FEITH

WebFCP
Version 9.2
User Guide

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All information in this work is subject to change and reflects software current at the time of publication.

Feith Systems and Software, Inc.
425 Maryland Drive
Fort Washington, PA 19034
Tel (215) 646-8000
Fax (215) 540-5495
www.feith.com

Table of Contents

Introduction

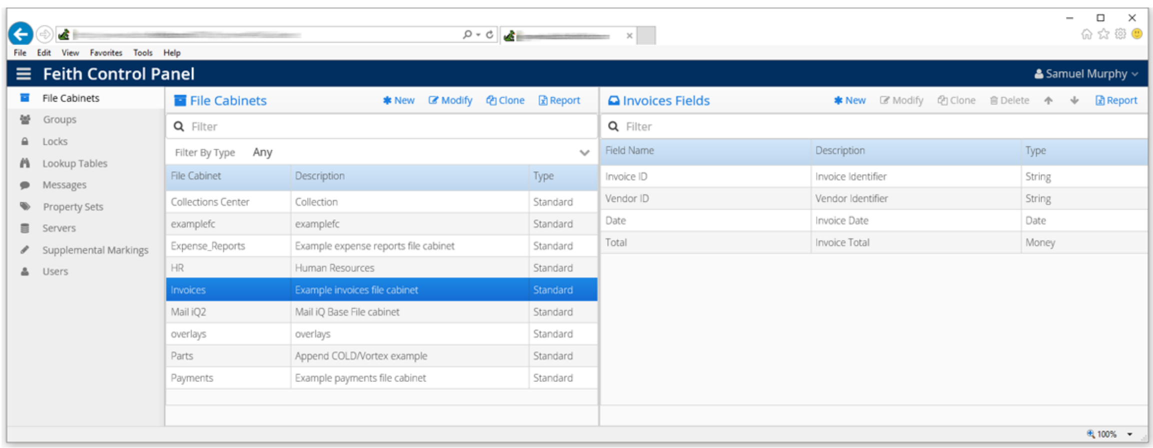
Welcome

Use **WebFCP** to administer your FDD system by creating and managing users, groups, file cabinets, permissions, and more. When starting out, you need to define the file cabinet structures that will store your documents and outline the security scheme your organization needs.

Get started:

- Define and create file cabinets to store your documents
- Set up a security scheme
- Create users and put them in groups
- ...and more in all the FCP modules

All you need is a browser on your desktop to login to WebFCP and manage your FDD system. A desktop version of FCP that is installed on your computer is also available.



What's New?

- **Easy Access to Common Tasks:** A few of the modules have a split display and on the right-hand side is quick access to the common maintenance tasks you have to do most often. In Groups it is the user membership, in Lookup Tables it is the lookup values, in File Cabinets it is the file cabinet fields, and more.

- **Filters:** Use the **Filter** fields provided in various modules to find what you are looking for quickly, such as in File Cabinets, Lookup Tables, Property Sets, and more.

- **Users Advanced Search:** Easily access the new Advanced Search in the Users module, where you can choose and combine various search criteria to quickly find the users you need to find. You can also look for the members of a certain group or search on last login by date range. See Advanced Search for more information.

- **MS Excel Reports:** Almost every list has a Report option which will create a MS Excel file containing the data that is currently visible. If you want to report on a subset of the data, simply use the filter.

- **Property Sets:** Create and manage sets of properties that can be assigned to documents in FeithDrive or for RMA iQ. Make property sets for different types or groups of documents, without being bound to a specific file cabinet. See Property Sets for more information.

- **Login Message:** On login WebFCP displays the logon message (AKA "message of the day"). See Messages for more information.

- **Lock Searching:** In the Locks module, you can use the Filter fields to easily search for a specific user who has locks or search for a specific document which is currently locked by doc_id/idx_id. See Locks for more information.

- **System Info:** If you are a Super Administrator, you can access the System Info module and view, but not edit, system settings that in are the database. This new module also houses the System Preferences. See System Info for more information.

- **Show Table or Column:** When creating a file cabinet or adding file cabinet fields, you can click the Show button (with the eye icon) to see the internal table name or column name that is generated based on your chosen name. See Add File Cabinet and Set File Cabinet Field Options for more information.

- **Info Tab:** When modifying, an Info tab displays the object’s internal ID plus creation and modification information. This is supported for users, groups, file cabinets, and messages.

Frequently Asked Questions

Why can't I see the module I need?

> There are various settings required to access a module, including what level of administrator you are and what task permissions you have. See FCP Module Access for more information.

Can I make a less-powerful administrator who can maintain their own groups and file cabinets?

> Yes, you can make a mid-level administrator who has limited powers but can still maintain their own objects. See Levels of Administrators for more information.

Why are no users listed by default in the Users module?

> If your system has more than 1,000 users, the user list is empty by default and you must use Advanced Search in order to get a list of users. See Advanced Search for more information.

Why can't I deny task permissions in a group?

> In a group, clearing a task permission (making it unset) would be a the same as denying the task permission. Since the two are functionally the same, deny is not an option for groups.

When the user is viewing a file cabinet in FDD Client, they do not see the field I just added?

> The user may have set **Column Preferences** in FDD Client. If they reordered or hid any columns using this feature, any new fields are automatically added as hidden fields. See FDD User Guide for more information.

When the user does a search in a file cabinet, they are getting back case-sensitive results. Can I change the results to be case-insensitive?

> Yes. Change the **Case** on the file cabinet field to be **Mixed Case Insensitive**. Note that this search may be less efficient. See Set File Cabinet Field Options for more information.

Can I change the name of the table and columns underlying the file cabinet?

> No. You can change the friendly file cabinet name or field name that display to end users, but the file cabinet's table name and field's column name will remain unchanged.

Can I use another table or view as a Lookup on a file cabinet field, instead of the standard lookup tables?

> Yes. You can use any view or table in your database as a **Lookup Table** on a file cabinet field. Instead of selecting a lookup table from the list, simply type in the view or table name and the column name(s) in the file cabinet field options. See Set File Cabinet Field Options for more information.

When editing a property, some options are not available that I did see when I was creating the property?

> Some settings are significant enough that it isn't appropriate to edit them at the property set level. Remember, when you are editing a property in a property set, you are only changing the property *in that one property set.* The property may be assigned to other property sets which will remain unchanged.
>
> Therefore, some settings can only be viewed and changed in the "base" property, which is essentially the underlying file cabinet field in the Document Properties auxiliary file cabinet.
>
> Simply click **Modify Base Property** in the **Modifying Property** dialog to access the settings you need to view or change. See Manage Properties and Manage File Cabinet Fields for more information.

When editing a property, some options are disabled that I could change when I was creating the property?

Some settings are significant enough that it isn't appropriate to edit them at the property set level. Remember, when you are editing a property in a property set, you are only changing the property *in that one property set.* The property may be assigned to other property sets which will remain unchanged.

Therefore, some settings can only be changed in the "base" property, which is essentially the underlying file cabinet field in the Document Properties auxiliary file cabinet.

Simply click **Modify Base Property** in the **Modifying Property** dialog to access the settings you need to change. See Manage Properties and Manage File Cabinet Fields for more information.

I changed the "base" property, but the changes were not copied into my property in the property set?

If the property is already assigned to a property set, only significant settings that must take effect are copied into a property already assigned to a property set. More minor settings are ignored. Remember, when you are editing a property in a property set, you are only changing the property *in that one property set.* The property may be assigned to other property sets which will remain unchanged.

If you assigned the property anew to a property set, it would have all the latest settings from its base property. You could remove the property then re-add it to the property set, or simply repeat the change in the property itself.

See Manage Properties and Manage File Cabinet Fields for more information.

Tips and Tricks

- It is recommended to set task permissions at the group level, instead of the user level, as well as grant groups resource permissions on bins, file cabinets, and documents, instead of individual users.

  If you manage permissions this way, you just need to change the group's task permissions in one place and then all the members' task permissions have been updated - no need to go into every user and change task permissions there.

  Also, if you want to stop a user accessing certain file cabinets, you just need to remove them from the group through which they got access - no need to go into every file cabinet and remove the user from each one.

- You can give a file cabinet field a special name in order for the field to be automatically populated with information from the file being imported. FDD and CheckIn automatically populate fields with certain names. See Appendix B: Auto-Populated Field Names for more information.

- Take advantage of the following keyboard shortcuts:

  - **ALT+M** opens module navigation
  - **ENTER** submits pop-up dialogs
  - **ESC** closes/cancels pop-up dialogs

- If you want the module navigation pane to stay open, right-click the **Modules Navigation** button and turn on **Keep Navigation Open**.

- You can create a URL to directly access a specific module that you use frequently. See FCP Modules for more information.

- Clear any criteria from a filter by right-clicking in the filter and selecting **Clear**.

- Instead of using the toolbar buttons, you can often right-click on an object to act on it. For example, right-click a file cabinet and select **Modify**.

- When creating a file cabinet or adding file cabinet fields, you can click the Show button (with the eye icon) to see the internal table name or column name that is generated based on your chosen name. See Add File Cabinet and Set File Cabinet Field Options for more information.

- To assign users to a group faster, you can double-click the user name to move it from one list to the other. See Manage Groups for more information.

- Use any view or table in your database as a Lookup on a file cabinet field. Instead of selecting a lookup table from the list, simply type in the view or table name and the column name(s) in the file cabinet field options. See Set File Cabinet Field Options for more information.

- When entering data in a lookup table, hit **TAB** to move to the next column. When you finish a row, hit **TAB** to go to the next row. You can hit **SHIFT+TAB** to go back if needed. See Enter Lookup Values for more information.

- You can view a report of which properties are assigned to which property sets. See Shared Properties Report for more information.

Login

To login to FCP:

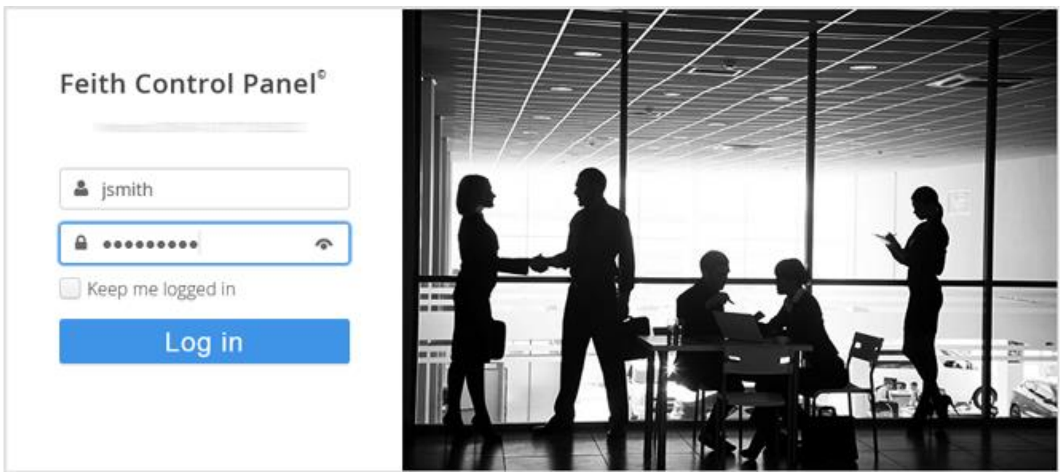
1. Open a browser window and enter the FCP address (e.g. http://prodserv/fcp). The FCP login screen displays.

   If you Single Sign-On, the FCP login screen does not display and you are logged in automatically.

2. Enter your **USERNAME**.

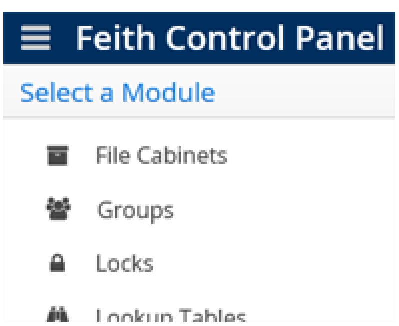
3. Enter your **PASSWORD**.

4. Optionally check **Keep me logged in**. Turn this option on for FCP to remember your login information and automatically login for you, skipping the login screen.

5. Click **Log in**. You are logged into FCP and the modules you have permission to access display. See FCP Modules for more information.

   Note: You may receive logon messages before being logged into FDD. These messages are configured by your administrator in FCP and contain information they want you to be aware of before using the system. You must answer **OK** to the message in order to proceed and login.

FCP Modules

Feith Control Panel contains the below administrative modules. When choosing a module, you must have permission to access and use the module. See FCP Module Access for more information. You can also create a URL to take you directly to a specific module.

File Cabinets
Create and manage file cabinets, which store documents indexed by field values.

Groups
Create and manage groups for your users.

Locks
Unlock locked documents, workflows, and work items.

Lookup Tables
Create and manage lookup tables, which contain a list of suggested values that can be assigned to a file cabinet field to help out users when entering information.

Messages
Create and manage logon messages, which display to end users when they log into the FDD database.

Property Sets
Create and manage sets of properties that can be assigned to documents in FeithDrive or for RMA iQ.

Servers
Create and manage server entries, which are used by Feith applications to call server applications.

Supplemental Markings
Create and manage supplemental markings, which restrict access to documents that are records for RMA.

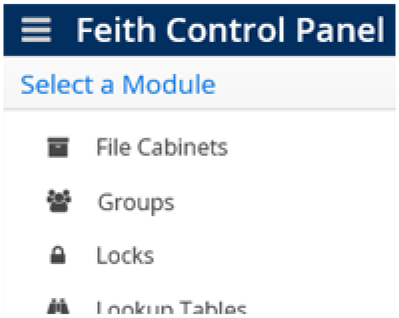
System Info
View FDD system information and also set system preferences, including fiscal year start day and RMA features.

Users
Create and manage FDD users.

Choose Module

To choose a module:

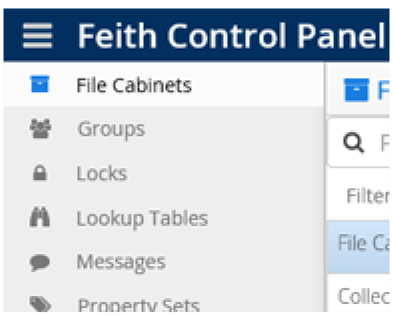
- After you login, select the desired module on the **Select a Module** screen.



Or:

- While viewing a module, click the **Modules Navigation** button (**ALT+M**) in the upper left. The modules list opens on the left and you can select the desired module.

  Tip: If you want the module navigation pane to stay open, right-click the **Modules Navigation** button and turn on **Keep Navigation Open**.



Directly Access Module by URL

You can use a URL to access a specific module directly, instead of having to select the module after logging in. This direct link is a convenience and respects permissions.

Starting with the WebFCP URL, add a number sign **#**, followed by an exclamation point **!**, then the name of the module.

For example**, http://prodserv/fcp/home#!groups** will take you to the Groups module.

The module names you can use in the URL are as follows:

- **#!fileCabinets**
- **#!groups**
- **#!locks**
- **#!lookupTables**
- **#!messages**
- **#!propertySets**
- **#!servers**
- **#!markings**
- **#!sysinfo**
- **#!users**

Plan for FDD

Define File Cabinets

FDD documents are stored in electronic file cabinets, similar to how paper documents are stored in metal file cabinets. A document stored in a file cabinet is indexed with a set of field values that identify the document. Users can search for the document based on these field values.

For example, the *Accounts Payable* file cabinet may store purchase orders, checks, and invoices. Each of these documents may be indexed by fields such as *Vendor*, *Amount*, *PO Number*, *Date*, and *Document Type*.

As the system administrator, you design the structure of each file cabinet and decide what fields should be included based on the needs of your organization and workers.

Ask yourself the following questions when designing file cabinets:

- What steps are currently involved in processing documents?
- What information is needed in order to find documents?
- What functional or departmental groups are involved in document processing?
- How are people going to use information from the documents?
- How will document flow change with implementation of the FDD system?

Tip: The value for the first file cabinet field is used in many places to identify the document, such as when viewing or exporting. Keep this in mind when creating file cabinets; the first field should be the most important or most meaningful field.

Each file cabinet is independent from the others, and therefore security and fields may be tailored for each individual file cabinet.

There is no limit to how many file cabinets you can create, but it is best to minimize the number of file cabinets when possible. For example, use a *Document Type* field to further organize documents within a file cabinet.

Careful consideration and planning results in a more effective and easy-to-use system, and can eliminate the need for time-consuming changes later.

Once you have your plan, see Add File Cabinet to start making your file cabinets in FCP.

Security

FDD provides several different levels of security that can be easily tailored to meet the security needs of your organization. Permissions determine what file cabinets, bins, and documents a group or user can access and what tasks they can perform.

By combining different levels of permissions, you can create a security system that is as simple or complex as you need. However, try to keep your security scheme as simple as possible in order to minimize the time spent maintaining permissions. You can modify security features at any time.

Ask yourself the following questions when developing your security scheme:

- What functional and departmental groups will be using the system?
- Who are the members of those groups?
- What tasks must these individuals and groups perform?

Use the following guidelines to keep the security scheme as simple as possible:

- Establish restrictions only when necessary.
- Minimize the number of groups and differences in permissions between groups.
- Avoid assigning user permissions that override inherited group permissions.
- Avoid restrictions that unnecessarily impede users' ability to work efficiently.

Security Features

The levels of FDD security:

FEATURE	WHAT DOES IT CONTROL?
Login Security	Each user is assigned an FDD login name. User login restricts unauthorized FDD access and helps to log user activity.
Task Permissions	Controls what FDD functions the user may perform.
Resource Permissions	Controls file cabinets the user may access.
Document Permissions	Controls who may access, add to, modify or delete a particular document.
Database Role	Controls what database privileges a user has.
Levels of Administrators	Make powerful super administrators or restricted mid-level administrators who administer the FDD system in FCP.
FCP Module Access	Use various settings to control which administrators can access which modules in FCP.

Task Permissions

Task permissions define what FDD tasks, or actions, a group can perform. See Groups and Users for instructions on assigning task permissions.

Task permissions are divided into sets: Basic, Advanced, Administrator, Developer, RMA iQ, Reports iQ, and Workflow iQ.

Tip: It is recommended to set task permissions at the group level, instead of the user level. Managing at the group level is easier than changing multiple users' permissions.

Basic Task Permissions

PERMISSION NAME	GRANTS PERMISSION TO:
Scan/Import	Scan pages and import files into FDD.
Index	Create a new document by indexing pages into a file cabinet.
View	Display images in FDD.
Print	Print pages and documents from FDD.
Route	Move a batch from one bin to another bin.
Create Document Note	Add notes to a document.
Create Page Note	Add notes to a page.
Modify/Delete Notes	Modify or delete notes from a page or document.
Delete Pages	Remove a page from a batch or document.
Delete Batches	Delete batches from FDD.
Reorder Pages	Change the order of pages within a document.
Modify Indexing Values	Change a document's indexing information.
Delete Document	Delete documents from FDD.
Change Your Password	Change user password without system administrator interaction.
Add Page	Add a page to a batch or document.
Search File Cabinets	Search for documents in a file cabinet.
Export/Email Attachments	Export pages and documents from FDD; email pages and documents (as attachments) from FDD.
Email Document Link	Email page and document URL and FRL (FDD URL) links from FDD.

Save Rotation Settings	Save the rotation angle of an image.
Copy Images	Copy FDD pages to the clipboard.
Copy Selected Rows	Copy selected rows of index values (in the file cabinet grid) to the clipboard.
Fill Column	Fill a column with the specified value for multiple documents.

Advanced Task Permissions

PERMISSION NAME	GRANTS PERMISSION TO:
Set Access Group	Assign a document permission template to a document.
View Access List	View document permission template descriptions in FDD.
View Audit Trail	View the audit trail. This is a list of actions showing time, date and user responsible for each action.
Check In/Check Out	Check in, check out or delete a document version.
Modify WebFDD Profile	Change your user profile in WebFDD.
Replace Page	Replace pages in FDD.
Maintain Folders	Create folders in FDD.
Edit Advanced Search	Edit the advanced search SQL query in FDD.
Edit Forms iQ SQL	Define Autofill from SQL Query or Option List from SQL Query in Feith Forms iQ Designer.
Create/Maintain Sections	Create and delete documents sections in FDD.
Auditor Login	Login to Auditor. Note that this permission only applies to Auditor version 8 or newer.
Edit Auditor SQL Wizard	Edit the SQL Wizard query in Auditor. Note that this permission only applies to Auditor version 8 or newer.
Manually UTR Index/Delete	Manually add/remove batches or documents from the full text database.

Administrator Task Permissions

PERMISSION NAME	GRANTS PERMISSION TO:
Create Bins	Create bins.
Modify/Delete Bins	Modify and delete bins.
Create File Cabinets	Create file cabinets.
Modify/Delete File Cabinets	Modify and delete file cabinets.
Create Groups	Create groups.
Modify/Delete Groups	Modify and delete groups.
Create Users	Create users.
Modify/Delete Users	Modify and delete users.
Create Document Permission Templates	Create document permission templates.
Modify/Delete Document Permission Templates	Modify and delete document permission templates.
Maintain Servers	Create, modify and delete servers.
Commit Images to Optical	Move images to permanent optical storage (if the images are temporarily stored on magnetic media).
Selective Commit	Commit images based on selected criteria (e.g., a particular file cabinet).
Purge Audit Trail	Purge the audit trail in FDD Auditor.
Rebuild Full Text Database	Rebuild Autonomy IDOL.
Administer Autonomy IDOL	Manage the Autonomy IDOL full text database (e.g. create IDOL database, drop IDOL database).
Selective Delete	Delete records from a file cabinet based on selected criteria.
WebFDD Administration	WebFDD Administration permission.
Unlock/Delete Approval Notes	Unlock or delete approval notes.
Unlock Batches	Unlock a batch. (When a batch is being indexed, the database "locks" the batch to prevent other users from accessing it. If a user's PC shuts down during the indexing procedure, the batch may remain locked in the database.)
Unlock Documents	Unlock a locked document.
Create/Modify Leaps	Create, modify and delete leaps.

Create/Modify Lookup Tables	Create, modify and delete lookup tables.
Create/Modify Messages	Create, modify and delete logon messages.
Create/Modify QI Capture Patterns	Create, modify and delete QI capture patterns using the Quick Integrator Admin Capture Editor.
Create/Modify QI Tools	Create, modify and delete QI tools using the Quick Integrator Admin Tool Editor.
Create/Modify Dashboards	Create, modify and delete dashboards using the Dashboard iQ Designer.
Create/Modify Redaction Codes	Create, modify and delete redaction reason codes.
Setup Audit Trail	Setup the audit trail in Auditor.
Administer States and Reasons	Manage States and Reasons.
Administer Supplemental Markings	Manage Supplemental Markings.
Administer Classifications	Manage Classifications.
Administer RMA Properties and Templates	Manage RMA Properties and Templates.
Administer Access Restrictions	Create and maintain access restriction rules.
Create/Modify Feith Views	Create and modify views and synonyms in the Feith View Builder.
Access to WebFCP Users Module	Open Users module in WebFCP.
Access to WebFCP Groups Module	Open Groups module in WebFCP.
Access to WebFCP Messages Module	Open Messages module in WebFCP.
Access to WebFCP Locks Module	Open Locks module in WebFCP.
Access to WebFCP File Cabinets Module	Open File Cabinets module in WebFCP.
Access to WebFCP Property Sets Module	Open Property Sets module in WebFCP.
Access to WebFCP Lookup Tables Module	Open Lookup Tables module in WebFCP.
Access to WebFCP Servers Module	Open Servers module in WebFCP.

Access to WebFCP System Info Module	Open System Info module in WebFCP.
Access to WebFCP Markings Module	Open Markings module in WebFCP.

Developer Task Permissions

PERMISSION NAME	GRANTS PERMISSION TO:
Edit JavaScript	Edit JavaScript in Feith Developer.
Edit CSS	Edit CSS in Feith Developer.
Edit HTML	Edit HTML in Feith Developer.
Edit Text	Edit text in Feith Developer.
Edit XSL	Edit XSL in Feith Developer.
Edit XSD	Edit XSD in Feith Developer.
Edit XML	Edit XML in Feith Developer.
Edit Image	Edit images in Feith Developer.
Edit SQL	Edit SQL in Feith Developer.
Edit FreeMarker	Edit FreeMarker in Feith Developer.
Edit Fonts	Edit fonts in Feith Developer.

RMA iQ Task Permissions

PERMISSION NAME	GRANTS PERMISSION TO:
Set Record State	Set the record state for a document.
Unset Record State	Unset the record state for a document.
Set/Unset Closed State	Set the closed state for a document.
Set/Unset Frozen State	Set the frozen state for a document.

Set/Unset Cutoff State	Set the cutoff state for a document.
Create/Modify Categories	Create, modify, and delete categories.
Assign/Remove Categories	Assign documents to and remove documents from a category.
Set User Clearance and Markings	Set user clearance and markings.
Edit Supplemental Marking Assignment	Edit supplemental marking assignments for a document.
Edit Classification Attributes	Edit classification attributes for a document.
View RMA Properties	View RMA properties for a document.
Modify RMA Properties	Modify RMA properties for a document.
Modify Document Country Assignment	Modify document country assignment for a document
Submit Ad Hoc Event	Submit an ad hoc event.

Reports iQ Task Permissions

PERMISSION NAME	GRANTS PERMISSION TO:
Create Reports iQ Template	Create a Reports iQ template.
Create Reports iQ Schedule	Create a Reports iQ schedule.
Modify Reports iQ Template	Modify a Reports iQ template.
Modify Reports iQ Schedule	Modify a Reports iQ schedule.
Delete Reports iQ Template	Delete a Reports iQ template.
Delete Reports iQ Schedule	Delete a Reports iQ schedule.
Report Administrator	Administer Reports iQ reports.

Workflow iQ Task Permissions

PERMISSION NAME	GRANTS PERMISSION TO:
View Workflow	View workflow maps.
Workflow Administration	Create, publish, and delete a workflow.
Add To Workflow	Manually add document to a workflow.
Withdraw From Workflow	Manually remove document from a workflow.
Ad Hoc Route Document	Move a document from one workflow task to another workflow task on an ad hoc basis.
View Document History	View the document workflow history.
Send Back Document	Return a document to its previous workflow task.
Clear Error/Remove Hold/Change Priority/Change Deadline	Change a document's status (clear an error or remove a hold), priority or deadline.
Create/Modify Finishing Touches and Rule Tokens	Create, modify and delete workflow finishing touch rules and rule tokens.
Bulk Workflow Done	Mark multiple workflow documents as "Done".
View Workflow Document Properties	View workflow status information when viewing document properties in FDD.
Modify/Delete from Version History	Modify and delete versions from a workflow's version history.

Resource Permissions

Resource permissions determine which groups and users can access various FDD system resources. There main resources in FDD are: bins, file cabinets and workflow tasks.

Tip: It is recommended to grant groups resource permissions on file cabinets, instead of individual users. Managing at the group level is easier than changing multiple users' permissions.

There are five types of resource permissions:

PERMISSION NAME	GRANTS PERMISSION TO:
Search	Controls the ability to retrieve batches, documents or folders.
View	Controls the ability to view batches, documents or folders.
Insert	Controls the ability to add new batches, documents or folders.
Update	Controls the ability to modify index values (for documents or folders).
Delete	Controls the ability to delete or move batches, documents or folders.

Resource permissions can be granted, denied, or left unset.

See File Cabinets for instructions on assigning resource permissions for file cabinets. See Feith Workflow iQ Manager User Guide for instructions on assigning resource permissions for workflow tasks.

Notes on Setting Permissions

When setting task and resource, and document permissions for a user or group, the following rules apply:

- Each permission is granted, denied, or unset.
- User level permission assignment overrides group level permission assignment.
- If a user is a member of two groups - one that grants a permission and another that denies the same permission - grant overrides deny.
- If a permission is unset, the value of that permission defaults to denied. So, any permission that is not assigned to the user, either at the user level or at any group level, will be denied.

For example, assume a user only belongs to the **public** group. The following chart shows whether or not the user will be allowed to view images based on the combination of user task permission assignment and the **public** group task permission assignment.

USER	PUBLIC GROUP	CAN THE USER VIEW IMAGES?
view granted	irrelevant (**view** can be granted, denied or unset)	YES
view denied	irrelevant (**view** can be granted, denied or unset)	NO
view unset	**view** granted	YES
view unset	**view** denied	NO
view unset	**view** unset	NO

A user must have the appropriate combination of task, resource, and document permission assignments in order to perform a task in FDD. For example, in order to be able to delete batches from a bin, a user must have both the delete batches task permission and the delete resource permission for the bin.

Tip: It is recommended to set task permissions at the group level, instead of the user level, as well as grant groups resource permissions on file cabinets and documents, instead of individual users. Managing at the group level is easier than changing multiple users' permissions.

Database Roles

The databases supported by FDD - Oracle and MS SQL Server - have different sets of rules governing access privileges. In Feith Control Panel, the user's database privileges are set as the **Database Role** on the General tab when adding or modifying a user.

The **Feith Admin** (on Oracle) and **Database Admin** (on MS SQL Server) roles grant the privileges needed to create users and tables in the database, allowing for an administrative user other than the **fdd** user who can create users and file cabinets.

See FCP Module Access for a chart showing the combination of permissions - the minimum Database Role, plus Super Administrator setting, plus Task Permission- required to use each Feith Control Panel module.

Database Roles on Oracle

ROLE	HIERARCHY	GRANTS PERMISSION TO:
Feith Admin	Highest	Create users and tables within the database. This permission is required to run the following WebFCP modules: • File Cabinets • Groups • Lookup Tables • Property Sets • Users • System Info
Feith Connect	Lowest	Connect to the database. This is the default database user type for new users created in Feith Control Panel.

Database Roles on MS SQL Server

ROLE	HIERARCHY	GRANTS PERMISSION TO:
Database Admin	Highest	Create users and tables within the database. This permission is required to run the following WebFCP modules: • File Cabinets • Groups • Lookup Tables • Property Sets • Users • System Info
Feith Connect with DB Owner		Connect to the database outside of FDD applications; for example, when using a SQL management tool.
Feith Connect	Lowest	Connect to the database, This is the default database user type for new users created in Feith Control Panel.

Note: The **fdd** user has the **Feith Admin** (on Oracle) / **Database Admin** (on MS SQL Server) database role, as required to allow this user to create users and tables.

Consult your database documentation for more information on roles and privileges within your particular database.

Levels of Administrators

Feith Control Panel supports two levels of administrators: **Super Administrator** and **Mid-Level Administrator**.

CHARACTERISTICS	SUPER ADMINISTRATOR	MID-LEVEL ADMINISTRATOR
Authority	A super administrator has the highest administrative authority in the FDD system.	A mid-level administrator has less authority than a super administrator, but can perform limited administrative tasks.
Configuration	A user with the **Super Administrator?** option turned on in the user's General tab.	A user who is *not* a super administrator but is a member of an administrator group. An administrator group has the **Administrator Group?** option turned on in the group's General tab.
Objects	A super administrator can maintain *all* file cabinets and groups.	A mid-level administrator can maintain a *subset* of file cabinets and groups to which they have been assigned. The group is assigned in the **Administered By** tab for a file cabinet or group.
Additional Privileges	A super administrator can do certain tasks that no one else can.	A mid-level administrator has no special privileges.

Notes:

- All administrators are still restricted by the task permissions they are granted at the group or user level. For example, even if a super administrator can always see all file cabinets in the list they still must have the **Modify/Delete File Cabinets** task permission in order to modify or delete file cabinets, otherwise those options will be disabled.

- Some actions are not permitted, even for a super administrator with all task permissions. For example, users cannot be removed from the public group, the public group cannot be deleted, and system file cabinets cannot be deleted.

Why Use Mid-Level Administrators?

This feature may be beneficial for sites running two or more separate applications, such as Accounts Payable and Human Resources. An administrator group can be created for each department, so that the administrators of a department will only be able to maintain the file cabinets and groups within that department. This allows the super administrator to delegate limited power to mid-level administrators who will maintain their own objects without calling on the super administrator.

Detailed Comparison of Super Administrators and Mid-Level Administrators

ACTION	SUPER ADMINISTRATOR	MID-LEVEL ADMINISTRATOR
Modify or delete file cabinet	A super administrator can modify and delete any file cabinet.	A mid-level administrators can modify and delete only file cabinets they administer.
Assign resource permissions to file cabinet	A super administrator can assign file cabinet resource permissions to any group or user.	A mid-level administrator can assign file cabinet resource permissions to any group but not to any users.
Assign administrator group to file cabinet	A super administrator can assign any administrator group to a file cabinet.	A mid-level administrator can assign only administrator groups of which they are a member to a file cabinet.
Modify or delete group	A super administrator can modify and delete any group.	A mid-level administrator can modify and delete only groups they administer.
Add and remove users to and from a group	A super administrator can add and remove users to and from any group.	A mid-level administrator can add and remove users to and from only groups they administer.
Grant task permissions to a group	A super administrator can grant any task permission.	A mid-level administrator can grant task permissions only at the group level and can grant only task permissions that they possess.
Assign administrator group to a group	A super administrator can assign any administrator group to a group.	A mid-level administrator can assign only administrator groups of which they are a member to a group.
Add administrator group	Only a super administrator can add an administrator group.	A mid-level administrator cannot perform this action.
Modify or delete messages	A super administrator can modify or delete any message.	A mid-level administrator can modify or delete only messages whose Access Group they administer.
Modify system preferences	Only a super administrator can modify system preferences.	A mid-level administrator cannot perform this action.
Assign administrative database role to user	Only a super administrator can assign the Feith Admin (Oracle) and Database Admin (MS SQL Server) database roles to a user.	A mid-level administrator cannot perform this action.
Add another super administrator	Only a super administrator can add another super administrator.	A mid-level administrator cannot perform this action.

Add and remove users to and from a group	A super administrator can add and remove users to and from any group.	A mid-level administrator can add and remove users to and from only groups they administer.
Grant task permissions to a user	Only a super administrator can set task permissions at the user level.	A mid-level administrator cannot perform this action.
Delete a user	A super administrator can delete any user.	A mid-level administrator can delete a user only if they administer *all* groups to which the user belongs.

FCP Module Access

You can set up administrators to use some modules but not others using a combination of the following settings:

- **Database Role:** A user *must* have the database role Feith Admin (Oracle) or Database Admin (MS SQL Server) in order to login to FCP. The database role has a set of rules governing access privileges in the database. See Database Roles for more information.
- **Super Admin or Mid-Level Admin:** A user is either a super administrator with access to all objects and privileges, or a mid-level administrator with limited powers. See Levels of Administrators for more information.
- **Task Permissions:** Certain task permissions are required to access and use all the features in specific FCP modules. Task permissions are set at the group or user level.

The combinations of settings required to use each module are listed below. Change the settings to control which administrators can access which modules in FCP and what they can do.

FCP MODULE	MINIMUM DATABASE ROLE	REQUIRED ADMIN LEVEL	REQUIRED TASK PERMISSIONS
File Cabinets	Feith Admin (Oracle) or Database Admin (MS SQL Server)	Super administrator or mid-level administrator. A mid-level administrator has limited powers.	Access to Web FCP File Cabinets Module Create File Cabinets Modify/Delete File Cabinets
Groups	Feith Admin (Oracle) or Database Admin (MS SQL Server)	Super administrator or mid-level administrator. A mid-level administrator has limited powers.	Access to Web FCP Groups module Create Groups Modify/Delete Groups
Locks	Feith Connect	(none)	Access to Web FCP Locks Module Unlock Documents
Lookup Tables	Feith Admin (Oracle) or Database Admin (MS SQL Server)	(none)	Access to Web FCP Lookup Tables Module Create/Modify Lookup Tables
Messages	Feith Connect	Any administrator. A mid-level administrator has limited powers.	Access to Web FCP Messages Module Create/Modify Messages
Property Sets	Feith Admin (Oracle) or Database Admin (MS SQL Server)	(none)	Access to Web FCP Property Sets Module Administer RMA Properties and Templates

Servers	Feith Connect	(none)	Access to Web FCP Servers Module Maintain Servers
Supplemental Markings	Feith Connect	(none)	Access to Web FCP Markings Module Administer Supplemental Markings
System Info	Feith Admin (Oracle) or Database Admin (MS SQL Server)	Super administrator only	Access to Web FCP System Info Module
Users	Feith Admin (Oracle) or Database Admin (MS SQL Server)	Any administrator. A mid-level administrator has limited powers.	Access to Web FCP Users Module Create Users Modify/Delete Users

Audit Events

The following instructions apply only if your FDD system is licensed for FDD Auditor.

If your FDD system is licensed for **FDD Auditor**, you can configure which audit events to track for which FDD groups. See Groups and Users for instructions on setting up audit tracking.

When an audit event is selected for a user, an entry is written to the **FDD Audit Trail** each time the user performs the action. For example, if the audit event **View Page** is selected for the *HR* group, then an audit entry is written each time any member of the *HR* group views a page. The audit data includes the user's internal ID, the name of the action performed, and the date and time the action was performed. Audit reports and graphs are viewed in the **FDD Auditor iQ** application; see the **Auditor iQ** documentation for more information on viewing audit data.

The following tables list the audit events that can be tracked in the FDD system:

- General User Audit Events
- Workflow User Audit Events
- RMA User Audit Events
- Feith Control Panel Audit Events
- Workflow iQ Manager Audit Events
- RMA iQ Administrator Audit Events
- Quick Integrator (QI) Audit Events
- Feith Developer Audit Events
- Reports iQ Audit Events

General User Audit Events

AUDIT NAME	ACTION AUDITED
Check In Document	Check in a new version of a document.
Check Out Document	Check out a version of a document.
Create Document Note	Create a document note.
Create Page Note	Create a page note.
Create Redaction	Create a redaction note.

DDE Requests	Issue an FDD DDE request. Typically done when using the Quick Integrator application.
Delete Batch	Delete a batch.
Delete Document	Delete a document.
Delete Document Note	Delete a document note.
Delete Page	Delete a page.
Delete Page Note	Delete a page note.
Delete Redaction	Delete a redaction note.
Email Document	Email a document.
Email Page	Email a page.
Export Document	Export a document.
Export Page	Export a page.
Import Document	Import a document.
Import Page	Import a page.
Index Document	Index a document.
Index Page	Index a page.
Lock Batch	Lock a batch.
Logoff	Logoff. Log out of an FDD application.
Logon	Logon. Login to an FDD application.
Modify Document Note	Modify a document note.
Modify Index Values	Modify a document's indexing values (file cabinet field values).
Modify Page Note	Modify a page note.
Modify Redaction	Modify a redaction note.

Print Document	Print a document.
Print Document Note	Print a document note.
Print Page	Print a page.
Print Page Note	Print a page note.
Replace Page	Replace a page.
Route (Copy) Documents	Route a document to a batch, leaving the original document.
Route (Copy) Pages	Route a page to a batch, leaving the original page.
Route (Move) Document	Route a document to a batch, deleting the original document.
Route (Move) Page	Route a page to a batch, deleting the original page.
Scan Batch	Scan a document.
Scan Page	Scan a page.
Search for a Document	Search for a document.
Unlock Batch	Unlock a batch.
View Document	View a document.
View Document Note	View a document note.
View Page	View a page.
View Page Note	View a page note.

Workflow User Audit Events

AUDIT NAME	ACTION AUDITED
Finish Work in Workflow Task	Finish (“Done”) a document in a workflow task.
Route Work in Workflow Task	Route a document from one workflow task to another workflow task.
Skip Work in Workflow Task	Skip a document in a workflow task.
Withdraw Work from Workflow Task	Withdraw a document from a workflow task.

RMA User Audit Events

AUDIT NAME	ACTION AUDITED
Assign Category to Document	Assign a category to a document.
Assign Country to Document	Assign a country to a document.
Assign Marking to Document	Assign a supplemental marking to a document.
Assign State to Document	Assign a state to a document.
Classification Attribute Update	Update the classification attribute of a document (i.e., change the classification assigned to a document).
Document Property Modification	Modify the RMA document properties assigned to a document.
Remove Category from Document	Remove a category from a document.
Remove Country from Document	Remove a country from a document.
Remove Marking from Document	Remove a supplemental marking from a document.
Remove State from Document	Remove a state from a document.

Feith Control Panel Audit Events

AUDIT NAME	ACTION AUDITED
Add File Cabinet	Create a new file cabinet.
Add File Cabinet Field	Add a new file cabinet field.
Add Group	Create a new group.
Add User	Create a new user.
Add View via FCP Feith View Builder	Add view in the View Builder.
Add Virtual File Cabinet	Create a new virtual file cabinet.
Change a User's Assigned Clearance Level	Change a user's assigned clearance level.
Change a User's List of Assigned Supplemental Markings	Change a user's list of assigned supplemental markings.
Create a Classification	Create a new classification.
Create a New State/Reason	Create a new state/reason.
Create a Supplemental Marking	Create a new supplemental marking.
Delete a Classification	Delete a classification.
Delete a State	Delete a state.
Delete a Supplemental Marking	Delete a supplemental marking.
Delete File Cabinet	Delete a file cabinet.
Delete File Cabinet Field	Delete a file cabinet field.
Delete Group	Delete a group.
Delete User	Delete a user.
Delete View via FCP Feith View Builder	Delete view in the View Builder.
Disable User Account	Disable a user account.

Enable User Account	Enable a user account.
Modify a Classification	Modify a classification.
Modify a Supplemental Marking	Modify a supplemental marking.
Modify an Existing State/Reason	Modify an existing state/reason.
Modify File Cabinet	Modify a file cabinet.
Modify File Cabinet Field	Modify a file cabinet field.
Modify File Cabinet Permissions	Modify file cabinet permissions.
Modify Group	Modify a group.
Modify Group Membership	Modify group membership.
Modify User	Modify a user.
Modify User or Group Permissions	Modify user or group permissions.
Modify View via FCP Feith View Builder	Modify view in View Builder.
Update Fiscal Year Start Day via FCP System Preferences	Update the fiscal year start day in System Preferences.
Update RMA Mode via FCP System Preferences	Update the RMA Mode in System Preferences.
Create Property Set	Create a new property set.
Modify Property Set	Modify a property set.
Delete Property Set	Delete a property set.
Assign Property Field to Property Set	Assign a property field to a property set.
Remove Property Field from Property Set	Remove a property field from a property set.
Create Lookup Table	Create a new lookup table.
Modify Lookup Table	Modify a lookup table.

Delete Lookup Table	Delete a lookup table.
Create Lookup Field	Create a new lookup field.
Modify Lookup Field	Modify a lookup field.
Delete Lookup Field	Delete a lookup field.
Modify Lookup Values	Modify lookup values.
Update Site ID via FCP System Preferences	Update Site ID in the System Preferences.

Workflow iQ Manager Audit Events

AUDIT NAME	ACTION AUDITED
Add Workflow	Create a new workflow.
Delete Workflow	Delete a workflow.
Modify Workflow	Modify a workflow.
Modify Workflow Permissions	Modify workflow permissions.

RMA iQ Administrator Audit Events

AUDIT NAME	ACTION AUDITED
Add a Category	Create a new category.
Create an Event	Create a new event.
Delete a Category	Delete a category.
Delete an Event	Delete an event.
Modify a Category	Modify a category.
Modify an Event	Modify an event.

Quick Integrator (QI) Administrator Audit Events

AUDIT NAME	ACTION AUDITED
Add QI Capture Pattern	Add a QI capture pattern.
Add QI Tool	Add a QI tool.
Delete QI Capture Pattern	Delete a QI capture pattern.
Delete QI Tool	Delete a QI tool.
Modify QI Capture Pattern	Modify a QI capture pattern.
Modify QI Tool	Modify a QI tool.
Run QI Tool	Run a QI tool.
Run Script in Tool Editor	Run script in the QI tool editor.

Feith Developer Audit Events

AUDIT NAME	ACTION AUDITED
Add Developer Object	Add a Feith Developer object.
Modify Developer Object	Modify a Feith Developer object.
Delete Developer Object	Delete a Feith Developer object.
View Developer Object	View a Feith Developer object.

Reports iQ Audit Events

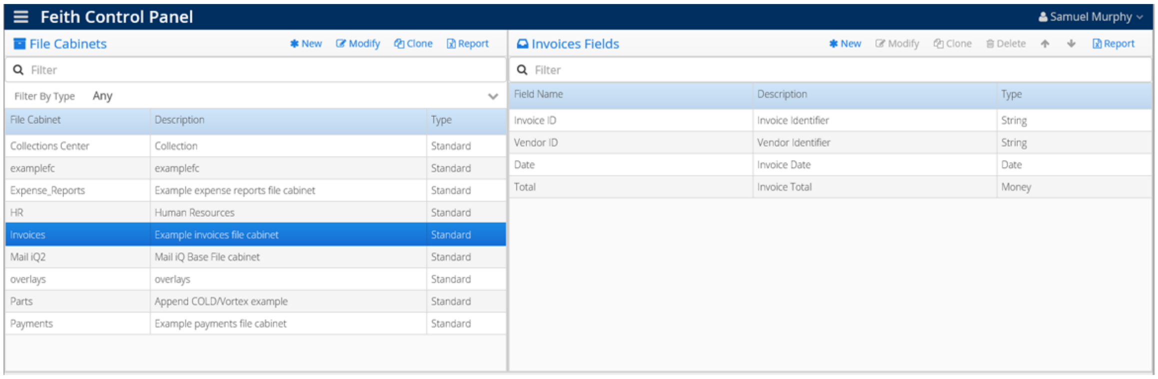
AUDIT NAME	ACTION AUDITED
Reports iQ: Run Report	Run a Reports iQ report.
Reports iQ: Report Parameters	Set report parameters.

File Cabinets

File Cabinets

Create and manage file cabinets, which store your documents indexed with a set of field values that identify the document. Users can search for the document based on these field values.

Before creating your file cabinets, you should take some time to think about the file cabinet design to ensure it meets the needs of your organization and workers. See Define File Cabinets for more information.



File Cabinets are listed on the left and the selected file cabinet's fields are listed on the right. You can **Filter** either list and click **Report** to generate an Excel report of either list.

System File Cabinets

The following system file cabinets are created during the FDD installation. These file cabinets are created for use with FDD applications.

FILE CABINET	DESCRIPTION
AiQ Training Sets	Analyze iQ file cabinet
Collections Center	Collections file cabinet
Document Properties	RMA iQ Document Properties auxiliary file cabinet
examplefc	Sample file cabinet
FeithDrive	FeithDrive file cabinet
FeithDrive AIQ	FeithDrive file cabinet
FeithDrive Base	FeithDrive file cabinet
FeithDrive Revisions	FeithDrive file cabinet
General Objects	General Objects file cabinet
Group Properties	RMA iQ Group Properties auxiliary file cabinet

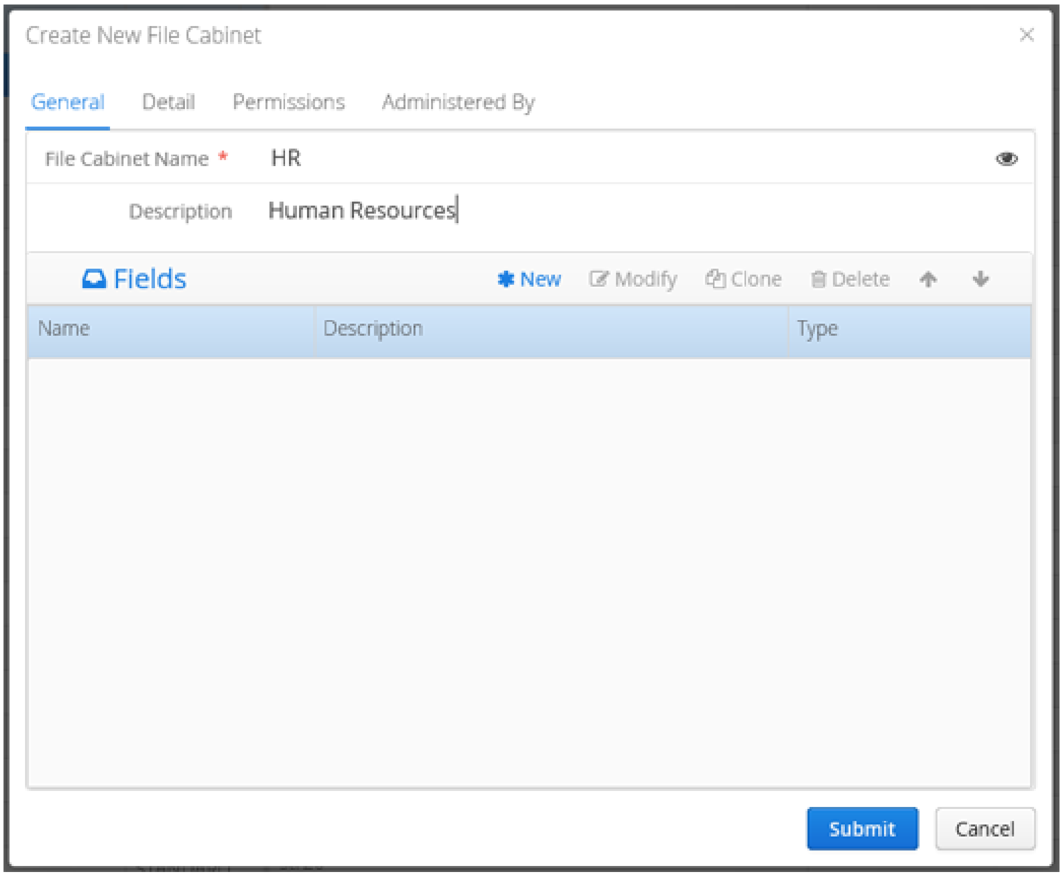
Mail iQ / Mail iQ2	Mail iQ file cabinet
My Reports	Reports iQ file cabinet
Office	Sample file cabinet for Office documents
Outlook	Sample file cabinet for Outlook documents
Overlays	Overlays file cabinet
Report Templates	Reports iQ file cabinet
Reports	Reports iQ file cabinet
Reports iQ Base	Reports iQ file cabinet
RMA iQ Change History	RMA iQ file cabinet
RMA iQ Compiled Rules	RMA iQ file cabinet
RMA iQ Event Formulas	RMA iQ file cabinet

Add File Cabinet

To add a file cabinet:

1. Go to the **File Cabinets** module. See FCP Modules for more information. The list displays all file cabinets to which you have administrative access.
2. Click **New**. The **Create New File Cabinet** dialog opens.
3. On the **General** tab, enter the **File Cabinet Name** and **Description**.

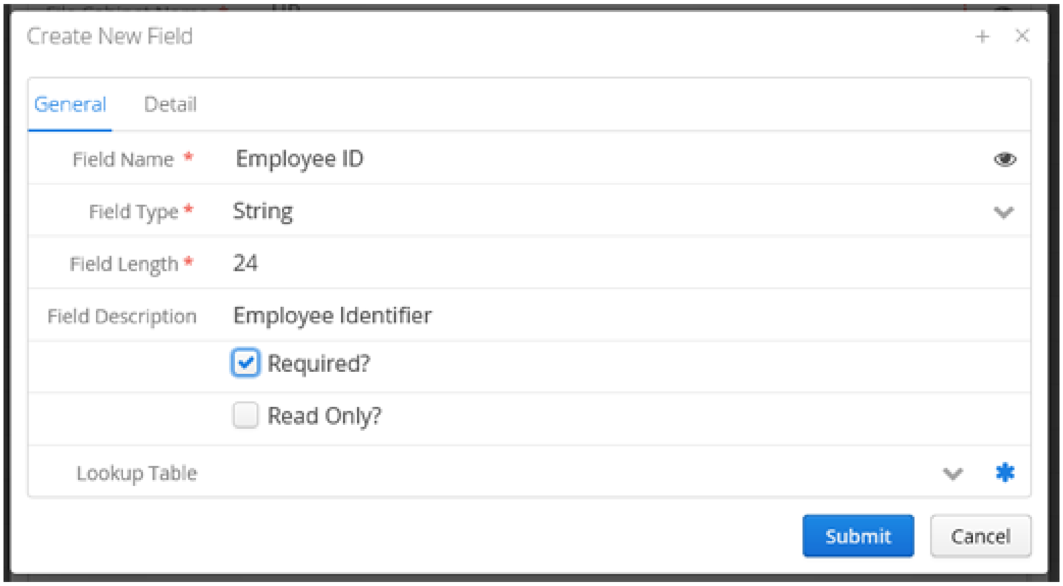
   As you enter the File Cabinet Name, the **Table Name** is automatically filled with the true name of the underlying table that will be used internally and is not visible to the end user. You can view the Table Name by clicking **Show Generated Table Name** .

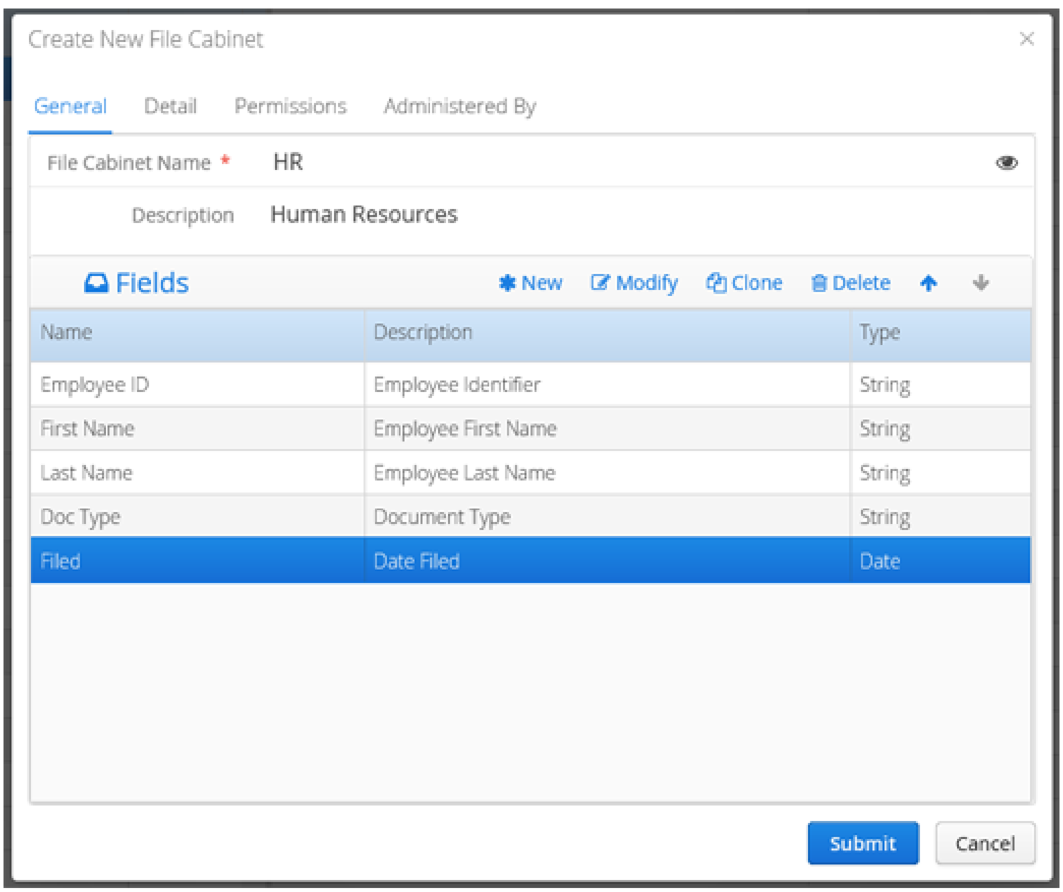
4. In the **Fields** list at the bottom of the **General** tab, click **New** to start adding a field to your file cabinet.

   Tip: The value for the first file cabinet field is used in many places to identify the document, such as when viewing or exporting. Keep this in mind when creating file cabinets; the first field should be the most important or most meaningful field.

5. Configure the file cabinet field. See Set File Cabinet Field Options for more information.



6. Continue adding fields as needed. You can **Clone** fields you already added and reorder fields using **Move Up** and **Move Down** as needed.



7. On the **Detail** tab, enter the following additional properties:

- **Storage Server:** The server where the file cabinet's pages are stored.

- **Volume:** Optionally set the optical volume.
- **Auto-tab Label:** The file cabinet field whose values are used as tab labels when viewing multiple documents in FDD Client.
- **Full-Text Index?:** Optionally full text index all documents in this file cabinet so they can be located by users doing a full text search.

8. On the **Permissions** tab, assign groups and users who will have resource permission to access this file cabinet. See Resource Permissions for more information.

   To add or remove groups and users for a file cabinet:

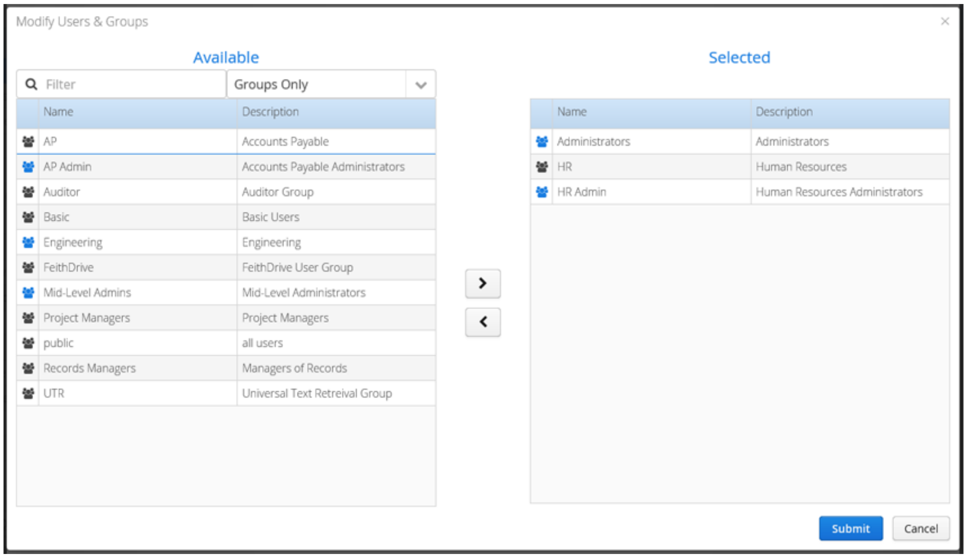
   a. Click **Add/Remove** to open the **Modify Users & Groups** dialog, which lists groups and users you can assign to the file cabinet.

   b. Select one or more groups or users in the **Available** list and click **Add** to add them to the file cabinet. To remove them, use **Remove**. Optionally filter the list to find a group or user.

      Select multiple groups/users using **CTRL+click** or **SHIFT+click**. You can also double-click the group/user name to move it from one list to the other.

      Tip: It is recommended resource permissions to groups instead of individual users. This way, a user's access is governed by adding or removing them from groups instead of changing permission assignment in every file cabinet.

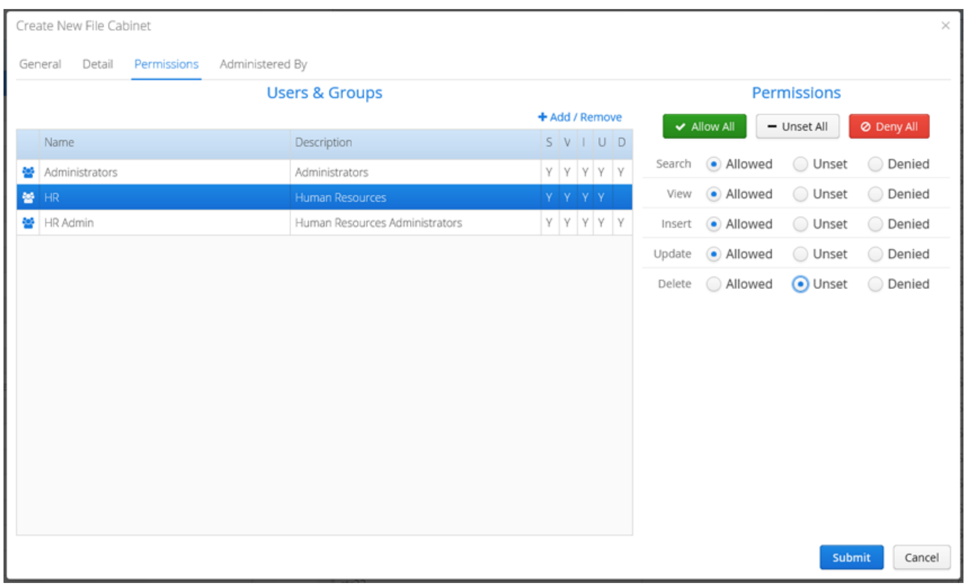
      Note: Mid-level administrators are limited in who they can assign resource permission to a file cabinet. See Levels of Administrators for more information.



c. Once your assignment changes are complete, click **Submit**. You are returned to the **Permissions** tab.

d. Set which resource permissions these groups and users have - **Search**, **View**, **Insert**, **Update**, and **Delete** - to **Allowed**, **Unset**, or **Denied**. You can select multiple groups or users using **SHIFT+click** or **CTRL+click** and set the resource permissions for all of them at once (instead of one at a time). See [Resource Permissions](#) for more information.

   Read [Notes on Settings Permissions](#) for more information on how different permissions interact, such as if one user is a member of multiple groups for which you set different resource permissions.



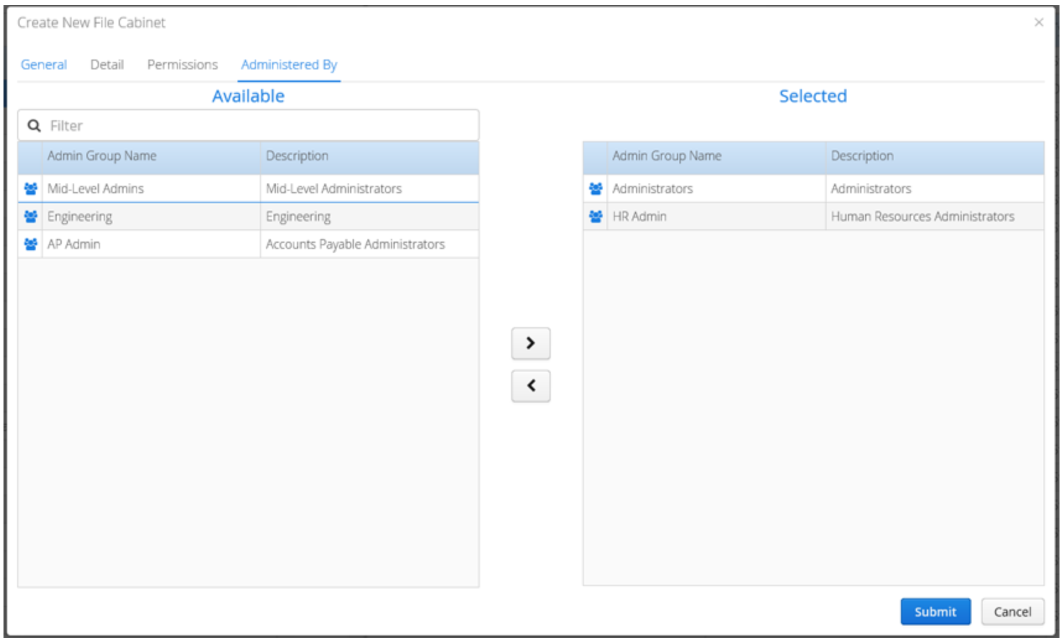
9. On the **Administered By** tab, you may optionally assign an administrator group to administer this new file cabinet. Select one or more groups in the **Available** list and click **Add** to add them to the file cabinet. To remove them, use **Remove**.

   You can select multiple administrator groups using **CTRL+click** or **SHIFT+click**. You can also double-click the administrator group name to move it from one list to the other.

The groups you choose here are mid-level administrators who will be able to modify this file cabinet in addition to any super administrators. See Levels of Administrators for more information.

If you are the member of an administrator group, all administrator groups to which you belong are automatically assigned to the file cabinet.

Note: Mid-level administrators are limited in who they can assign to administer a file cabinet. See Levels of Administrators for more information.



10. Click **Submit**. The file cabinet is added.

Set File Cabinet Field Options

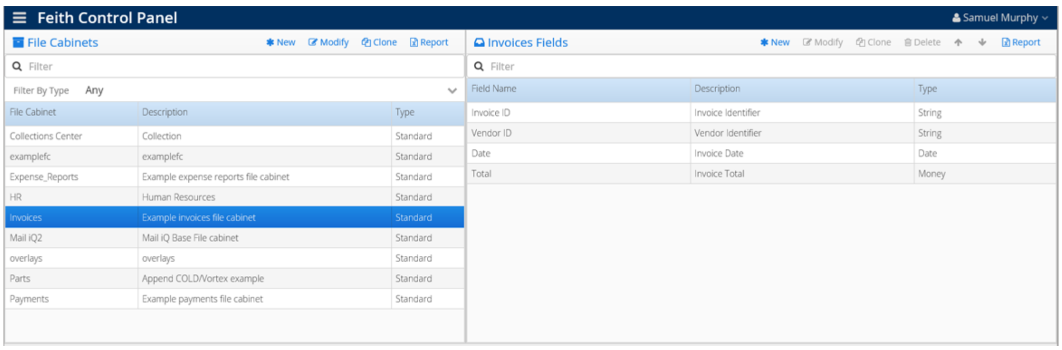
To configure a field in a file cabinet:

1. Go to the **File Cabinets** module. See FCP Modules for more information. The list of file cabinets displays.

2. Begin to add or modify a file cabinet field.

   When creating a file cabinet, click **New** or **Modify** in the **General** tab. See Add File Cabinet for more information.

   For an existing file cabinet, select the file cabinet in the list to view its fields on the right. In the field list on the right, click **New** or **Modify**.

   Whether you are adding or modifying a field, the dialog you open will look something like this:

3. On the **General** tab, enter the field's **Field Name**, which displays to the end user. As you enter the Field Name, the **Column Name** is automatically filled with the true name of the underlying column that will be used internally and is not visible to the end user. You can view the Column Name by clicking **Show Generated Column Name** .

   Tip: You can give a file cabinet field a special name in order for the field to be automatically populated with information from the file being imported. FDD and CheckIn automatically populate fields with certain names. See Appendix B: Auto-Populated Field Names for more information.

4. Select the **Field Type**. Options are:

    - **String:** Any string of alphanumeric characters. Maximum 250 characters.
    - **Integer:** Any whole number between -2,147,483,647 and +2,147,483,647.
    - **Decimal:** Digits and one decimal holder (e.g., 432.344).
    - **Money:** A decimal in dollar format (e.g., 328.99).
    - **Date:** Three integers with date separators (e.g., 08/02/2016).
    - **Date Time:** Date and time.
    - **Signature:** Stores a Forms iQ signature. No other field options can be set for this field type.
    - **List of Strings:** Any string of alphanumeric characters. Multiple values can be entered. Maximum 250 characters.
    - **List of Numbers:** Digits and one decimal holder (e.g., 432.344). Multiple values can be entered.
    - **List of Dates:** Three integers with date separators (e.g., 08/02/2016). Multiple values can be entered.

5. Enter the **Field Length**, if it is required for the selected **Field Type** (String, Decimal, List of Strings, List of Integers). For "list" type fields, which accept multiple values, this length applies to each individual value (not the total length of all values).

6. Enter the **Scale** for Decimal or List of Numbers type field. This is the number of digits stored to the right of the decimal point.

7. Enter a **Field Description**.

8. Optionally turn on **Required?** to require the end user to enter a value in the field.

9. Optionally turn on **Read Only?** to make the field read-only so end users cannot enter a value in the field.

10. Optionally assign a **Lookup Table** to provide the end user with a list of suggested values for the field.

    - To assign a lookup table:

        a. Select a **Lookup Table**. Alternatively, you can type in the name of any table or view in the database.

        b. Select the **Lookup Value** that will be stored. Alternatively, type in the name of the table/view column you want to use.

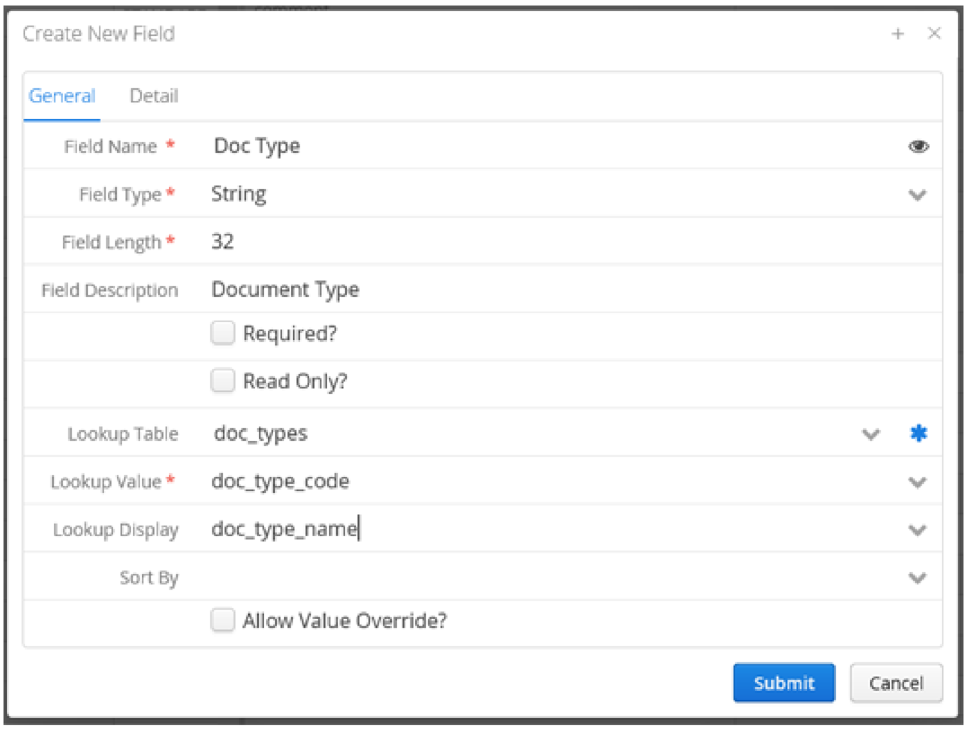
        c. Optionally select additional options:

- **Lookup Display:** A column containing values that describe the **Lookup Value** column's values in a way that is friendly to the end user. Alternatively, type in the name of the table/view column you want to use.

- **Sort By:** A column that specifies the sort order for the **Lookup Value** column's values. Alternatively, type in the name of the table/view column you want to use.

- **Allow Value Override?:** Turn on to allow the end user to enter a value that does *not* exist in the lookup table. Turn off to force the end user to select a value that exists in the lookup table.

- See Lookup Tables for more information on creating lookup tables. Alternatively, you can also use any table or view in your database as a lookup table by typing in its name and column names.



11. Click the **Detail** tab and additional options display.

12. Optionally enter a **Default Value** that will be filled into the field by default for the end user.

13. Choose the type of **Index** you want on the field's column. Options are:

    - **Allow Duplicates:** An index is created for the field and duplicate values are allowed.

    - **Unique:** An index is created for the field and duplicate values are *not* allowed.

    - **None:** No index is created for the field.

14. Turn on **Distinct Values Lists?** to allow end users to select a search value from the list of distinct values in the field's column. This list can be helpful to users when searching, but it can also be costly to compile such a list.

15. Select the desired **Case** for a String type field.

    - **Mixed Case Insensitive:** Both upper and lower case characters are accepted and the field is optimized for case-insensitive searching.

    - **Mixed Case Sensitive:** Both upper and lower case characters are accepted and the field is optimized for case-sensitive searching.

    - **Force Lowercase:** All values are forced to be lowercase.

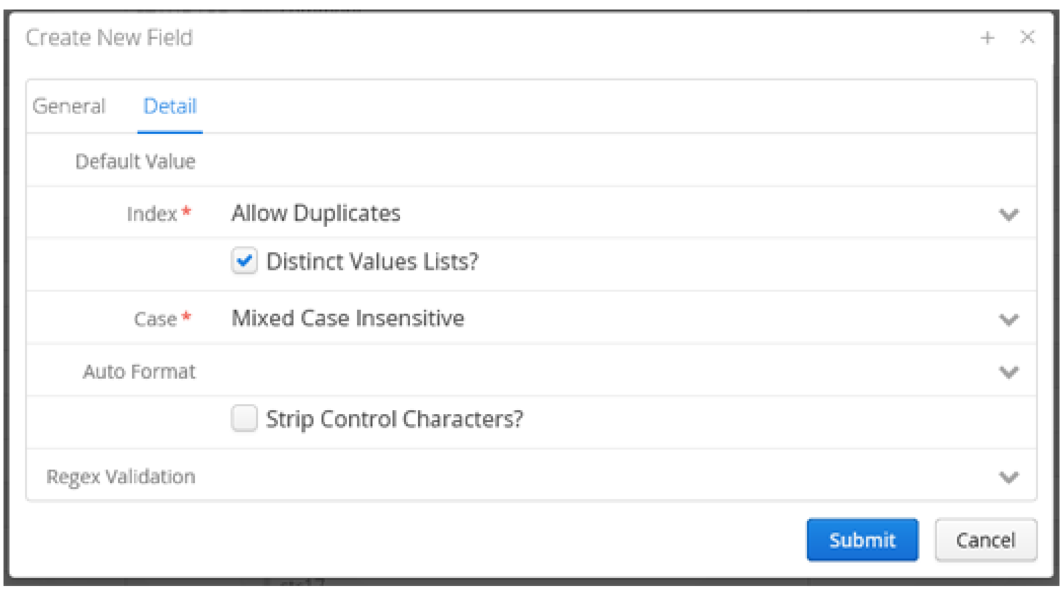
    - **Force Uppercase:** All values are forced to be uppercase.

16. Optionally select or enter an **Auto Format** that is applied to the field's value in order to help the end user to enter the value in the correct format.

17. Optionally turn on **Strip Control Characters** for a String type field to remove any control characters (e.g. line feed) inserted into the field. This may be useful if users typically copy and paste text from a source such as a word processing document.

18. Optionally select or enter a **Regex Validation** that validates the field's value against a regular expression in order to help the end user to enter the value correctly. Turn on **Allow Regex Override?** to allow the end user to enter a value that does *not* match the regular expression. Turn off **Allow Regex Override?** to force to the end user to enter value that matches the regular expression.

    See Appendix A: Auto Format and Regex Syntax for more information on regular expression syntax.



19. Click **Submit**. The file cabinet field is configured.

Manage File Cabinet Fields

Manage your file cabinet fields:

- Modify File Cabinet Field
- Reorder File Cabinet Fields
- Clone File Cabinet Field
- Delete File Cabinet Field

Modify File Cabinet Field

To modify a file cabinet field:

1. Go to the **File Cabinets** module. See FCP Modules for more information. The list of file cabinets displays.
2. Select a file cabinet. The file cabinet's fields display on the right.
3. Select a file cabinet field and click **Modify**. The **Modify Field** dialog opens.
4. Make changes to the general and detail settings as needed.
5. Click **Submit**. The file cabinet field is modified.

Reorder File Cabinet Fields

To reorder file cabinet fields:

1. In the **File Cabinets** module, select a file cabinet. The file cabinet's fields display on the right.
2. Select a field and click **Move Up** or **Move Down** as needed. The file cabinet field is reordered.

Clone File Cabinet Field

To clone a file cabinet field:

1. In the **File Cabinets** module, select a file cabinet. The file cabinet's fields display on the right.
2. Select a field and click **Clone**. The **Create New Field** dialog opens.
3. Change the **Field Name** and other settings as needed.
4. Click **Submit**. The file cabinet field is added.

Delete File Cabinet Field

To delete a field:

1. In the **File Cabinets** module, select a file cabinet. The file cabinet's fields display on the right.

2. Select a field and click **Delete**. You are prompted to confirm the delete.

3. Click **Yes** to continue with the delete. The file cabinet field is deleted.

Manage File Cabinets

Manage your file cabinets:

- Modify File Cabinet
- Clone File Cabinet

Modify File Cabinet

To modify a file cabinet:

1. Go to the **File Cabinets** module. See FCP Modules for more information. The list displays all file cabinets to which you have administrative access.
2. You may wish to edit the file cabinet's properties or its fields:
   - To edit the file cabinet's properties, select the file cabinet and click **Modify**. Make changes to general, detail, permissions, and administered by settings as needed.
   - To edit the file cabinet's fields, select the file cabinet and its fields display on the right. Change the fields as needed. See Manage File Cabinet Fields and Set File Cabinet Field Options for more information.

Clone File Cabinet

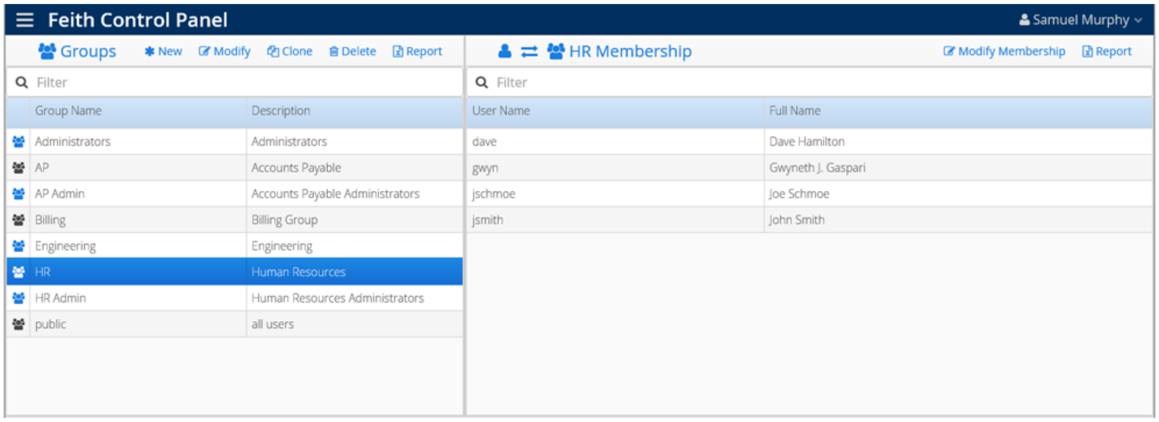
To clone a file cabinet:

1. In the **File Cabinets** module, select the desired file cabinet and click **Clone**. The **Clone File Cabinet** dialog opens.
2. Set the file cabinet's general, detail, permissions, and administered by settings as needed.
3. Click **Submit**. The file cabinet is added.

Groups

Groups

Create and manage groups for your users with similar responsibilities who perform similar tasks. A user can belong to one or more groups and inherits permissions from its groups.



Groups are listed on the left and the selected group's membership is listed on the right. You can **Filter** either list and click **Report** to generate an Excel report of either list.

System Groups

The following system groups are created during the FDD installation. These groups are created for use with FDD applications and cannot be deleted.

All users belong to the **public** group and cannot be removed from that group.

GROUP	DESCRIPTION
FeithDrive	FeithDrive User Group
public	All Users
UTR	Universal Text Retrieval Group

Add Group

To add a group:

1. Go to the **Groups** module. See FCP Modules for more information. The list displays groups to which you have administrative access.

2. Click **New**. The **Create New Group** dialog opens**.**

3. On the **General** tab, enter the group's properties:

    - **Group Name:** The group name. Maximum 64 characters.

    - **Description:** The group description. Maximum 64 characters.

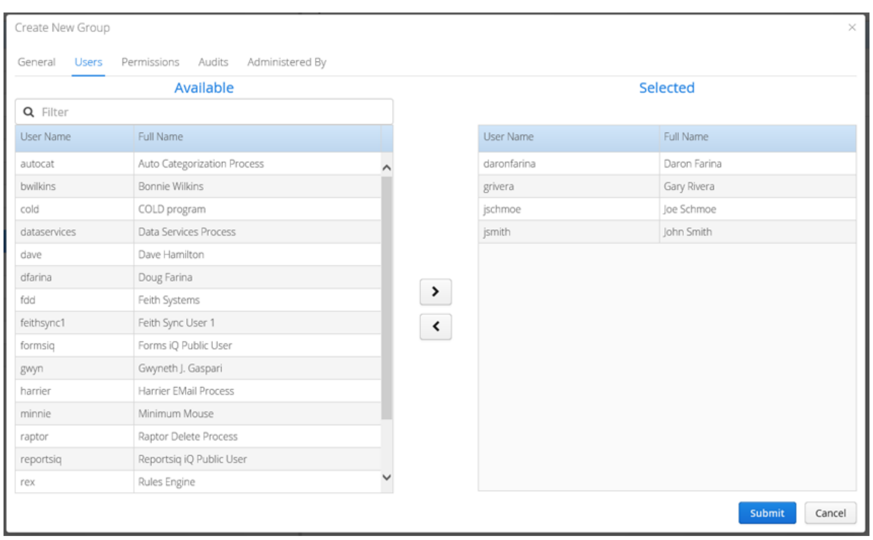
    - **Group Email:** Optionally enter an email address for the group. Maximum 64 characters.

    - **Administrator Group?:** Turn on to make this an administrator group. An administrator group can be assigned administrative access to specific file cabinets and groups, making them a mid-level administrator. See Levels of Administrators for more information.

      Note: This property can only be set by a super administrator.

4. On the **Users** tab, assign users to the group. To assign users faster, you can select multiple users using **CTRL+click** or **SHIFT+click**. You can also double-click the user name to move it from one list to the other.

   Tip: You can also change the group membership for a specific user in the **Users** module. See Add User for more information.



5. On the **Permissions** tab, assign task permissions to the group. Task permissions control what actions the users in the group are allowed to take in various Feith applications (see Task Permissions for more information).

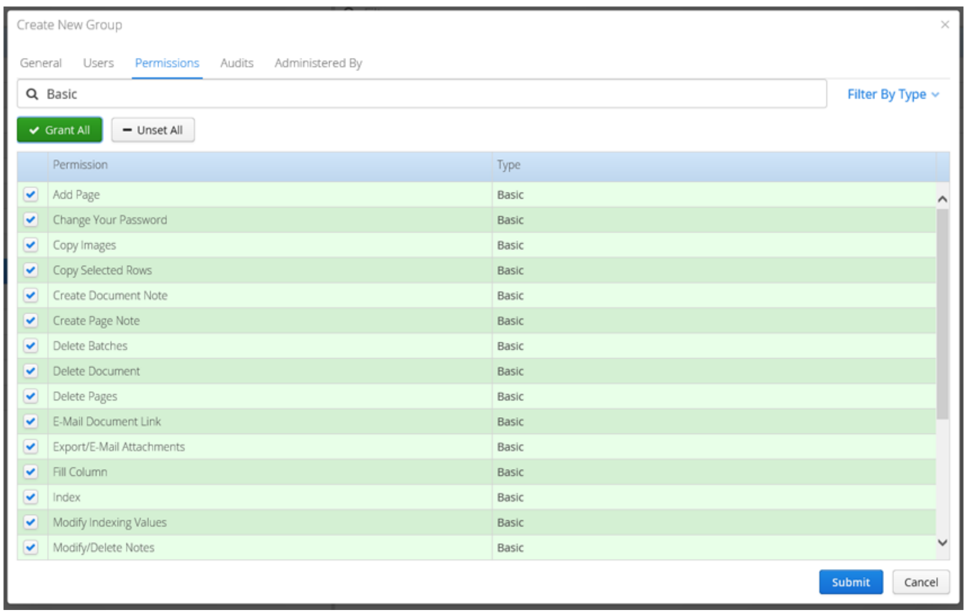
   You can use the **Filter** to find permissions by name or type. In the **Filter By Type** list you can select a permission type to filter on.

   When you have found the desired permissions, you can grant or unset individual permissions. You can also use the **Enable All** or **Unset All** buttons to change all the permission currently listed (permissions filtered out will not be changed).

   Notes:

   - Permissions can also be set at the user level, although this is not generally recommended. See Notes on Settings Permissions for more information on how group and user permissions interact.

   - A mid-level administrator is limited in what task permissions they can assign. See Levels of Administrators for more information.



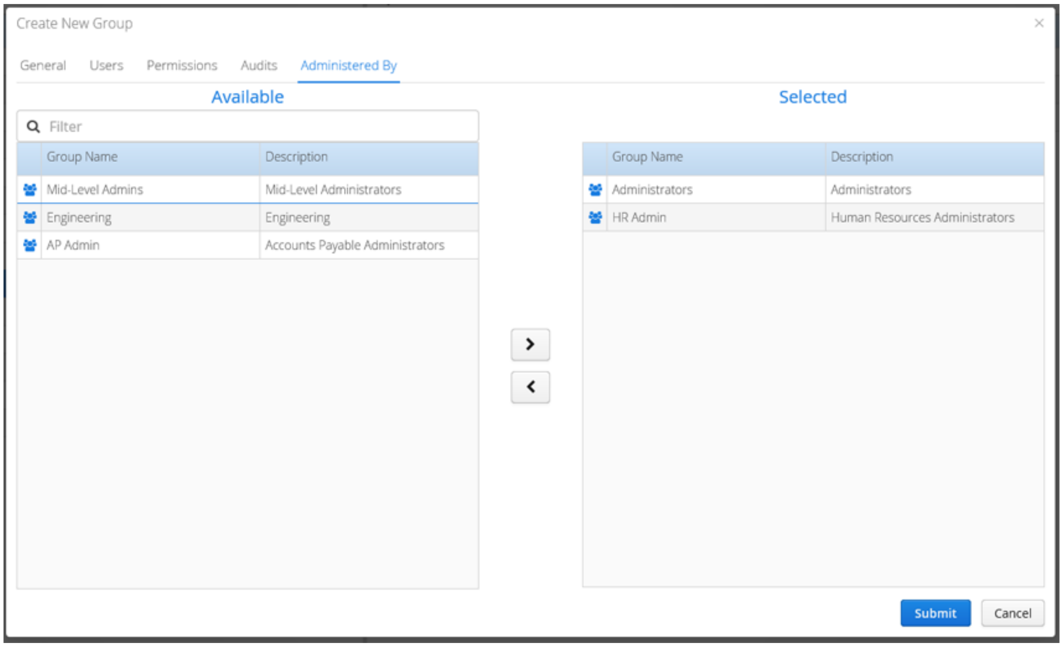
6. On the **Administered By** tab, you may optionally assign an administrator group to administer this new group. Select one or more groups in the **Available** list and click the right arrow button to add them to the file cabinet. To remove them, use the left arrow button .

   You can select multiple administrator groups using **CTRL+click** or **SHIFT+click**. You can also double-click the administrator group name to move it from one list to the other.

   The groups you choose here are mid-level administrators who will be able to modify this group in addition to any super administrators. See Levels of Administrators for more information.

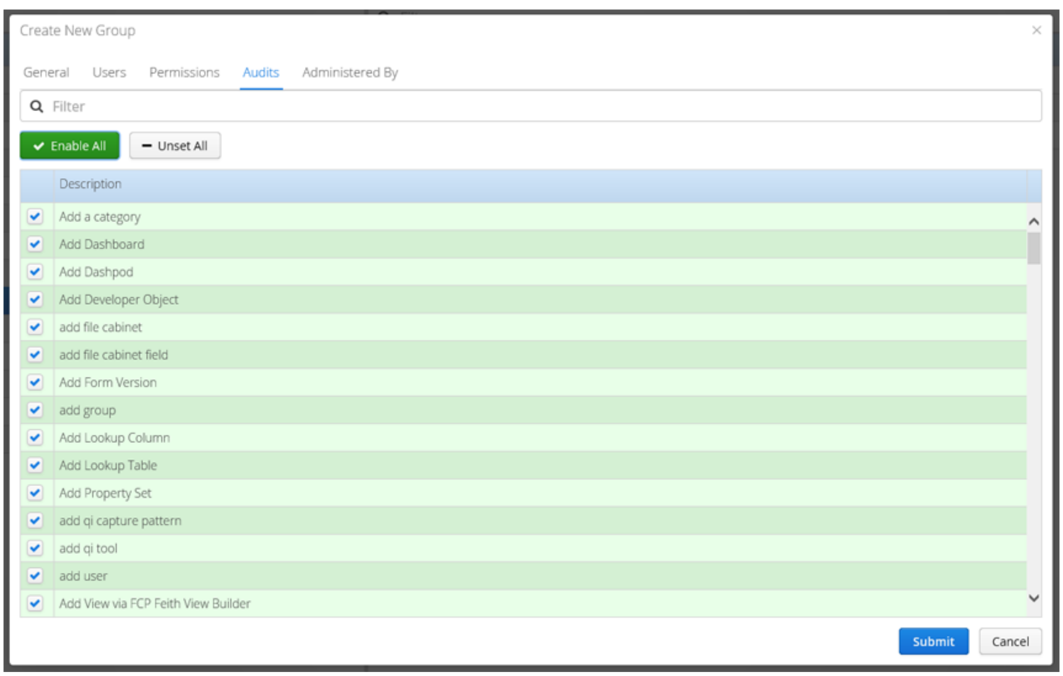
   If you are the member of an administrator group, all administrator groups to which you belong are automatically assigned to the group.

   Note: A mid-level administrator is limited in which administrator groups they can assign to a group.



7. If your FDD system is licensed for auditing, the **Audits** tab is also available. Audits turned on here will be tracked for the group's members and written to the FDD Audit Trail, which can be reported on and viewed in Auditor iQ (see Audit Events for more information).

   You can use the **Filter** to find the audit by name. When you have found the desired audit, you can turn individual audits on or off. You can also use the **Enable All** or **Unset All** buttons to change all the audits currently listed (audits filtered out will not be changed.)



8. Click **Submit**. The group is added.

Manage Groups

Manage your groups:

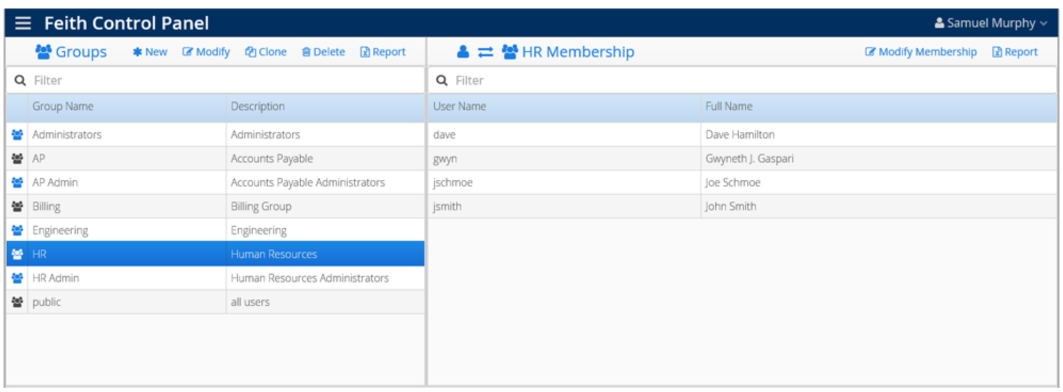
- Modify Users
- Modify Group
- Clone Group
- Delete Group

Modify Users

To modify a group's user membership:

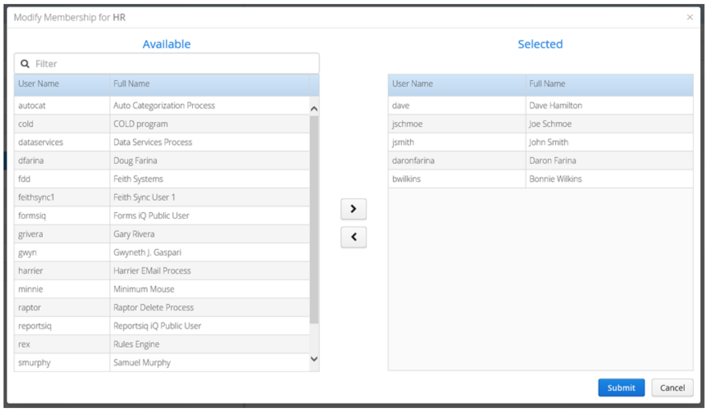
1. Go to the **Groups** module. See FCP Modules for more information. The list displays groups to which you have administrative access.

2. Select the desired group. The group's list of members displays on the right in the **Membership** list.



3. Click **Modify Membership** in the upper right. The **Modify Membership** dialog displays.

4. Assign users as desired. To assign users faster, you can select multiple users using **CTRL+click** or **SHIFT+click**. You can also double-click the user name to move it from one list to the other.



5. Click **Submit**. The group's user membership is modified.

Modify Group

To modify a group:

1. In the **Groups** module, select the desired group and click **Modify**. The **Modify Group** dialog opens.
2. Change the group's general, membership, permissions, and administration as needed. If applicable, you can also edit audits.
3. Click **Submit**. The group is modified.

Clone Group

To clone a group:

1. In the **Groups** module, select the desired group and click **Clone**. The **Clone Group** dialog opens.
2. Set the group's general, membership, permissions, and administration as needed. If applicable, you can also edit audits.
3. Click **Submit**. The group is added.

Delete Group

To delete a group:

1. In the **Groups** module, select the desired group and click **Delete**. You are prompted to confirm the delete.
2. Click **Yes** to continue. The group is deleted.

Locks

Locks

Unlock locked documents, workflows, and work items.

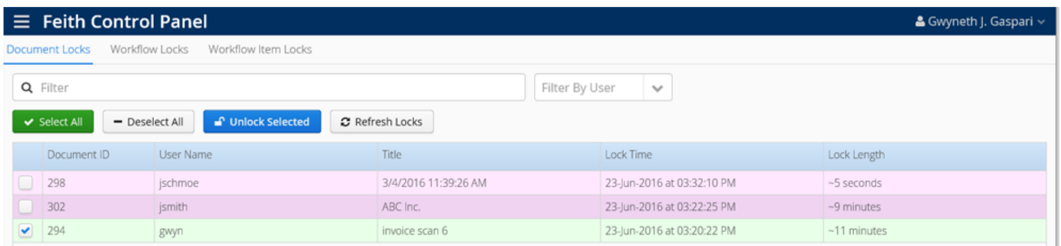
Unlock Documents

To unlock a document or batch:

1. Go to the **Locks** module. See FCP Modules for more information. The list of **Document Locks** displays locked documents and batches.

2. In the **Document Locks** tab, find the locks you want to unlock. You may optionally **Filter** the list or **Filter By Users** who currently hold locks.

3. Select the desired locks by checking their checkboxes, or click **Select All** to select all visible locks in the list.



4. Click **Unlock Selected**. If more than one lock is selected, you are prompted to confirm the unlock - click **Yes** to proceed.

5. The selected documents and batches are unlocked and available.

Unlock Workflows

To unlock a workflow:

1. In the **Locks** module, select the **Workflow Locks** tab. The list of locked workflows displays.

2. In the **Workflow Locks** tab, find the locks you want to unlock. You may optionally **Filter** the list or **Filter By Users** who currently hold locks.

3. Select the desired locks by checking their checkboxes, or click **Select All** to select all visible locks in the list.

4. Click **Unlock Selected**. You are prompted to confirm the unlock

5. Click **Yes** to proceed. The selected workflows are unlocked and available.

Unlock Work Items

To unlock a work item in workflow:

1. In the **Locks** module, select the **Workflow Item Locks** tab. The list of work items locked in workflows displays.

2. In the **Workflow Items Locks** tab, find the locks you want to unlock. You may optionally **Filter** the list or **Filter By Users** who currently hold locks.

3. Select the desired locks by checking their checkboxes, or click **Select All** to select all visible locks in the list.

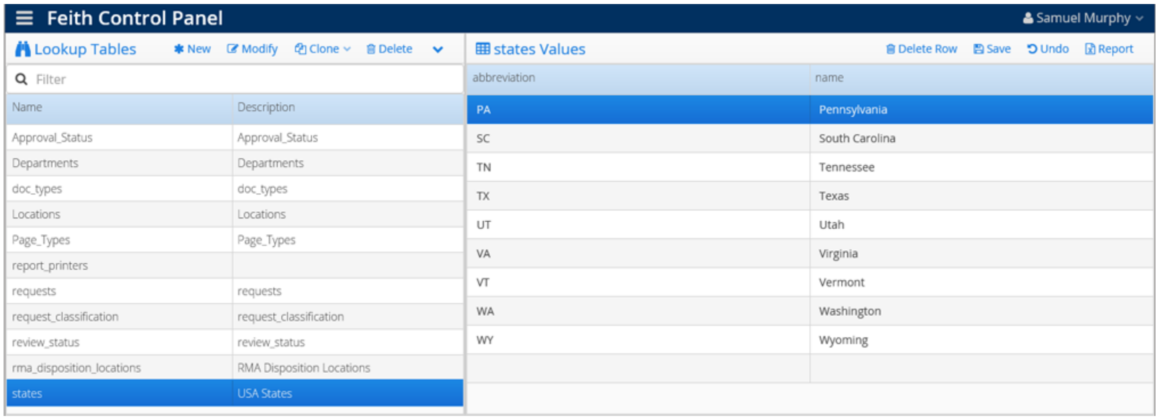
4. Click **Unlock Selected**. If more than one lock is selected, you are prompted to confirm the unlock - click **Yes** to proceed.

5. The selected work items are unlocked and available in the workflow.

Lookup Tables

Lookup Tables

Create and manage lookup tables, which contain a list of suggested values that can be assigned to a file cabinet field to help out users when entering information. See Set File Cabinet Field Options for more information on assigning a lookup table to a file cabinet field.



Lookup tables are listed on the left and the selected lookup table's values are listed on the right. You can **Filter** the lookup table list and click **Report** to generate an Excel report of either list.

System Lookup Tables

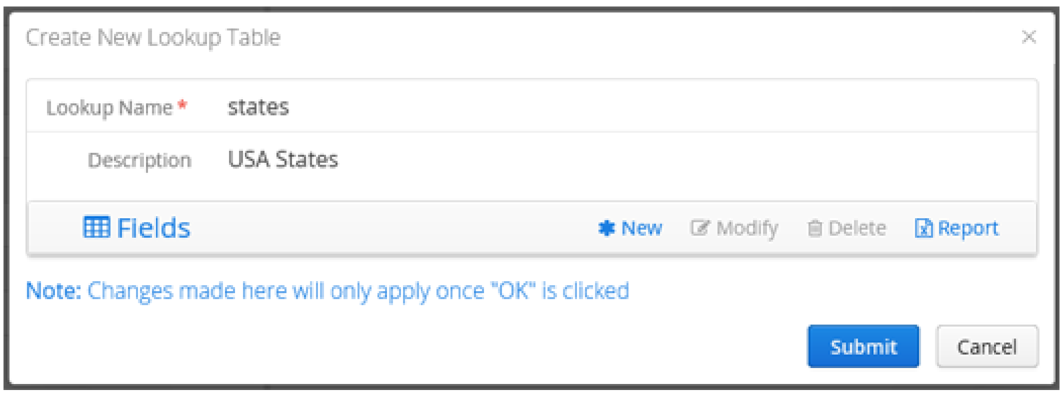
The following system lookup tables are created during the FDD installation. These lookup tables are created for use with FDD applications and cannot be deleted.

FILE CABINET	DESCRIPTION
doc_types	Sample lookup table
report_printers	Report Printers lookup table used by Feith Reports iQ
rma_disposition_locations	RMA Disposition Locations lookup table used by Feith RMA iQ File Plan Administrator

Add Lookup Table

To add a lookup table:

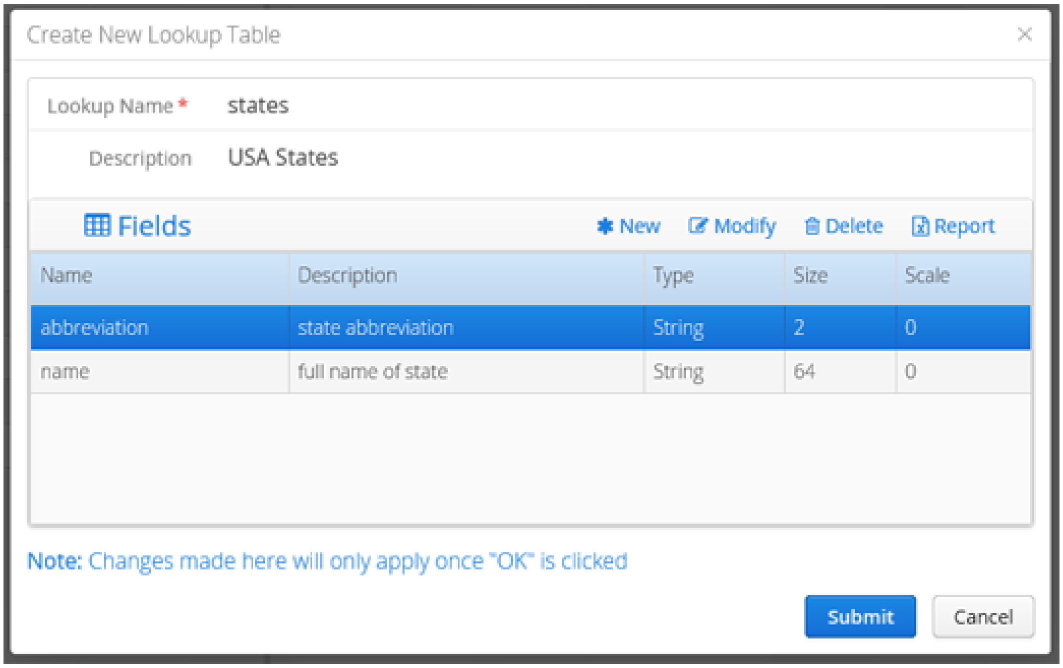
1. Go to the **Lookup Tables** module. See FCP Modules for more information. The list of lookup tables displays.
2. Click **New**. The **Create New Lookup Table** dialog opens.
3. Enter a **Lookup Name**.
4. Optionally enter a **Description**.



5. Click **New** to start adding fields. The **Create New Lookup Field** dialog opens.
6. Enter the following properties for the field:

   - **Field Name:** The field name.
   - **Field Type:** The field's data type (e.g. string, date).
   - **Field Length:** The maximum length the field will accept for a value.
   - **Description:** The field description.

7. Continue to add more **New** fields as desired. You can also **Modify** and **Delete** fields if needed.



8. Click **Submit**. The lookup table is added.

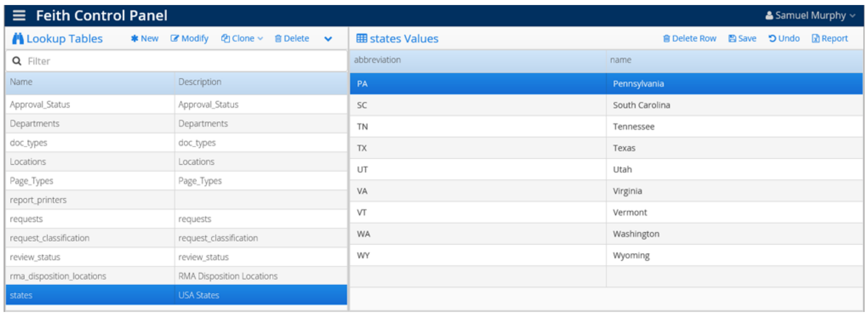
   Continue by adding values to the lookup table. See Enter Lookup Values for more information.

Enter Lookup Values

To enter lookup values in a lookup table:

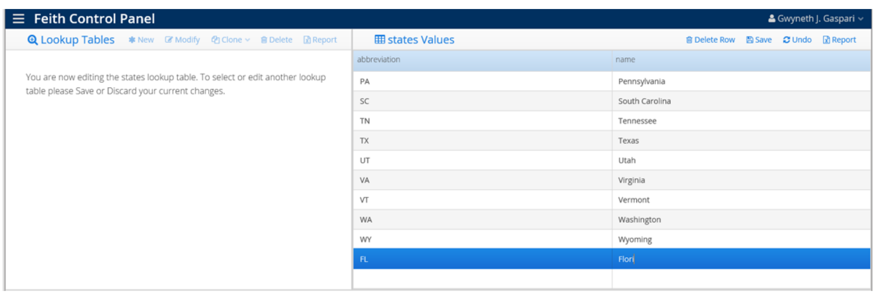
1. Go to the **Lookup Tables** module. See FCP Modules for more information. The list of lookup tables displays.

2. Select the desired lookup table. The lookup table's values (if any) display in the list on the right.



3. Click in the blank row and start entering the values.

   Hit **TAB** to move to the next column. When you finish a row, hit **TAB** to go to the next row. You can hit **SHIFT+TAB** to go back if needed.



4. When you are finished entering values, click **Save**. The lookup values are saved in the lookup table.

To delete a row:

1. In the **Lookup Tables** module, select the desired lookup table. and the lookup table's values display on the right.

2. Click **Delete Row**. You are prompted to confirm the delete.

3. Click **Yes** to continue. The row of the values is deleted from the lookup table.

To cancel changes to lookup values:

1. Click **Reset**. You are prompted to confirm the reset.

2. Click **Yes** to continue. Your changes since the last save are undone.

Manage Lookup Tables

Update and manage your lookup tables. For information on modifying and managing lookup values, see Enter Lookup Values.

Modify Lookup Table

To modify the lookup table structure:

1. Go to the **Lookup Tables** module. See FCP Modules for more information. The list of lookup tables displays.
2. Select the desired lookup table and click **Modify**. The **Modify Lookup Table** dialog opens.
3. Change the lookup fields as needed using the **New**, **Modify**, and **Delete** buttons. See Add Lookup Table for more information.
4. Click **Submit**. The lookup table is modified.

Clone Lookup Table

To clone a lookup table:

1. In the **Lookup Tables** module, select a lookup table and click **Clone** then select **Structure Only** or **With Data**. The **New Lookup Table** dialog opens.
    - **Structure Only:** Clone the lookup with its fields and do not include the lookup values.
    - **With Data:** Clone the lookup with its fields and its lookup values.
2. In the **Clone Lookup Table** dialog, give the clone a new **Lookup Name**. If you chose **Structure Only**, you can also modify the columns if desired.
3. Click **Submit**. The lookup table is added.

Delete Lookup Table

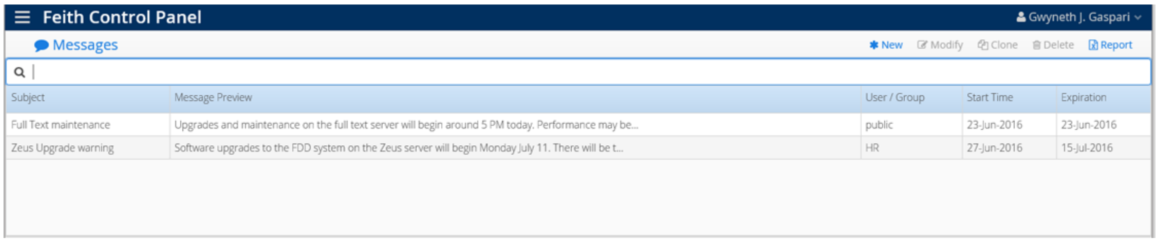
To delete a lookup table:

1. In the **Lookup Tables** module, select a lookup table and click **Delete**. You are prompted to confirm the delete
2. Click **Yes** to continue with the delete. The lookup table is deleted.

Messages

Messages

Create and manage logon messages, which display to end users when they log into the FDD database. You may use messages for notices like system maintenance or security agreements. The user will have to click **OK** to the message in order to login to the application.



You can **Filter** the messages list and click **Report** to generate an Excel report of the list.

Manage your messages:

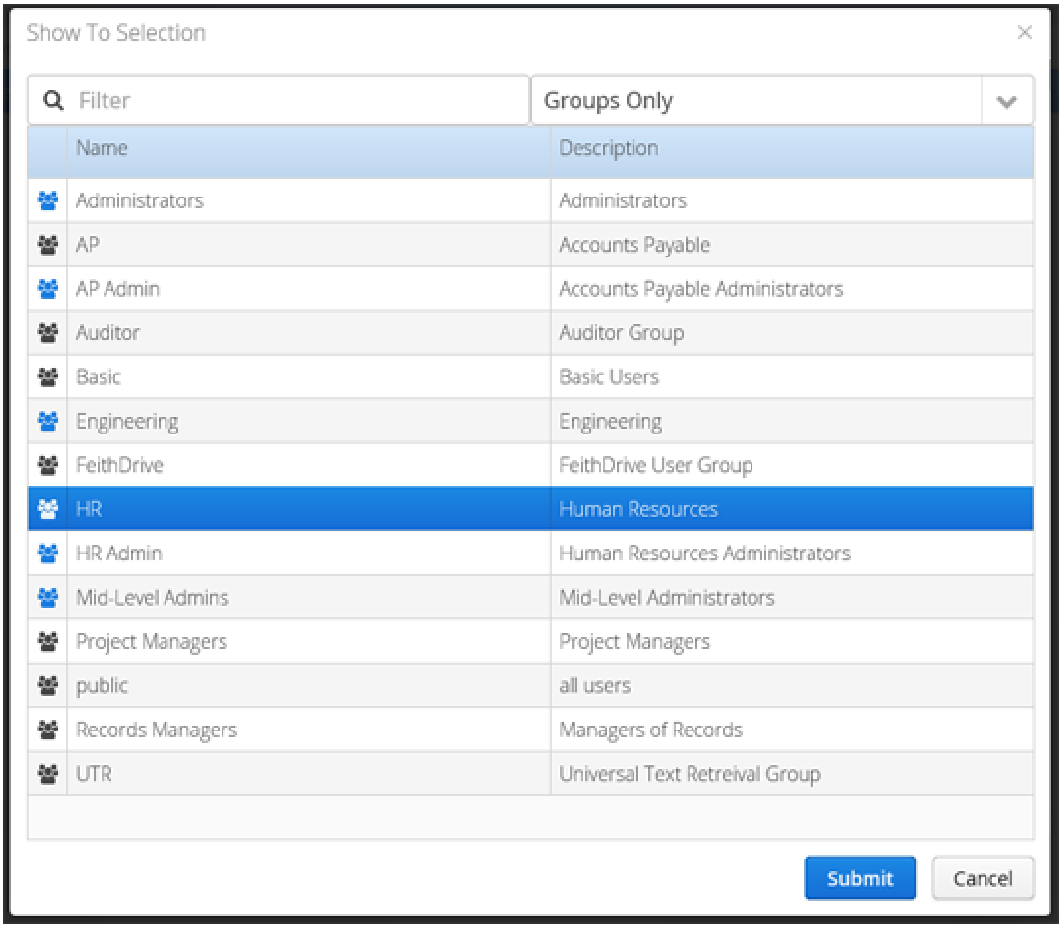
- Add Message
- Modify Message
- Clone Message
- Delete Message

Add Message

To add a logon message:

1. Go to the **Messages** module. See FCP Modules for more information. The list displays messages to which you have administrative access.
2. Click **New**. The **Create New Message** dialog opens.
3. Enter a **Subject**, which will display at the top of the of message to the end user.
4. Enter the **Message** body which the end user will read.

5. In **Show To**, click **Select User or Group** . The **Show To Selection** dialog opens.



6. Select the group or user who will get the message and click **Submit**. The selected group or user displays in the **Show To** field.

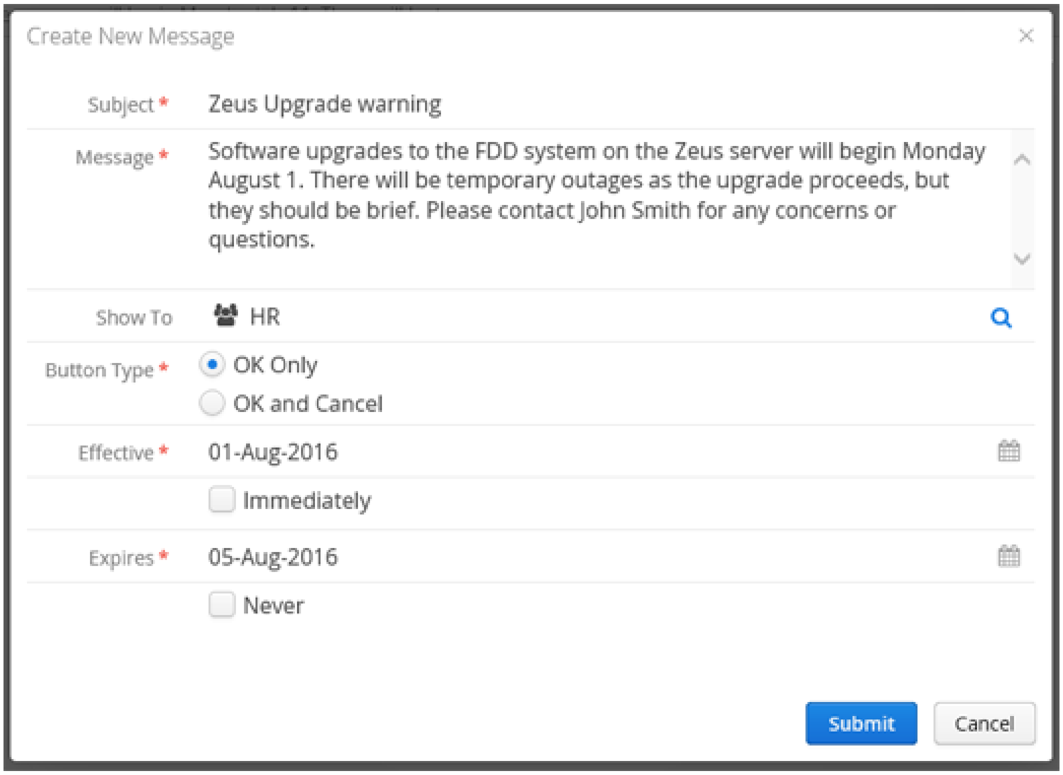
7. Choose the **Button Type** for the message.

   - **OK Only:** The user will simply click **OK** to the message to login to the application.

   - **OK and Cancel:** The user clicks **OK** to proceed and login to the application. If they click **Cancel**, they are not logged in to the application.

8. Choose the date the message will become **Effective**. Select a specific date or choose to have the message take effect **Immediately**.

9. Choose the date the message **Expires**. Select a specific date or choose to have the message **Never** expire.



10. Click **Submit**. The message is added.

Modify Message

To modify a logon message:

1. In the **Messages** module, select the desired message and click **Modify**. The **Modify Message** dialog opens.

2. Set the message's general settings as needed.

3. Click **Submit**. The message is modified.

Clone Message

To clone a logon message:

1. In the **Messages** module, select the desired message and click **Clone**. The **Clone Message** dialog opens.

2. Configure the message as needed.

3. Click **Submit**. The message is added.

Delete Message

To delete a logon message:

1. In the **Messages** module, select the desired message and click **Delete**. You are prompted to confirm the delete.

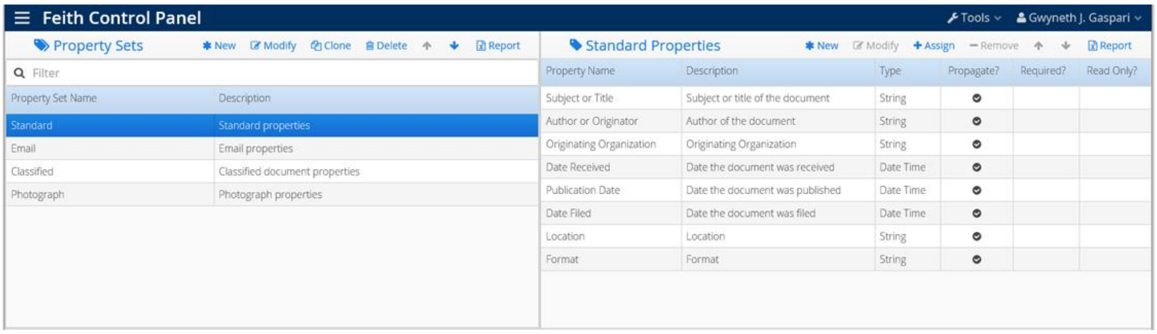
2. Click **Yes** to continue. The message is deleted.

Property Sets

Property Sets

Create and manage sets of properties that can be assigned to documents in FeithDrive or for RMA iQ. Make property sets for different types or groups of documents, without being bound to a specific file cabinet. For example, you could make property sets for emails, photographs, classified documents, and more. Several properties are included in your system by default which you can assign to property sets, or you can add your own properties.

Once a property set is created, it is available to assign in FeithDrive and RMA iQ Workplace. See FeithDrive User Guide and RMA iQ Workplace User Guide for more information.



Property Sets are listed on the left and the selected property set's properties are listed on the right. You can **Filter** the property sets list and click **Report** to generate an Excel report of either list.

Add and Manage Property Sets

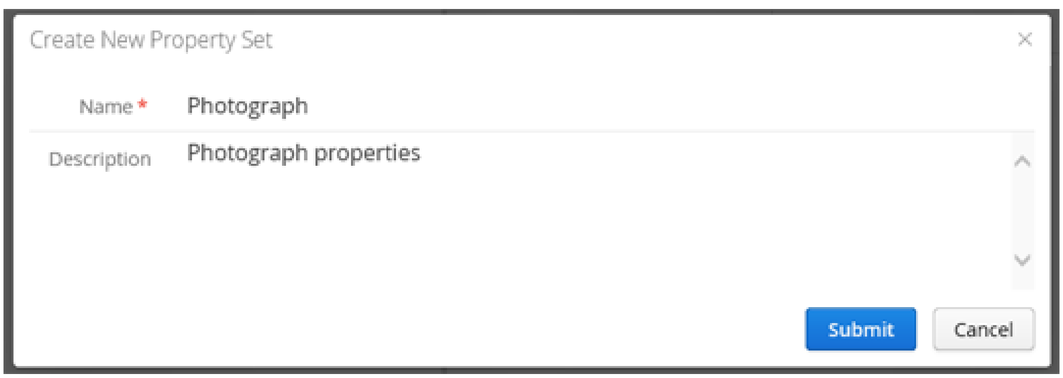
Add new property sets and manage them to suit your needs.

- Add Property Set
- Modify Property Set
- Clone Property Set
- Reorder Property Sets
- Delete Property Set

Add Property Set

To add a new property set:

1. Go to the **Property Sets** module. See FCP Modules for more information. The list of property sets displays.
2. In the **Property Sets** list on the left, click **New**. The **Create New Property Set** dialog opens.
3. Enter the property set's **Name**.
4. Optionally enter a **Description**.



5. Click **Submit**. The new property set is created. Proceed to assign properties or create new properties in your new property set.

Modify Property Set

To modify a property set's basic information:

1. In the **Property Sets** module, select the desired property set.
2. Click **Modify**. The **Modify Property Set** dialog opens.
3. Modify the property set's basic information as needed.
4. Click **Submit**. The property set is modified.

Clone Property Set

To clone a property set:

1. In the **Property Sets** module, select the desired property set.
2. Click **Clone**. The **Clone Property Set** dialog opens and has the same basic information as the property set you cloned, except the **Name** is prefixed with "Copy of".
3. Change the new property set's basic information as desired.
4. Click **Submit**. A clone of the property set is created. All the properties are copied to the clone as well, including the properties' set-specific information. See Manage Properties for more information.

Reorder Property Sets

To reorder property sets:

1. In the **Property Sets** module, select the desired property set.
2. Click the **Move Up** or **Move Down** button to reorder the property set until it is in the desired location. The order in this list is the same order used when an end user views the list of property sets in an application (e.g. FeithDrive).

Delete Property Set

To delete a property set:

1. In the **Property Sets** module, select the desired property set.
2. Click **Delete**. You are prompted to confirm the delete.
3. Click **Yes**. The property set is deleted.

   Note: Deleting a property set does not delete the properties assigned to it. Those properties are still available to assign to other property sets.

Assign Properties

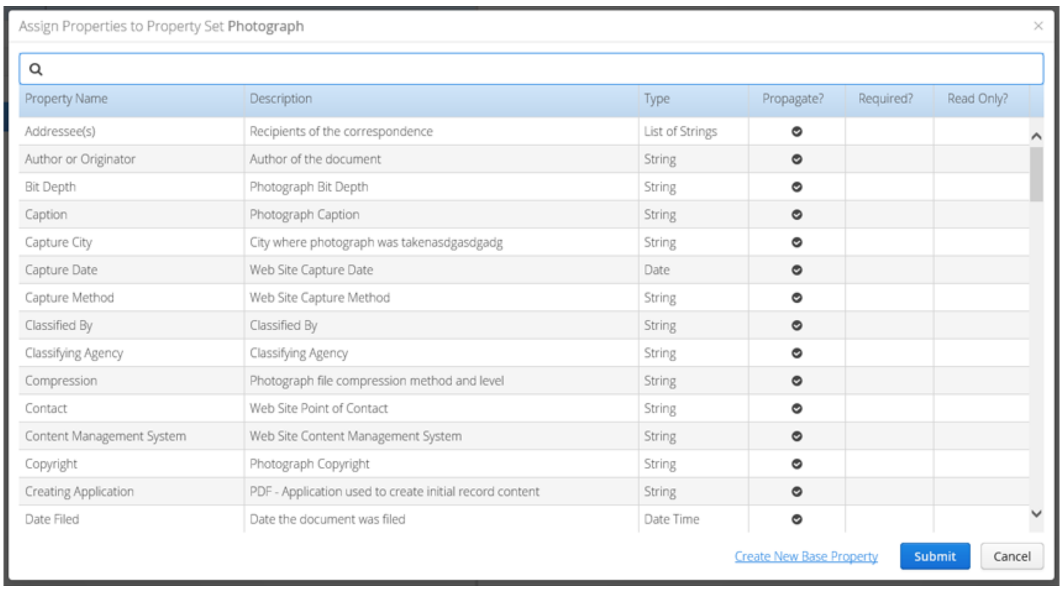
Several properties are included in your system by default which you can assign to property sets. You can also add a new property.

To assign an existing property to a property set:

1. Go to the **Property Sets** module. See FCP Modules for more information. The list of property sets displays.

2. In the **Property Sets** list on the left, select the desired property set. The **Properties** list on the right lists any properties currently assigned to the property set.

3. In the Properties list on the right, click **Assign**. The **Assign Properties to Property Set** dialog opens and lists any properties available to assign (which does not include properties already assigned to this property set).



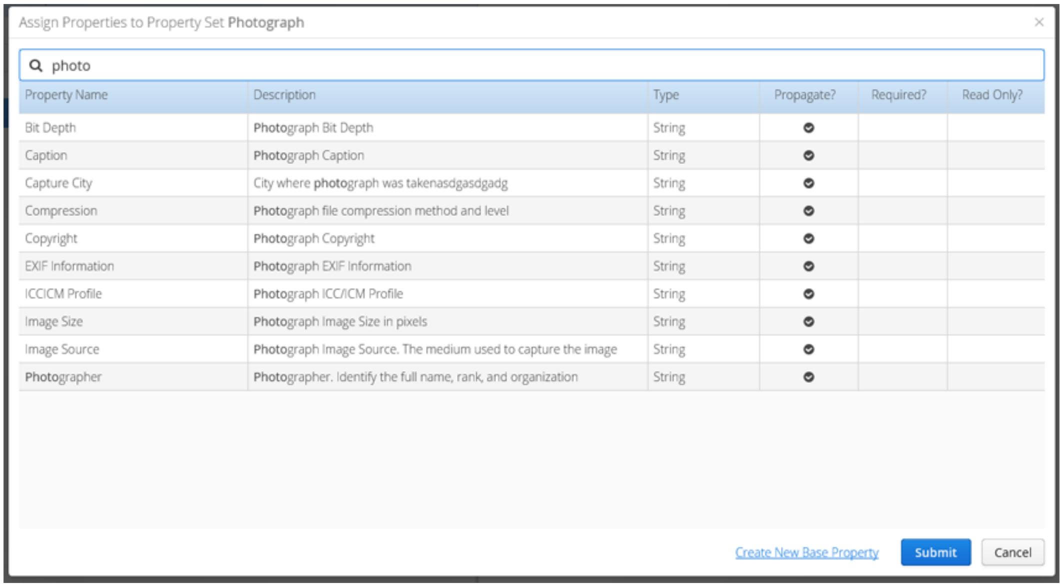
Assign Properties to Property Set **Photograph**

Property Name	Description	Type	Propagate?	Required?	Read Only?
Addressee(s)	Recipients of the correspondence	List of Strings	✔		
Author or Originator	Author of the document	String	✔		
Bit Depth	Photograph Bit Depth	String	✔		
Caption	Photograph Caption	String	✔		
Capture City	City where photograph was takenasdgasdgadg	String	✔		
Capture Date	Web Site Capture Date	Date	✔		
Capture Method	Web Site Capture Method	String	✔		
Classified By	Classified By	String	✔		
Classifying Agency	Classifying Agency	String	✔		
Compression	Photograph file compression method and level	String	✔		
Contact	Web Site Point of Contact	String	✔		
Content Management System	Web Site Content Management System	String	✔		
Copyright	Photograph Copyright	String	✔		
Creating Application	PDF - Application used to create initial record content	String	✔		
Date Filed	Date the document was filed	Date Time	✔		

Create New Base Property Submit Cancel

4. Optionally filter the properties list to find the property you need. Start typing the name of the desired property in the **Filter Properties** field at the top of the list. As you type more letters, the list will filter further until you find the desired property.

   Tip: If you cannot find the property you need, click **Create New Property** to add it. See Add New Property for more information.



5. Select one or more properties to assign. To select multiple properties, use **CTRL+click** or **SHIFT+click**.

6. With the desired properties selected, click **Submit**. The properties are assigned to the property set.

   You can configure the properties' information further within the specific property set. See Manage Properties for more information.

Tip: You can view a report of which properties are assigned to which property sets. See Shared Properties Report for more information.

Add New Property

Several properties are included in your system by default which you can assign to property sets. You can also add new properties.

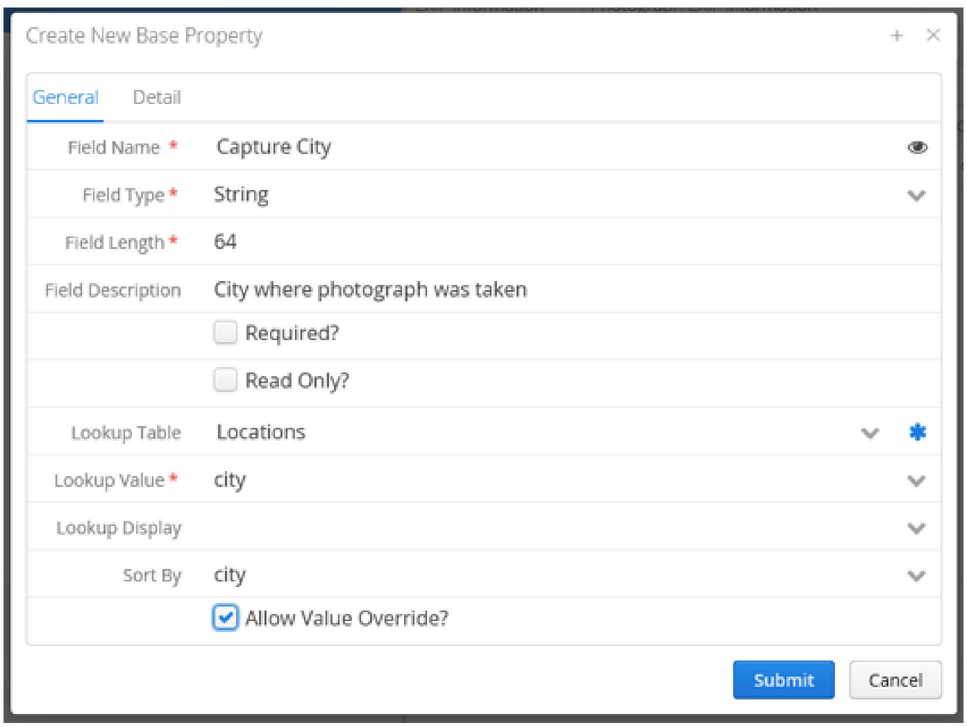
To add a new property to a property set:

1. In the **Property Sets** module, select the desired property set.
2. In the **Properties** list on the right, click **New**. The **Create New Base Property** dialog opens.

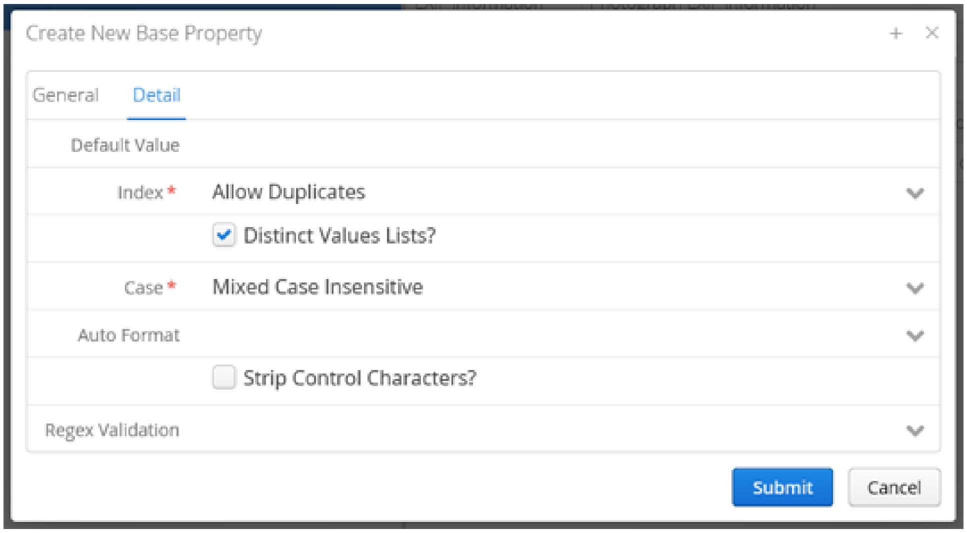
   Tip: The options you select when creating this new property will be the default whenever you assign the property to any property set in the future. Once the property is assigned to a property set, you can configure the property's information further within the specific property set. See Manage Properties for more information.

3. When you are creating a new property, you are essentially adding a new file cabinet field to the Document Properties auxiliary file cabinet. Therefore, the property's settings are the same as a file cabinet field's settings. Refer to the following for instructions:

   - Set the property's general settings on the General tab



- [Set detail settings for the property in the Detail tab]



4. Click **Submit**. The new property is created and assigned to the property set.

   The options you selected when creating this new property will be the default whenever you assign the property to any property set in the future. Once the property is assigned to a property set, you can configure the property's information further within the specific property set. See Manage Properties for more information.

Manage Properties

Manage your properties:

- Modify Property
- Reorder Properties
- Remove Property from Property Set

Modify Property

When a property is first assigned to a property set, its options default to those set when it was first created.

When modifying a property in a property set:

- Changes made only apply to the property within the specific property set. This means you can add the same property to multiple sets and it can have different options within each property set.
- Fewer options are available when modifying. For example, you cannot change the field type or length.
- If you want to modify the base property, instead of just making changes to the property within the specific property set, click **Modify Base Property**. When you are modifying a base property, you are essentially modifying a file cabinet field in the Document Properties auxiliary file cabinet. Therefore, the property's settings are the same as a file cabinet field's settings; see Manage File Cabinet Fields for more information. Depending on the option changed, it may or may not take effect in property sets where the property has already been assigned.

To modify a property:

1. Go to the **Property Sets** module. See FCP Modules for more information. The list of property sets displays.
2. In the **Property Sets** list on the left, select the desired property set. The **Properties** list on the right lists any properties currently assigned to the property set.
3. In the Properties list, select the desired property.
4. Click **Modify**. The **Modify Property** dialog opens.
5. Modify the property's options as desired. Options are:
    - **Description**
    - **Default Value:** Value that will be filled into the property when an end user is adding this property to a document.
    - **FeithDrive Propagate?:** Turn this option on to have this property's value inherited from the document's parent directory in FeithDrive.
    - **Required?:** Turn on to require the end user to enter a value in the property.

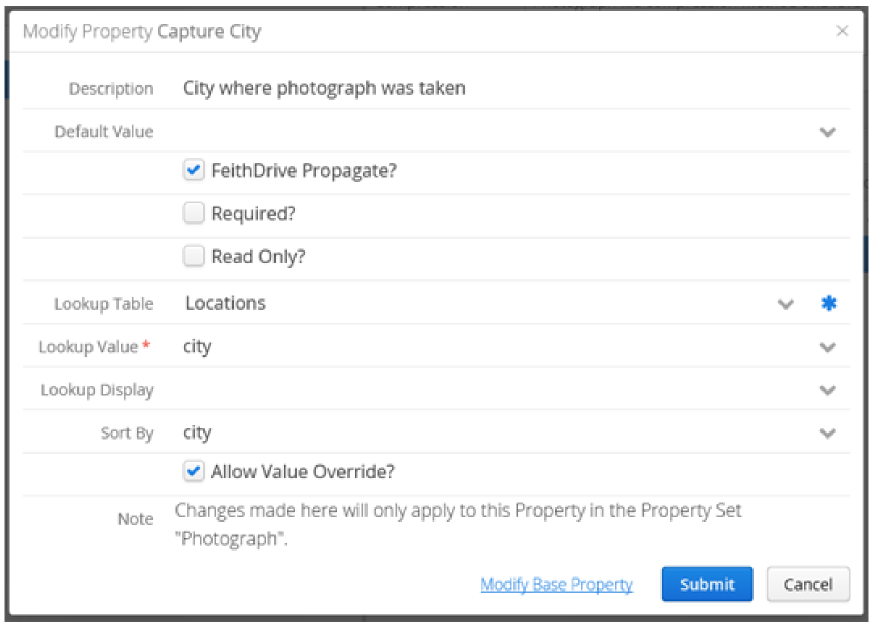
- **Read Only?:** Turn on to make the property read-only so end users cannot enter a value in the property.

- **Lookup Table:** Turn on to provide the end user with a list of values for the property. After selecting the **Lookup Table**, select the **Lookup Value** that will be stored. Optionally select additional options:

  - **Lookup Display:** A column containing values that describe the **Lookup Value** column's values in a way that is friendly to the end user.

  - **Sort By:** A column that specifies the sort order for the **Lookup Value** column's values.

  - **Allow Value Override?:** Turn on to allow the end user to enter a value that does *not* exist in the lookup table. Turn off to force the end user to select a value that exists in the lookup table.



6. Click **Submit**. The property is modified within the specific property set. The property is *not* changed in any other property set where it exists.

Reorder Properties

To reorder properties within a property set:

1. In the **Property Sets** module, select the desired property set.

2. In the **Properties** list on the right, select the desired property.

3. Click the **Move Up** or **Move Down** button to reorder the property until it is in the desired location. The order in this list is the same order used when an end user views the property set in an application (e.g. FeithDrive).

Remove Property from Property Set

To remove a property from a property set:

1. In the **Property Sets** module, select the desired property set.

2. In the **Properties** list on the right, select one or more properties. Select multiple properties using **CTRL+click** or **SHIFT+click**.

3. Click **Remove**. You are prompted to confirm you want to remove the properties from the property set.

4. Click **Yes** to proceed with the removal. The properties are removed from the property set but are still available to assign to a property set if needed.

Tip: You can view a report of which properties are assigned to which property sets. See Shared Properties Report for more information.

Shared Properties Report

View a report of which properties are assigned to which property sets.

To view the Shared Properties Report:

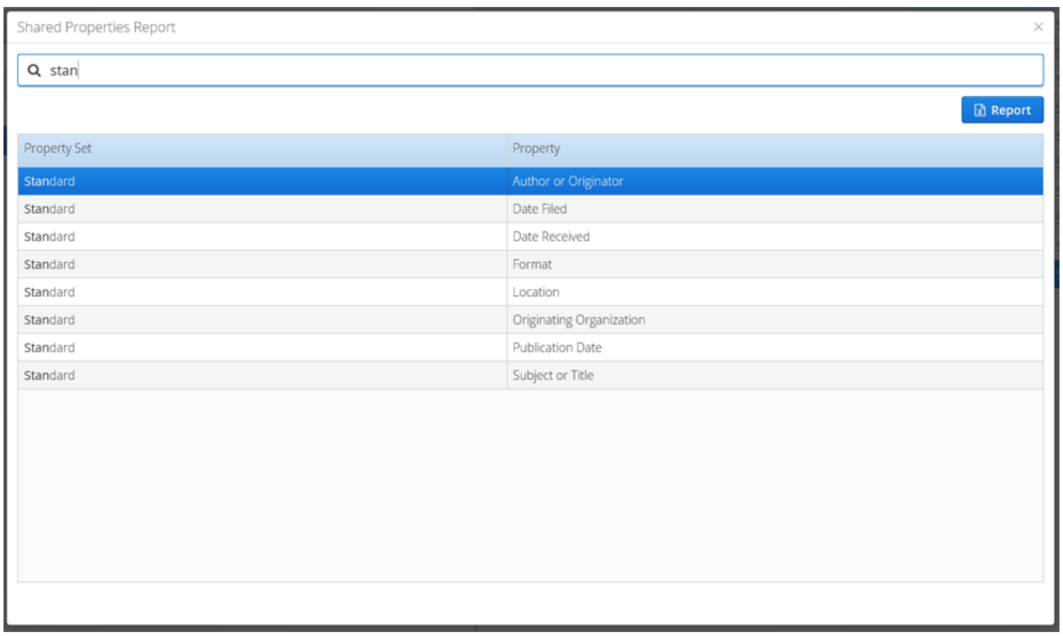
1. Go to the **Property Sets** module. See FCP Modules for more information. The list of property sets displays.

2. Select **Tools>Shared Properties Report**. The **Shared Properties Report** dialog opens and displays every property assigned to a property set as well as the property set to which the property is assigned.

   Note: Empty property sets without any properties are not listed. Properties with no assignments are not listed either.

3. Optionally filter the list to find the property set or property you need. Start typing the name of the desired property set/property in the **Filter Property Sets and Properties** field at the top of the list. As you type more letters, the list will filter further until you find the desired property set /property.

   You can click **Report** to generate an Excel report of the list. You can also click the column headers **Property Set** or **Property** to sort the columns.

4. When you are done viewing the report, click the **X** in the upper right to close the Shared Properties Report dialog.

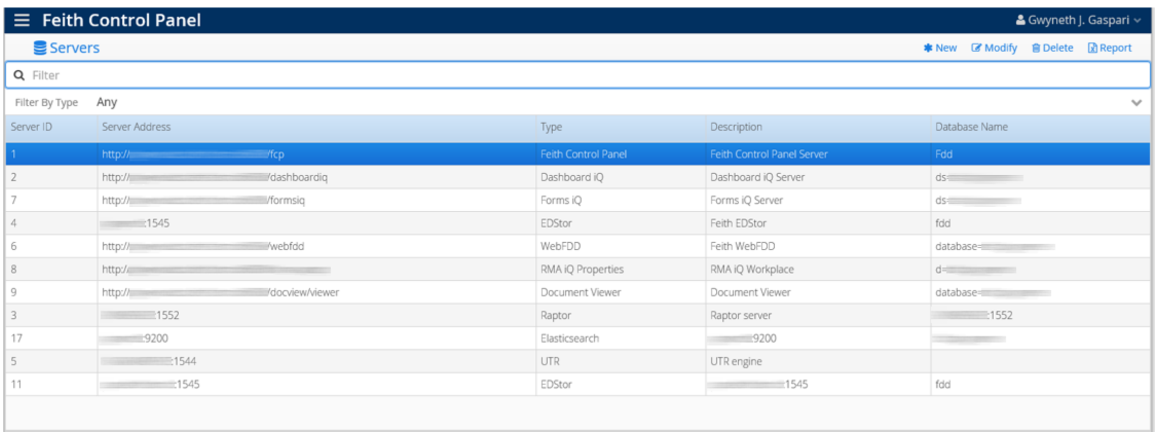
Servers

Servers

Create and manage server entries, which are used by Feith applications to call server applications. For example, the server entry for Forms iQ allows the clients to call Forms iQ Server when displaying submitted forms in file cabinets.

There are several types of servers and the instructions are broken down by general server types and what kind of information they require:

- **EDStor Server:** Stores the pages for your documents and a few other objects.
- **Full Text Server:** Stores the text from FDD documents, making them full text searchable. We support the Elasticsearch and Autonomy IDOL full text servers.
- **Web Server:** A web server is an application installed on a server that you can access from workstations in a browser. E.g. WebFDD, Forms iQ, Dashboard iQ, and more.



You can **Filter** the servers list or **Filter By Type**. You can also click **Report** to generate an Excel report of the list.

Read-Only Server Entries

The following server entries are handled automatically by their respective applications. You can view them in the Servers module, but you cannot change them.

SERVER	DESCRIPTION
Raptor	A service that processes deleting at high speed.
UTR	A service that processes documents to make them full text searchable.

EDStor Server

EDStor stores the pages for your documents and a few other objects.

To add an EDStor server:

1. Go to the **Servers** module. See FCP Modules for more information. The list of servers displays.
2. Click **New**. The **Create New Server** dialog opens.
3. Select **EDStor** as the **Server Type**.
4. In the **Server Address** field, enter the name of the machine where EDStor is running.
5. Enter the **Port** EDStor is running on (typically **1545**).
6. Optionally enter a **Description**.

7. Click **Submit**. The EDStor server is added.

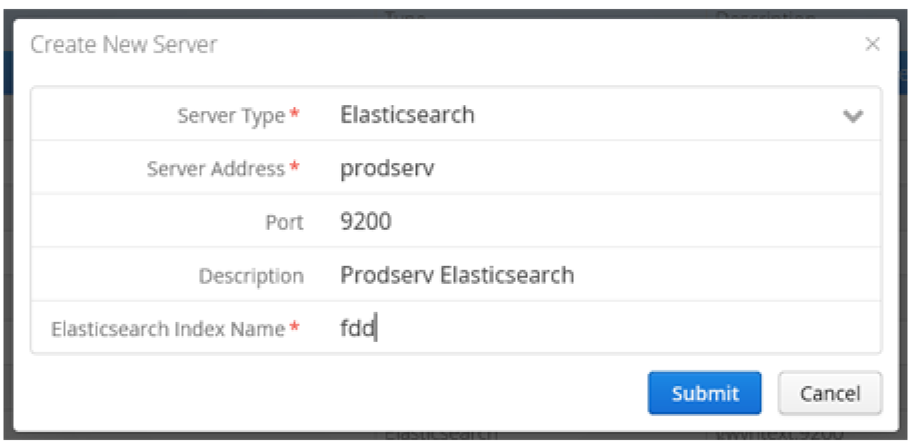
Full Text Server

A full text server stores the text from FDD documents, making them full text searchable. We support the **Elasticsearch** and **Autonomy IDOL** full text servers.

Elasticsearch

To add an Elasticsearch full text server:

1. Go to the **Servers** module. See FCP Modules for more information. The list of servers displays.
2. Click **New**. The **Create New Server** dialog opens.
3. Select **Elasticsearch** as the **Server Type**.
4. In the **Server Address** field, enter the name of the machine where the Elasticsearch is running.
5. Enter the **Port** the Elasticsearch is running on (typically **9200**).
6. Optionally enter a **Description**.
7. Enter the **Elasticsearch Index Name**, which is the index in Elasticsearch where you will store your documents' text.



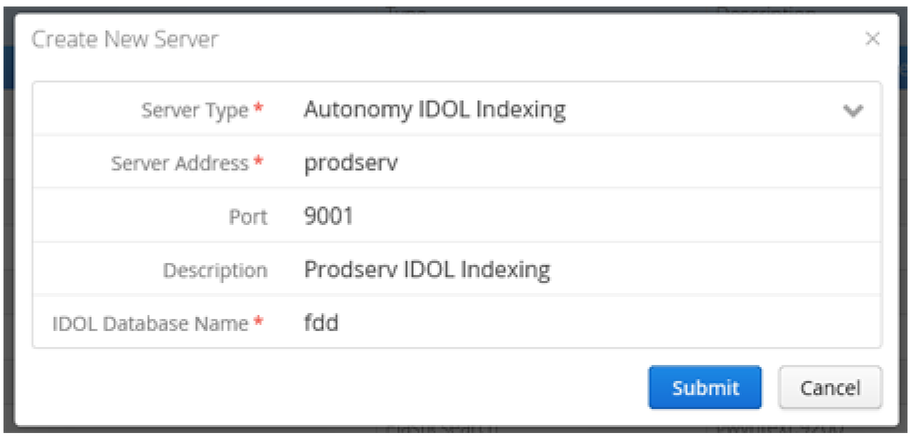
8. Click **Submit**. The Elasticsearch server is added.

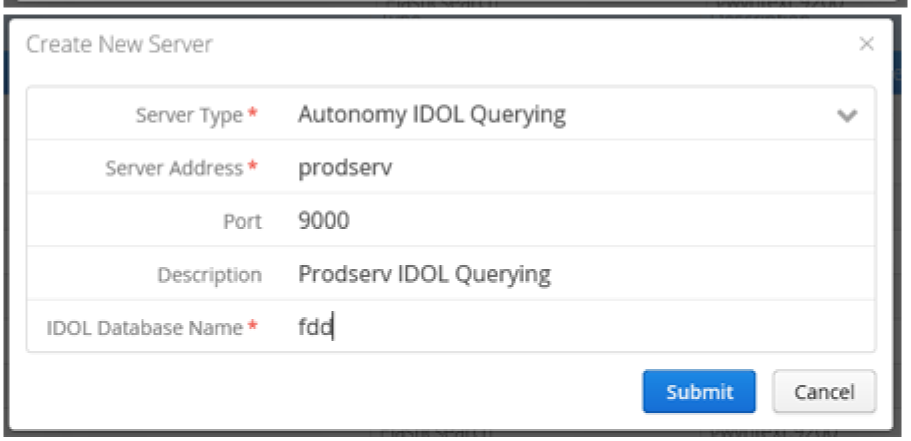
Autonomy IDOL

Autonomy IDOL server entries are added in the same way as Elasticsearch, except you needs *two* server entries for an IDOL server: **Autonomy IDOL Indexing** and **Autonomy IDOL Querying**.

- **Server Address** is the machine where Autonomy IDOL is running.
- You must add two server entries of different **Server Types**: **Autonomy IDOL Indexing** and **Autonomy IDOL Querying**.
- Autonomy IDOL Indexing typically runs on **Port 9001**.

  Autonomy IDOL Querying typically runs on **Port 9002**.
- **IDOL Database Name** is the name of the database in IDOL where you will store your documents' text.





Web Server

A web server is an application installed on a server that you can access from workstations in a browser. There many web applications which are used for a variety of purposes.

For example, to add a WebFDD web server:

1. Go to the **Servers** module. See FCP Modules for more information. The list of servers displays.
2. Click **New**. The **Create New Server** dialog opens.
3. Select **WebFDD** as the **Server Type**.
4. In the **Server Address** field, enter the URL to the WebFDD application.
5. Optionally enter a **Description**.
6. Enter the **FDD Database Name**, which is the name of the database connection in WebFDD's configuration file.

The FDD Database Name must match the database connection in the web server's configuration file. If they do not match, problems could occur later on.

7. Click **Submit**. The WebFDD server is added.

All web server entries are added in the same way as the WebFDD example above, except a couple 3rd-party servers require less information. Example **Server Addresses** with the standard application names are given below.

We recommend you use the same database connection name in all your web servers' configuration files and therefore the same FDD Database Name for all your web server entries. Inconsistent database connection names could cause problems later on.

WEB SERVER TYPE	EXAMPLE SERVER ADDRESS
Analyze iQ (Manager) Configure boolean and bayesian schemes for Analyze iQ Server to auto-categorize documents.	http://prodserv/analyzeiq

CRE (Central Rendering Engine) Renders pages in various formats for Document Viewer and other applications.	http://prodserv/cre
Dashboard iQ (Server) View and track your organizations key performance indicators in dashboards you built in Dashboard iQ Designer.	http://prodserv/dashboardiq
Developer (Server) Serves up objects you coded in the Developer client.	http://prodserv/dataservices/rest/v1/api/developer
Document Viewer View documents, make notes, download pages, and more.	http://prodserv/docview/viewer
External Reference an external, 3rd-party application, such as MS SharePoint.	http://mysharepoint/
FeithDrive Upload files into a private cloud to share and collaborate with coworkers.	http://prodserv/feithdrive
Forms iQ (Server) Fill out and submit web forms you build in Forms iQ Designer.	http://prodserv/formsiq
Geomap Reference and external, 3rd-party geographical mapping server for Geomap pods in Dashboard iQ.	http://amappingservice
RMA iQ Properties View and update a record's RMA document properties, category, supplemental markings, and more.	http://prodserv/rmaiq
WebFCP Administer your FDD system by creating and managing users, groups, file cabinets, permissions, and more, all in a web application.	http://prodserv/fcp
WebFDD View and manage your documents in the FDD system using a web application.	http://prodserv/webfdd

Manage Servers

Modify Server

To modify a server:

1. In the **Servers** module, select the desired server and click **Modify**. The **Modify Server** dialog opens.

2. Make changes as needed according to the **Server Type**. See EDStor Server, Full Text Server, or Web Server for more information.

3. Click **Submit**. The server is modified.

Delete Server

To delete a server:

1. In the **Servers** module, select the desired server and click **Delete**. You are prompted to confirm the delete

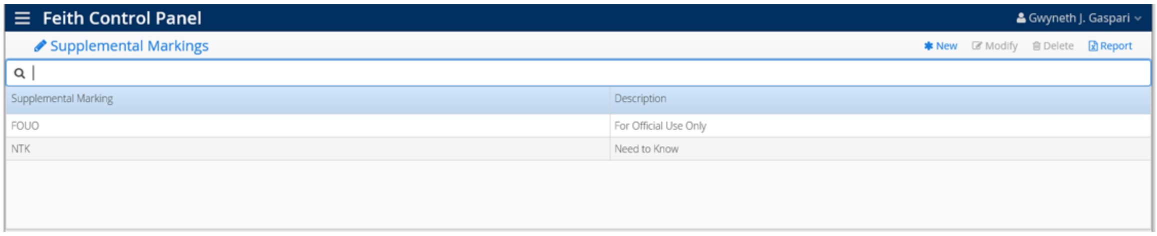
2. Click **Yes** to proceed. The server is deleted.

   Note: If objects in the FDD system are associated with the server, you will be prevented from deleting the server entry. For example, if pages are stored on an EDStor server then you will not be able to delete the EDStor server entry.

Supplemental Markings

Supplemental Markings

Create and manage supplemental markings, which restrict access to documents that are records for RMA. A user must have a supplemental marking in order to access a document with that supplemental marking. Users are assigned supplemental markings in their Clearances tab.



You can **Filter** the supplemental markings list and click **Report** to generate an Excel report of the list.

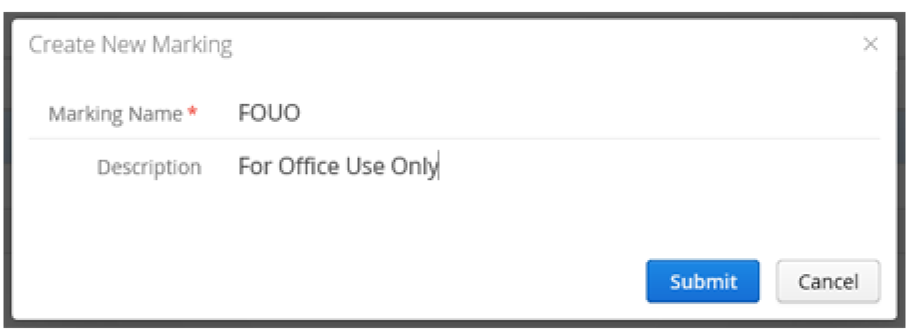
Manage your supplemental markings:

- Add Supplemental Marking
- Modify Supplemental Marking
- Delete Supplemental Marking

Add Supplemental Marking

To add a supplemental marking:

1. Go to the **Supplemental Markings** module. See FCP Modules for more information. The list of supplemental markings displays.
2. Click **New**. The **Create New Marking** dialog opens.
3. Enter a **Marking Name**.
4. Optionally enter a **Description**.



5. Click **Submit**. The supplemental marking is added.

Modify Supplemental Marking

To modify a supplemental marking:

1. In the **Supplemental Markings** module, select the desired marking and click **Modify**. The **Modify Marking** dialog opens.

2. Change the marking as needed.

3. Click **Submit**. The marking is modified.

Delete Supplemental Marking

To delete a supplemental marking:

1. In the **Supplemental Markings** module, select the desired marking and click **Delete**. You are prompted to confirm the delete.

2. Click **Yes** to continue. The supplemental marking is deleted.

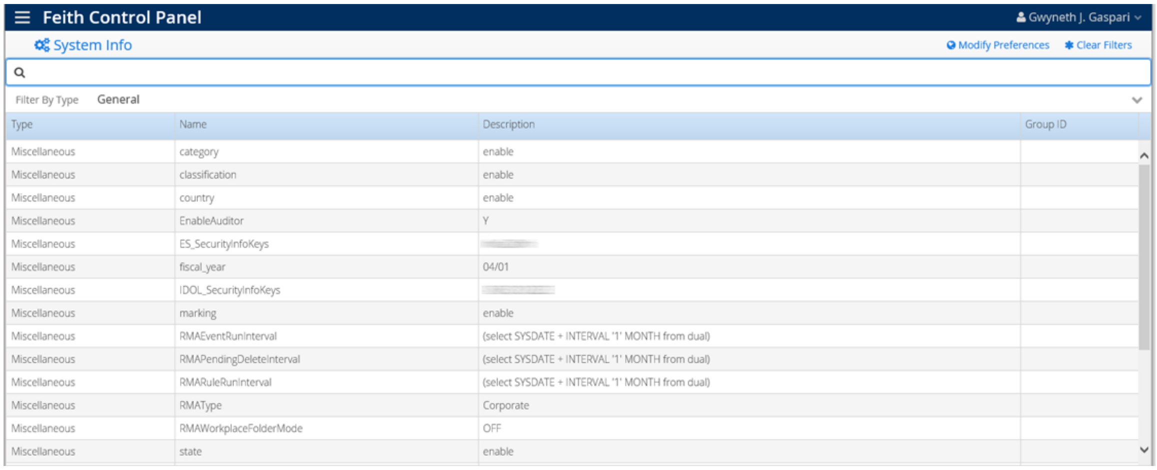
   Note: A supplemental marking can only be deleted if it is not assigned to any documents.

System Info

System Info

View FDD system information and also set system preferences, including fiscal year start day and RMA features.

Note: Only a super administrator can access the System Info module.

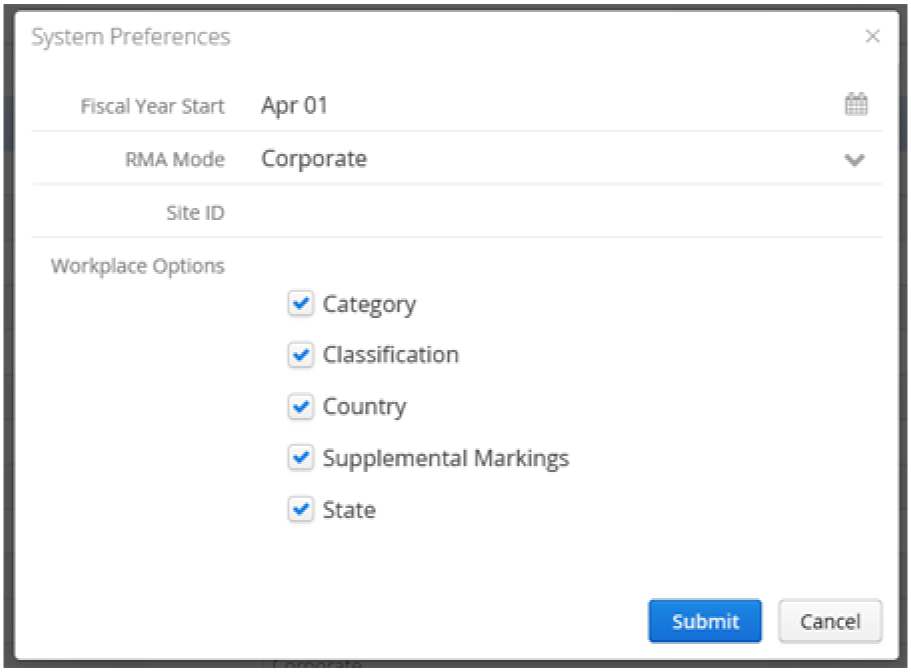


The system information list is read-only and cannot be changed. You can **Filter** the system info list or **Filter By Type** of information.

System Preferences

To modify system preferences:

1. Go to the **System Info** module. See FCP Modules for more information. The list of system information displays.
2. Click **Modify Preferences**. The **System Preferences** dialog opens.
3. Change system preferences as needed:
    - **Fiscal Year Start:** Set the start day of the fiscal year for the FDD system.
    - **RMA Mode:** Enable or disable RMA features in various Feith applications. Options are:
        - **None:** RMA features are off and unavailable.
        - **Corporate:** RMA features are turned on and available, such as categories, supplemental markings, and more. Classifications are excluded.
        - **Government:** All RMA features are turned on, including classifications.
    - **Workplace Options:** Enable or disable RMA iQ features by checking them on and off, including **Category**, **Classification**, **Country**, **Supplemental Markings**, and **State**.

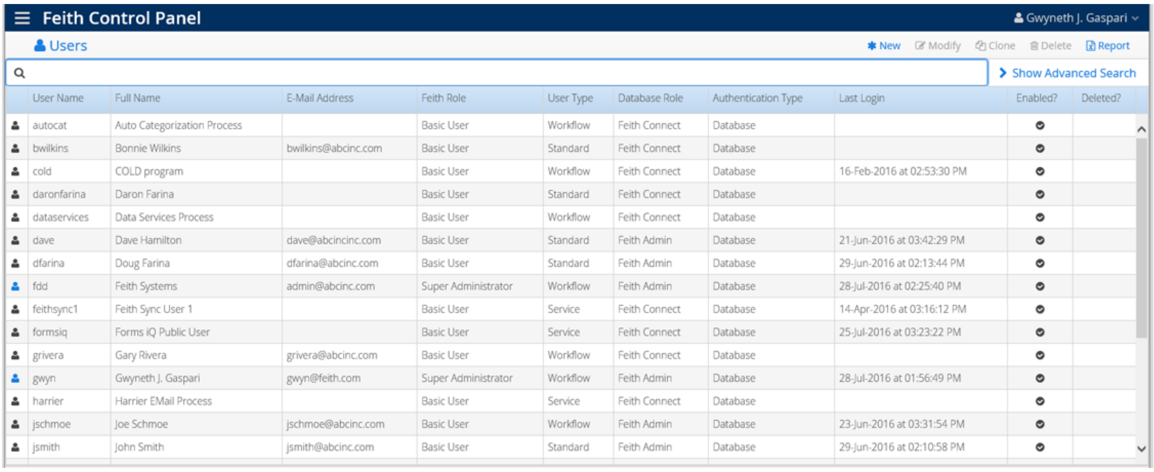


4. Click **OK**. Changes to the system preferences are saved.

Users

Users

Create users for your people to login to the Feith Document Database (FDD) system and assign them to groups. When adding users you must consider what authentication type you are going to choose: database or external.



Groups are listed on the left and the selected group's membership is listed on the right. You can **Filter** the user list and click **Report** to generate an Excel report of the list. You can also do an Advanced Search for users.

System Users

The following system users are created during the FDD installation. These users are created for use with FDD applications.

USER	DESCRIPTION
autocat	Auto Categorization user
cold	COLD user
dataservices	Data Services user
fdd	Feith Systems Administrative user
feithsync1	Feith Sync user
formsiq	Forms iQ Server user
harrier	Harrier user
raptor	Raptor user
reportsiq	Reports iQ user

rex	Rules Engine user
system	System Administrator
utr1	Universal Text Recognition user

Advanced Search

Choose and combine various search criteria to quickly find the users you need to find.

Note: If your system has more than 1,000 users, the user list is empty by default and you must use Advanced Search in order to get a list of users.

To do an advanced search for users:

1. Go to the **Users** module. See [FCP Modules] for more information. The list of users displays.

2. Click **Show Advanced Search**. The advanced search fields display.

3. Enter search criteria as desired:

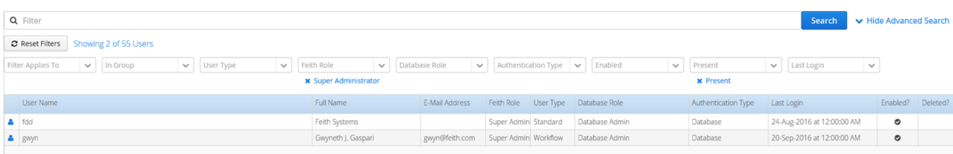
   - Specify which column the **Filter Applies To** for the text you entered in the **Filter** field.

   - Search on various columns in the user list, including **User Type**, **Feith Role**, **Database Role**, **Authentication Type**, **Enabled**, and **Last Login**.

   - Select a group from **In Group** to list users from a specific group.

   - In the **Present** field, you can select **Deleted** to view users that have been deleted.

   - To clear search criteria, you can click **Reset Filters** or click the **X** next to specific criteria. To clear **Last Login** criteria, select the blank option at the top of the list.

4. Click **Search**. The users matching your search criteria are listed.

Add User

User Authentication Types

When creating a user, you must choose whether they will be **Database** authenticated or **Externally** authenticated.

Database Authenticated

Unless your FDD system is configured for external authentication, users must be added as database authenticated users. When adding a database authenticated user, a password must be set for the user. The password must be entered every time the user logs in to FDD.

See Add Database Authenticated User for more information.

Externally Authenticated

Externally authenticated users can be added when your FDD system is configured for external authentication; for example, if FDD is integrated with Microsoft Active Directory.

Single Sign-On: Integrating with Active Directory using Kerberos authentication provides Single Sign-On (SSO) in addition to external authentication. With SSO, when a user logs into their computer they can login to FDD without typing in their FDD user name and password, because FDD takes the credentials from the operating system and verifies them against Active Directory directly. Note that SSO does *not* apply when running on an Oracle database that is configured to use RADIUS authentication.

See the appropriate topic for your database:

- Add Externally Authenticated User on Oracle
- Add Externally Authenticated User on MS SQL Server

Add Database Authenticated User

To add a database authenticated user:

1. Go to the **Users** module. See FCP Modules for more information. The list of users displays.

2. Click **New**. The **Create New User** dialog opens.

3. On the **General** tab, enter the user's general properties:

    - Choose **Database** as the **Authentication Type**.

    - The **Login Name** they will type to login to FDD.

    - Their **Full Name**.

    - Optionally enter their **Email**.

    - Optionally enter a **Description** of the user.

    - Select a **User Type**. Options are:

        - **Standard:** Standard user with no specific designation.

        - **Guest:** For unauthenticated users to access specific functions and objects within Feith applications. This type of account is typically used by Feith Developer.

        - **Service:** Account for service application, such as REX, Harrier, and Raptor.

        - **Workflow:** A workflow user who has access to workflow features in the clients (e.g. FDD Client). Your system must be licensed for workflow and you must have available workflow user licenses.

    - Select a **Database Role.** The privileges of each database role differ between databases; see Database Roles and/or refer to your database vendor's documentation for more information.

      Note: Only super administrators can set the **Feith Admin** and **Database Admin** database roles.

    - Optionally make the user a **Super Administrator?**. A super administrator is the most powerful type of administrator. See Levels of Administrators for more information.

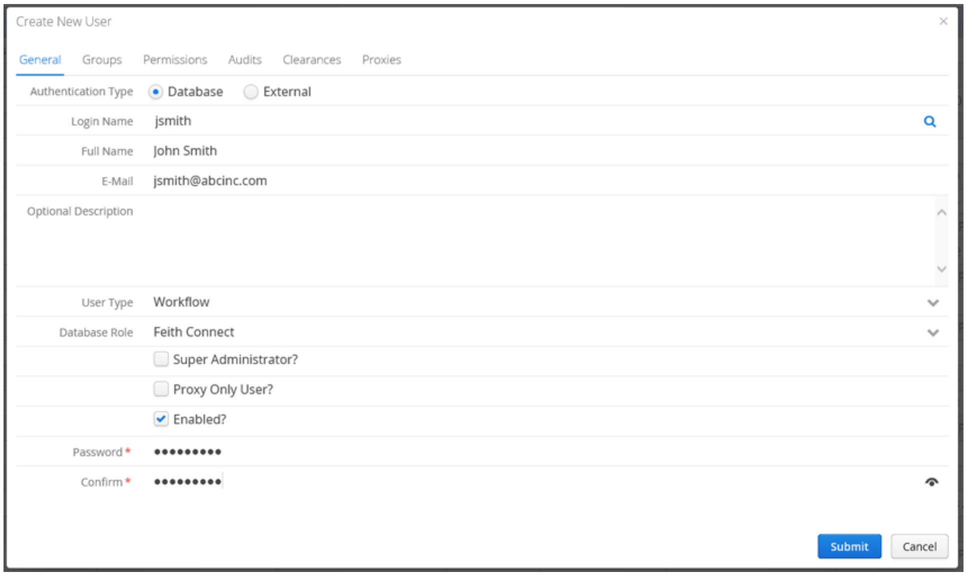
      Note: Only a super administrator can set this option for a user.

    - Optionally turn on **Proxy Only User?** to have this user only connect through a proxy.

    - Optionally turn off **Enabled?** to disable the user.

    - Enter a **Password** for the user.

- Verify the password by re-entering it in **Confirm**.

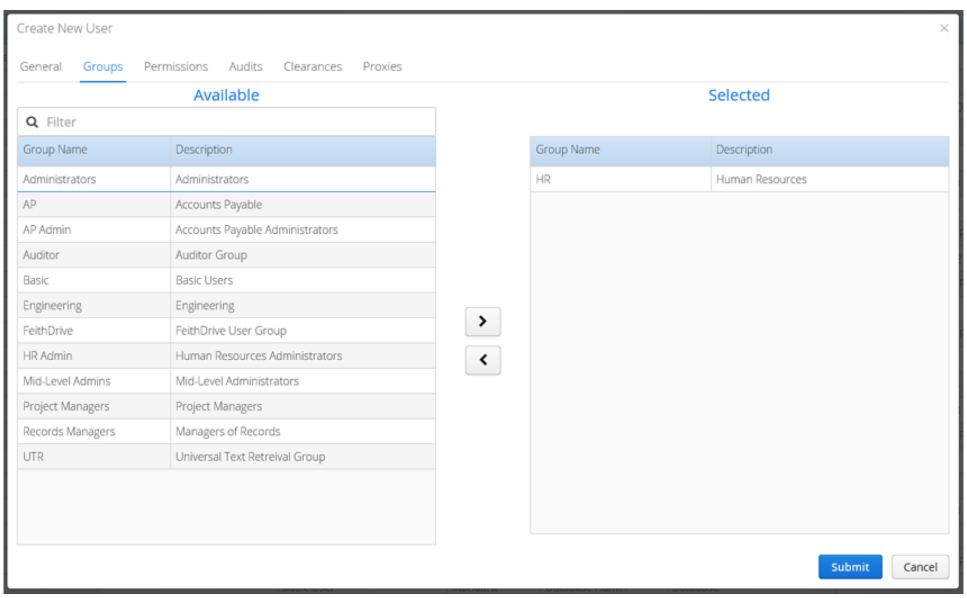


4. On the **Groups** tab, assign the user to groups. To add groups faster, you can select multiple groups using **CTRL+click** or **SHIFT+click**. You can also double-click the group name to move it from one list to the other.

Notes:

- All users belong to the **public** group and cannot be removed from it.

- Mid-level administrators are limited in which groups they can assign to a user. See [Levels of Administrators](#) for more information.



5. On the **Permissions** tab, you can assign task permissions to the user, but it is recommended you set task permissions at the group level instead. Task permissions control what actions the users in the group are allowed to take in various Feith applications (see Task Permissions for more information).

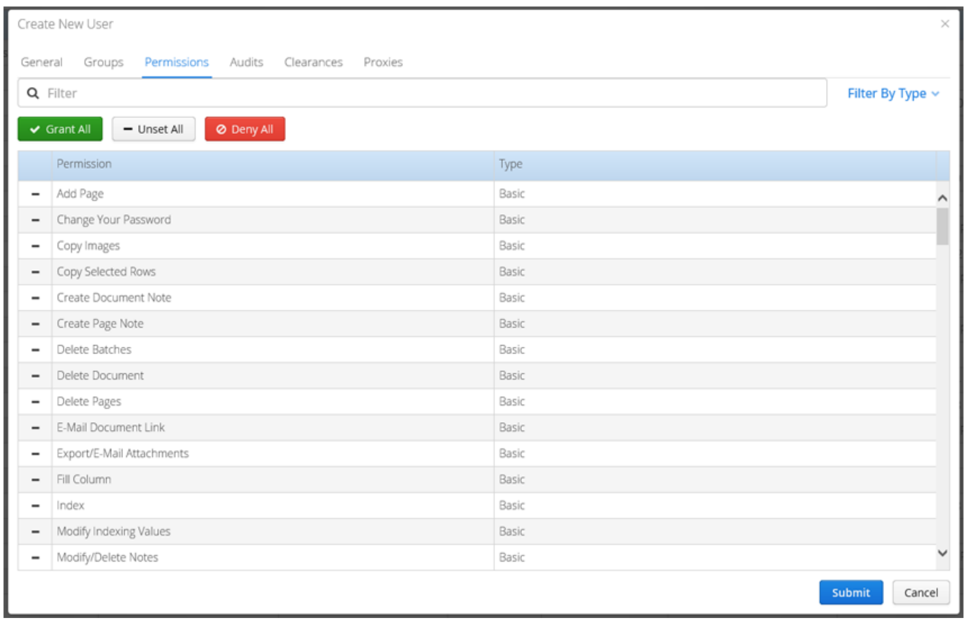
   You can use the **Filter** to find permissions by name or type. In the **Filter By Type** list you can select a permission type to filter on.

   When you have found the desired permissions, you can grant, unset, or deny individual permissions. You can also use the **Enable All**, **Unset All**, or **Deny All** buttons to change all the permission currently listed (permissions filtered out will not be changed).

   Notes:

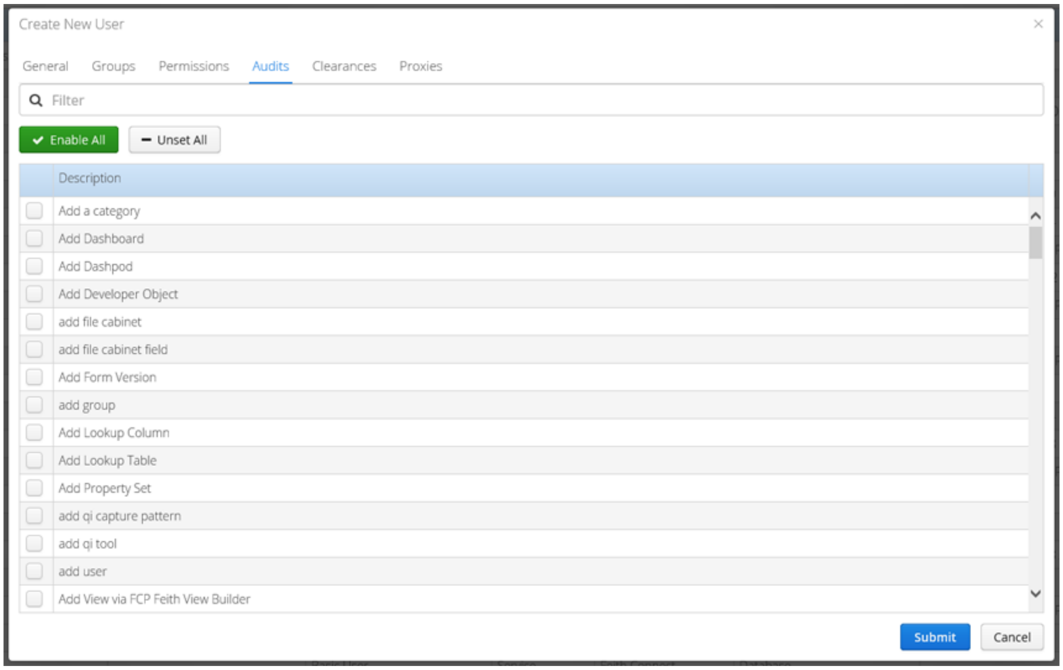
   - Only a super administrator can set task permissions at the user level.

   - See Notes on Setting Permissions for more information on how group and user permissions interact.



6. If your FDD system is licensed for auditing, the **Audits** tab is also available. Audits turned on here will be tracked for the user and written to the FDD Audit Trail, which can be reported on and viewed in Auditor iQ (see Audit Events for more information). However, you may find it easier to set audits at the group level instead.

   You can use the **Filter** to find the audit by name. When you have found the desired audit, you can turn individual audits on or off. You can also use the **Enable All** or **Unset All** buttons to change all the audits currently listed (audits filtered out will not be changed.)

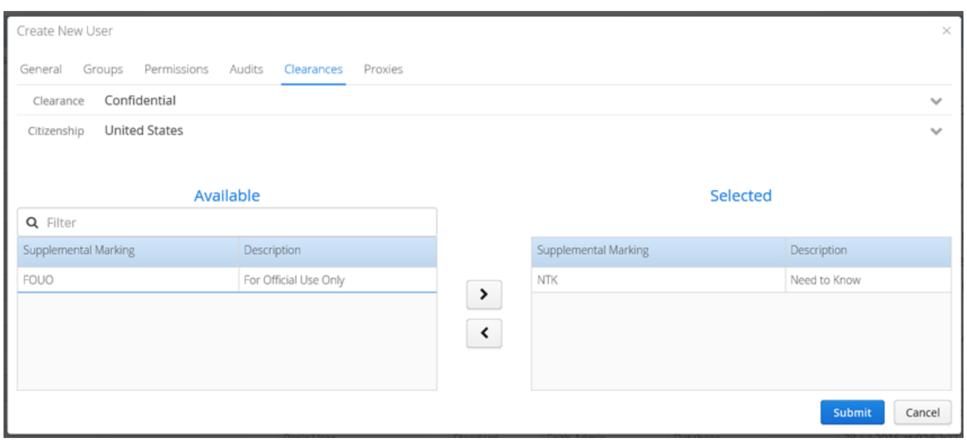


7. If you are using RMA iQ in your FDD system for records management, the **Clearances** tab is also available where you can set the properties applicable for your setup:

   - **Clearance:** The user is granted a clearance level and they will have access to documents of the same clearance level and lower clearance levels.

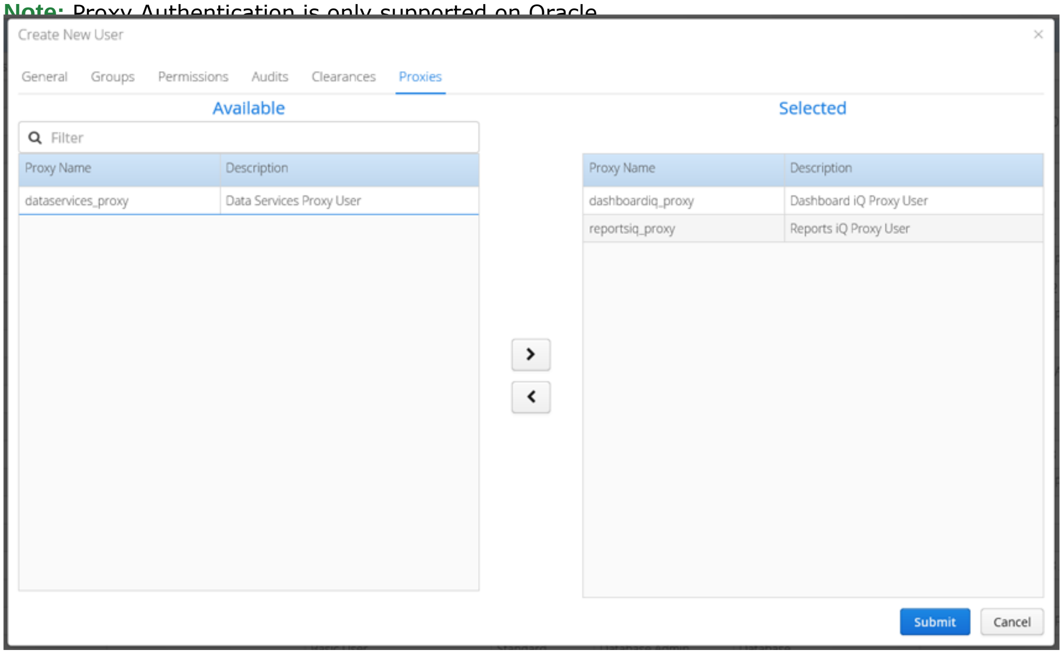
   - **Citizenship:** Users can access documents that have the same country code as their citizenship.

   - **Supplemental Markings:** A user must have the same supplemental markings as a document in order to access it. To add markings faster, you can select multiple groups using **CTRL+click** or **SHIFT+click**. You can also double-click the marking name to move it from one list to the other.



8. If your FDD system is configured for Proxy Authentication, click the **Proxies** tab and check on the proxy users to which you want to assign to this user.

   Note: Proxy Authentication is only supported on Oracle.



9. Click **Submit**. The user is added.

Add Externally Authenticated User on Oracle

The following instructions apply only if your FDD system is configured for external authentication. Otherwise users must be database authenticated.

To add an externally authenticated user on Oracle:

1. Go to the **Users** module. See FCP Modules for more information. The list of users displays.

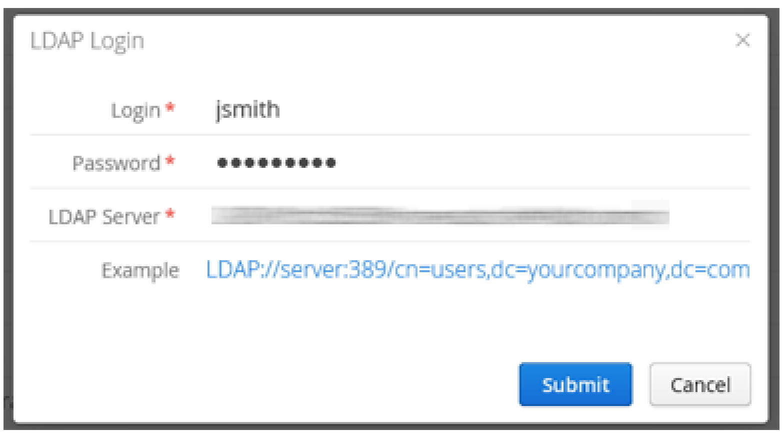
2. Click **New**. The **Create New User** dialog opens.

3. On the **General** tab, choose **External** as the **Authentication Type**.

4. If you have an LDAP server that contains a list of users that corresponds to your external authentication system (for example, if you are using Microsoft Active Directory), you can search for the user in your LDAP server and copy over the properties:

   a. Click **Find User in LDAP** next to the **External Name** field.

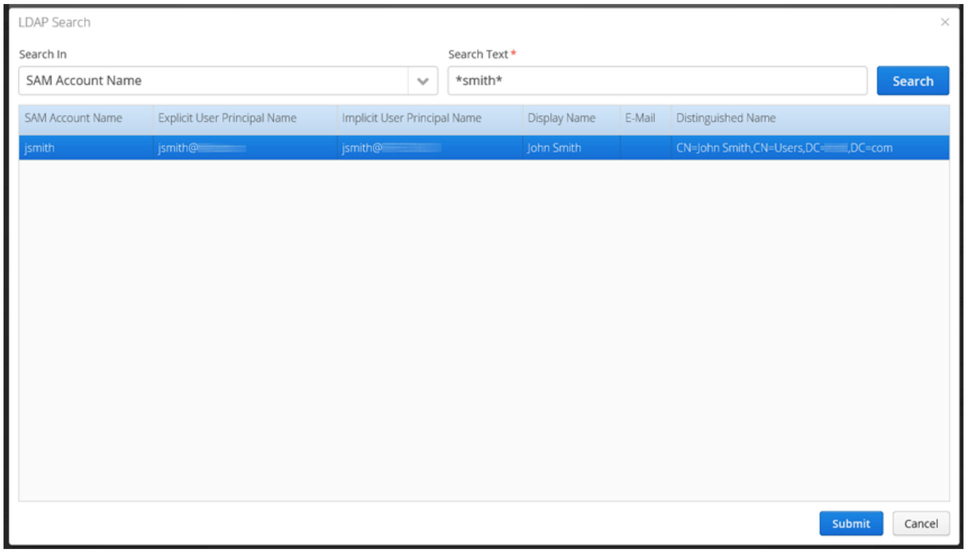
   b. If prompted, login to your LDAP server.



   c. After logging in, enter search criteria in the **Search Text** field and click **Search**.

   Tip: The asterisk character (*) can be used as a wildcard to replace any number of characters in the search string.

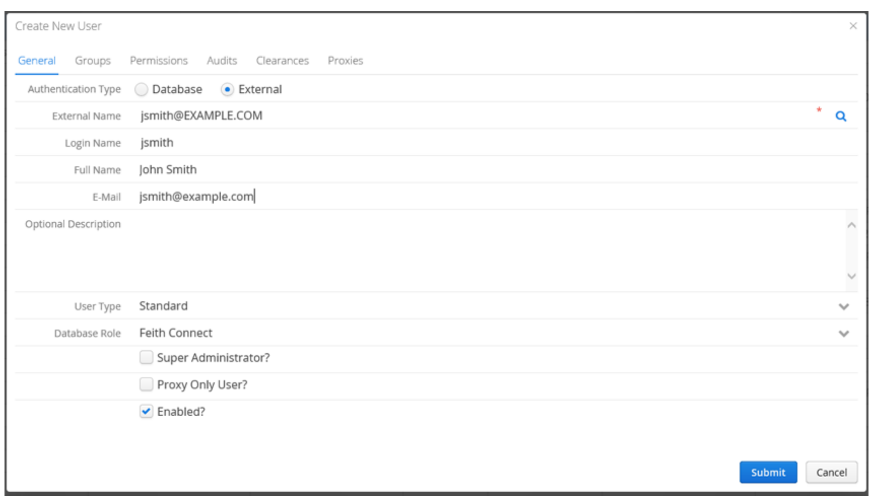
d. Select a user name from the search results.



e. Click **Submit**. The user's **External Name**, **Login Name**, **Full Name**, and **Email** are filled in with their information from the LDAP account.

For example, if you are using Microsoft Active Directory the user properties are copied as follows:

- **External Name** = Implicit UPN
- **Login Name (alias)** = sAMAccountName
- **Full Name** = DisplayName
- **Email** = Email Address



5. If you cannot use the **Find User in LDAP** option to search for a user, then enter the user properties by hand as follows:

- **External Name:** The external name must match the user name in the external authentication system (e.g., Microsoft Active Directory).
  Notes:
  - The External Name is case sensitive.

  - If using Active Directory, the FDD user's External Name must match the user's Implicit UPN in Active Directory.

- **Login Name:** The login name is the alias for the external name; this is the name that will display as the user name in FDD applications. A maximum of 30 characters is accepted.

6. Set the remaining user properties in the **General** tab, including **Description**, **User Type**, **Database Role**, and **Super Administrator**.

   The password options, including **Password** and **Confirm Password**, do not apply.

7. On the **Groups** tab, assign the user to groups.

8. On the **Permissions** tab, you can assign task permissions to the user, but it is recommended you set task permissions at the group level instead.

9. If your FDD system is licensed for auditing, the **Audits** tab is also available. you can turn on audits to track them for this user.

10. If you are using RMA iQ in your FDD system for records management, the **Clearances** tab is also available where you can set properties including Clearance, Citizenship, and Supplemental Markings.

11. If your FDD system is configured for Proxy Authentication, click the **Proxies** tab and check on the proxy users to which you want to assign to this user.

12. Click **Submit**. The user is added.

Add Externally Authenticated User on MS SQL Server

The following instructions apply only if your FDD system is configured for external authentication. Otherwise users must be database authenticated.

To add an externally authenticated user on MS SQL Server:

1. Go to the **Users** module. See FCP Modules for more information. The list of users displays.

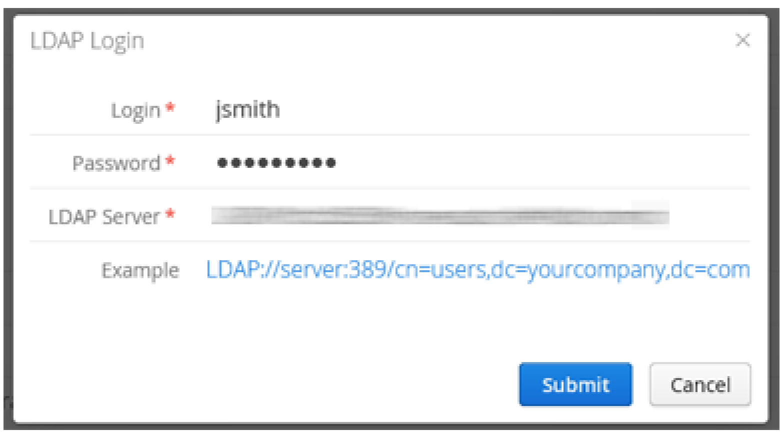
2. Click **New**. The **Create New User** dialog opens.

3. On the **General** tab, choose **External** as the **Authentication Type**.

4. If you have an LDAP server that contains a list of users that corresponds to your external authentication system (for example, if you are using Microsoft Active Directory), you can search for the user in your LDAP server and copy over the properties:

   a. Click **Find User in LDAP** next to the **Domain** field.

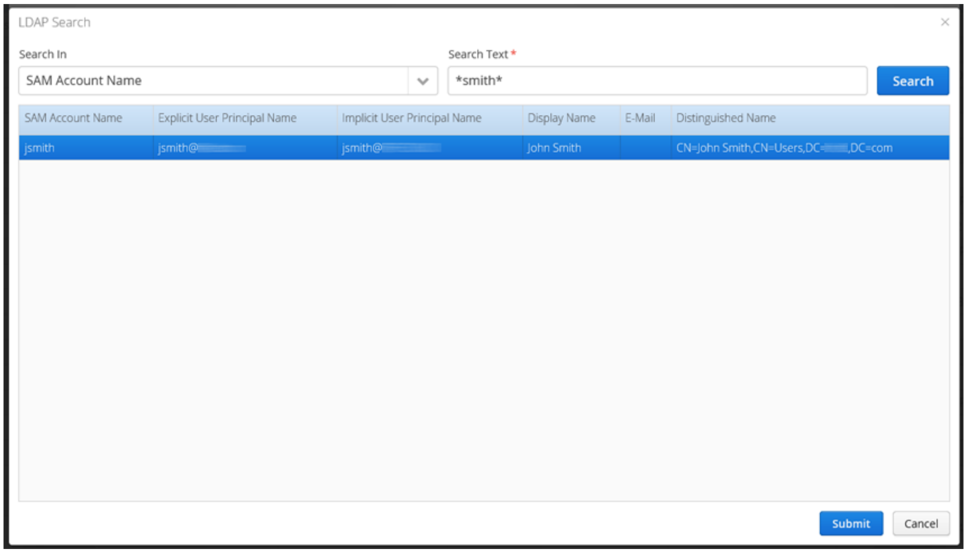
   b. If prompted, login to your LDAP server.

   c. After logging in, enter search criteria in the **Search Text** field and click **Search**.

   Tip: The asterisk character (*) can be used as a wildcard to replace any number of characters in the search string.

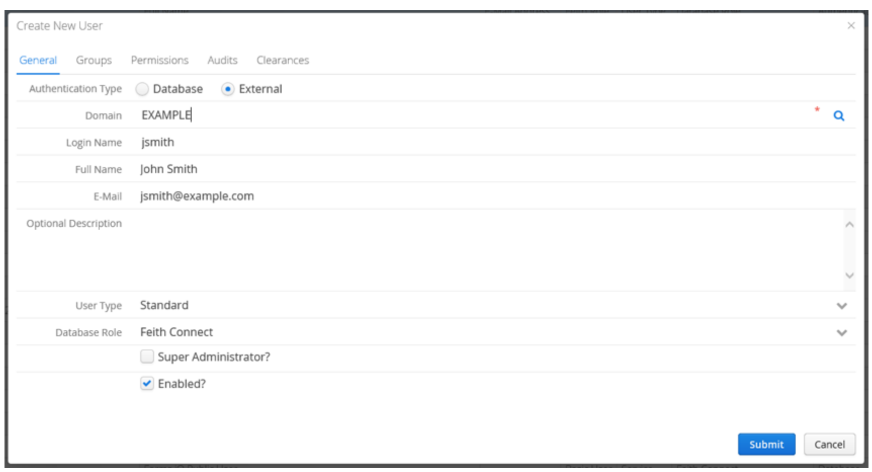
d. Select a user name from the search results.



e. Click **Submit**. The user's **Domain**, **Login Name**, **Full Name**, and **Email** are filled in with their information from the LDAP account.

For example, if you are using Microsoft Active Directory the user properties are copied as follows:

- **Domain** = Domain name (the first part if multi-part)
- **Login Name** = sAMAccountName
- **Full Name** = DisplayName
- **Email** = Email Address



5. If you cannot use the **Find User in LDAP** option to search for a user, then enter the user properties by hand as follows:

   - **Domain:** Enter your domain name.

   - **Login Name:** The login name must match the user name in the external authentication system (e.g., Microsoft Active Directory).

6. Set the remaining user properties in the **General** tab, including **Description**, **User Type**, **Database Role**, and **Super Administrator**.

   The password options, including **Password** and **Confirm Password**, do not apply.

7. On the **Groups** tab, assign the user to groups.

8. On the **Permissions** tab, you can assign task permissions to the user, but it is recommended you set task permissions at the group level instead.

9. If your FDD system is licensed for auditing, the **Audits** tab is also available. you can turn on audits to track them for this user.

10. If you are using RMA iQ in your FDD system for records management, the **Clearances** tab is also available where you can set properties including Clearance, Citizenship, and Supplemental Markings.

11. If your FDD system is configured for Proxy Authentication, click the **Proxies** tab and check on the proxy users to which you want to assign to this user.

12. Click **Submit**. The user is added.

Change User Authentication Type

Caution **The following instructions include steps that result in the FDD user's database login being deleted and re-added.**
The following instructions apply only if your FDD system is configured for external authentication. Otherwise users must be database authenticated.

If you are configuring an existing FDD system for external authentication, you may want to convert existing database authenticated users to externally authenticated users. This process involves changing both the user authentication type and the user name.

To convert a database authenticated user to an externally authenticated user:

1. Go to the **Users** module. See FCP Modules for more information. The list of users displays.

2. Select the desired user and click **Modify**. The **Modify User** dialog opens.

3. On the **General** tab, change the **Authentication Type** from **Database** to **External**.

   Caution: On MS SQL Server, changing the user's authentication type results in a change to the login name, which results in the database login being deleted and re-added.

4. Change the FDD user name to match the user's name in your external authentication system.

   Caution: On both Oracle and MS SQL Server, changing the user name for an FDD user will delete and re-add the user's database login.

   - If you have an LDAP server that contains a list of users that corresponds to your external authentication system (for example, if you are using Microsoft Active Directory), you can search for the user in your LDAP server and copy over the properties. This step varies slightly depending on your database:

     If you are on Oracle, see instructions for Find User in LDAP on Oracle.

     If you are on MS SQL Server, see instructions for Find User in LDAP on MS SQL Server.

   - If you cannot use the Find in LDAP option to search for the user, then enter the user properties by hand as follows:

     If you are on Oracle, see instructions for entering user properties by hand on Oracle.

     If you are on MS SQL Server, see instructions for entering user properties by hand on MS SQL Server.

5. Click **Submit**. The user is modified and now an externally authenticated user.

Manage Users

Manage your users:

- Modify User
- Clone User
- Disable User
- Enable User
- Delete User

Note: If your system has more than 1,000 users, the user list is empty by default and you must use Advanced Search in order to get a list of users.

Modify User

To modify a user:

1. Go to the **Users** module. See FCP Modules for more information. The list of users displays.
2. Select the desired user and click **Modify**. The **Modify User** dialog opens.
3. Change the user's General properties, Groups, Permissions, Audits, Clearances, and Proxies as needed.
4. Click **Submit**. The user is modified.

Clone User

To clone a user:

1. In the **Users** module, select the desired user and click **Clone**. The **Clone User** dialog opens with some information filled in from the cloned user.
2. Set the user's General properties, Groups, Permissions, Audits, Clearances, and Proxies as needed.
3. Click **Submit**. The user is added.

Disable User

To disable a user:

1. In the **Users** module, select the desired user and click **Modify**. The **Modify User** dialog opens.

2. Uncheck **Enabled?** and click **Submit**. The user is disabled and cannot log into FDD.

Enable User

To enable a user:

1. In the **Users** module, select the desired user and click **Modify**. The **Modify User** dialog opens.

2. Check on **Enabled?** and click **Submit**. The user is enabled and can log into FDD again.

Delete User

To delete a user:

1. In the **Users** module, select the desired user and click **Delete**. You are prompted to confirm the delete.

   Note: A mid-level administrator is limited in which users they can delete. See Levels of Administrators for more information.

2. Click **Yes**. The user is deleted.

Appendix

Appendix A: Auto Format and Regex Syntax

Auto Format

Auto Format on a file cabinet field (or base property) is created by setting up a sequence of placeholder characters. The characters are listed below.

#	The digit place holder. 0-9
A	Alphanumeric place holder. 0-9 and a-Z
?	Alpha place holder.
\	The escape character.
.	The decimal place holder.

For example, **###-###-#### Ext ###** will provide an input mask for **area code**, **phone number** and **extension**.

Regular Expression Validations

Regular expressions provide a way to define a string pattern. Since property values frequently follow a pattern or format, a regular expression can be created to test input data in a file cabinet field (or base property) for proper format.

[\^$.|?*()	These are the special characters of regular expressions. When these characters exist in the pattern, then they can be escaped with a '\' character.
^	The caret specifies the beginning of a pattern.
$	The dollar sign specifies the end of a pattern.
[ ]	This specifies a set of characters. For example, [abc] specifies 'a' or 'b' or 'c'. [a-zA-Z] specifies the alphabet.
[^]	Specifies anything but the listed set of characters. For example, [^0-9] specifies anything but the digits 0 through 9.
\d	Specifies a digit.
\w	A word character. The same as [a-zA-Z0-9]
|	The pipe character performs an OR. For example, abc|xyz specifies "abc" or "xyz".
{n}	Specifies a sequence of characters. For example, z{2} specifies "zz". \d{3} specifies 3 digits.
{n,m}	Specifies a sequence of characters of at least n and less than equal to m. For example, \d{2,3} specifies 2 or 3 digits.
?	Specifies that the previous item optional. For example, Bills? Specifies "Bill" or "Bills"

*	Specifies that the previous item will be repeat zero or more times. The period specifies any single character.
+	Specifies that the preceding character(s) will repeat 1 or more times.
()	The parenthesis supports precedence.

For example, **^\d{3}-\d{2}-\d{4}$** will test for a **Social Security number**:

^	The beginning of the pattern.
\d{3}	The first 3 digits.
-	The first hyphen.
\d{2}	The middle 2 digits.
-	The second hyphen.
\d{4}	The last 4 digits.
$	The end of the pattern.

Appendix B: Auto-Populated Field Names

You can give a file cabinet field a special name in order for the field to be automatically populated with information from the file being imported. FDD and CheckIn automatically populate fields with certain names.

Results will vary based on the file type, operating system, and method of submitting the document through CheckIn. The below table is based on files saved to FDD through CheckIn from within Microsoft Office applications.

In order for this feature to work, the file cabinet fields must be given specific names when creating them in Feith Control Panel.

FIELD NAME	APPLICATION	SUGGESTED FIELD TYPE	WORD, EXCEL, POWERPOINT	OUTLOOK
Addressee	CheckIn	String	No	Yes
Application Name	CheckIn	String	Yes	No
Author	CheckIn	String	Yes	No
CC	CheckIn	String	No	Yes
Comments	CheckIn	String	Yes	No
Creation Date	CheckIn	Date	Yes	Yes
Date Received	CheckIn	Date	No	Yes
Extension	FDD and CheckIn	String	Yes	Yes
Filename	FDD and CheckIn	String	Yes	Yes
Filesize	FDD and CheckIn	Integer	Yes	Yes
Recipient	CheckIn	String	No	Yes
Sender	CheckIn	String	No	Yes
Sent On	CheckIn	Date	No	Yes
Start Date	CheckIn	Date	No	Yes
Subject	CheckIn	String	Yes	Yes
Title	CheckIn	String	Yes	No
Type	CheckIn	String	No	Yes

Notes:

- **Filesize** contains the size of the file measured in bytes.
- FDD and CheckIn will recognize the field name whether it is typed in uppercase, lowercase, or mixed case.
- The presence or absence of spaces in two-word field names *does* matter. Enter the field name exactly as shown in the above list