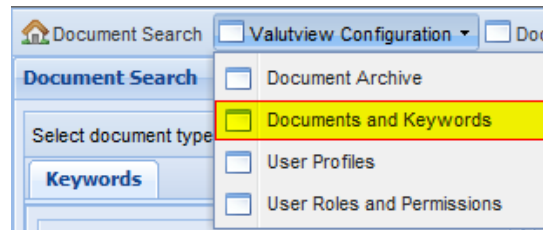




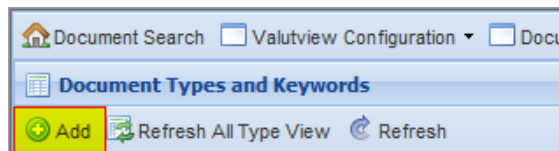
Documents and Keywords – Adding a New Document Type

The following instructions outline the steps to add a new Document Type and Keywords to Vaultview.

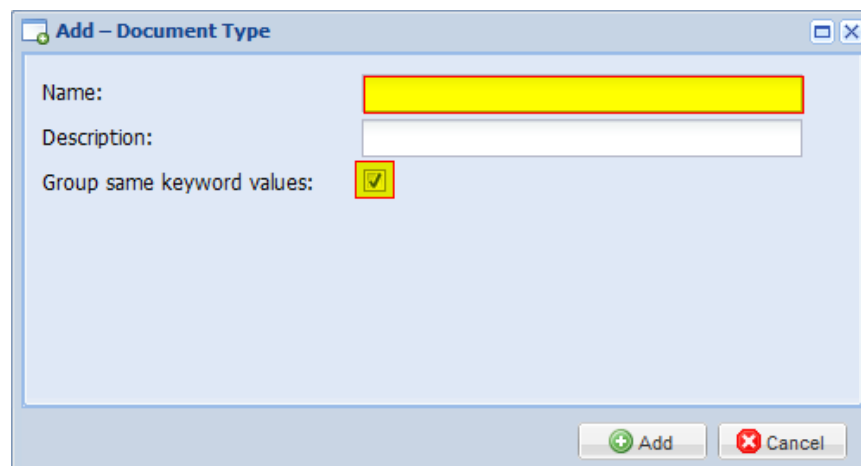
1. Under the Vaultview Configuration menu, select Documents and Keywords.



2. Click the Add button on the Document Types and Keywords configuration screen.



3. Enter Document Type Name and Description in the Add Document Type dialog. (ie. Name: Invoices, Student Records. Description is optional.)
 - a. Group same keyword values: Allows documents to be updated by adding new pages at a later date. New pages are appended to previously created documents based on 'like' keyword values. (Recommended setting is enabled.)
 - b. Click Add once completed.

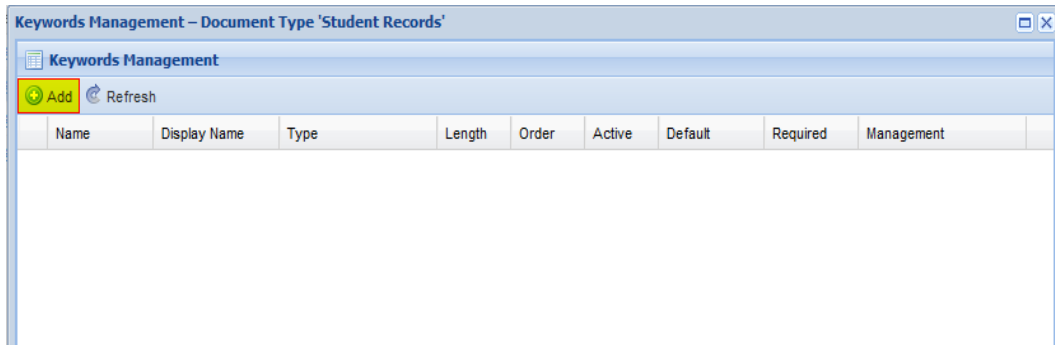




4. Click Keywords to Add index keyword fields.

ID	Document Type Name	Description	Group	Inactive Data Size	Document Type Management	Keyword Management
5	Student Records		true	0 bytes		

5. Click Add to create a new keyword.



6. Configure by selecting or entering the following:

- Document Keyword Type: Single Line of text, Choice Menu, Number, Date and Time.
- Enter the associated Keyword Details to the right. Keyword Name is the database field name and should not contain spaces. The Display name is the customizable user friendly name and may contain spaces.
- Click Save once completed.
- Repeat Steps 5 and 6 for each Document Keyword.

Add - Keywords

Keyword Types:

Document Keyword Type:

- Single line of text
- Choice Menu
- Number(1,10,100)
- Date and Time

Keyword Details

Keyword Name: Display Name:

Display Order: Required:

Active:

Max Characters: Default Value:

Description:



7. Once you have completed adding Keywords the New Document Type is ready. Documents can be added through Document Management | Manual Upload tool in the web client.

Note: Importing batches of images must be done through the Vaultview Admin Utility located on the Vaultview Server. If your Vaultview solution is a hosted through Tronitech you will need to contact Tronitech Technical Support for assistance.

8. Add or Update User Roles by assigning appropriate Document Permissions for the New Document Type.