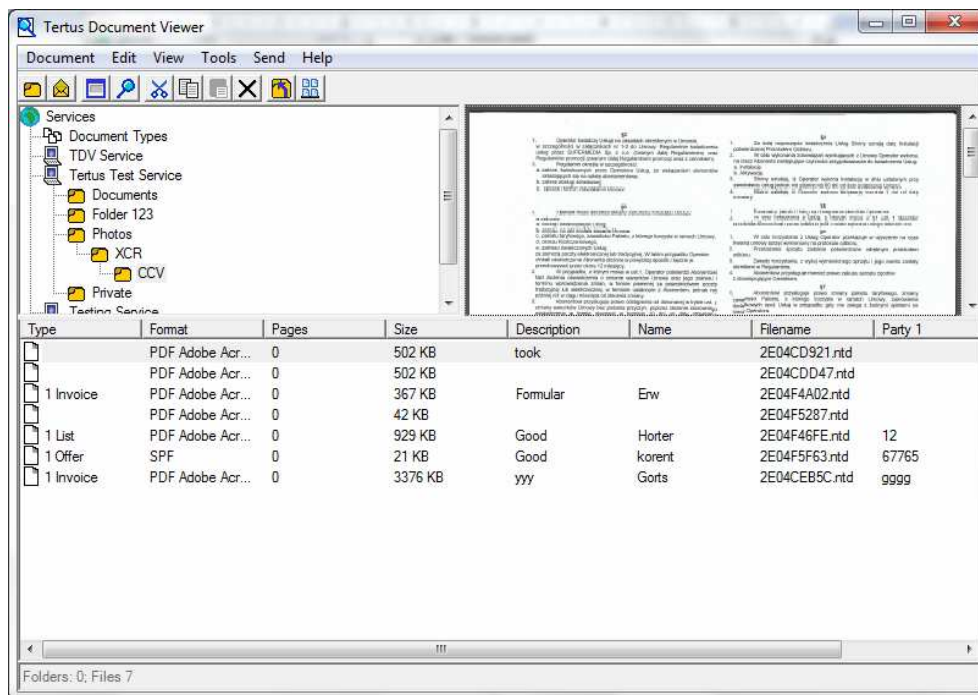
Now you should choose the folder to which you want to cut or copy selected documents.




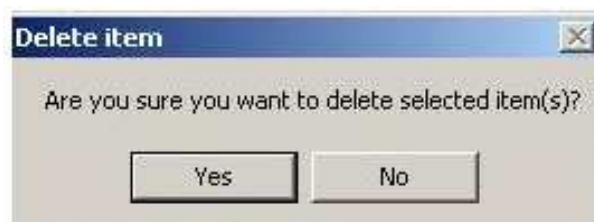
Now you should use Paste command from Edit menu, use Paste button from context menu ( paste button) or use hotkey Ctrl+V.



You will receive the following view on the selected folder to which you have moved the documents.

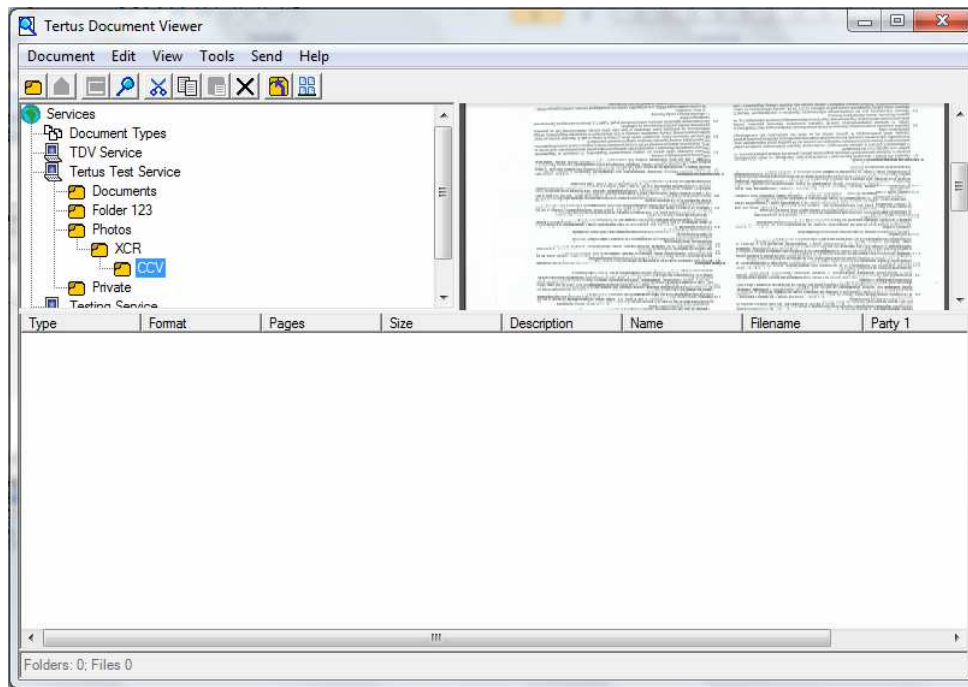


In order to delete selected documents from the folder use Delete command from Edit menu use Delete button from context menu ( delete button) or use key from keyboard (Del). Program will ask you again if you are sure to remove the documents. You will see the following dialog window.



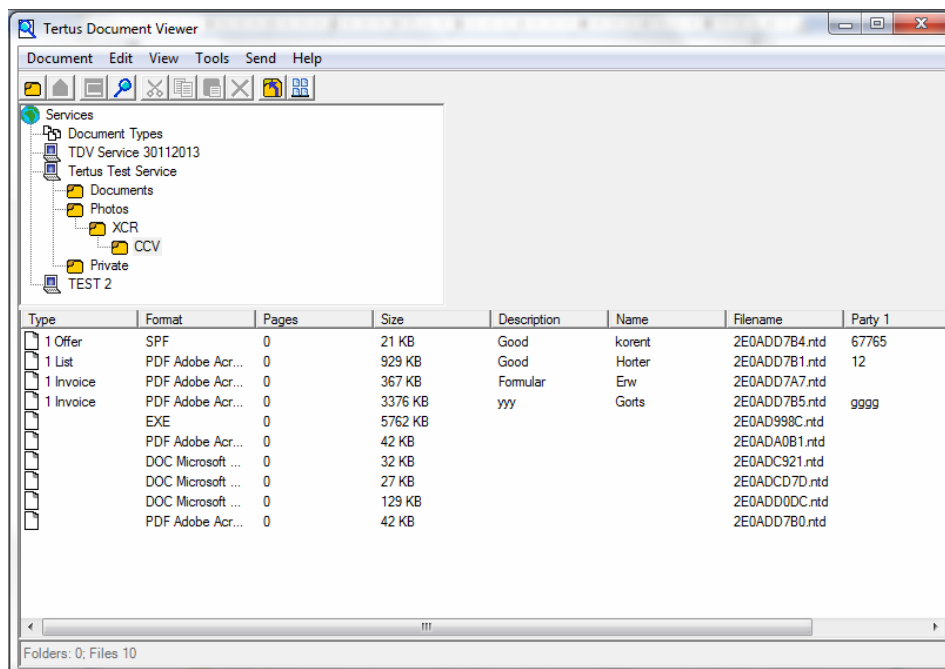
If you are sure click Yes, if not, click No.

If you have chosen Yes selected documents will be removed.

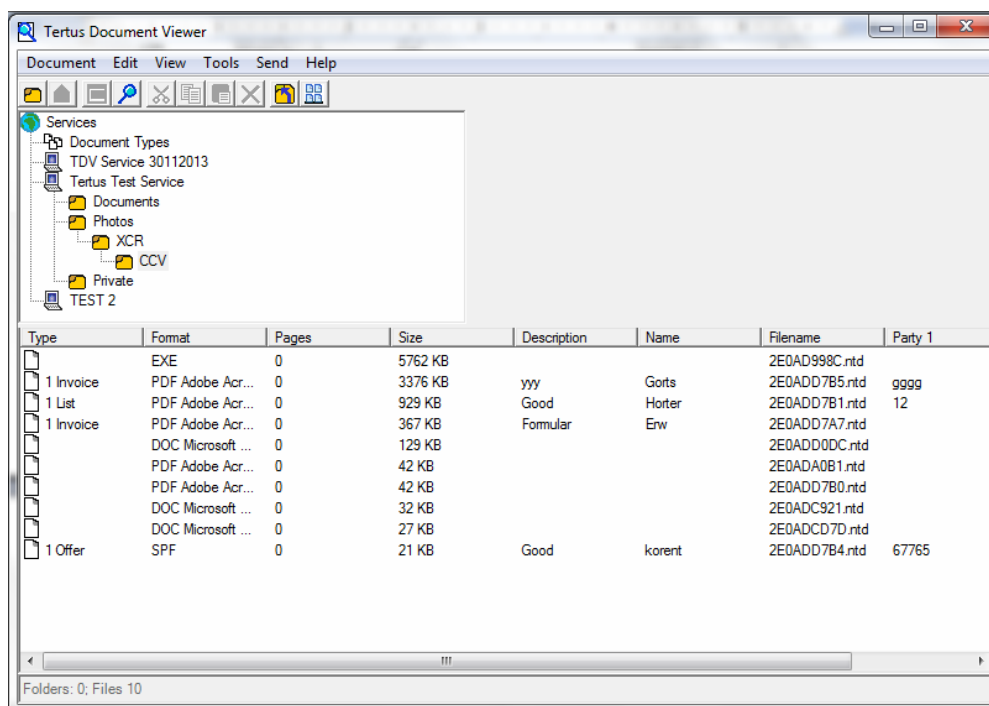


Sorting documents

We can sort the documents by clicking on the header of chosen column. The example of descending sorting by Type you can see below.



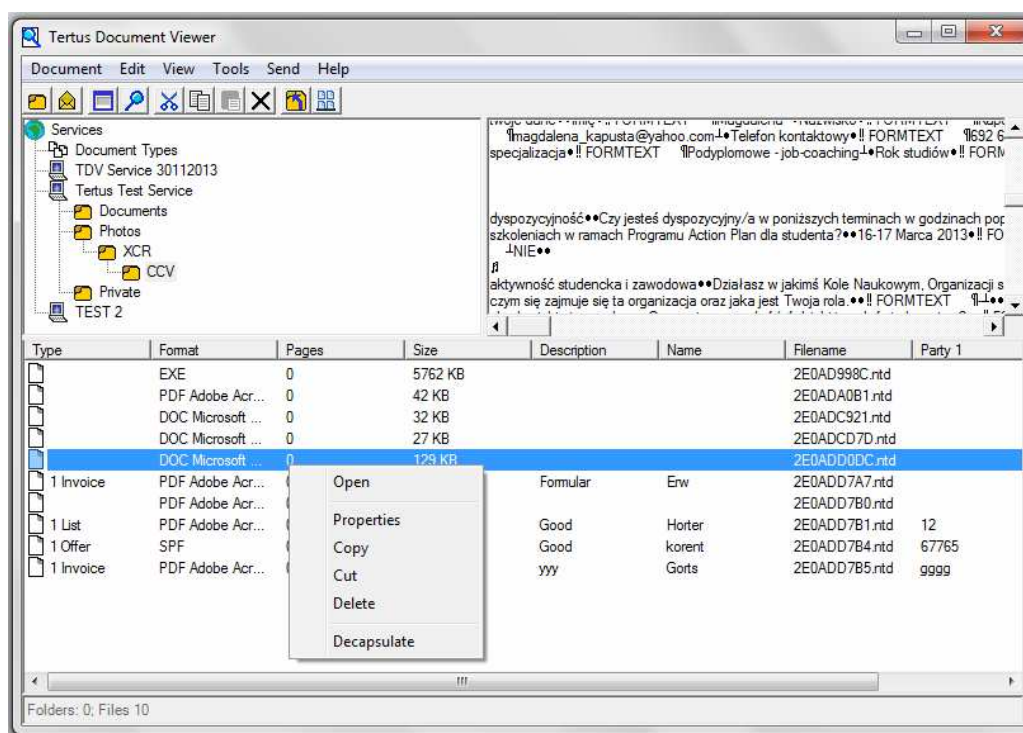
The example of ascending sorting by Size you can see below.



Navigating from the level of files and folder tree previews

Depending on the document type you will have a possibility to make several actions.

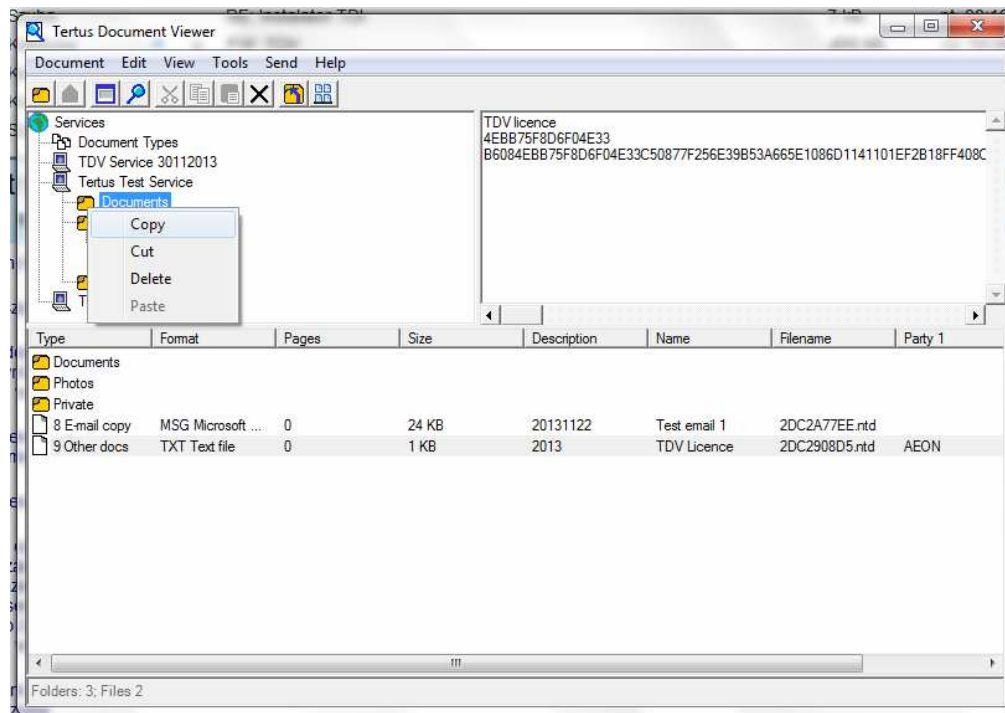
Two of the possibilities are visible below. In case you want to open document not just have a preview of it you should do that by clicking twice on selected file or clicking with right button of mouse and opening the list of tasks visible below.



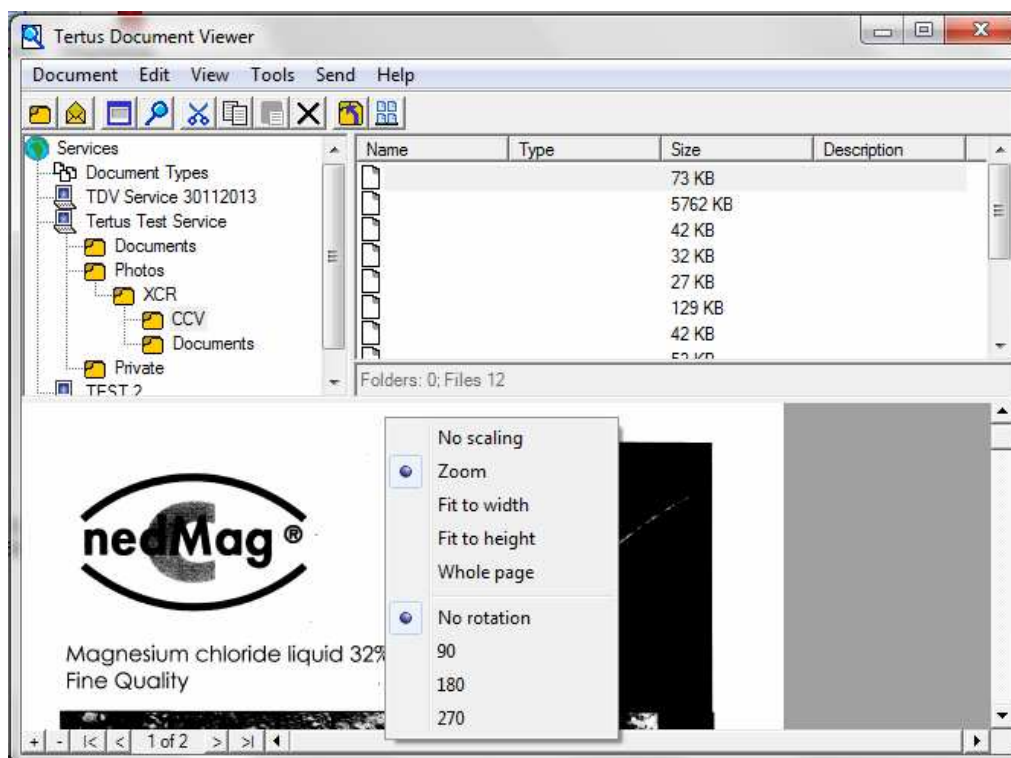
Selected document will open automatically in dedicated program.

Also by clicking the list of tasks you can set properties of the file, copy it, cut and paste or delete. You can also decapsulate the file.

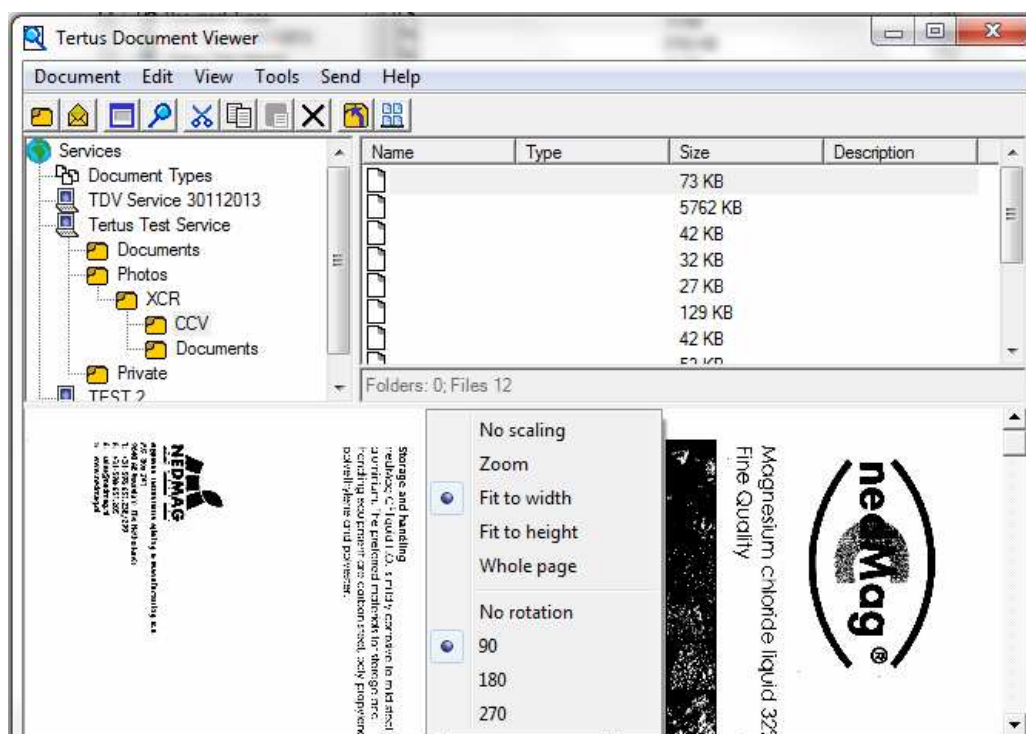
Similar possibility to act with the files and documents you have from the level of folders. You can Copy, Cut and delete or also paste whole folders or documents.



In case of scanned documents, which will be automatically send to tif type of the file, you have a possibilities to set e.g.: visibility of the document within the page and rotation. In the picture below you can see the default settings.




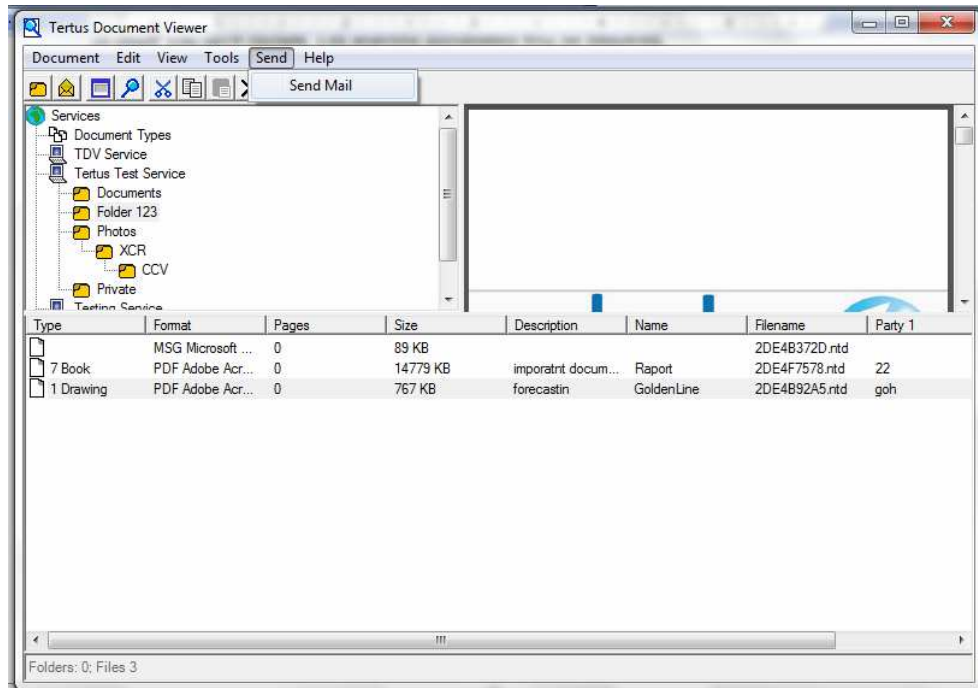
If you need to change the view of the document choose the settings you wish. The example you can see in the picture below:



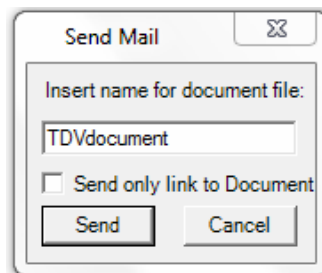
Sending documents via E-mail

You have a possibility to send selected document via e-mail and you have two possibilities to do that:

- by using Send Mail command from Send menu
- by clicking Send button from context menu ( Send button)



After using command of clicking Send button the following dialog window:

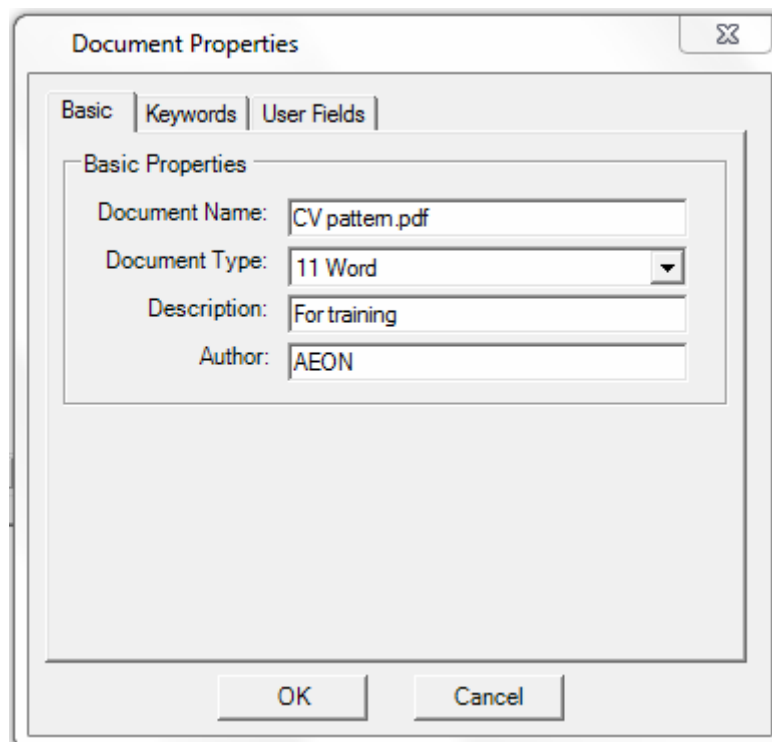


You can send just link to selected document. In this case tag the “Send only link to Document”. In case you want to send whole document do not tag this option. After you click Send you will be automatically directed to mail program you are using. In case you want to cancel action click Cancel button.

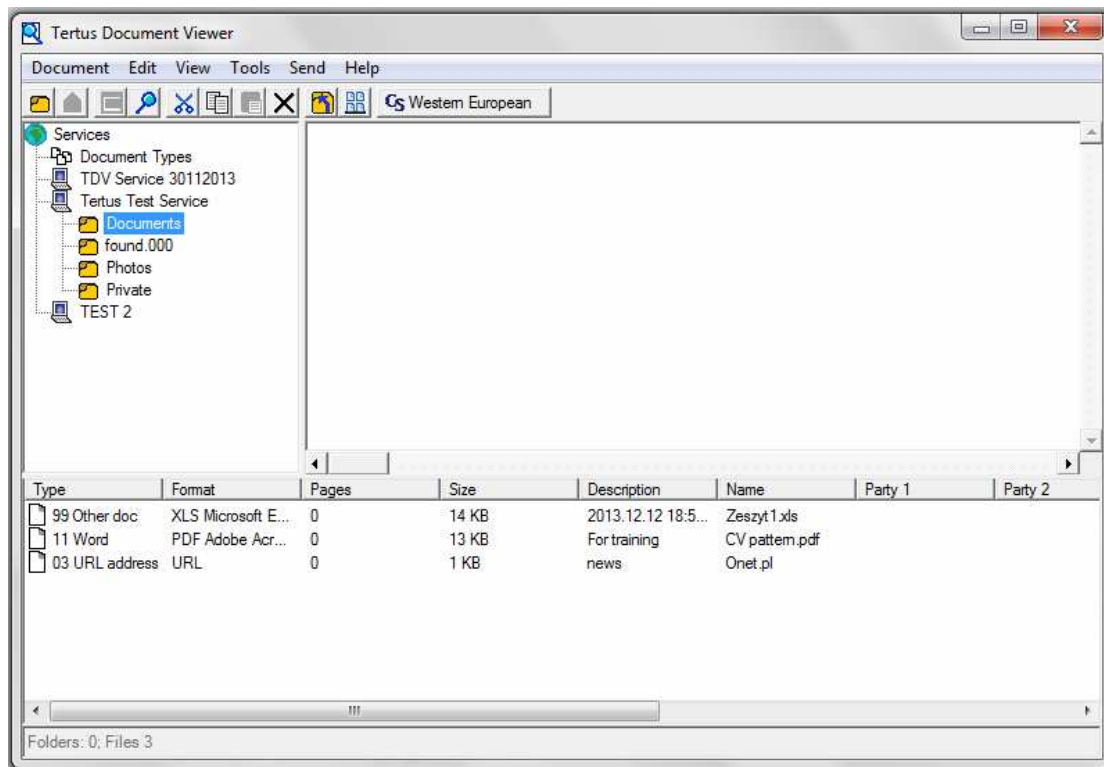
Drag and drop function

This function gives you possibility to drag documents from place where they are stored to chosen folders TDV, so it is an easy and quick way to place document in archives of TDV. You can also archive emails by dragging them directly from Outlook to TDV. You have possibility to drag into TDV archive single documents/emails or whole folders.

If you want to drag document/mail click on it and holding it move/drop selected document in chosen folder. During dragging you have possibility to set properties of the document/mail e.g. name, date, author etc. The example you can see in the picture below:

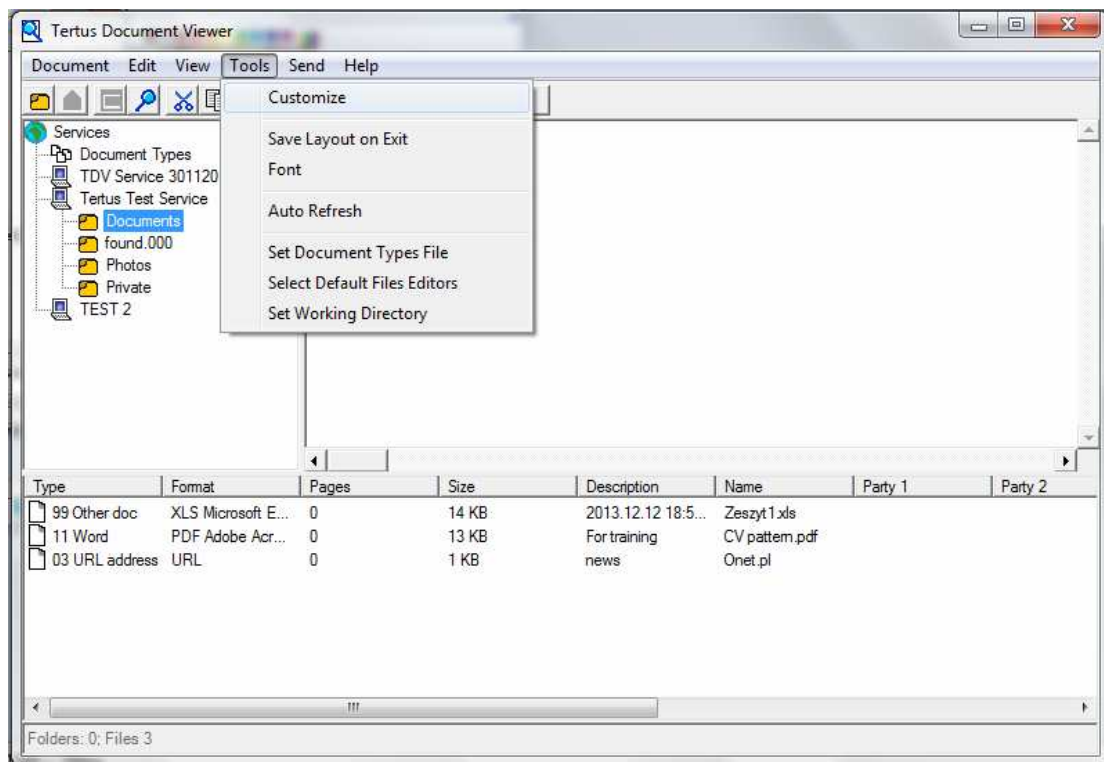


You can change, adjust or complete properties of the document, you are archiving. Those are: name of the document, type, description, keywords, users areas. In case you do not want to continue click Cancel. In order to accept click OK. You will see result of your action in the picture below.

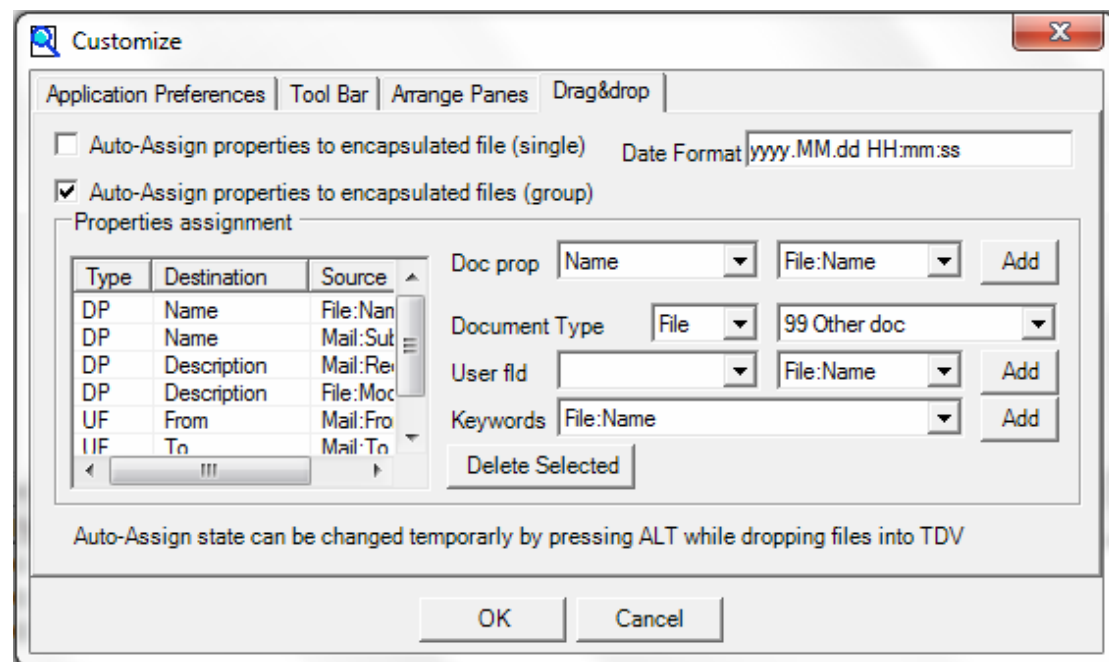


Setting Drag & Drop options

In order to set your own preferences use Customize command from Tools menu.



You will see the following dialog window:

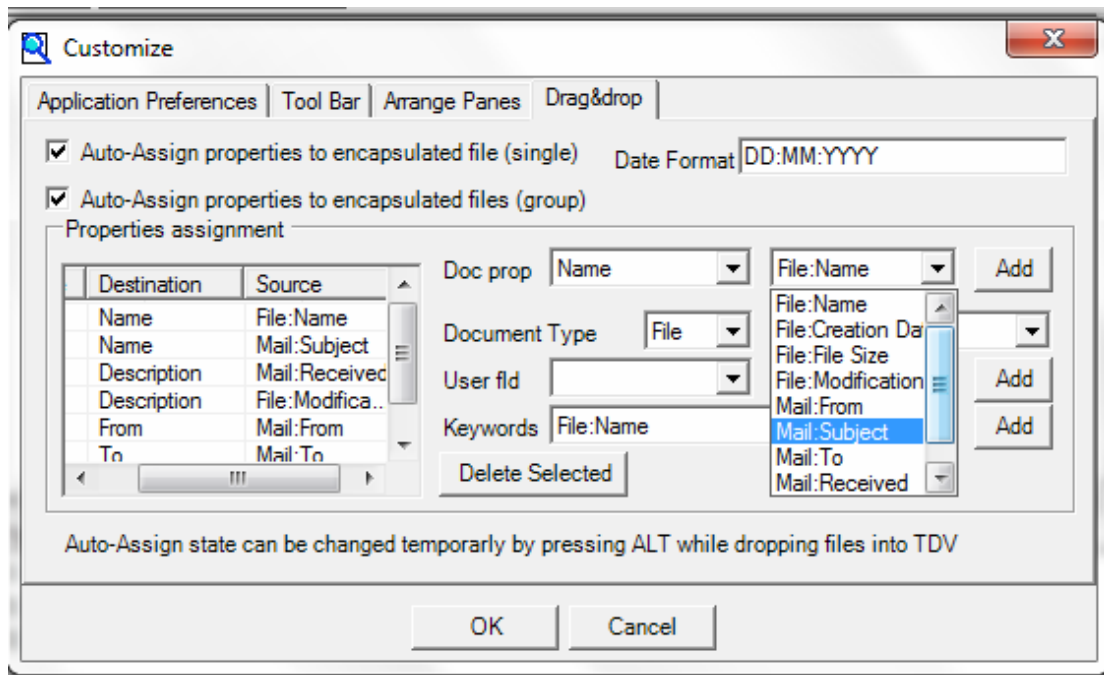


In Drag&Drop Tab you have possibility to adjust the default client package to your needs. You can adjust the following options:

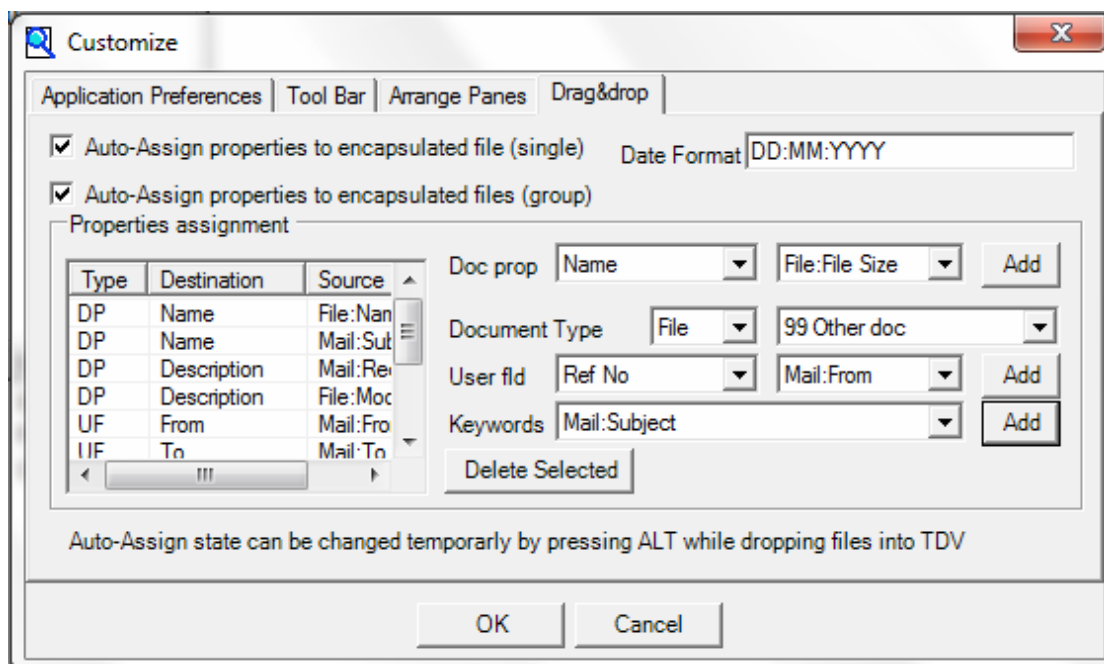
- Auto-Assign properties to encapsulated file (single) – gives you possibility to add automatically information, which comes from source document properties, for single document that is added to archive.
- Auto-Assign properties to encapsulated files (group) – gives you possibility to define if you want to assign information, which comes from document properties, for the group of documents, which we add to archive
- In „Date Format” window exists possibility of setting date format (e.g.. yyyy means year, MM - month, dd – day, HH – hour (HH for time in 24-hours format or hh for hour in 12-hours format), mm- minutes, ss – seconds.

In Type/Destination/Source Table User may specify the source of data.

In this Table User have a possibility to adjust information which are taken from the source file properties and added to the archived files (eg. Heading: Destination Name, Reading: Source File: Name – in case of such settings file name, shown in TDV archive folder will be, as default, taken from the folder which we add to archive etc.)



In order to accept use Add button (Add button). Below you will see result of this operation.

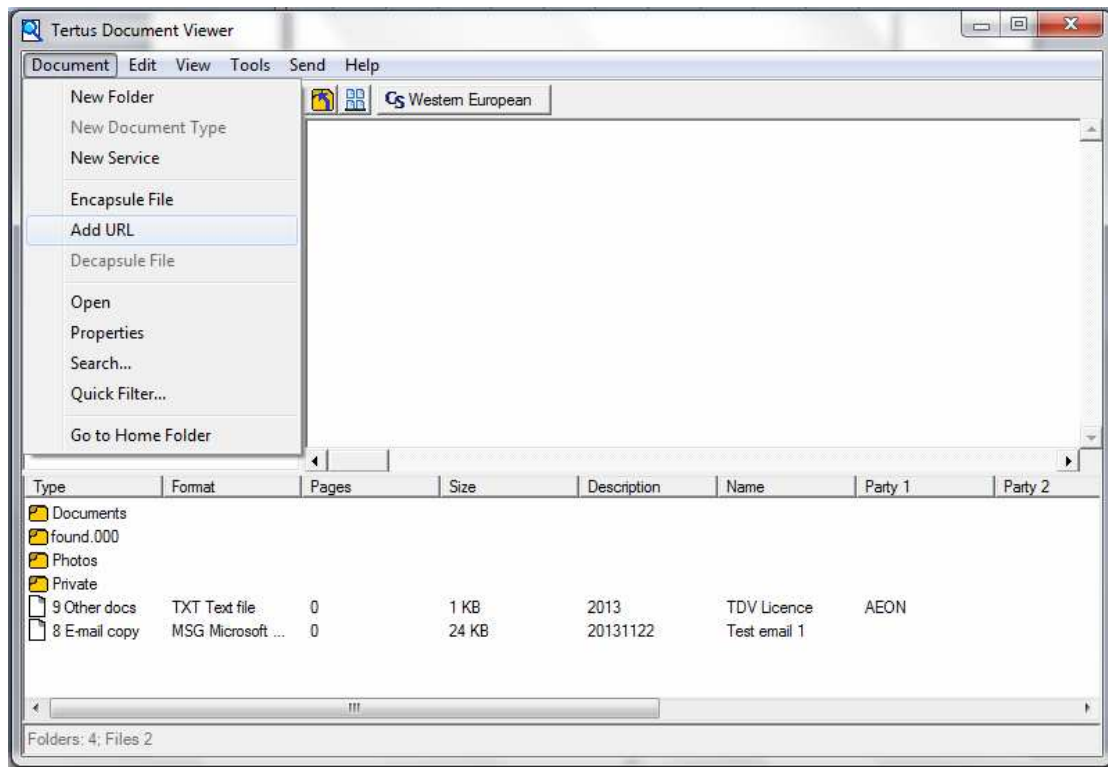


Furthermore drag & drop function lets you easily drag documents from archive by making copies of them (e.g. by dragging them directly on desktop). This function is similar to decapsulation of the document.

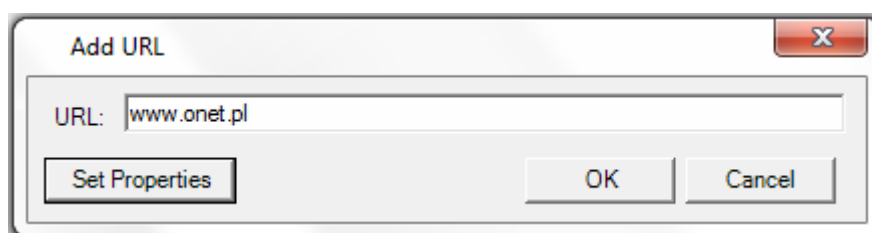
Please note! Using this option you can drag single documents from the archives and whole folder. However there is possibility to add whole folder to TDV archives.

Add URL function

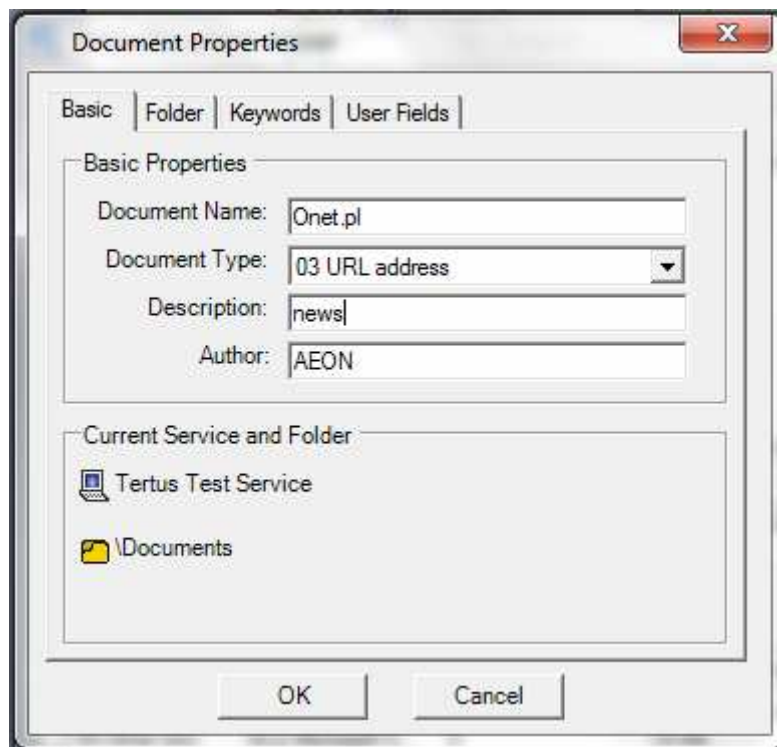
In addition to documents storage function TDV can also be used to archive web sites addresses. In order to use this function use Add URL command from Document menu.



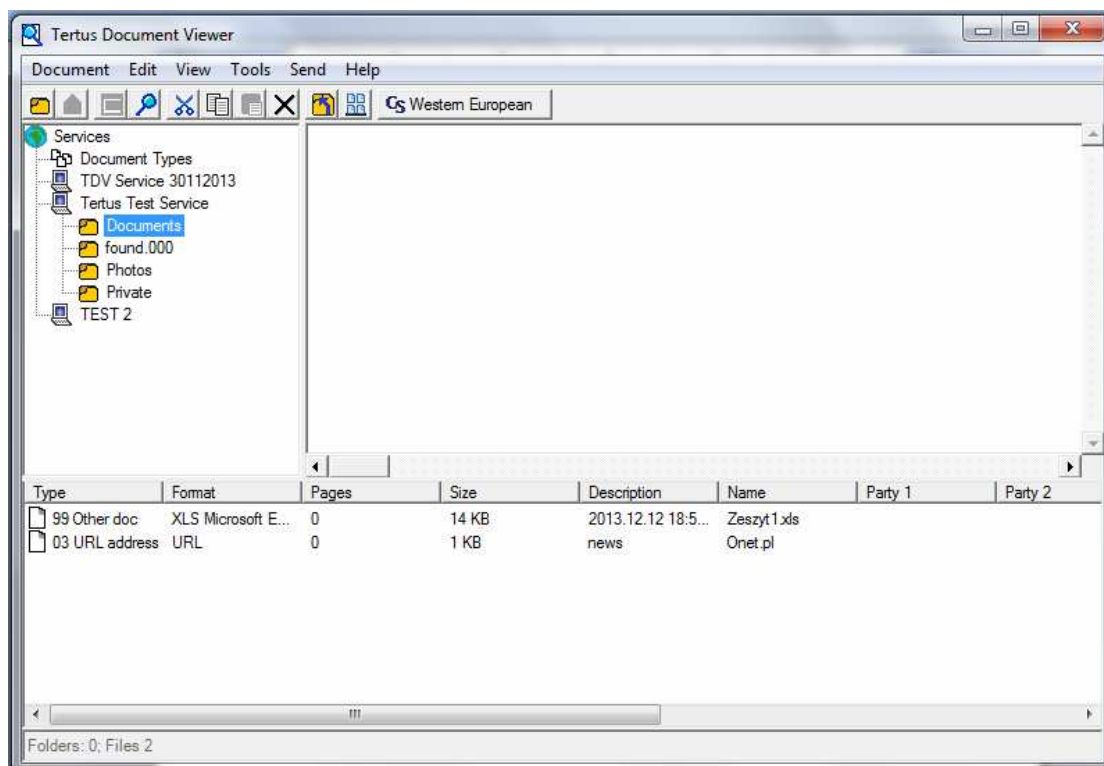
After choosing this command you will see the following dialog box.



Add the URL address. By clicking the button Set Properties you can additionally set some properties of the www address, you are saving. Example you can see below:



Click OK. to accept or Cancel to stop the operation If you decide to continue, you will see URL added to list of documents. The example, please find below:



Refresh

If you want to refresh TDV's view e.g. after any action you should use Refresh command from menu View. Other easy way to use the option is to use F5 button from keyboard.

