

# UltraDoc



## user guide



# UltraDoc User Guide

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*by Alto Imaging Technologies*

# UltraDoc User Guide

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Printed: 2/10/2010  
Revision: 20100210

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# **Introducing UltraDoc**





# 1 Introducing UltraDoc

## *Get ready to experience powerful, flexible, easy-to-use content management!*

UltraDoc is an enterprise-level, information management platform ideal for collaboration and distribution of electronic documents. UltraDoc provides both middleware and front-end application layers creating an interface to an information store built on Microsoft SQL Server. UltraDoc lets you access individual content and manage information stores through an easy-to-use stand-alone client or Internet Explorer.

UltraWeb leverages Microsoft's ActiveX, and Active Server Page (ASP) technologies giving you remote access including the ability to view, print, and modify content of virtually any type. UltraWeb pages can easily be merged with your existing company web site running on Microsoft Internet Information Server (IIS). UltraWeb site pages are ready for your custom logos and personalized messages. Both UltraDoc and UltraWeb take advantage of Microsoft Windows NT and Microsoft SQL Server security models to provide user-level access control.

UltraDoc continues to set the standard for easy-to-use, scalable, content neutral information management systems. [Integration with Microsoft Office](#)<sup>69</sup> applications and other UltraWare applications provides the framework for general content management, sophisticated litigation support, copyright management, medical forms management, and print-on-demand solutions.

## 1.1 Before You Begin

Before you begin, it is important to know some basic facts about the components that make UltraDoc work. The heart of the system is a relational database running on Microsoft SQL Server. Information about every file you access or store is kept in the tables that make up the database. Any type of electronic information can be included in your UltraDoc system, this includes image files, document files like Word or Excel, email messages from Outlook, video, audio, and almost anything else you can imagine.

Applications that can be used as UltraDoc clients include:

- [UltraDoc Explorer](#)<sup>29</sup>
- [Image Arranger](#)<sup>63</sup>
- [UltraPrint](#)<sup>68</sup>
- [UltraCopy](#)<sup>64</sup>
- [Microsoft Office](#)<sup>69</sup>

UltraDoc Explorer (installed with UltraDoc Server and UltraDoc Client) provides content management tools to help you maintain your UltraDoc database. Image Arranger, UltraPrint, and UltraCopy are other software packages available from Alto Imaging Technologies each providing access to UltraDoc in ways that are specific to their overall

purpose. Using the Microsoft Office applications as clients requires UltraDoc Client be installed on your computer, and gives you the ability to store files in their native formats.

Web based access is available using the Internet Explorer, when UltraWeb, an extension of UltraDoc, is installed on a web server running Microsoft Internet Information Server. UltraWeb provides a familiar, easy-to-use interface giving you access to your content from the company intranet or Internet.

## 1.2 What's New in UltraDoc

The following new features and enhancements have been added to UltraDoc in version 6.0:

- Document level security. Assign permissions to user or group accounts at the table or document level. Select Read Only, Read/Write, or Full Control permissions. Built-in groups simplify administration and assignment of common permission.
- Easier user administration. Create user and group accounts directly from UltraDoc Explorer using a simple interface. Accounts are created and managed by the UltraDoc Explorer application eliminating the need to create accounts directly through SQL Enterprise Manager. The account owner or administrator may change account passwords.
- Certificate based authentication. UltraDoc connections are made using a certificate based authentication system. Each client PC maintains a unique certificate allowing future scalability. The UltraDoc Connection Certificate Maker generates ODBC Data Sources automatically.
- More intuitive user interface. Quickly search, view, and manipulate documents, bundles, and collections from an easy-to-use interface. One-click access to the active document, bundle, or collection makes it simple to organize content into a structured, hierarchical content management system.

# **Installing and Configuring**



## 2 Installing and Configuring

Installing UltraDoc is easy, but before you begin be sure you have:

- A computer that meets the [system requirements](#)<sup>[7]</sup> for UltraDoc Server.
- Installed Microsoft SQL Server and configured Mixed Mode (SQL Server and Windows) authentication. See the product documentation for details.
- The UltraDoc installation software. If you have a CD, this installation software is located in the directory specified in the installation steps. If you obtained the software electronically, then locate the installation file you downloaded.

Here is a summary of the steps it takes to get started:

1. [Install the](#)<sup>[9]</sup> UltraDoc [software](#)<sup>[9]</sup> and reboot the computer.
2. [Activate your software](#)<sup>[10]</sup> by [requesting](#)<sup>[11]</sup> and [installing](#)<sup>[11]</sup> a software activation key.
3. [Configure a content store](#)<sup>[12]</sup>.
4. [Create and attach a certificate](#)<sup>[19]</sup>.
5. [Configure a storage device](#)<sup>[21]</sup> to hold your database content.
6. Install UltraDoc Client software on other networked computers (optional).
7. [Start working with UltraDoc](#)<sup>[29]</sup>!

.

### 2.1 System Requirements

What do you need to run UltraDoc? Use the information in the following tables to help you select a computer and operating system that meets your needs. Remember, UltraDoc performs better with a faster processor, more memory, and fast storage devices.

UltraDoc System Requirements	
<b>Processor</b>	<ul style="list-style-type: none"> <li>1.8GHz dual-core processor or higher</li> </ul>
<b>Operating System</b>	<ul style="list-style-type: none"> <li>Windows® Server 2008, Standard or Enterprise Edition 32-bit SP2 or later</li> <li>Windows® Server 2003, R2 Standard or Enterprise Edition 32-bit SP2 or later</li> </ul>
<b>Memory</b>	<ul style="list-style-type: none"> <li>2GB (GB) of RAM or higher; <i>4 gigabyte (GB) of RAM recommended</i></li> </ul>
<b>Available Hard Drive Space</b>	<ul style="list-style-type: none"> <li>250 gigabyte (GB) or higher</li> </ul>
<b>Hard Drive Controller</b>	<ul style="list-style-type: none"> <li>SATA 3 Gb/s, 64 MB Cache, 7200 RPM; <i>RAID, SAS, NAS or other high-capacity, fault-tolerant network storage recommended</i></li> </ul>
<b>Display</b>	<ul style="list-style-type: none"> <li>1024x768 resolution or higher</li> </ul>
<b>Networking</b>	<ul style="list-style-type: none"> <li>10/100 Ethernet adapter or higher</li> </ul>
<b>Other Software and Devices</b>	<p>Microsoft SQL Server™ 2005/2008 Workgroup, Standard, or Enterprise</p> <ul style="list-style-type: none"> <li>SQL Server 2005 Backwards Compatibility Components</li> <li>SQL Server Management Studio</li> <li>Mixed Mode Authentication</li> </ul> <p>Microsoft Internet Information Server (IIS) 6.0 (required for UltraWeb, ADP, and AITS)</p> <ul style="list-style-type: none"> <li>World Wide Web Service with Active Server Pages (ASP)</li> <li>File Transfer Protocol (FTP) Publishing Service</li> <li>Message Queuing Service (required for AITS)</li> </ul> <p>.NET Framework 2.0 or later (required for AITS)</p> <p>Internet Explorer 6 or later (required for all UltraWeb clients)</p>



#### Notes

Memory requirements are dependent on operating system selection and other factors and may be higher. Installation requires 40-55 MB of available hard disk space; 50 MB for a typical installation.

## 2.2 Installing UltraDoc

1. Log on to your Microsoft Windows computer as Administrator, or as a user who is a member of the Administrator group.
2. If you are installing from CD, click the **Start** button, choose **Run** and type **D:\UltraDoc\Data\Setup.exe** where **D:** is the drive letter for your CD-ROM drive, and then click **OK**.

—or—

If you are installing from a downloaded file, click the **Start** button, choose **Run**, and browse to the folder where you saved the program file. Select the program file, click **Open**, and then click **OK**.

3. When **Alto Imaging Technologies UltraDoc Server Installation Welcome** appears, click **Next** to begin installation.
4. After reviewing and accepting the end user license agreement (EULA), click **Next**.
5. Click **Next** to install UltraDoc 7 in the default program folder.

—or—

To install in a directory other than the default, click **Browse** and select a folder. If the folder does not exist, it will be created for you.

6. Click **Yes** to save copies of any files replaced during the installation process or click **No** to overwrite files without saving, and then click **Next**.

If you select **Yes**, you are prompted to choose the folder where you want to save the files. To save to a folder other than the default, click **Browse** and select a folder. If the folder does not exist, it will be created for you

7. After the required information is gathered, click **Next** to begin copying setup files.



If you want to make changes, click **Back** until you find the information you want to change

The installer begins copying files to your computer.

8. Click **Finish**.

The setup program prompts you to restart the system.



If you are installing other UltraWare applications, you can perform these installations prior to restarting the system. After all installations are complete, the system must be restarted

**Next:** [Activate your software](#) 

## 2.3 Activating Your Software

Before you can begin using an UltraWare application, you must activate your copy of the software. Your license is valid for a specific period. During this time, you can install updates as they become available. At the end of your license period, your UltraWare application will continue to function, but new updates cannot be applied.

Use the [UltraKey PC Identifier](#) <sup>[10]</sup> to create a unique PC identifier file that contains general information about your system components. The information in this file is used to generate a unique software activation key.

Once you have successfully created the hardware identifier, [request a software activation key](#) <sup>[11]</sup> by submitting the file to Alto Imaging Technologies using a simple web based form.

[Install the software activation key](#) <sup>[11]</sup> by copying the file you receive from Alto Imaging Technologies in the UltraKey folder to complete the activation process.



### Important Note:

Applying an update dated after your license expires will cause your UltraWare applications to stop working. Always verify the expiration date on your license prior to installing a newer version. To check the expiration date of your license, open the **Help** menu, and then click **About** in any UltraWare application. If you have more than one application, be sure and check the expiration date for each.

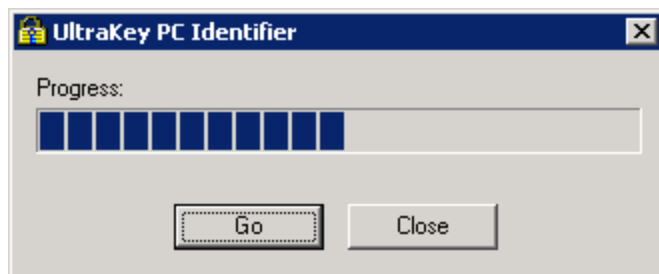
### 2.3.1 Creating a PC Identifier

#### To create a PC identifier

1. Click **Start**, choose **Run**, and then type:

**C:\Program Files\Alto Imaging Common\UltraKey\UKPCID.exe**

2. Click **OK** to launch the **UltraKey PC Identifier**.
3. Click **Go** to begin creating the hardware identifier.



4. Click **Save** to create the file using the default filename.

—or—

Choose a new folder, type a new file name, and then click **Save**.

5. Click **Close**.





Remember where you save the file so you can easily locate it when you are ready to request activation.

Next: [Request an activation key](#)<sup>[11]</sup>

### 2.3.2 Requesting a Software Activation Key

#### To request a software activation key

1. Use your web browser to request a software activation key at:  
[www.altoimaging.com/altoweb/productregistration/keysubmit/keyform.html](http://www.altoimaging.com/altoweb/productregistration/keysubmit/keyform.html)
2. Type the requested information in each field.
3. Click **Browse** to locate and attach the [PC identifier file](#)<sup>[10]</sup> you created in the previous steps.
4. Click **Submit** to send the request.



- Your software activation key will be returned to the email address you enter on the request form
- It can take up to 24 hours to receive your software activation key

Next: [Install the activation key](#)<sup>[11]</sup>

### 2.3.3 Installing the Software Activation Key

#### To install the software activation key

- Copy the [activation key](#)<sup>[11]</sup> you received to the UltraKey folder. The path to the folder is:  
**C:\Program Files\Alto Imaging Common\UltraKey\**

See also: [How do I change the UltraKey folder path?](#)<sup>[73]</sup>

### 2.3.4 Attaching the License

Before you can begin making connections, the software license must be associated with the SQL Server database.

#### To attach the certificate

1. [Launch UltraDoc Explorer](#)<sup>[29]</sup>.
2. Click [Actions](#)<sup>[31]</sup>, and then select **UDS Attach**.
3. Type or select your server from the **SQL Server** list.

#### 4. Select **Windows Authentication**.

—or—

Type a **Login Name** and **Password**.



#### 5. Click **OK** to attach and bind the certificate to the database server



- The account used to attach license must be the database 'owner' or hold the 'sysadmin' role.

## 2.4 Configuring a Content Store

UltraDoc uses Microsoft SQL Server database management system as the foundation for your content store (database). UltraDoc Explorer and other applications use a series of Stored Procedures to access your database content and manage the UltraDoc system.

### Before you begin, be sure you have:

- [Installed the UltraDoc Server software](#)
- A [software activation key](#) from Alto Imaging Technologies. The key must be installed before your software will be functional.
- Installed Microsoft SQL Server and configured it to use both Windows and SQL Server authentication. See the product documentation for details.
- Microsoft SQL Server Enterprise Manager and a SQL Server login with rights to create or attach a database and run SQL queries

### Follow these steps to create a content store:

1. Use SQL Enterprise Manager to [create a database](#).
2. Use SQL Query Analyzer to [create database tables and stored procedures](#).

**After you create the content store, there are just a few final steps to**

### complete configuration.

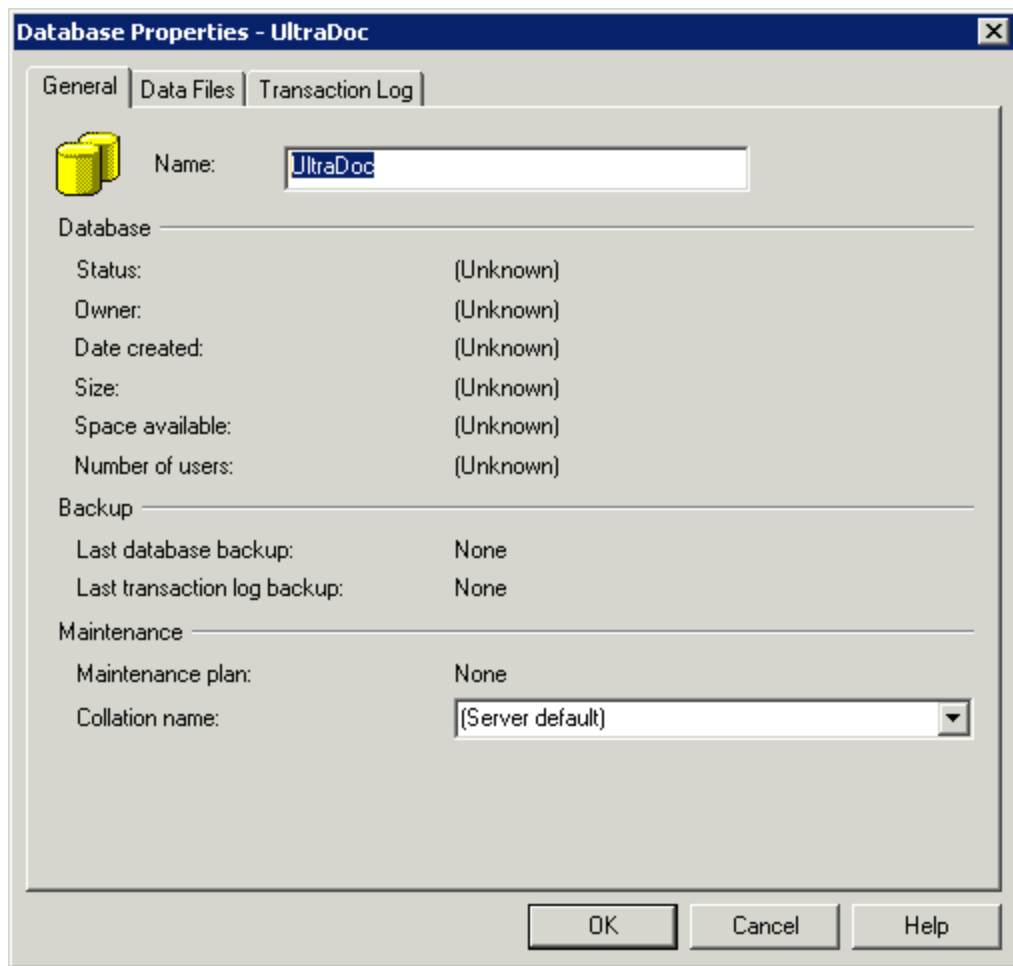
1. [Create a SQL Login account](#)<sup>16</sup>.
2. Use SQL Query Analyzer to [grant permissions](#)<sup>18</sup> to the SQL Server login.
3. Use UltraDoc Explorer to [create and attach a certificate](#)<sup>19</sup>.
4. [Configure a storage device](#)<sup>21</sup> to store your database content.

#### 2.4.1 Creating a Database

This step creates and attaches a new database to the SQL Server. The database will initially be empty, except for a few system tables and other objects used by SQL Server. In later steps, you will create database tables and stored procedures that UltraDoc will use to store and manager information (meta data) about the content in your database.

#### To create a database

1. [Launch SQL Server Enterprise Manager](#)<sup>73</sup>.
2. Expand a server group, and then expand a server.
3. Right-click **Databases**, and click **New Database**.
4. Enter a **Name** for the new database.



Next: [Create tables and stored procedures](#) <sup>14</sup>

## 2.4.2 Creating Tables and Stored Procedures

UltraDoc requires several system tables, user tables, and stored procedures to add, modify, and manage the content in your information store. You create these database objects by running a series of special scripts using SQL Query Analyzer.

The SQL Scripts are located in C:\Program Files\Alto Imaging UltraDoc\UD7

Follow the steps below and run the SQL Scripts *in the following order* (where **X.xx** reflects the latest version):

**UD7\_DB\_SetupX.xx.sql**

**UD7\_DemoTablesX.xx.sql**

**UD7CSPX.xx.sql**

**UD7StoredProceduresX.xx.sql**

Each script will cause a different messages to be displayed as displayed in the following

example:

(1 row(s) affected)

—or—


Cannot add rows to sysdepends for the current stored procedure because it depends on the missing object 'someDatabaseObject'. The stored procedure will still be created.

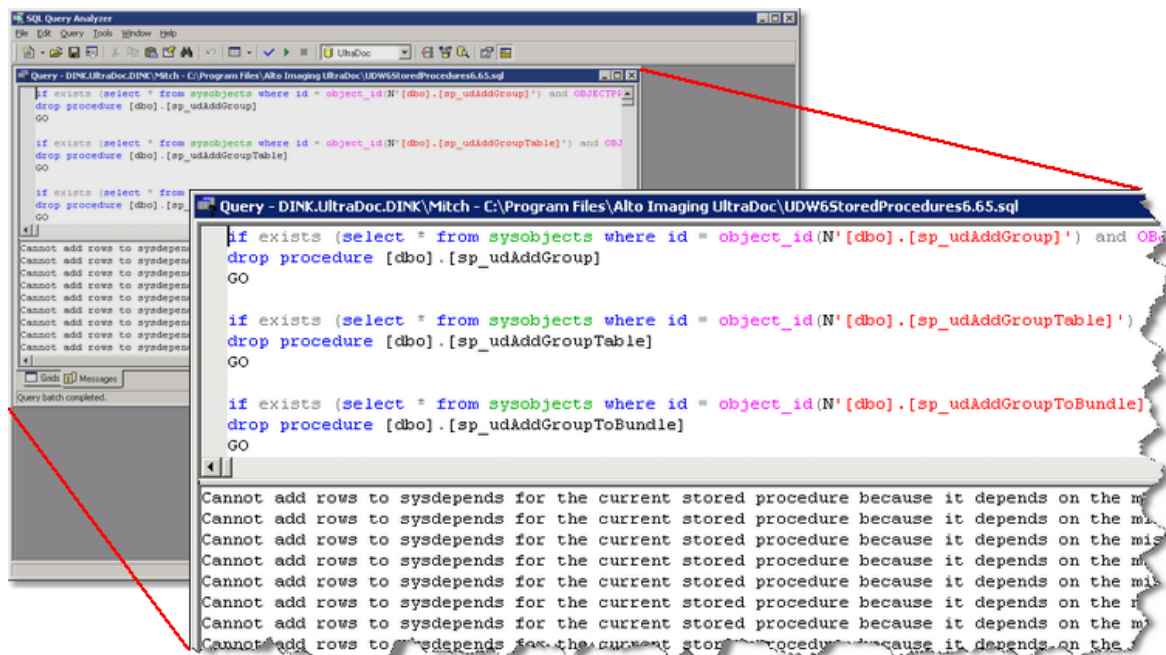
All of these messages can be safely ignored.

**Important Note**

UD7\_DB\_SetupX.xx.sql and UD7\_DemoTablesX.xx.sql should never be executed again after initial configuration. Doing so could result in the loss of data.

## To run a SQL script

1. [Launch SQL Query Analyzer](#)  75.
2. Select your database from the list in the toolbar. Use the arrow to view the **Change** database list.
3. Click **Load SQL Script** on the toolbar.
4. **Browse** to the SQL Script file.
5. Click **Open** to load the script into the query window.
6. Click **Execute Query** on the toolbar. The **Results Pane** displays any messages resulting from execution.



Results after running SQL Script

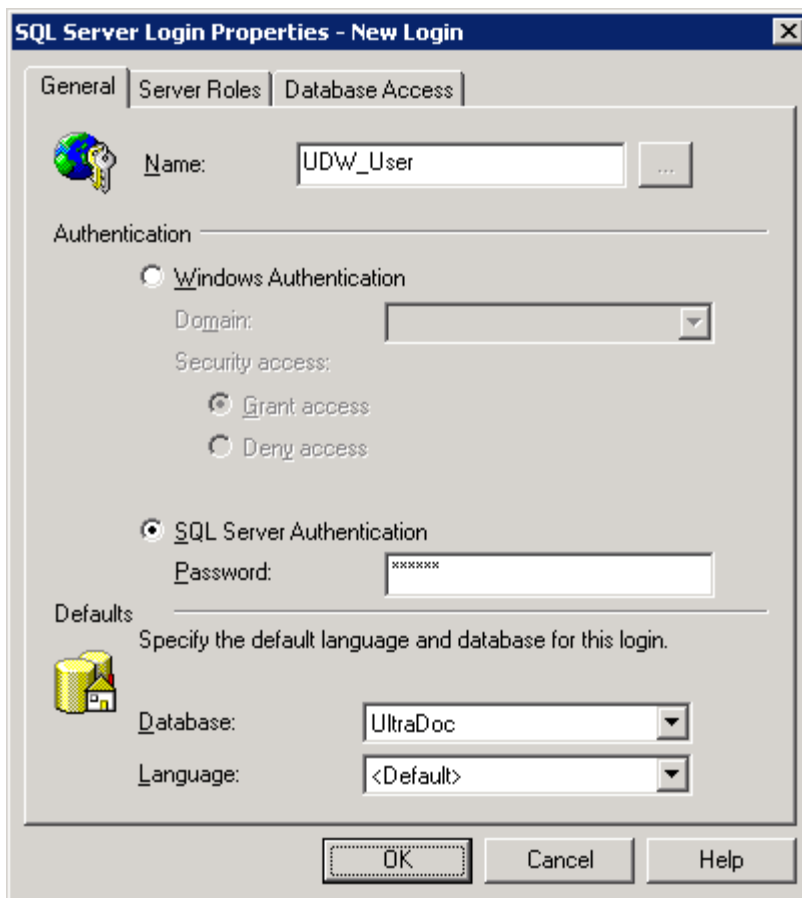
**See also: Updating a database**

### 2.4.3 Adding a SQL Server Login

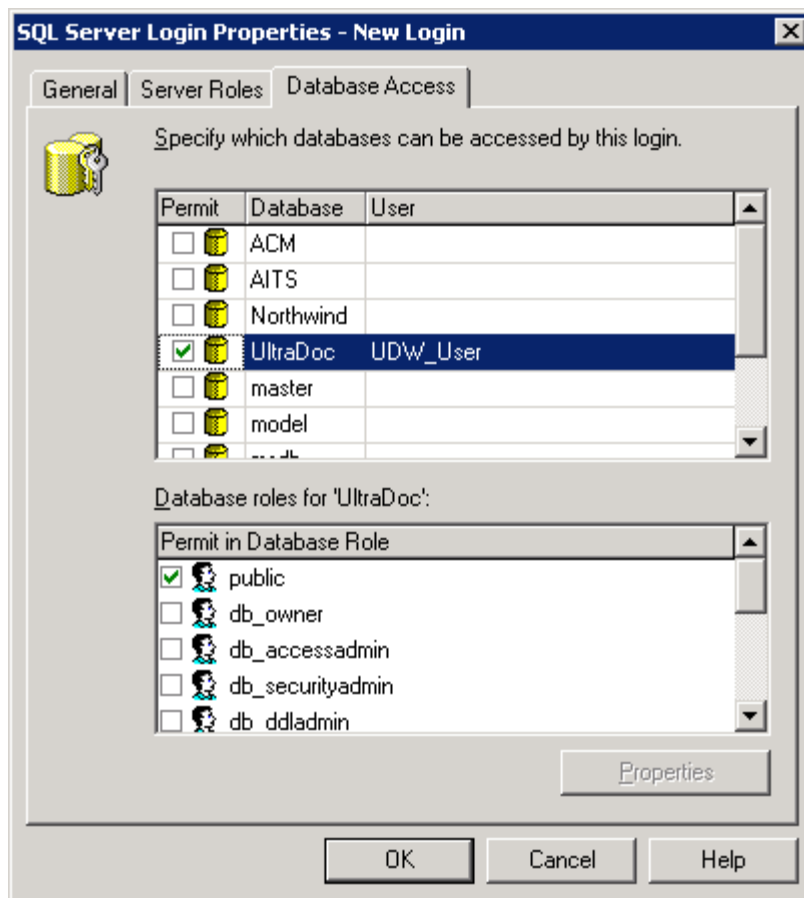
UltraDoc makes use of a single SQL Server Login. This account is only used by UltraDoc to establish and maintain a connection to the database.

#### To add a SQL Server Login

1. [Launch SQL Server Enterprise Manager](#)<sup>73</sup>.
2. Expand **Security**, right-click **Logins**, and then click **New Login**.
3. In the **Name** box, type: *UDW\_User*
4. Under **Authentication**, select **SQL Server Authentication**.
5. In **Password** box, type: *udw\_pw* (case sensitive)



6. In the **Default** section, select the database you attached or created in earlier steps.
7. Select the **Database Access** tab, click the **Permit** check box next to your UltraDoc database, and then click **OK**.
8. **Confirm** the password.



Next: [Grant Permission to the SQL Server Login](#) <sup>18</sup>

See Also: [Creating and Attaching a Certificate](#) <sup>19</sup>

## 2.4.4 Granting Permission to the SQL Server Login

The SQL Server login you created in earlier step needs permission to the access and interact with the database objects in your UltraDoc database.

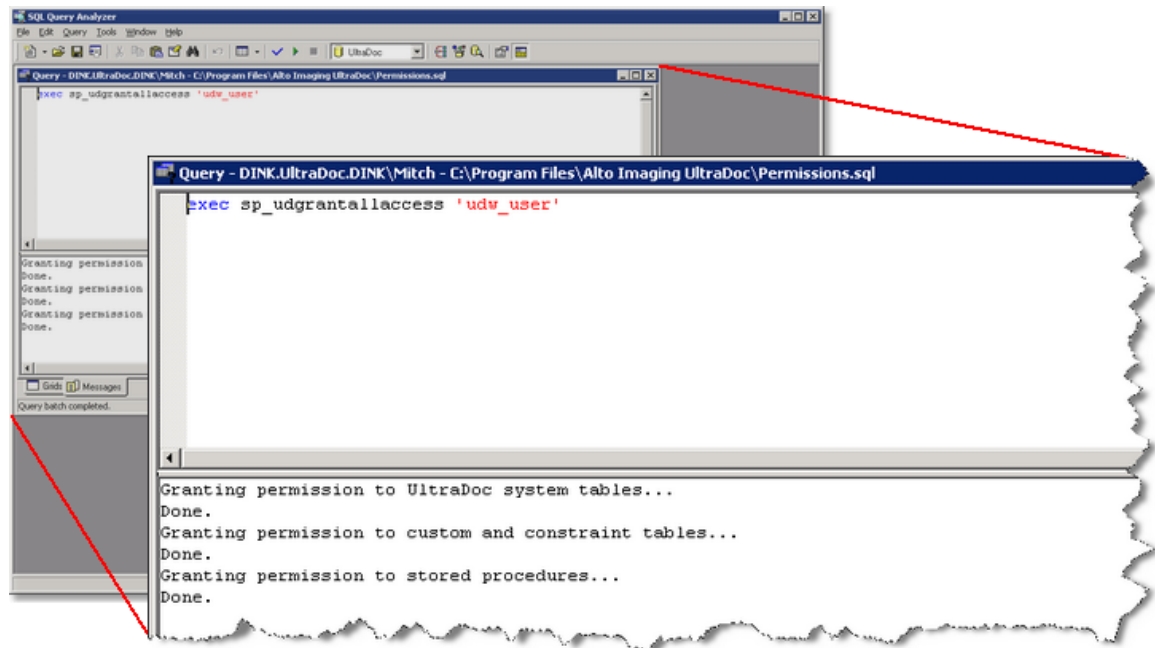
### To grant permissions to the account

1. [Launch SQL Query Analyzer](#) <sup>75</sup>.
2. Select your database from the list in the toolbar. Use the arrow to view the **Change** database list.
3. Click **Load SQL Script** on the toolbar.
4. **Browse** to **C:\Program Files\Alto Imaging UltraDoc\Tools** and select **Permissions.sql**
5. Click **Open** to load the script into the query window.



6. Click **Execute Query** on the toolbar. The **Results Pane** displays several messages:

```
Granting permission to UltraDoc system tables...  
Done.  
Granting permission to custom and constraint tables...  
Done.  
Granting permission to stored procedures...  
Done.
```



## 2.5 Creating and Attaching a Certificate

The authentication certificate lets you make a connection to the UltraDoc database using an UltraDoc client application like UltraDoc Explorer, Image Arranger, or a Microsoft Office application like Word. The authentication information is contained in a file you create using UltraDoc Explorer. Each computer that connects to your UltraDoc database requires a certificate.

After you create a certificate, you must attach certificate to the UltraDoc database. This final step binds the certificate and software activation key to the UltraDoc database.

### To create a certificate

1. [Launch UltraDoc Explorer](#) <sup>29</sup>.
2. Click [Actions](#) <sup>31</sup>, and then select **Create Connection**.
3. Type the required information in each box as follows:

<b>User Name</b>	<i>UDW_User</i>
<b>Password</b>	<i>udw_pw</i>
<b>Confirm Password</b>	<i>udw_pw</i>
<b>System DSN</b>	A short name that identifies the connection to your content store, for example, dbcACCT, dbcSALES, or CORP
<b>SQL Server</b>	Name of the computer that hosts your SQL Server
<b>Database</b>	Name of the database you created in earlier steps

- Click Create and Save the authentication certificate to C:\Program Files\Alto Imaging Common\UltraDoc\



A certificate is not required when accessing UltraDoc 6 using Internet Explorer. Connections made using Internet Explorer connect using the UltraWeb Server certificate.

## To attach the certificate

- [Launch UltraDoc Explorer](#) <sup>29</sup>.

2. Click [Actions](#)<sup>31</sup>, and then select **UDS Attach**.
3. Type or select your server from the **SQL Server** list.
4. Select **Windows Authentication**.

—or—

Type a **Login Name** and **Password**.



5. Click **OK** to attach and bind the certificate to the database server.

See Also: [How do I change the folder where certificates are stored?](#)<sup>73</sup>

## 2.6 Creating a Storage Device

Information or meta data about each item in your content store is contained in the UltraDoc database, however, the actual document, image file, or other digital content is stored on a physical storage device. This device can be as simple as a folder on the computer where your UltraDoc database is hosted, a shared folder on your company network, or as sophisticated as a RAID array or NAS implementation.

### To create a storage device using a shared folder

1. [Launch UltraDoc Explorer](#)<sup>29</sup>.
2. Click [Actions](#)<sup>31</sup>, and then select **Logon**. Use the following credentials to logon (password is case sensitive):

<b>User Name</b>	<i>Administrator</i>
<b>Password</b>	<i>udwpw</i>

**Data  
Source**

*The System DSN  
name you created in  
previous steps*



**Important Note:**

Change the Administrator password as soon as possible. See [Changing User or Group Properties](#)<sup>52</sup>.

3. From the [Actions](#)<sup>31</sup> menu, select **Device Maintenance**.
4. Click **Add**, and then type the share name of your storage device in the **Description** box.

**Device Description**

Description: dbContent

OK Cancel

5. Type the **Path** to the storage device using the format \\ServerName\ShareName
6. Select a device **Type** from the list.
7. If necessary, select the **Read Only** or **Removable** options, and then click **Modify**.

**Device Maintenance**

dbContent

Close Add... Delete Modify

Path: \\UW-SERVER\dbContent\$

Type: Hard disk ☐ Read Only ☐ Removable

***Congratulation! You have successfully installed and configured UltraDoc!***

## 2.7 Configuring UltraWeb Server

Before you begin...

- Install Microsoft Internet Information Services (IIS) 5.0 or later with both World Wide Web (WWW) and File Transfer Protocol (FTP) services enabled. See the Microsoft

Windows operating system documentation for details.

UltraWeb uses Microsoft Internet Information Services (IIS) to serve the web pages that display content from the UltraDoc database to remote clients using Microsoft Internet Explorer (5.5 or later).

Configuring IIS for use with UltraWeb takes just a few simple steps.

1. If you installed IIS 6.0 (Windows Server 2003), enable and [configure Active Server Pages \(ASP\) and support for Parent Paths](#)<sup>[23]</sup>.
2. [Create virtual directories](#)<sup>[24]</sup> to map to physical folders or other storage locations used by UltraDoc.



**Note:** Web applications using UltraWeb as a foundation may require [additional configuration](#)<sup>[25]</sup>.

### 2.7.1 Enabling Active Server Pages in IIS 6.0

Internet Information Services (IIS) 6.0 is the latest version of the free web server software bundled with Microsoft Windows Server 2003. By default, IIS serves only static content. Request handlers for scripting languages like Active Server Pages (ASP) are not available unless you explicitly enable them. Since UltraWeb uses ASP to generate dynamic content from UltraDoc, you must enable the ASP request handlers by allowing the ASP Web Service Extension.

UltraWeb calls several ASP methods that requires the **Parent Paths** option be enabled in IIS. By default, this setting is disabled in IIS 6.0.



**Note:** These steps are not necessary for IIS versions earlier than 6.0.

#### To enable the ASP Web Service Extension

1. In Internet Services Manager, expand the local computer, and then click **Web Service Extensions**.
2. Select the **Active Server Pages** extension, and then click **Allow**.

#### To Enable Parent Paths

1. In Internet Services Manager, right-click the Web site where UltraWeb is installed, and then select **Properties**.
2. Select **Home Directory**, and then click **Configuration**.
3. Click **Options**, and then select the **Enable Parent Paths** check box, and then click **OK**.

**Next:** [Map virtual directories](#)<sup>[24]</sup>.

## 2.7.2 Creating Virtual Directory Mappings

Since the content you keep in UltraDoc is not stored in the web server's root, and may even exist on other computers or network storage devices, IIS needs a set of mappings or "virtual directories" that make these locations available to UltraWeb. These virtual directories also serve as aliases that help keep your content secure by hiding the name of the actual storage locations.

Before you can complete the following steps, you need to know the description and path associated with your [UltraDoc storage device](#)<sup>[21]</sup>.

Create a virtual directory for each path in the table below.



**Note:** Use the virtual directory names provided.

Site	Virtual Directory	Path	Access Permission
Default FTP Site	UDWUpload	C:\Program Files\Inetpub\ftproot\UltraDocUpload	Write
Default FTP Site	UPWUpload	C:\Program Files\Inetpub\ftproot\UPWUpload	Write
Default FTP Site	<i>Storage device description</i>	<i>Storage device path</i>	Write
Default Web Site	UDWUpload	C:\Program Files\Inetpub\ftproot\UltraDocUpload	Read
Default Web Site	UPWUpload	C:\Program Files\Inetpub\ftproot\UPWUpload	Read
Default Web Site	<i>Storage device description</i>	<i>Storage device path</i>	Read

### To map a virtual directory



**Note:** To use a directory on another computer, you must specify the directory's Universal Naming Convention (UNC) name, and provide a user name and password for access rights.

1. In **Internet Services Manager**, expand the **FTP Sites** or **Web Sites** folder, expand the **Default FTP Site** or **Default Web Site**, right-click the site where wish to create the virtual directory, point to **New**, and click **Virtual Directory**.
2. Click **Next** to start the **Virtual Directory Creation Wizard**.
3. In the **Alias** box, type a name for the virtual directory (see table), and click **Next**.
4. In the **Path** box, type or browse to the physical directory in which the virtual directory resides (see table), and click **Next**.
5. In the **Access Permissions** dialog box, set the access permissions appropriate to your needs (see table), and click **Next**.



**Warning:** Remove **Run Scripts (Such as ASP)** from the virtual directory's **Access Permissions** you create in the **Default Web Site**.

6. Click **Finish**. The virtual directory is created below the currently selected site.

### 2.7.3 Using Windows Authentication

UltraWeb uses its own authentication system by default but can be configured to use Windows Authentication eliminating the need for duplication of user account information.

#### To enable Windows authentication

1. In Internet Services Manager, expand the **Web Sites** folder, right-click the **UDW7** folder, and then click **Properties**.
2. Select the **Directory Security** tab, and then from the **Anonymous access and authentication control** section click **Edit**.
3. Click to clear the **Anonymous access** check box.
4. Click to select the **Integrated Windows authentication** check box, and then click **OK**.

### 2.7.4 Configuring Web Applications

Several applications use UltraWeb as a foundation to provide specialized applications addressing specialized requirements. Some require additional configuration. These applications include:

- Alto Digital Publishing (ADP)
- Alto Internet Transaction Server (AITS)
- UltraDoc Stationery Server (UDS)

#### Alto Digital Publisher (ADP)

Alto Digital Publisher (ADP) custom publishing solutions that manages the submission and tracking of requests for permission to reprint copyrighted works, and the associated royalty payments. Electronic submission to Copyright Clearance Center (CCC) is available but must be activated by registering the supporting application library (ACMUtil.dll) with the operating system.



**Warning:** When AITS is initially installed, two versions of the application library are installed — "ACMUtil.dll(demo)" and "ACMUtil.dll(production)". Using the (demo) version will result in permission being granted for demonstration purposes only; using the (production) version will result in actual permissions being granted and will be billed by Copyright Clearance Center.

Remove the parenthesized notation after **ONE** of the files prior to performing the following steps.

#### To enable electronic submission

1. Click **Start**, and then click **Run**.
2. Type `Regsvr32.exe ACMUtil.dll` and then click **OK**.

### Alto Internet Transaction Server (AITS)

Alto Internet Transaction Server (AITS) is a web-based platform for the submission, estimating, ordering, and archival of print jobs.

You must create an ASP web application, isolating AITS from its parent web site and other applications. To create the application, you designate the directory that serves the AITS web pages as the starting point (application root) for the application.

#### To create an ASP web application

1. In the **Internet Services Manager** window, right-click `AltoAITS`, and then click **Properties**.
2. Click the **Home Directory** tab.
3. Under **Application Settings**, click **Create**, and then click **OK**.



**Note:** If the Create button is not present, a default application has already been specified. In this case, click Remove to remove the default application, and then click Create.

### UltraDoc Stationery Server

UltraDoc Stationery Server (UDS) is a web-based platform for creating and ordering standard stationery like letterhead, envelopes, and business cards.

You must create an ASP web application, isolating UDS from its parent web site and other applications. To create the application, you designate the directory that serves the UDS web pages as the starting point (application root) for the application.

#### To create an ASP web application

1. In the **Internet Services Manager** window, right-click `AltoUDS`, and then click **Properties**.
2. Click the **Home Directory** tab.
3. Under **Application Settings**, click **Create**, and then click **OK**.



**Note:** If the Create button is not present, a default application has already been specified. In this case, click Remove to remove the default application, and then click Create.



# **Working with UltraDoc**



## 3 Working with UltraDoc

### UltraDoc is a hierarchical database...

This means that content is stored as related information with a pre-defined relationship in a "tree-like" fashion. Information is traced from a major group, to a subgroup, and to further subgroups. In a simple context, individual content items you add to the UltraDoc database are stored as **Documents**. Documents may be grouped to form a relationship called a **Bundle**, and bundles may be grouped to form a relationship called a **Collection**. This method is analogous to storing related files (documents) in folders (bundles), and storing them in a file cabinet (collection).

### Document

A document is always a single digital file and is the basic unit of information in your information store. In the case of many image formats, this file will contain one image. TIFF image files or documents created in applications like Microsoft Word files, may contain multiple images or pages. Any file format may be included in the database as a document, however only some types may be used by other UltraWare applications. File formats associated with other applications may be viewed or acted upon in some fashion when retrieved from the web-based interface if the originating application can be called from the web browser.

### Bundle

Bundles are logical groups of Documents. Bundles may be built around print-on-demand requirements, organized around departmental needs, categorized for on-line viewing, or by chronology. There are many possibilities.

### Collection

Collections are logical groups of Bundles, and simply provide another level of organization to help you manage your UltraDoc information store.

Both bundles and collections simply maintain links to their members, therefore, a single document may belong to an unlimited number of bundles and a single bundle may be a member of multiple collections. This design results in the ability to reuse content and eliminate file duplication, maximizing the use of electronic storage space.

### Table

A fourth part of the hierarchy exists called a **Table**. Tables serve to further classify and secure content at each of the three primary levels. Documents, bundles, and collections all exist in a specific table. Every information store contains at least one table for each of three group types. Documents may not be stored in a bundle or collections table; bundles may not be stored in a document or collection table; collections may not be stored in a document or bundle table.

[UltraDoc Explorer](#)<sup>29</sup> is the primary tool used to add, retrieve, and organize the content in your information store. Managing users, groups, and access to the content in your information store are other tasks easily accomplished using [UltraDoc Explorer](#)<sup>29</sup>.

## 3.1 UltraDoc Explorer (overview)

This is the UltraDoc Explorer workspace. UltraDoc Explorer is the primary application you use to work with and manage the content in your information store.

### To launch UltraDoc Explorer

- Select the **UltraDoc Explorer** icon in the **Alto Imaging UltraDoc** program group.

### To logon to an UltraDoc database

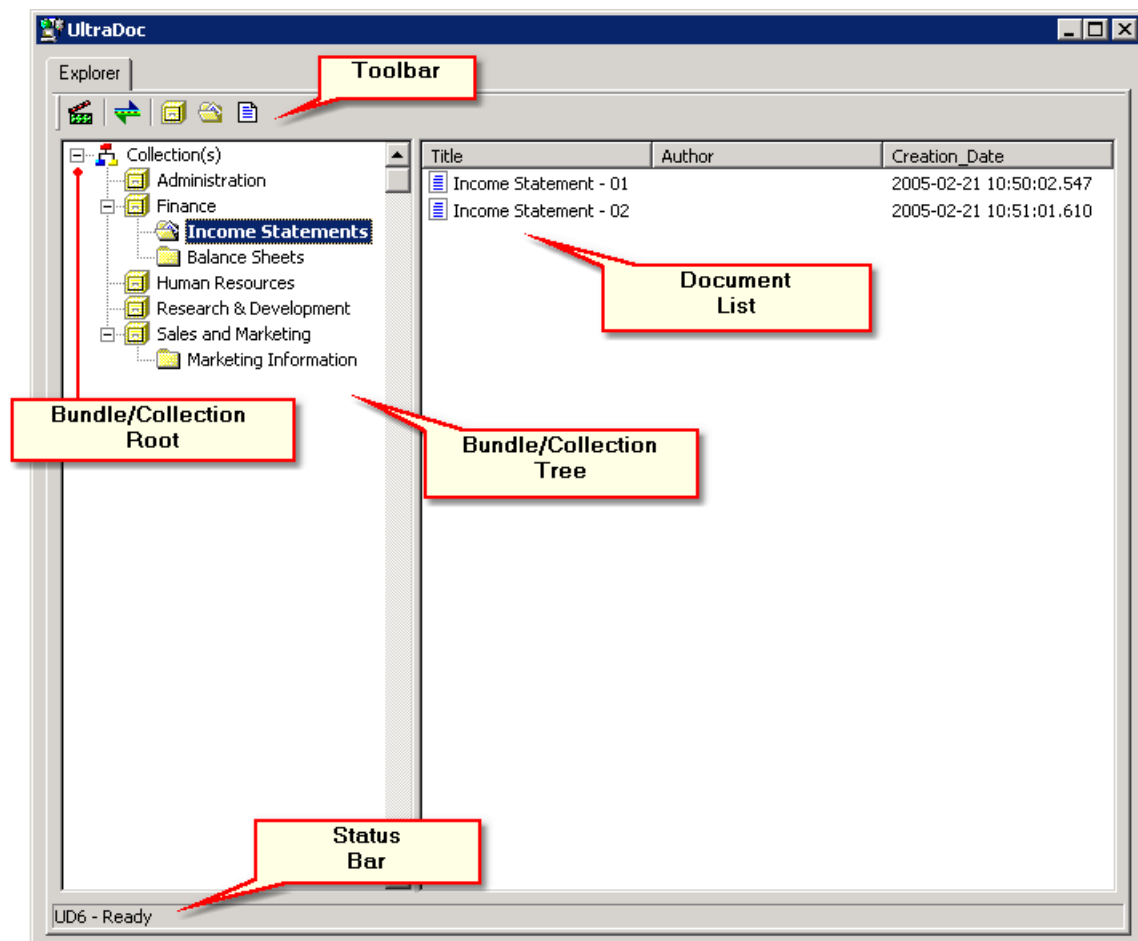
1. From the **Actions** <sup>31</sup> menu, click **Logon**
2. Type the **User name**, **Password**, and select the **Data Source** assigned by your administrator.



Selecting **Add New** or **Search** from a **Tasks** <sup>29</sup> menu will prompt you to logon if you are not already connected to an UltraDoc database.

### To logoff an UltraDoc database

- From the **Actions** <sup>31</sup> menu, click **Logoff**, or simply close UltraDoc Explorer



### Toolbar <sup>31</sup>

All functions and commands are available from the toolbar.

### Bundle/Collection Tree

This tree-like view shows the relationship between a container object, like a collection, and its child members. Selecting a bundle or container lets you display its members in the Document List and perform operations like adding and removing members or changing an object's properties.

### Bundle/Collection Root

Selecting the Bundle/Collection Root causes all lower-level objects to be displayed in the Document List.

### Document List

The contents of this view changes based on the current operation and/or selection. After a search, the items you select are displayed here; this can include documents, bundles, or collections. If you select the Bundle/Collection Root, or an individual item, the objects that are part of that group are displayed here.

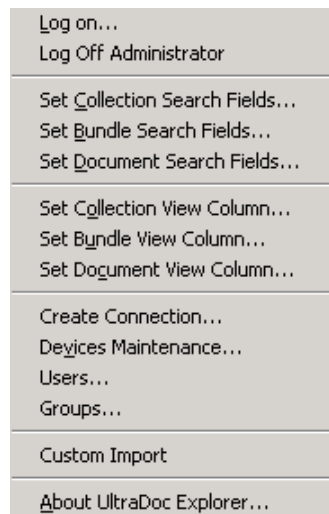
### Status Bar

The status bar displays the data source name for the database you are currently connected to.

## 3.1.1 Toolbar and Commands



### Actions



[Log On/Log Off](#) <sup>29</sup>

[Set Search Fields](#) <sup>43</sup>

[Set Collection Fields](#) <sup>43</sup>

[Create Connection](#) <sup>19</sup>

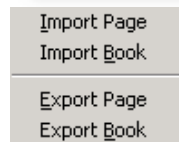
[Devices Maintenance](#) <sup>21</sup>

[User/Groups](#) <sup>49</sup>

[Custom Import](#) <sup>43</sup>



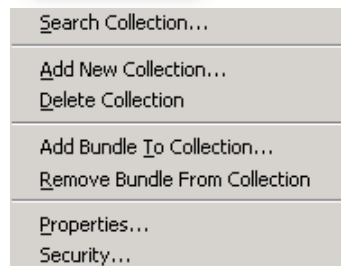
### Import/Export



[Import/Export](#) <sup>68</sup>



### Collection Tasks



[Search](#) <sup>33</sup>

[Add New Collection](#) <sup>37</sup>

[Delete Collection](#) <sup>40</sup>

[Add Bundle to Collection](#) <sup>38</sup>

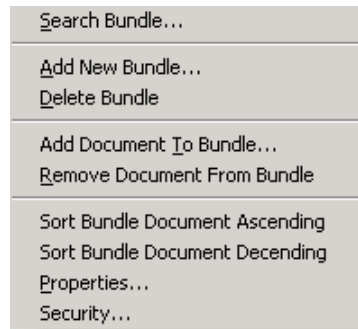
[Remove Bundle from Collections](#) <sup>38</sup>

[Properties](#) <sup>35</sup>

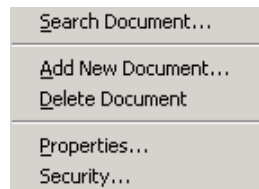
[Security](#) <sup>57</sup>



### Bundle Tasks



### Document Tasks



[Search](#) <sup>[33]</sup>

[Add New Bundle](#) <sup>[37]</sup>

[Delete Bundle](#) <sup>[40]</sup>

[Add Document to Bundle](#) <sup>[38]</sup>

[Remove Document from Bundle](#)

<sup>[38]</sup>

[Sorting Bundle Documents](#) <sup>[39]</sup>

[Properties](#) <sup>[35]</sup>

[Security](#) <sup>[57]</sup>

[Search](#) <sup>[33]</sup>

[Adding New Document](#) <sup>[32]</sup>

[Delete Document](#) <sup>[36]</sup>

[Properties](#) <sup>[35]</sup>

[Security](#) <sup>[57]</sup>

## 3.2 Basic Operation

### 3.2.1 Adding New Documents

Add new documents by first entering descriptive information, or meta data, that describes the document. This information becomes the document's properties. After entering the properties, select a file to add, or use a template as a temporary place holder.

#### To add new documents

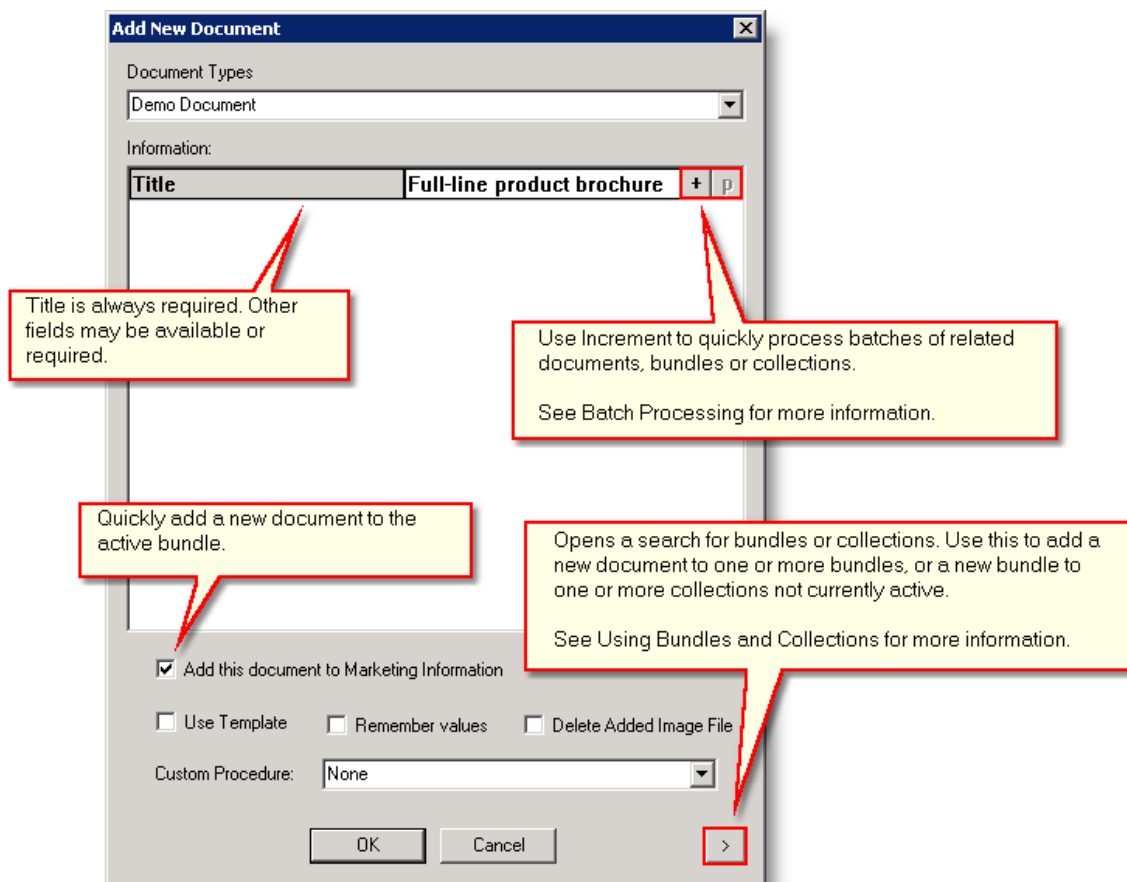
1. Click [Document Tasks](#) <sup>[32]</sup>, and then select **Add New Document**

If necessary, [Logon](#) <sup>[30]</sup> to your UltraDoc database.

2. In the **Document Types** list, select a table.
3. Type a **Title** to describe the document.



Fill in other fields if available to provide a more detailed description.



4. Select any or all of the following [advanced options](#)<sup>[41]</sup>, and then click **OK**.

- **Add this document to the current bundle**
- **Use Template**
- **Remember Values**
- **Delete Added Image File**
- **Custom Procedure**

5. Select a file, and then click **Open** to add the document to the database.

The new document is added to the database and appears in the [Document List](#)<sup>[31]</sup>.

**See Also:** [Advanced Options](#)<sup>[41]</sup>, [Batch Processing](#)<sup>[42]</sup>, [Searching for Documents](#)<sup>[33]</sup>

### 3.2.2 Searching

UltraDoc has powerful search capabilities that let you quickly locate any item in your database. Once you find what you are looking for you can place the item in the [document list](#)<sup>[31]</sup> where you can perform a variety of tasks.



The following steps apply to searching for documents, bundles, or collections.

**To search for a document, bundle, or collection**

1.

To	Do this...
Search for a Document (shown here)	Click <a href="#">Document Tasks</a> <sup>32</sup> , and then select <b>Search Document</b>
Search for a Bundle	Click <a href="#">Bundle Tasks</a> <sup>32</sup> , and then select <b>Search Bundle</b>
Search for a Collection	Click <a href="#">Collection Tasks</a> <sup>31</sup> , and then select <b>Search Collection</b>

If necessary, [Logon](#)<sup>30</sup> to your UltraDoc database.

2. In the **Document Types** list, select a table.

Select tables from **Bundle Types** or **Collections Types** when searching for those items.

3. Enter information in any of the **Search Criteria** fields.

**Search**

Document Types  
Demo Document

Search Criteria:

Title	Inc
	Inc

Search Results:

- Income Statement - 01
- Income Statement - 02
- Income Statement

Search

OK

Cancel

Search begins after typing 3 characters in any field. The more you enter, the more specific the search results.

Click Search to start a search on smaller criteria.



Click **Search** with no **Search Criteria** to return all items in the table.



4. Select one or more documents from the **Search Results**.
5. Click the **OK** to place the selected documents in the [Document List](#)<sup>[29]</sup>.

**See Also:** [Viewing and Changing Properties](#)<sup>[35]</sup>, [Deleting Items](#)<sup>[36]</sup>

### 3.2.3 Viewing and Changing Properties

You can view or change an item's properties after selecting the item in the [document list](#)<sup>[29]</sup>.



The following steps apply to documents, bundles, and collections.

#### To view or change an item's properties

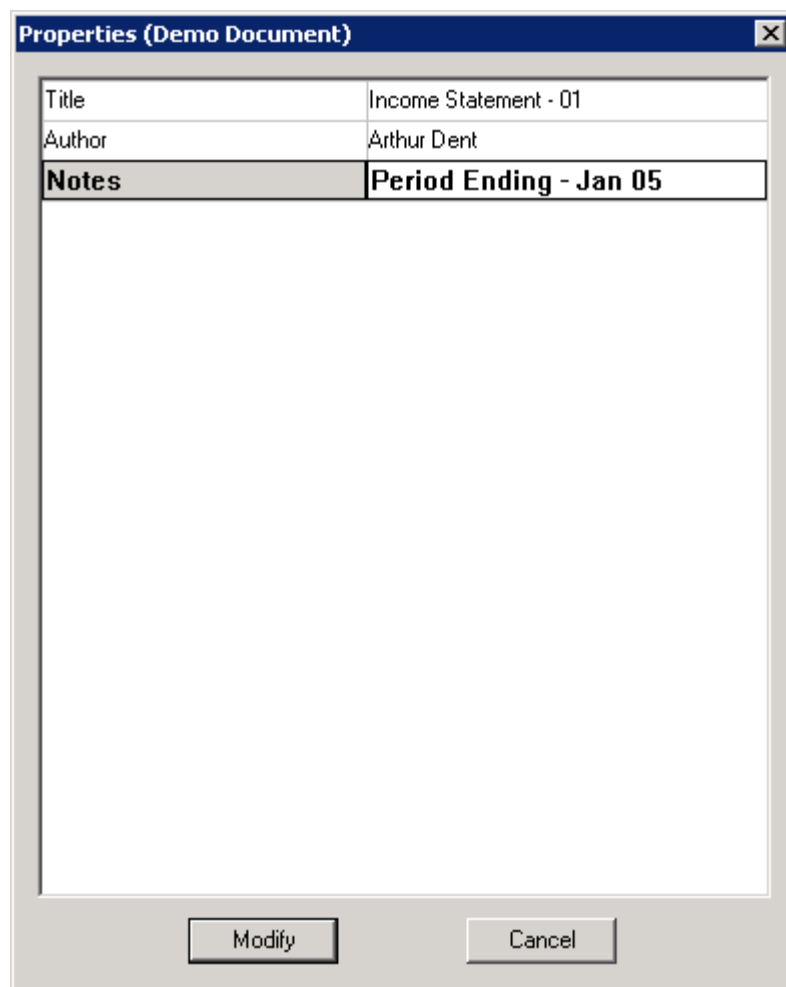
1. [Search](#)<sup>[33]</sup> for the item you want to view or change.
2. Select the item from the [Document List](#)<sup>[31]</sup>.

To	Do this...
View or modify Document properties (shown here)	Click <a href="#">Document Tasks</a> <sup>[32]</sup> , and then select <b>Delete Document</b>
View or modify Bundle properties	Click <a href="#">Bundle Tasks</a> <sup>[32]</sup> , and then select <b>Delete Bundle</b>
View or modify Collection properties	Click <a href="#">Collection Tasks</a> <sup>[31]</sup> , and then select <b>Delete Collection</b>

3. Edit or add information, and then click **Modify**.



Some fields may not be available for editing based on your access rights.



**See Also:** [Configuring Search Fields and View Columns](#)<sup>[43]</sup>, [Searching for Documents](#)<sup>[33]</sup>

### 3.2.4 Deleting Items

Deleting an item permanently removes it from your information store.

#### To delete an item

1. [Search](#)<sup>[33]</sup> for the item you want to remove.
2. Select the item(s) in the [Document List](#)<sup>[31]</sup>.

To	Do this...
Delete a Document	Click <a href="#">Document Tasks</a> <sup>[32]</sup> , and then select <b>Delete Document</b>
Delete a Bundle	Click <a href="#">Bundle Tasks</a> <sup>[32]</sup> , and then select <b>Delete Bundle</b>
Delete a Collection	Click <a href="#">Collection Tasks</a> <sup>[31]</sup> , and then select <b>Delete Collection</b>



**Warning:** Once an item is deleted, it cannot be recovered.

#### Notes

Deleting a *document* from the information store removes the record associated with the document; however, the document itself still exists on the storage device and may be recovered by an Administrator.

## 3.3 Using Bundles and Collections

### 3.3.1 Creating Bundles and Collections

After you create a few bundles or collections, you can begin to organize the content in your information store. Use bundles to organize related documents, and collections to organize related bundles.



The following steps apply to both bundles and collections.

#### To add a new bundle or collection

1.

To	Do this...
Add a Bundle (shown here)	Click <a href="#">Bundle Tasks</a> <sup>32</sup> , and then select <b>Add New Bundle</b>
Add a Collection	Click <a href="#">Collection Tasks</a> <sup>31</sup> , and then select <b>Add New Collection</b>

If necessary, [Logon](#)<sup>30</sup> to your UltraDoc database.

2. In the **Bundle Types** list, select a table.

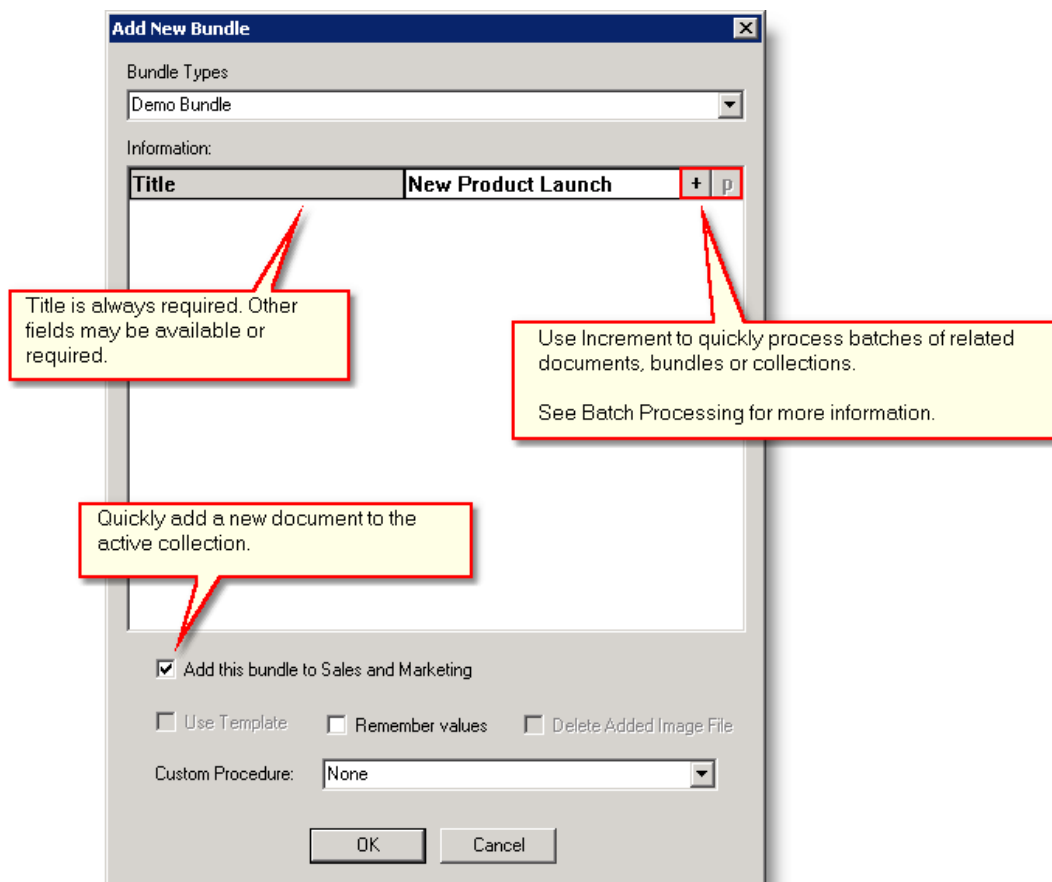


Select a table from **Collections Types** when creating a collection.

3. Type a **Title** to describe the bundle, or collection.



Fill in other fields if available to provide a more detailed description.



4. Select any or all of the following [advanced options](#)<sup>41</sup>, and then click **OK**.

- **Add this document to the current collection**
- **Remember values**
- **Custom Procedure**



Options may not be available or may vary based on the type of item you are creating.

The new bundle, or collection is added to the information store and appears in the [Document List](#)<sup>31</sup>.

**See Also:** [Advanced Options](#)<sup>41</sup>, [Batch Processing](#)<sup>42</sup>, [Searching for Documents](#)<sup>33</sup>


### 3.3.2 Adding and Removing Members



Documents that are part of a bundle, and bundles that are part of a collection become members of that larger group. You can add members to a bundle or collection in just a few steps.




The following steps apply to both bundles and collections.

#### To add members

1. Select a bundle or collection from the [Bundle/Collection Tree](#) .


To	Do this...
Add a document to a Bundle	Click <a href="#">Bundle Tasks</a>  , and then select <b>Add Document to Bundle</b> The <b>Search Document</b> form is displayed
Add a document to a Collection	Click <a href="#">Collection Tasks</a>  , and then select <b>Add Bundle to Collection</b> The <b>Search Bundle</b> form is displayed



2. [Search](#)  for the item(s) you want to add to the group.
3. Select the item(s), and then click **OK**.



You can drag members to **move** them from one group to another. Hold down CTRL and drag to **copy** a member from one group to another.

#### To remove members

1. Select a bundle or collection from the [Bundle/Collection Tree](#) .
2. Select the member item(s) you want to remove.
- 3.

To	Do this...
Remove a document from Bundle	Click <a href="#">Bundle Tasks</a>  , and then select <b>Remove Document from Bundle</b>
Remove a bundle from a collection	Click <a href="#">Collection Tasks</a>  , and then select <b>Remove Bundle from Collection</b>



Removing a member from a bundle or collection does not delete that item from your information store, but simply discontinues its membership in that organizational group


### 3.3.3 Ordering or Sorting Bundles and Collections

Changing the position of a member item in a bundle or collection is a drag-and-drop operation. You can quickly sort documents by title within a bundle in either ascending or descending order.



The following steps apply to both bundles and collections.

#### To move a member to a new position

1. Select a bundle or collection from the [Bundle/Collection Tree](#) .
2. In the Document List, select a bundle or collection member and drag it to a new position.

The item is inserted ahead of the bundle or collection member you drag it to.

### To sort a bundle

- Select a bundle from the [Bundle/Collection Tree](#)<sup>[29]</sup> or [Document List](#)<sup>[29]</sup>.

To	Do this...
Sort ascending by document title	Click <a href="#">Bundle Tasks</a> <sup>[32]</sup> , and then select <b>Sort Bundle Document Ascending</b>
Sort descending by document title	Click <a href="#">Bundle Tasks</a> <sup>[32]</sup> , and then select <b>Sort Bundle Document Descending</b>

### 3.3.4 Deleting Bundles and Collections

Deleting a bundle or collection removes that item from the information store, leaving its member items in tact.

To remove a bundle or collection.

### To add members


- Select a bundle or collection from the [Bundle/Collection Tree](#)<sup>[29]</sup> or [Document List](#)<sup>[29]</sup>.

To	Do this...
Delete a Bundle	Click <a href="#">Bundle Tasks</a> <sup>[32]</sup> , and then select <b>Delete Bundle</b>
Delete a Collection	Click <a href="#">Collection Tasks</a> <sup>[31]</sup> , and then select <b>Delete Collection</b>

### 3.3.5 Organizing As You Go

When you add new documents, UltraDoc let's you create bundles and collections, "as you go", minimizing the amount of time it takes to develop and link new content groups. You can also add a document to multiple bundles in a single operation.

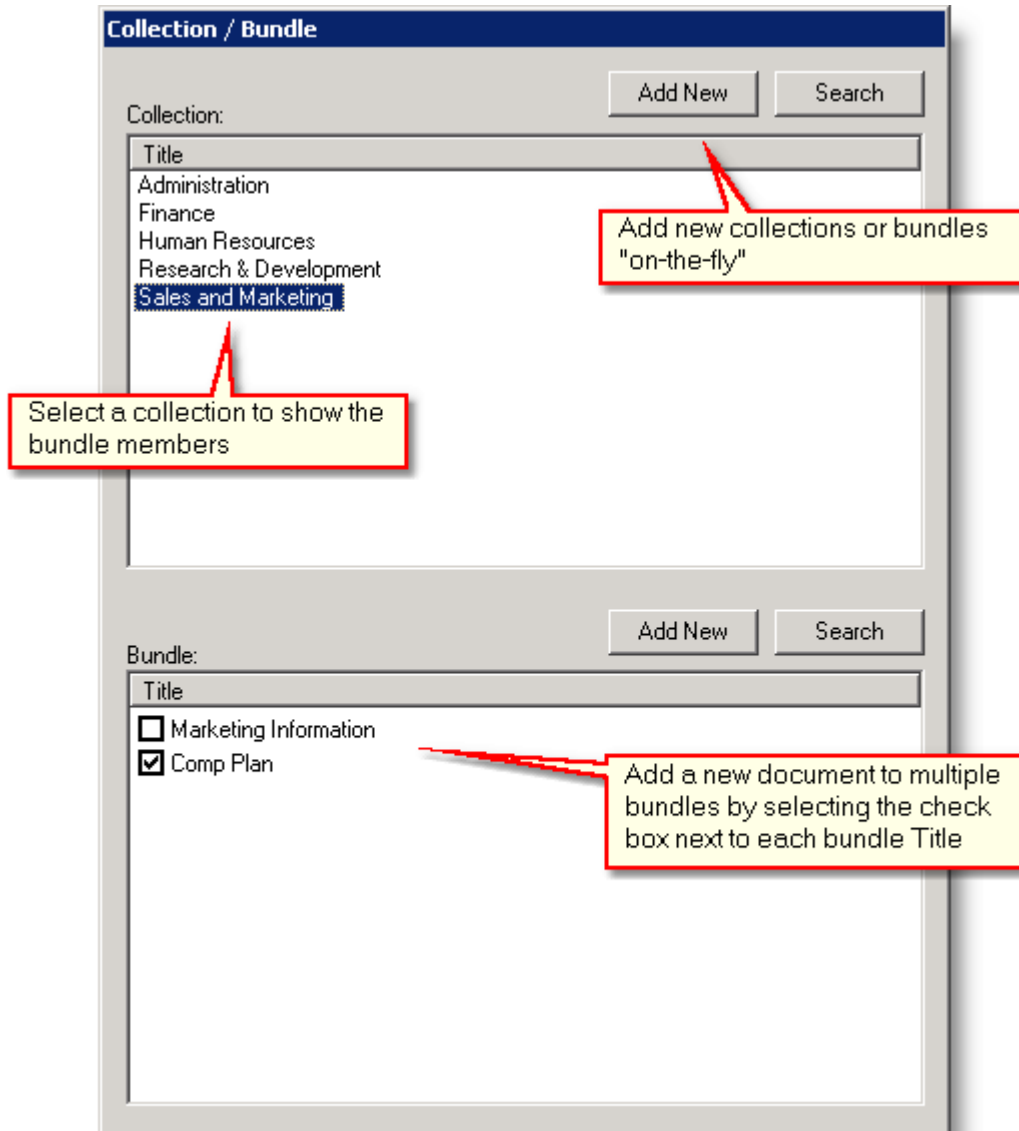
### To quickly create new content groups

- From the [Add New Document](#)<sup>[32]</sup> window,  button in the lower right area of the window.

To	Do this...
To add a document to an existing bundle	<ul style="list-style-type: none"> <li>• Click <b>Search</b> and locate one or more bundles</li> <li>• Select the check box next to each bundle name you want to add the document to</li> </ul>
To create a new bundle or collection	<ul style="list-style-type: none"> <li>• Click <b>Add New</b></li> </ul> <p>See <a href="#">Creating Bundles and Collections</a><sup>[37]</sup></p>



Select a collection before creating a bundle to automatically add the new bundle to an existing collection



## 3.4 Advanced Operation

### 3.4.1 Advanced Options

When [Adding Documents, Bundles, and Collections](#)<sup>32</sup>, several advanced options are available to help you organize and manage the content creation process. The options available for each **Add New** process include:

#### **Add New Document**

- **Add this document to the current bundle.** Adds the newly created document to the *active bundle*, that is the bundle currently selected in the [Bundle/Collection Root](#)

<sup>31</sup>. See Organizing Documents.

- **Use Template.** Stores a system generated, one page template as a placeholder for a document. This is useful for adding information about a document you *intend* to add, prior to the content being actually being created or made available for addition to your information store.
- **Delete Added Image File.** *Deletes* the original file from your computer after it has been successfully added to the information store.

#### Add New Bundle

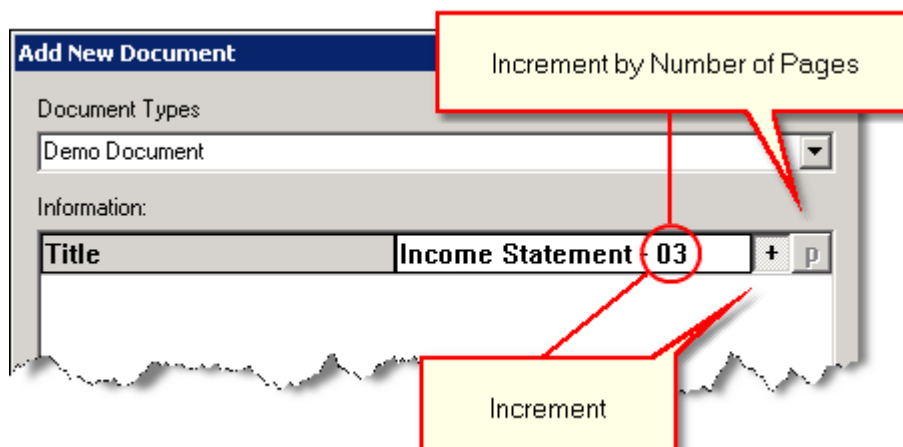
- **Add this document to the current collection.** Adds the newly created bundle to the *active collection*, that is the collection currently selected in the [Bundle/Collection Root](#)<sup>31</sup>. See Organizing Documents.

#### Add New Document, Bundle, or Collection

- **Remember Values.** Fills the [Add New Document, Bundle, or Collection](#)<sup>32</sup> form with information from the previous operation. This is especially useful when [Batch Processing](#)<sup>42</sup>.
- **Custom Procedure.** Runs a custom procedure during the addition of a new document, bundle or collection. These procedures are developed and made available by Alto Imaging Technologies to address specific customer requirements.

### 3.4.2 Batch Processing

Batch processing lets you quickly add multiple documents, bundles, or collections by pre-filling the **Add New** form using information from the previous operation.



Options available for batch processing include:

- **Auto Increment** adds a numeric suffix to the field data. UltraDoc will append a numeric suffix to each field where this control is activated. This option only works when used with the [Remember Values](#)<sup>41</sup> option.

**Example:** You are adding a multi-chapter document with, each chapter contained in a separate file. You enter the first document with the **Title** field 'Cost Study'. Remaining



documents are added with **Title** fields: *Cost Study1*, *Cost Study2*, *CostStudy3*, etc.



You can define the numeric format by adding your own numeric suffix. For example, adding '- 01' to the first document will add '-02', '-03', '-04', etc. to successive new documents.

- **Increment by Number of Pages** increments the numeric suffix by the physical number of pages in the document. This option only works when adding TIFF image documents using **Image Arranger**.

**Example:** You are adding a multi-chapter document with each chapter contained in a separate file. The first document contains 10 pages and you enter the document with the **Title** field '*Financial Report*'. Each remaining document is 5 pages long. Remaining documents are added with the **Title** fields: *Financial Report10*, *Financial Report15*, *Financial Report15*, etc.

### 3.4.3 Custom Import

Launches a process to quickly add content from competitive or existing systems.

#### To start a custom import

1. Click [Actions](#)<sup>[31]</sup>, and then select **Custom Import**.
2. Select a script from the **Import** list, and then click **Import**.

#### Notes

Custom import scripts may be provided by Alto Imaging Technologies to address specific requirements. Contact your software provider for more details.

### 3.4.4 Configuring Search Fields and View Columns

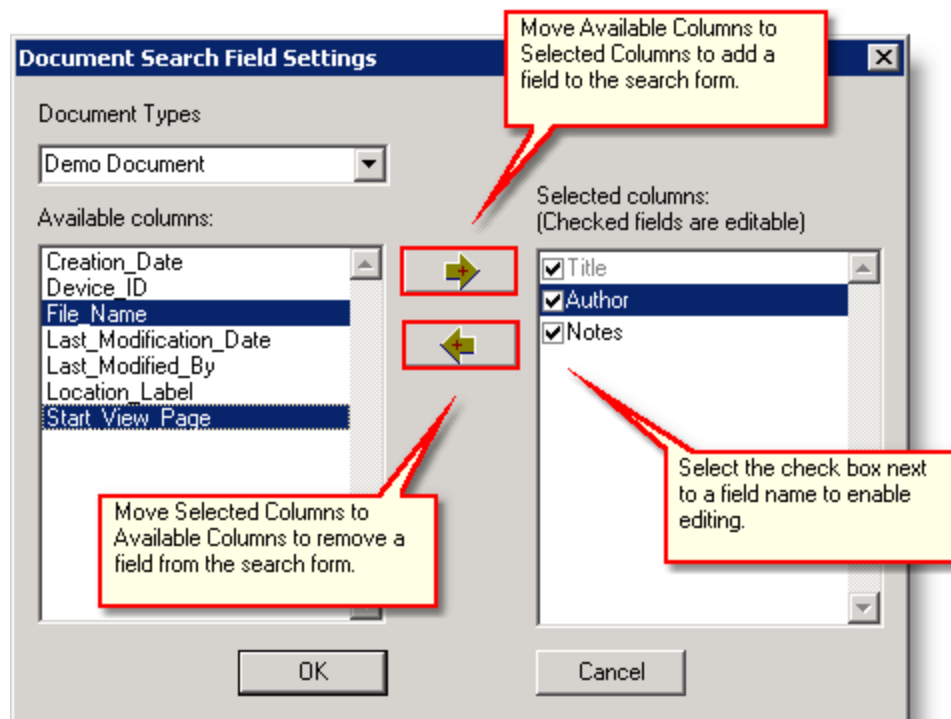
UltraDoc is configured to display only selected fields in search forms, the [Document List](#)<sup>[31]</sup>, and when you [view or change document properties](#)<sup>[35]</sup>. You can also set which fields may be edited.



The following steps apply to document (shown), bundle, or collection tables.

#### To set document search fields

1. [Launch UltraDoc Explorer](#)<sup>[29]</sup>.
2. [Logon](#)<sup>[30]</sup> as Administrator or an account that is a member of the [Administrators group](#)<sup>[49]</sup>.
3. Click [Actions](#)<sup>[31]</sup>, and then select **Set Document Search Fields**.



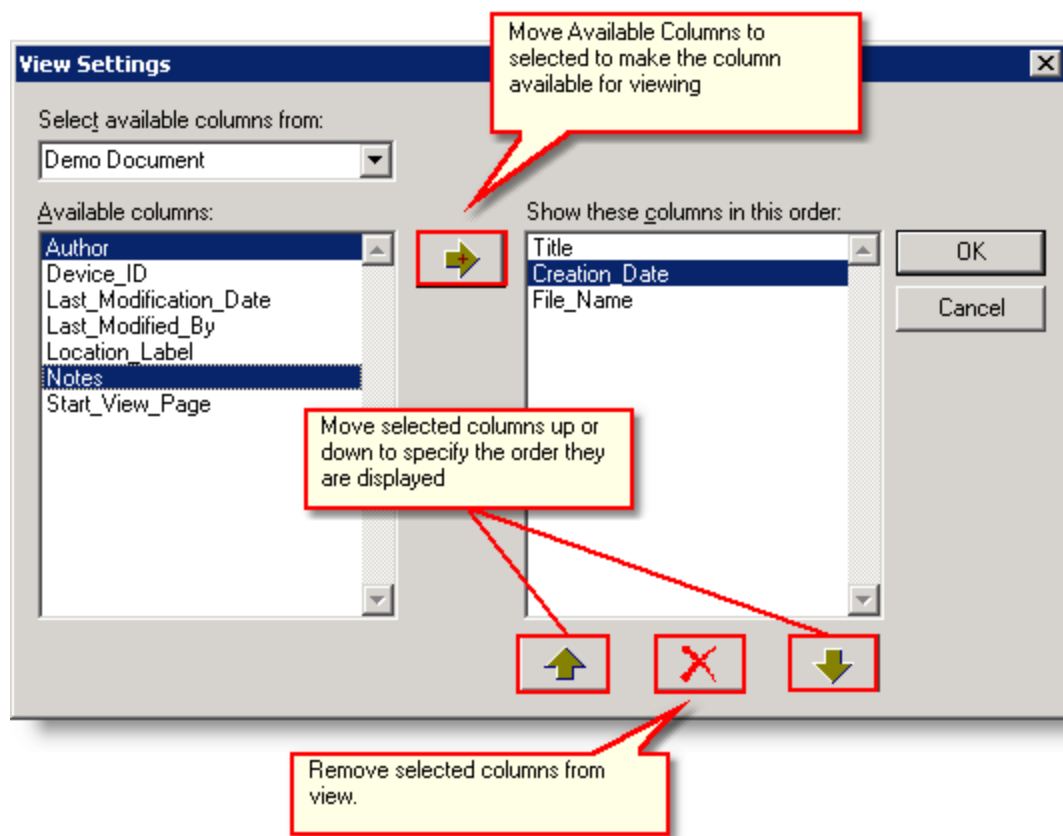
4. Select a document table from the **Document Types** list.
5. Do either of the following:
  - Add columns to the search form by moving **Available Columns** to **Selected Columns**.
  - Remove columns from the search form by moving **Selected Columns** to **Available Columns**.
6. Select the check box each next to each **Selected Column** that should be enabled for editing.



**Title** cannot be removed from any search form, nor can editing be disabled.

#### To set document view columns

1. [Launch UltraDoc Explorer](#)<sup>[29]</sup>.
2. [Logon](#)<sup>[30]</sup> as UltraDoc Administrator or an account that is a member of the [Administrators group](#)<sup>[49]</sup>.
3. Click [Actions](#)<sup>[31]</sup>, and then select **Set Document View Columns**.



4. From the **Select available columns from list**, select a table.
5. Do any of the following:
  - Enable column viewing by moving **Available Columns** to selected columns.
  - Remove columns from view.
  - Change the display order of the selected columns.



**Title** cannot be removed from any view.

#### Notes

These settings affect all users.



# **Managing Security**



## 4 Managing Security

UltraDoc 6 provides several layers of security to keep the content in your information secure. Anyone who wants access to the information store requires a user account. Access to any given content table, individual document, bundle, or collection object is granted or denied based on user account, or that account's membership in a larger group account. Permissions control a user or group account's ability to read, modify, or delete an individual object, or to modify a security list.

### 4.1 Users and Groups

Everyone that requires access to the content stored in UltraDoc needs a user account. When you first install UltraDoc, the only user account available is Administrator. Use the Administrator account to create new user and group accounts.



Use the Administrator account only when required. For normal activity, create a secondary user account with the minimum level of security required to complete your day-to-day tasks.

A user account is made up of a user name and password combination, that uniquely identifies each user and their rights to work with specific content tables or items. Place user accounts in group accounts to simplify administration.

Group accounts simplify administration by minimizing the number of security objects used to grant access to individual content tables or items. By placing user accounts in groups, and assigning permissions only to the group, administration overhead is greatly reduced. User accounts may be members of more than one group account.

There are several built-in group accounts including **Administrators**, **Power Users**, and **Users**. Built-in groups cannot be removed. Each member of a built-in group can perform specific operations:

- **Administrators** (includes the Administrator account by default). Administrators can add, modify, and delete users, groups, documents, bundles, and collections. Administrators can assign table access to user and group accounts.
- **Power Users** (no default members). Power Users may add, modify, and delete documents, bundles, and collections.
- **Users** (includes all user accounts by default). Users can search for and view documents, bundles, and collections, and view members of a bundle or collection.

Only a user that is a member of the Administrators group can add, modify, or remove group accounts.

**See Also:** [Creating User and Group Accounts](#) <sup>49</sup>, [Managing Group Membership](#) <sup>52</sup>, [Controlling Access to Database Content](#) <sup>54</sup>

#### 4.1.1 Creating User and Group Accounts

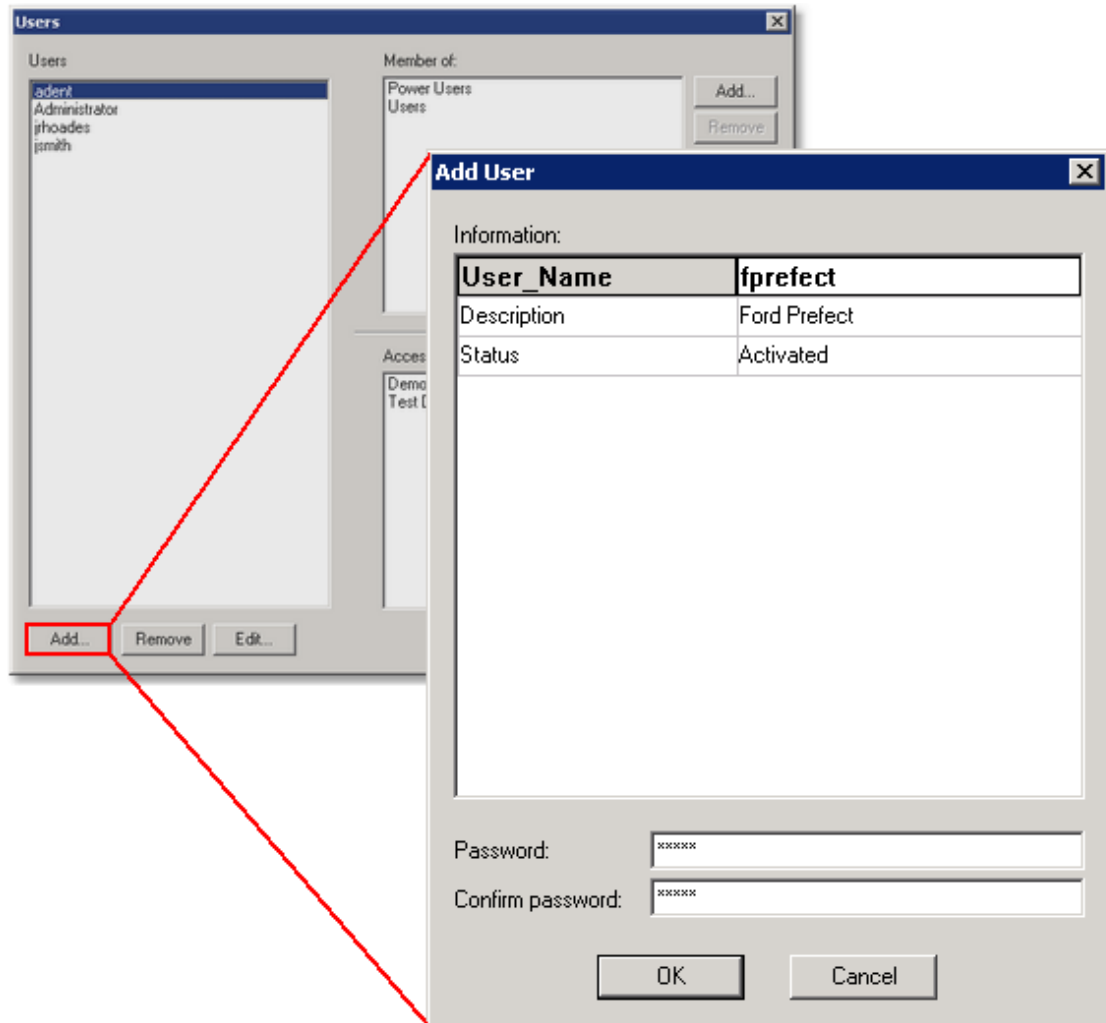
**To create a user account**

1. [Logon](#) <sup>30</sup> as Administrator or an account that is a member of the [Administrators group](#) <sup>49</sup>.
2. From the [Actions](#) <sup>31</sup> menu, click **Users**.

3. Click **Add** under the **Users** section.
4. Type a **User Name** and optional **Description**.



**Description** can be used to represent the user's full name, department, or other information.



5. Select the account **Status**.
6. Type a **Password**. Retype the password a second time in **Confirm Password**, and then click OK.

The new account is created and appears in the **Users** list.



A new user account is automatically added to the [Users group](#)<sup>[49]</sup> inheriting all permissions granted to the group

#### To create a group account

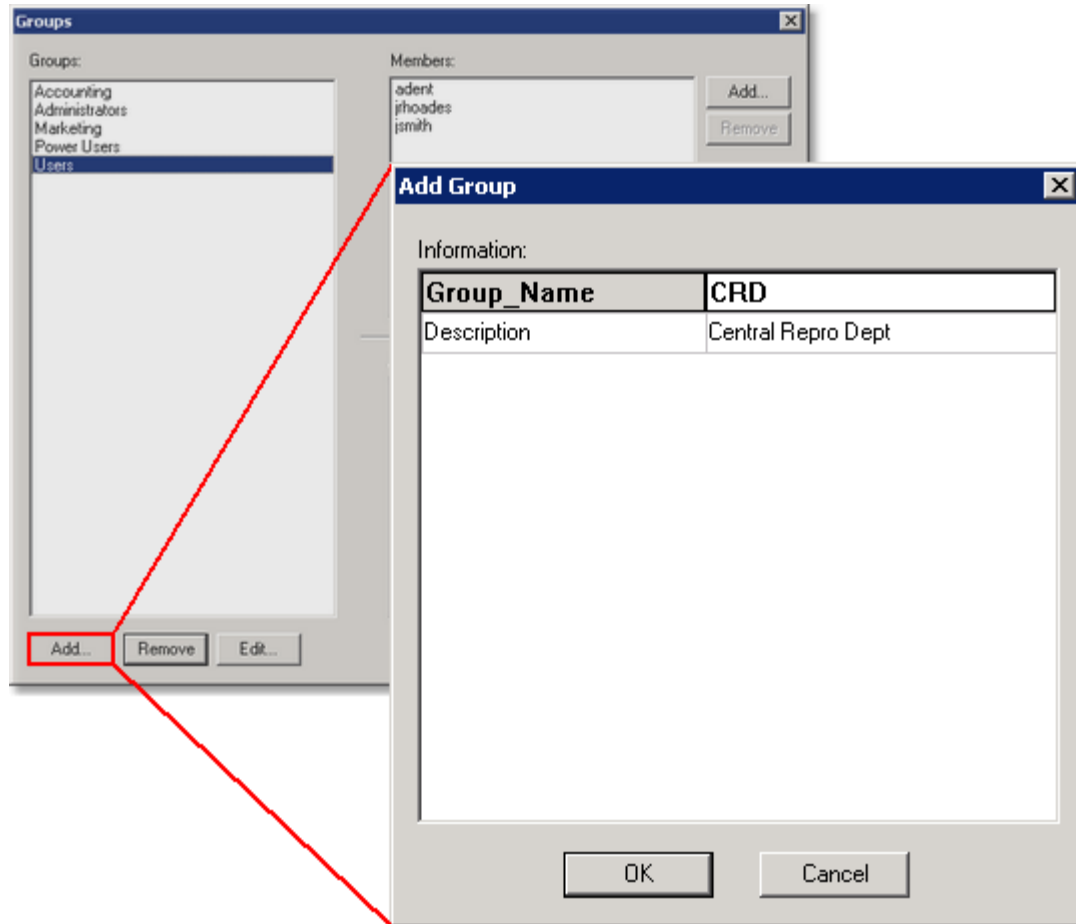
1. [Logon](#)<sup>[30]</sup> as Administrator or an account that is a member of the [Administrators group](#)<sup>[49]</sup>.



2. From the [Actions](#)<sup>31</sup> menu, click **Groups**.
3. Click **Add** from the **Groups** section.
4. Type a **Group Name**, optional **Description**, and then click **OK**.



**Description** can be used to represent the groups department or other information.



The new group is created and appears in the **Groups** list. A new group does not contain any members, nor does a group have permission to access any content areas in the information store.

**See Also:** [Managing Group Membership](#)<sup>52</sup>, [Controlling Access to Database Content](#)<sup>54</sup>

#### 4.1.2 Changing User or Group Properties

**To change user or group account properties**

1. [Logon](#)<sup>30</sup> as Administrator or an account that is a member of the [Administrators group](#)<sup>49</sup>.

To	Do this...
Change a user account	<ul style="list-style-type: none"> <li>From the <a href="#">Actions</a><sup>31</sup> menu, select Users.</li> </ul>

	<ul style="list-style-type: none"> <li>• Select a user account, and then click <b>Edit</b> under the <b>Users</b> section.</li> </ul>
Change a group account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a> <sup>31</sup> menu, select <b>Groups</b>.</li> <li>• Select a user account, and then click <b>Edit</b> under the <b>Users</b> section.</li> </ul>

2. Select a user or group account, and then click **Edit** under the **Users** or **Groups** section.
3. Edit or add information, and then click **OK**.

#### To change a password

1. [Logon](#) <sup>30</sup> as Administrator or an account that is a member of the [Administrators group](#) <sup>49</sup>.
2. Click **Change Password**.
3. Type your new password in **New Password**.
4. **Confirm** the password and click **OK**.

See Also: [Users and Groups](#) <sup>49</sup>

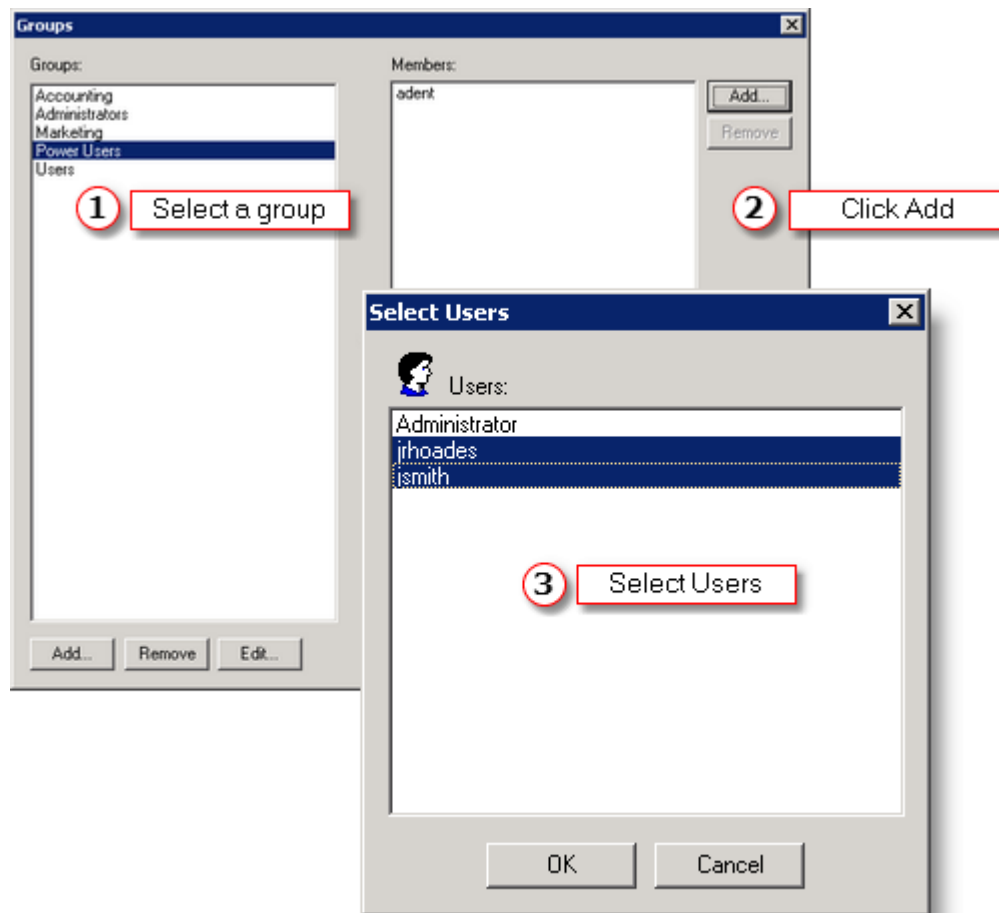
### 4.1.3 Managing Group Membership

Group membership can be managed in either the **User** or **Group** window. The difference is primarily convenience based on the scope of the membership change you want to make. For example, to add a single user account to more than one group, it is easier to make the change from the **Users** window where you can add multiple group account to a user accounts membership list. In contrast, to add or remove several user accounts from a single group account, make the change from the **Group** window.

#### To add group members

1. [Logon](#) <sup>30</sup> as Administrator or an account that is a member of the [Administrators group](#) <sup>49</sup>.

To	Do this...
Add a single <b>User</b> account to one or more <b>Group</b> accounts	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a> <sup>31</sup> menu, select <b>Users</b>.</li> <li>• Select a user account, and then click <b>Add</b> next to the <b>Groups</b> section.</li> <li>• Select one or more <b>Groups</b> and then click <b>OK</b>.</li> </ul>
Add one or more <b>User</b> accounts to a single <b>Group</b> account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a> <sup>31</sup> menu, select <b>Groups</b>.</li> <li>• Select a group account, and then click <b>Add</b> next to the <b>Users</b> section.</li> <li>• Select one or more <b>Users</b> and then click <b>OK</b>.</li> </ul>



### To remove group members

1. [Login](#) <sup>30</sup> as Administrator or an account that is a member of the [Administrators group](#) <sup>49</sup>.

To	Do this...
Remove group membership for a single <b>User</b> account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a> <sup>31</sup> menu, select <b>Users</b>.</li> <li>• Select a user account.</li> <li>• From <b>Member of</b>, select one or more <b>Groups</b>, and then click <b>Remove</b>.</li> </ul>
Remove one or more user accounts from a single <b>Group</b> account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a> <sup>31</sup> menu, select <b>Groups</b>.</li> <li>• Select a group account.</li> <li>• Select one or more <b>Users</b> from <b>Members</b>, and then click <b>Remove</b></li> </ul>

#### 4.1.4 Deleting User and Group Accounts

You can delete any user or group account you create, however, you cannot delete the default [Administrator](#)<sup>[49]</sup> account or any of the [built-in groups](#)<sup>[49]</sup>.

##### To delete a user or group account

- [Logon](#)<sup>[30]</sup><sup>[49]</sup> as Administrator or an account that is a member of the [Administrators group](#)

To	Do this...
Delete a user account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a><sup>[31]</sup> menu, select <b>Users</b>.</li> <li>• Select one or more user accounts, and then click <b>Remove</b>.</li> </ul>
Delete a group account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a><sup>[31]</sup> menu, select <b>Groups</b>.</li> <li>• Select one or more <b>Users</b> and then click <b>Remove</b>.</li> </ul>

## 4.2 Controlling Access to Database Content

Content tables must be made accessible to user accounts or group accounts before any operation, including the ability to search or view, can be performed. UltraDoc's [built-in accounts](#)<sup>[49]</sup> always have access to all tables, each possessing a set of [default permissions](#)<sup>[59]</sup>.

Access to content tables can be granted to user or group accounts, however, adding user accounts to group accounts and assigning permission to the group account makes managing access to the information store easier.

### 4.2.1 Managing Table Access and Permissions

#### Adding and Removing Table Access

##### To make a table accessible to a user or group account

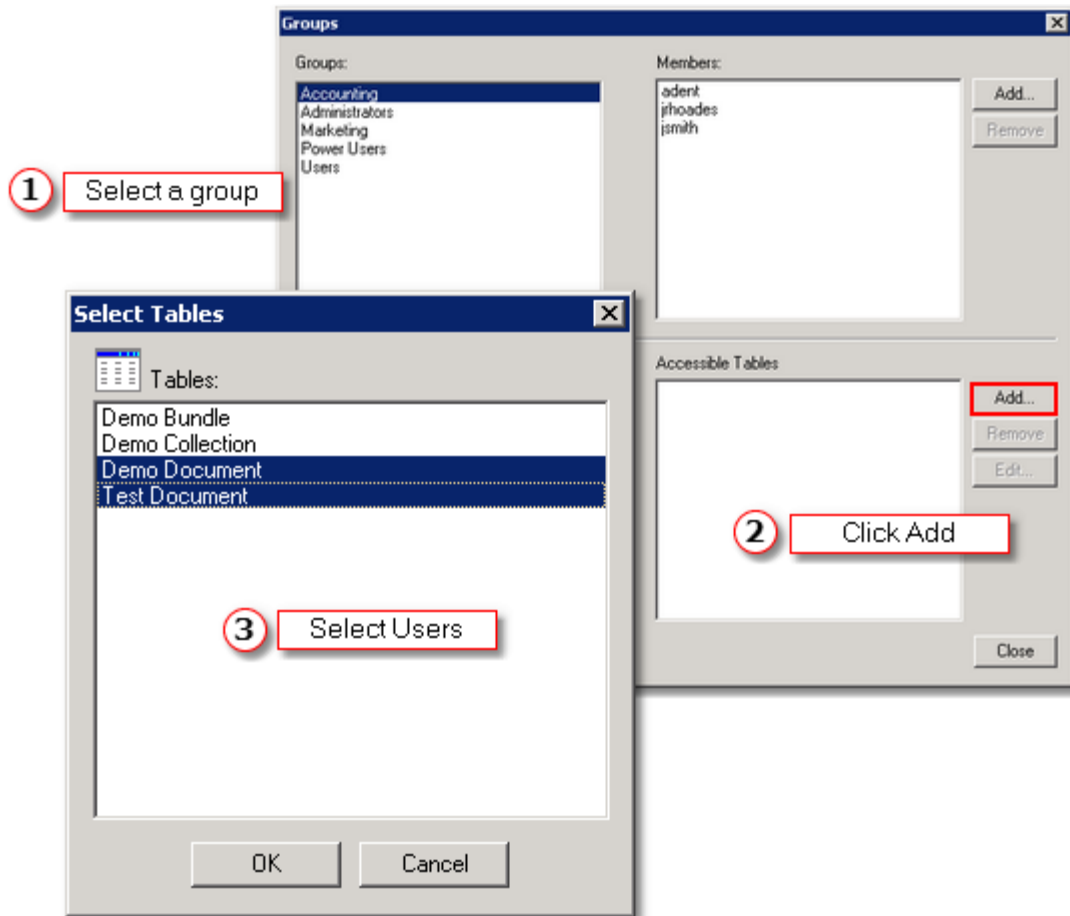
1. [Logon](#)<sup>[30]</sup><sup>[49]</sup> as Administrator or an account that is a member of the [Administrators group](#)

To	Do this...
Make a table accessible to a user account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a><sup>[31]</sup> menu, select <b>Users</b>.</li> <li>• Select a user account, and then click <b>Add</b> next to the <b>Accessible Tables</b> section</li> </ul>
Make a table accessible to a group account (shown here)	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a><sup>[31]</sup> menu, select <b>Groups</b></li> <li>• Select a group account, and then click <b>Add</b> next to the <b>Accessible Tables</b> section</li> </ul>

2. Select one or more **Tables** and then click **OK**.



When adding a new user or group, [Read/Execute](#) permission is assigned by default



### To remove an accessible tables from a user or group account

1. [Login](#) as Administrator or an account that is a member of the [Administrators group](#).

To	Do this...
Remove an accessible table from a user account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a> menu, select <b>Users</b>.</li> <li>• Select a user account</li> </ul>
Remove an accessible table from a group account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a> menu, select <b>Groups</b></li> <li>• Select a group account</li> </ul>

2. Select an **Accessible Table**, and then click **Remove**.



Remove user accounts from the built-in Users group account and assign to group accounts you create for greater control

### Important Notes

All tables are accessible to all [built-in group accounts](#)<sup>[49]</sup> by default. You cannot edit or remove an accessible tables for any built-in group account.

See Also: [Viewing or Changing Table Permissions](#)<sup>[56]</sup>

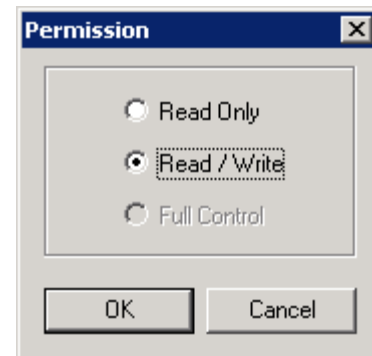
## Viewing or Changing Table Permissions

To view or change table permissions

1. [Logon](#)<sup>[30]</sup> as Administrator or an account that is a member of the [Administrators group](#)<sup>[49]</sup>.

To	Do this...
To view or change table permissions for a user account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a><sup>[31]</sup> menu, select <b>Users</b>.</li> <li>• Select a user account, and then click <b>Edit</b> next to the <b>Accessible Tables</b> section</li> </ul>
To view or change table permissions for a group account	<ul style="list-style-type: none"> <li>• From the <a href="#">Actions</a><sup>[31]</sup> menu, select <b>Groups</b></li> <li>• Select a group account, and then click <b>Edit</b> next to the <b>Accessible Tables</b> section</li> </ul>

2. Select **Read** or **Read/Write** permission, and then click **OK**.



For a description of permissions see [Permissions for Tables and Objects](#)<sup>[59]</sup>



Full Control permission is not available at the table level. Only the built-in [Administrator group](#)<sup>[49]</sup> and its members are assigned Full Control.



Whenever possible place user accounts in group accounts, and assign permissions only to the group account to simplify administration.

### Notes

Table permissions are *cumulative*, that is, if a user account is a member of a group account that has read permission to a table, and is also a member of a group account that has read/write permission to that same table, the user account's effective permission is read/write.

See Also: [Managing Object Level Permissions](#)<sup>[57]</sup>, [Description of Permissions](#)<sup>[59]</sup>

## 4.2.2 Managing Object-level Permissions

You can assign permission to individual content objects like documents, bundles, or collections. This adds a finer level of access control to your information store.



You can view or change an item's properties after selecting the item in the [document list](#)




 29.





The following steps apply to documents, bundles, and collections.

### To view or change object permissions

1. [Search](#)  33 for the item you want to view or change.
2. Select the item from the [Document List](#)  31.

To	Do this...
View or change Document permissions (shown here)	Click <a href="#">Document Tasks</a>  32, and then select <b>Security</b>
View or change Bundle permissions	Click <a href="#">Bundle Tasks</a>  32, and then select <b>Security</b>
View or change Collection permissions	Click <a href="#">Collection Tasks</a>  31, and then select <b>Security</b>

3. Do one of the following:
  - **Add or Remove** a User or Group account to the Security list. See [Changing an Object Security List](#)  57.
  - **Edit** (shown here) permissions for a User or Group account. See [Editing Object Permissions](#)  58.



Granting permission at the object-level may introduce unnecessary complexity into the management of your information store. Wherever possible, add user accounts to group accounts and assign table-level permission to the group account.

### Changing an Object Security List

The security list for each document, bundle, or collection object includes user and group accounts that have been granted explicit permissions.

#### To add or remove an account

- 1.

To	Do this...
<b>Add or Remove</b> a user account	Click <b>Add or Remove</b> under <b>Accessible Users</b>
<b>Add or Remove</b> a group account	Click <b>Add or Remove</b> under <b>Accessible Users</b>

2. Select one or more accounts, and then click **OK**.



When adding a new user or group, [Read/Execute](#)  59 permission is assigned by

default

## Change Object Permissions

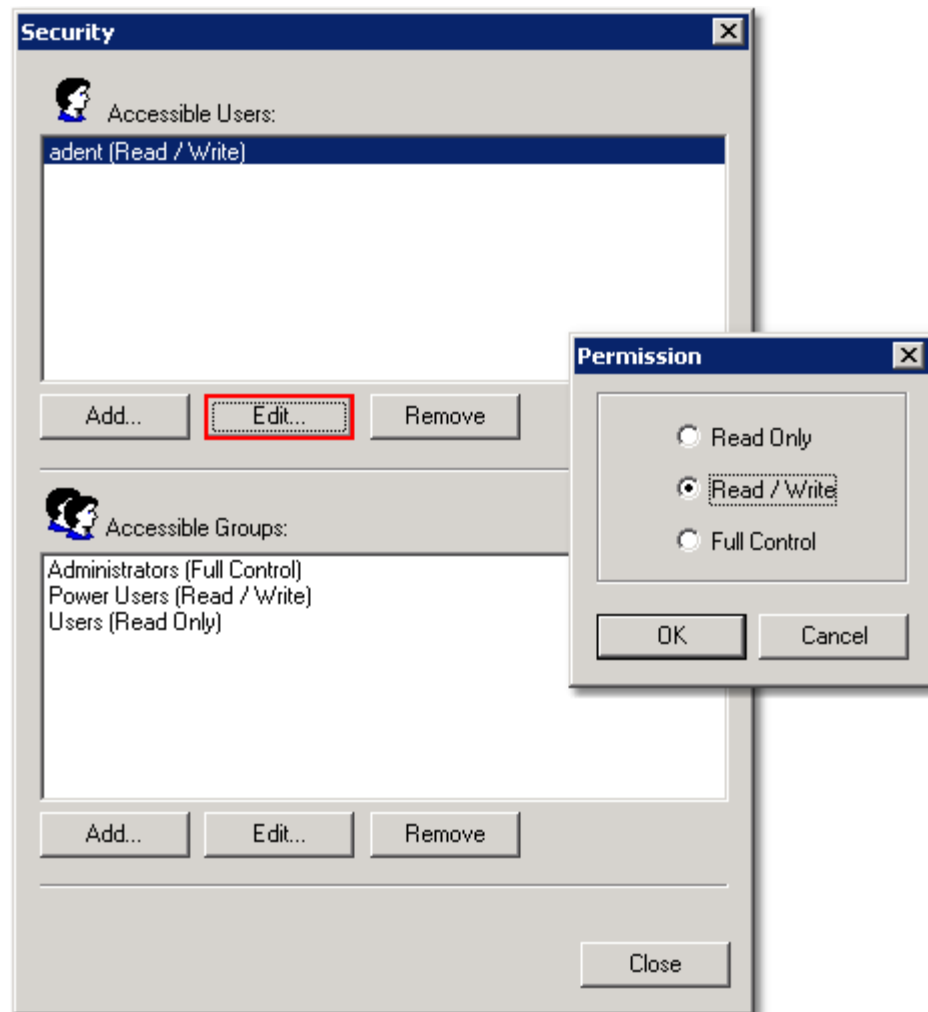
To change an object's permissions

1. Select a user or group account

To	Do this...
<b>Edit</b> permissions for a user account	Click <b>Edit</b> under <b>Accessible Users</b>
<b>Edit</b> permissions for a group account	Click <b>Edit</b> under <b>Accessible Groups</b>

2. Select **Read**, **Read/Write**, or **Full Control** permission, and then click **OK**.

For a description of permissions see [Permissions for Tables and Objects](#) <sup>59</sup>



### Important Notes

Permissions assigned at the table level override permissions at the document, bundle, or collection object level.



### 4.2.3 Description of Permissions

Permissions for tables and document, bundle or collection objects. Available permissions include **Read**, **Read/Write**, and **Full Control**.

Permission	Description
<b>Read Only</b> <i>(default for built-in Users group)</i>	<ul style="list-style-type: none"><li>• Search and view properties for all items in a given table</li></ul> <b><i>Overrides permissions assigned at the document, bundle, or collection object level</i></b>
<b>Read/Write</b> <i>(default for built-in Power Users group)</i>	<ul style="list-style-type: none"><li>• Search and view properties for all items in a given table</li><li>• Update a document, bundle, or collection object</li><li>• Delete a document, bundle, or collection object</li></ul>
<b>Full Control</b> <i>(default for built-in Administrators group)</i>	<ul style="list-style-type: none"><li>• Search and view properties for all items in a given table</li><li>• Update a document, bundle, or collection object</li><li>• Delete a document, bundle, or collection object</li><li>• Change the security list or permissions for a document, bundle, or collection object</li></ul>

#### Important Notes

- Read/Write permission is required at the table-level to update, delete, or modify permissions for a document, bundle, or collection object.
- Read Only permission at the table level overrides Read/Write and Full Control permissions at the document, bundle, or collection object level.



# **Integration With Other Applications**



## 5 Integration With Other Applications

The UltraWare family includes other applications each possessing direct integration with UltraDoc 6. This includes Image Arranger, UltraCopy, and UltraPrint.

### 5.1 Image Arranger

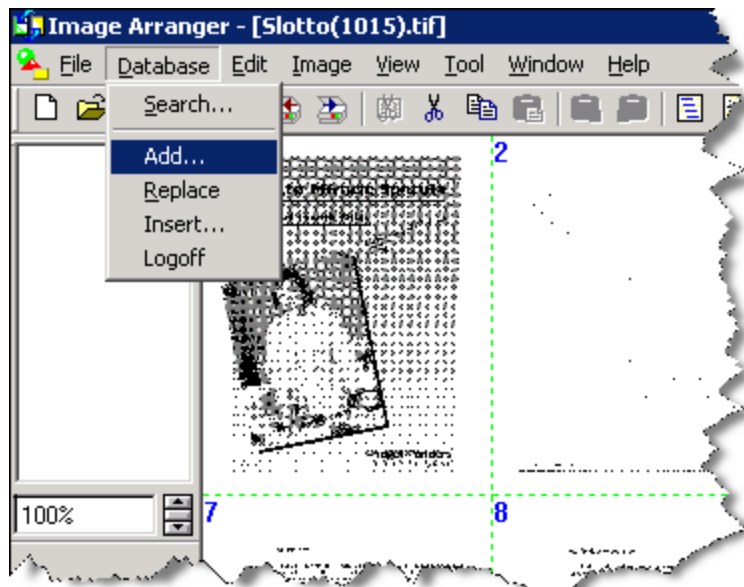
Image Arranger is a powerful image capture and processing application and is tightly integrated with UltraDoc. Use Image Arranger to capture images from existing hardcopy or import electronic documents from PostScript and PDF formats, and then add the images as new documents to your information store.

#### To access UltraDoc from Image Arranger

- Select **Database** from the menu

Choosing a database operation for the first time during an **Image Arranger** session will prompt you to [Logon](#)

Exit **Image Arranger** or **Logoff** to end your session with UltraDoc



In addition to [Search](#)<sup>[33]</sup> and [Add New Document](#)<sup>[32]</sup>, Image Arranger lets you replace existing content or, when working with TIFF image documents, insert new pages.

#### To replace a document

1. On the **Database** menu, click **Search**

[Search](#)<sup>[33]</sup> for the document you want to replace.

2. Select the document, and then click **OK** to load the document into the Image Arranger workspace.

User Image Arranger to edit or change the document. See the ***Image Arranger User Guide*** for more information.


3. On the **Database** menu, click **Replace**

The existing document is overwritten with the document currently displayed in the Image Arranger workspace.

#### To insert images into a document

1.

To	Do this...
Insert captured images	On the <b>File</b> menu, click <b>Acquire</b> . See your scanner documentation for more information.
Insert previously captured images	On the <b>File</b> menu, click <b>Open</b> . Select the image file you want to insert and load into the Image Arranger workspace. See the <i><b>Image Arranger User Guide</b></i> for more information.
Insert an existing UltraDoc document	On the <b>Database</b> menu, click <b>Search</b> . Search for the document you want to insert. Select the document, and then click OK to load the document into the Image Arranger workspace

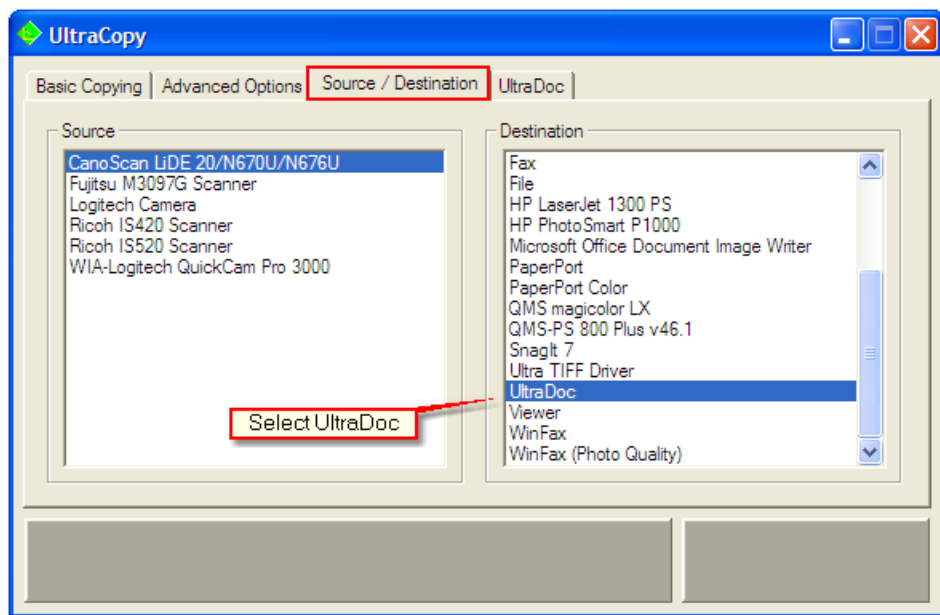
2. On the **Database** menu, click **Insert**
3. [Search](#)  for the receiving document. Select the document, and then click **OK**.  
This document becomes the target of the **Insert** process.
4. In the **Insert At** list, select **Beginning** or **End** as the insertion point, and then click **OK**.

## 5.2 UltraCopy

UltraCopy is an easy-to-use application designed to connect disparate image capture and output devices. By setting UltraDoc as the output device, you can use UltraCopy to capture hardcopy directly to your image store.

### To configure UltraCopy for use with UltraDoc

1. Launch **UltraCopy**.  
See the ***UltraCopy User Guide*** for more information.
2. Select the **Source/Destination** tab.
3. In the **Destination** list, click **UltraDoc**.



The Copy and Reset buttons will be unavailable until you select the UltraDoc tab and logon.

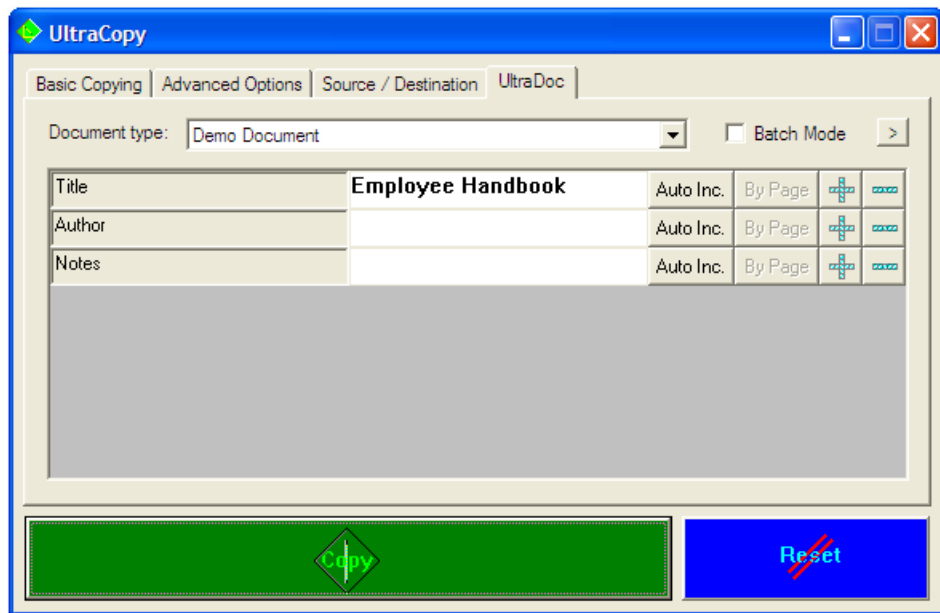
### To capture images to UltraDoc

1. Select the **UltraDoc** tab.
2. [Logon](#) to your UltraDoc database.
3. In the **Document Types** list, select a table.
4. Type a **Title** to describe the document.



Fill in other fields if available to provide a more detailed description.

5. Click **Copy**.




### Advance Options

UltraCopy has several advanced options to help you manage your capture and storage process.

UltraCopy let's you add new documents to bundles, "as you go", minimizing the amount of time it takes to develop and link new content groups.

#### To add new documents to a bundle

1. Select  button in the upper right area of the UltraDoc tab.  
the
2. In the **Bundle Type** list select the table that contains the bundle
3. Click the search field button and select the field you want to search on.
4. Select the bundle from the resulting list.





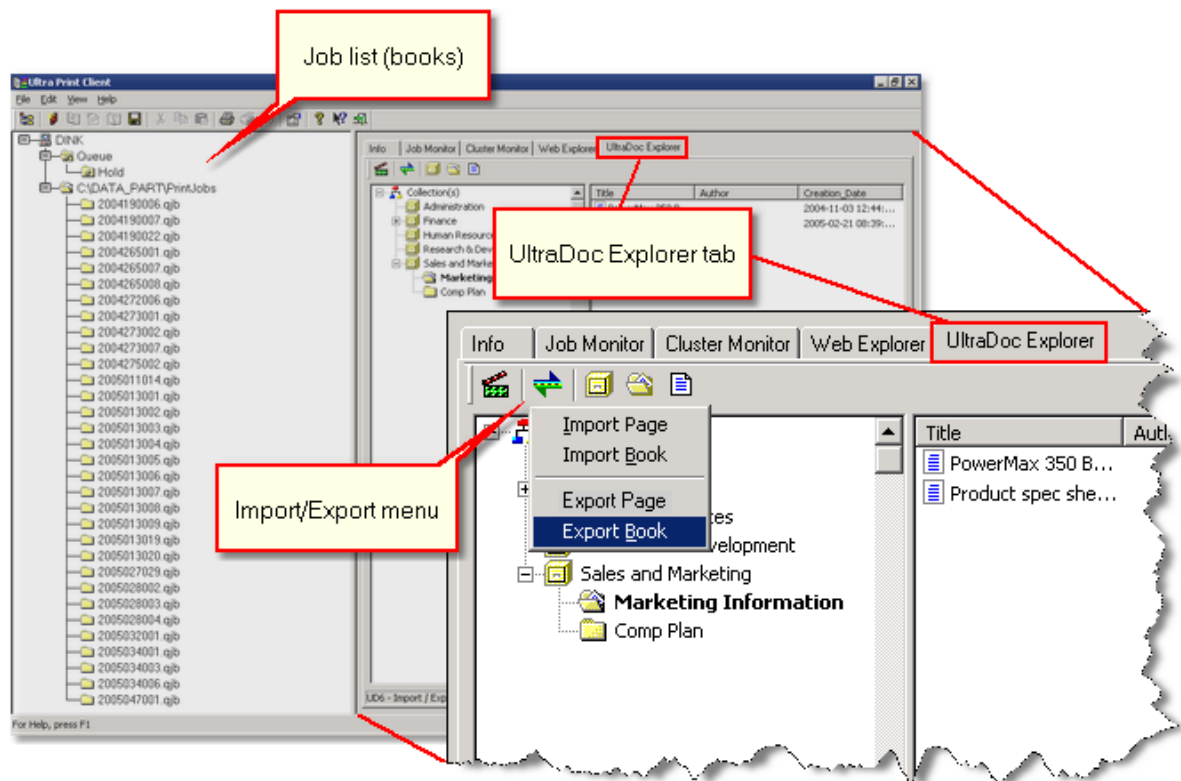
*Financial Report15*, etc.

- **Manual Increment/Decrement** lets you change the suffix prior to capturing the next image.

## 5.3 UltraPrint

When it comes to printing documents from your information store, UltraPrint serves as a sophisticated job manager. After locating a document or bundle, you export the item as a page (file) or book (print job), to UltraPrint's job list. Pages or books created in UltraPrint may be imported into UltraDoc as documents and bundles respectively.

UltraPrint implements the UltraDoc Explorer interface in its entirety. You can use UltraPrint to perform any task you would normally complete using UltraDoc Explorer.



### To export a document to the job list

1. Select the **UltraDoc Explorer** tab
2. [Search](#)<sup>33</sup> for the document you want to print.
3. Select the document in the [Document List](#)<sup>31</sup>
4. Click [Import/Export](#)<sup>29</sup>, and then select **Export Page**.

The document is exported as a page to the book currently selected in UltraPrint's job list. Use UltraPrint to print the document.

### To export a bundle to the job list

1. Select the **UltraDoc Explorer** tab

2. [Search](#)<sup>[33]</sup> for the bundle you want to print.
3. Select the bundle in the [Document List](#)<sup>[31]</sup>
4. Click [Import/Export](#)<sup>[29]</sup>, and then select **Export Book**.

The bundle is exported as a book in UltraPrint's job list. Use UltraPrint to print the bundle.

#### **To add an UltraPrint page to the information store**

1. Select the **UltraDoc Explorer** tab
2. Select a page from the UltraPrint job list
3. Click **Import/Export**, and then select **Import Page**
4. Select a document table from the **Document Types** list.  
Optionally select **Add this document to the selected bundle(s)**
5. Click **OK** to add the document to the information store.

#### **To add an UltraPrint bundle to the information store**

1. Select the **UltraDoc Explorer** tab
2. Select a book from the UltraPrint job list
3. Click **Import/Export**, and then select **Import Book**
4. Select a bundle table from the **Bundle Types** list.  
Optionally select **Add this bundle to the selected collection(s)**
5. Click **OK** to add the bundle to the information store.

#### **Notes**

The page or book name is used as **Title** when importing a document or bundle to the information store.

## **5.4 Working with Microsoft Office**

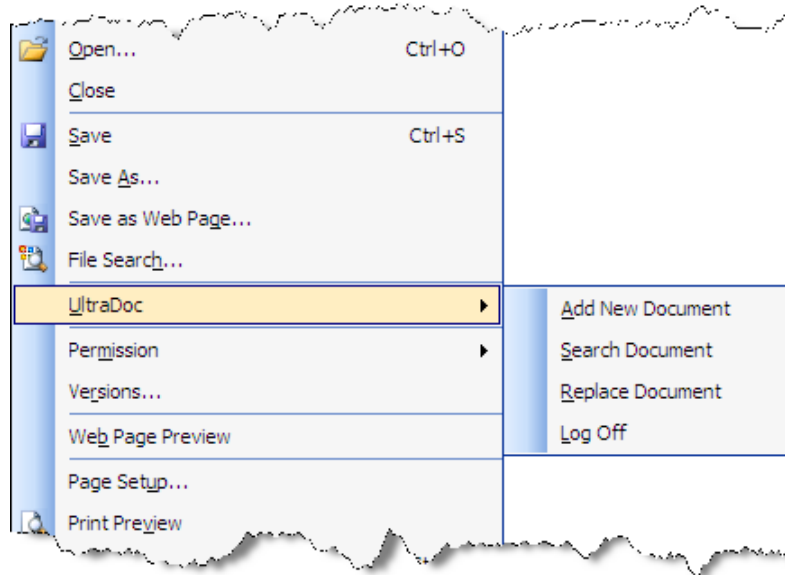
UltraDoc integrates with many of the Microsoft Office applications including Word, Excel, PowerPoint, and Outlook. Each Office application works with UltraDoc documents in their native format.

**To access UltraDoc from Word, Excel, or PowerPoint**

- From the **File** menu, point to **UltraDoc**, and select a command from the submenu

**To access UltraDoc from Outlook**

- From the **UltraDoc** menu, select a command

**Important Notes**

Microsoft Office integration requires an [authentication certificate](#)<sup>19</sup>. You can create a certificate with UltraDoc Explorer which is installed as part of the standard UltraDoc installation, or with the installation of the UltraDoc Client software.

**How Do I...**



## 6 How Do I...

### 6.1 Change the folder where certificates are stored?

When you attempt to open a connection to an UltraDoc database, the program looks for a authentication certificate in the path specified by a registry key.

#### To change the authentication certificate folder path

- Edit the **Certificate Path** value in the following registry key:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Alto Imaging\UltraDoc
```

This change affects all UltraWare applications. Be sure and move your authentication certificates to the new location.



**Warning:** Modifying the registry can cause serious problems that may require you to reinstall your operating system. We cannot guarantee that problems resulting from modifications to the registry can be solved. Use the information provided at your own risk.

### 6.2 Change the UltraKey folder path?

When you start an UltraDoc, the program looks for the software activation key in the path specified by a registry key.

#### To change the UltraDoc folder path

- Edit the **Container Path** value in the following registry key:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Alto Imaging\UltraKey
```


This change affects all UltraWare applications. Be sure and move your software activation keys to the new location.



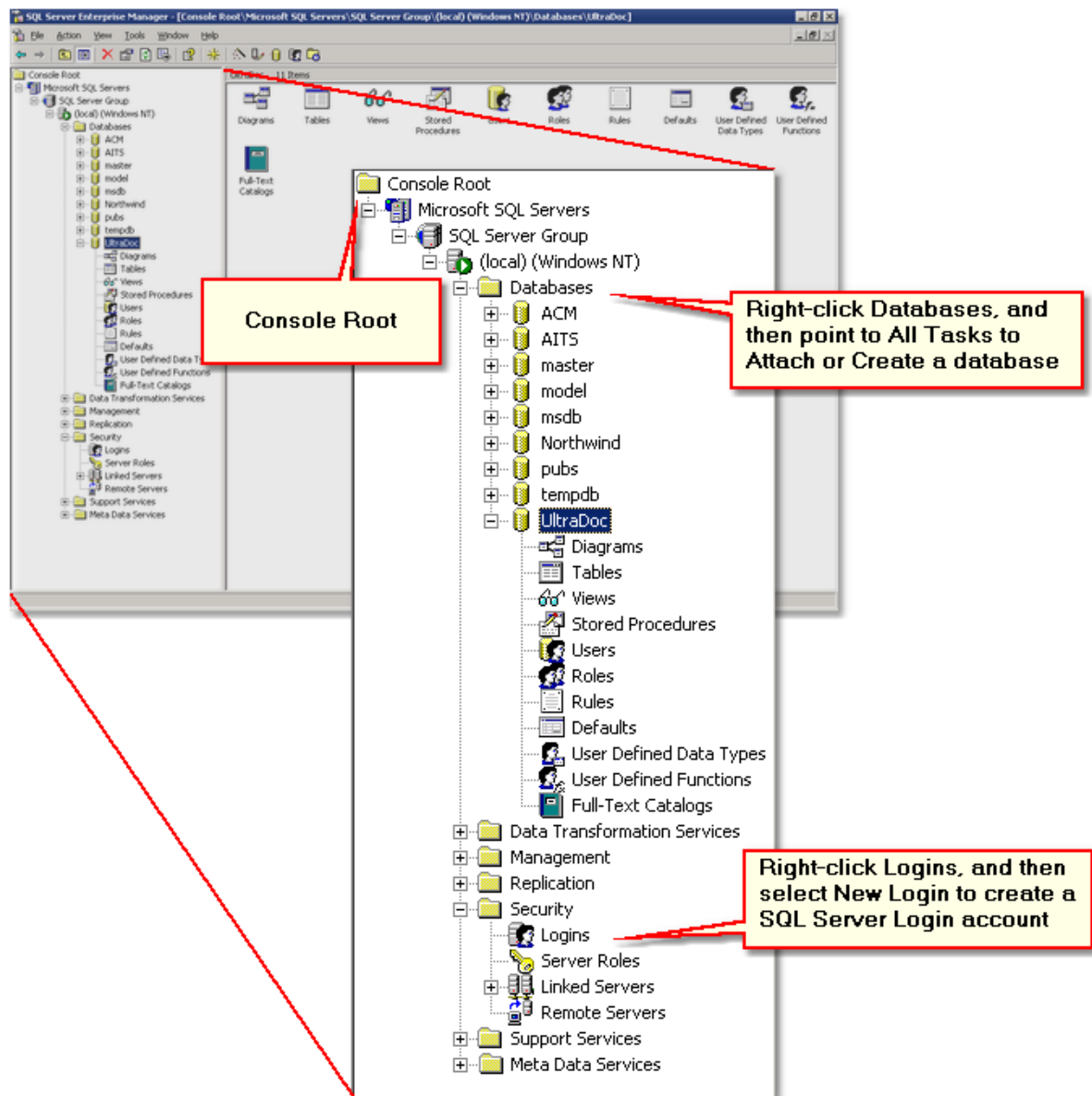
**Warning:** Modifying the registry can cause serious problems that may require you to reinstall your operating system. We cannot guarantee that problems resulting from modifications to the registry can be solved. Use the information provided at your own risk.

### 6.3 Launch and use SQL Server Enterprise Manager?

#### To launch SQL Server Enterprise Manager

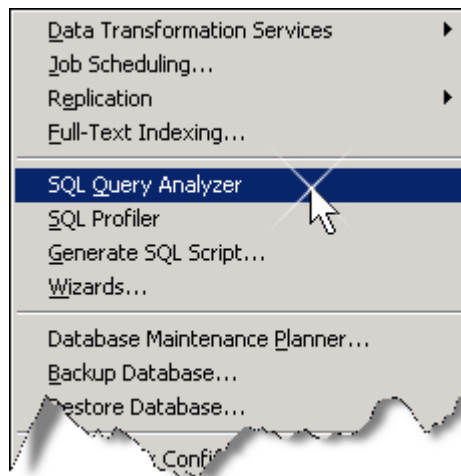
1. Select the **Enterprise Manager** icon in the **Microsoft SQL Server** program group.
2. Click  to expand your **SQL Server Group**, and then expand your server.

Most of the tasks that need to be completed during the installation or maintenance of your UltraDoc database are completed from the Console area of SQL Server Enterprise Manager. This screen capture draws attention to the areas where those tasks are performed.





### To launch SQL Query Analyzer through a connection in SQL Server Enterprise Manager



1. Select a **SQL Server Group**, server, or database object.
2. From the **Tools** menu, click **SQL Query Analyzer**.



Select your database from the database list prior to starting the SQL Query Analyzer. This will open a query window with your database already selected and prevent you from accidentally performing a query on the wrong database.

## 6.4 Launch and use SQL Query Analyzer?

### To launch SQL Query Analyzer

- Select the **Query Analyzer** icon in the **Microsoft SQL Server** program group.

Connect to a SQL Server to open a query window.

If you access SQL Query Analyzer without first establishing a connection, the **Connect to SQL Server** dialog box is displayed to allow you to specify a database server.

### To connect to a SQL Server and open a query window

1. In the **Connect to SQL Server** box, enter the name of your database server in the **SQL Server** box.

To select the local server, select (local).

To specify another server or another instance of the server, enter the server name in the **SQL Server** box. Click the browse button (...) to display a list of active servers.

2. Click **SQL Server Authentication**, and then type the **Login name** and **Password** required to connect to the SQL Server.



**Tip:** If you access SQL Query Analyzer through a connection in SQL Server Enterprise Manager, a query window opens automatically.

**See Also:** [Launch SQL Server Enterprise Manager](#) <sup>73</sup>

## 6.5 Get Help?

There are many sources of support available to ensure your experience with UltraDoc is an enjoyable one. Here are several ways to obtain the help you need.

### Microsoft Windows Documentation

Refer to the documentation provided by the computer manufacturer or with the operating system.

### Scanner Documentation

Your scanner documentation provides complete information about the hardware.

**Alto Imaging Technologies Resellers**

Your local reseller (the one that helped you choose your UltraWare system) may be best equipped to help you. Your vendor has specially trained service technicians available to answer questions, and the equipment to analyze your problems.

**Online**

Web site: <http://www.altoimaging.com/>

E-mail: [prefect@altoimaging.com](mailto:prefect@altoimaging.com)

Knowledge Base: <http://www.altoimaging.com/kb>

Support Request: <http://www.altoimaging.com/AltoWeb/ProductSupport/Support/Support.html>

**Customer Service**

Monday through Friday, 8:00 am to 5:00 pm, Central Standard Time

You can reach us by telephone at (251) 343-9339 (US)

If you do call for assistance, have the following information ready so our Customer Support Representatives can help you more quickly.

- Your phone number, fax number, email and shipping addresses
- A description of the problem
- The version of the Alto Imaging application you're using (from the Help menu choose the About command)
- The printer, scanner, and computer models
- The type and version of operating system you're using
- The amount of memory installed on your PC and printer
- Your printer type and any firmware version information you have

# Appendix



## 7 Appendix

### 7.1 Custom Import Configuration

Custom Import lets you quickly import external records, including associated documents or images, into your UltraDoc 6 information store. Links between document, bundle, and collection objects can be made during the import process even if the parent object does not yet exist. You can create and use any number of import processes. The descriptor and details of each process, including field mappings, are described by two **UD\_Import** tables in the UltraDoc database:

#### UD\_Import\_Header Table

Names the source import file, describes the source file schema, and defines import behavior. This table can contain any number of import headers, meaning you can define and use many different import processes.

#### UD\_Import\_Detail Table


Specifies target tables and describes mappings between the source import file and the target table.

The last requirement for a custom import is the actual import data, or **Source Import File**. The source import file contains the data you wish to import, including the path and/or filename for associated document or image files if available. This is a list of comma separated values (CSV) or a tab delimited text file.

Here's a summary of the steps required to create and use a Custom Import

1. Create a **Source Import File**. This can be created manually, or may be exported from another application.
2. Define a new import process by adding a header record to the **UD\_Import\_Header** table.
3. Map fields from the **Source Import File** by adding entries to the **UD\_Import\_Details** table.
4. Use [UltraDoc Explorer](#)<sup>[29]</sup> to launch the [Custom Import](#)<sup>[43]</sup>.

#### To add an import process and mappings


1. [Launch SQL Server Enterprise Manager](#)<sup>[73]</sup>.
2. Click  to expand your **UltraDoc** database.
3. Select **Tables**, and then do one of the following:

To	Do this...
To add a new import process to UD_Import_Header	<ul style="list-style-type: none"> <li>• Right-click <b>UD_Import_Header</b>, point to <b>Open Table</b>, and then click <b>Return all rows</b>.</li> </ul> See <a href="#">UD Import Header Schema</a> <sup>[80]</sup> .
To add import mappings to UD_Import_Detail	<ul style="list-style-type: none"> <li>• Right-click <b>UD_Import_Detail</b>, point to <b>Open Table</b>, and then click <b>Return all rows</b>.</li> </ul>

See [UD Import Detail Schema](#)  84

### 7.1.1 UD\_Import\_Header Schema

When a Custom Import is defined, the process profile and import behavior is determined by using the schema information contained in the **UD\_Import\_Header** table. A single entry in this table defines each Custom Import Process. Following is a description of each field.

Column Name	Data Type	Description
Import_ID	int (4)	Unique identifier assigned by the SQL Server. Referenced by UD_Import_Detail records to create relationships between the import process and its field mappings.
Title	varchar (50)	Process name as displayed in UltraDoc Explorer. This is the name you see when selecting Custom Import from the Actions menu. <i>Example: My Import</i>
Source	varchar (256)	Full path to Source Import File. The file referenced by this entry contains the data that is imported when the Custom Import process is launched. Fields in this file should be delimited by commas (comma-separated values) or tabs. <i>Example: C:\Custom Import\export.csv</i>
Source_Type	varchar (128)	<b>File</b> is currently the only supported source type and is the only acceptable entry.
Source_Schema	varchar (256)	ODBC is currently the only supported source schema. See <a href="#">Source Schema</a>  83 for more information.
Source_Image_File_Location	int (4)	Specifies the location of document or image files associated with the import records. <i>Possible values:</i> <b>0</b> = No document or image files. <b>1</b> = Full path to document or image files is specified in the <i>Source Import File</i> and mapped to <b>File_Name</b> in the <b>UD_Import_Detail</b> table. <b>2</b> = File name of document or image files is specified in the <i>Source Import File</i> and mapped to <b>File_Name</b> in the <b>UD_Import_Detail</b> table. Document or Image files must be located in same directory as <i>Source Import File</i> . <b>3</b> = Same as 2, but matches filename using file extension specified by <b>Source Image File Info</b> column.
Source_Image_File_Info	varchar (128)	File extension referenced by <b>Source_Image_File_Location</b> option 3.

		<i>Example: .pdf</i> (must include ".")
--	--	---

## UD\_Import\_Header Schema (continued)

Column Name	Data Type	Description
Source_File_Action	int (4)	<p>Performs the specified file operation on the Source Import File after the import process is complete.</p> <p><i>Possible values:</i></p> <ul style="list-style-type: none"> <li><b>0</b> = No action.</li> <li><b>1</b> = Delete <i>Source Import File</i>.</li> <li><b>2</b> = Move <i>Source Import File</i> to directory specified by <b>Source_File_Action_Info</b> column.</li> <li><b>3</b> = Append text specified by <b>Source_File_Action_Info</b> column to the <b>Source Import File</b> name.</li> </ul>
Source_File_Action	char (256)	Directory path or text referenced by <b>Source_File_Action</b> options <b>2</b> or <b>3</b> .
Source_Image_File_Action	int (4)	<p>Performs the specified file operation on the associated document or image files after the import process is complete.</p> <p><i>Possible values:</i></p> <ul style="list-style-type: none"> <li><b>0</b> = No action.</li> <li><b>1</b> = Delete <i>Source Import File</i>.</li> <li><b>2</b> = Move <i>Source Import File</i> to directory specified by <b>Source_Image_File_Action_Info</b> column.</li> <li><b>3</b> = Append text specified by <b>Source_Image_File_Action_Info</b> column to the <b>Source Import File</b> name.</li> </ul>
Source_Image_File_Action_Info	char (256)	Directory path or text referenced by <b>Source_File_Action</b> options <b>2</b> and <b>3</b> .
Unique_Doc_Title	int (4)	<p>Determines the import action if a document with the same title already exists in the database.</p> <p><i>Possible values:</i></p> <ul style="list-style-type: none"> <li><b>0</b> = Import record.</li> <li><b>1</b> = Do not import record.</li> </ul>
Unique_Bundle_Title	int (4)	<p>Determines the import action if a bundle with the same title already exists in the database.</p> <p><i>Possible values:</i></p> <ul style="list-style-type: none"> <li><b>0</b> = Import record.</li> <li><b>1</b> = Do not import record.</li> </ul>
Unique_Collection_Title	int (4)	<p>Determines the import action if a collection with the same title already exists in the database.</p> <p><i>Possible values:</i></p> <ul style="list-style-type: none"> <li><b>0</b> = Import record.</li> <li><b>1</b> = Do not import record.</li> </ul>



**UD\_Import\_Header Schema (continued)**

Column Name	Data Type	Description
Unique_Bundle_Doc	int (4)	Determines if a document or image is linked to the specified bundle when a document with the same title already exists and is linked to the bundle.  <i>Possible values:</i> <b>0</b> = Link document. <b>1</b> = Do not link document.
Unique_Collection_Bundle	int (4)	Determines if a bundle is linked to the specified collection when a bundle with the same title already exists and is linked to the collection.  <i>Possible values:</i> <b>0</b> = Link bundle. <b>1</b> = Do not link bundle.

**Source Schema**

The format of the Source Import File is determined by the **Source\_Schema** field. This field provides the ODBC drivers with information about the general format of the file, the column name and data type information, and other data characteristics.

The syntax for the **Source\_Schema** field is:

```
ColNameHeader=True
Format=CSVDelimited
MaxScanRows=25
CharacterSet=ANSI
Col1=c1 text
Col2=c2 text
Col3=c3 text
```

**Specifying the File Format**

The Format option in **Source\_Schema** specifies the format of the text file. The following table lists the valid values for the Format option.

Format Specifier	File Format	Source_Schema statement
Tab Delimited	Fields in the file are delimited by tabs.	Format=TabDelimited
CSV Delimited	Fields in the file are delimited by commas (comma-separated values).	Format=CSVDelimited

**Selecting a Character Set**

The **CharacterSet** setting in overrides the setting in the Windows Registry on a file-by-file basis. The following example shows the **Source\_Schema** entry that sets the character set to ANSI:

```
CharacterSet=ANSI
```

**Specifying the Fields**

You can specify field names in a character-delimited text file in two ways:

- Include the field names in the first row of the table and set ColNameHeader to True.

- Specify each column by number and designate the column name and data type.

You must specify each column by number and designate the column name and data type.

The data types of the fields can also be determined. Use the MaxScanRows option to indicate how many rows should be scanned when determining the column types. If you set MaxScanRows to 0, the entire file is scanned. The MaxScanRows setting in **Source\_Schema** overrides the setting in the Windows Registry on a file-by-file basis.

The following entry indicates that ODBC should use the data in the first 25 rows of the table to determine field names and should examine the entire file to determine the data types used:

```
ColNameHeader=True
MaxScanRows=25
```

The next entry designates fields in a table by using the column number (**Coln**) option, which is optional for character-delimited files and required for fixed-length files. The example shows the **Source\_Schema** entries for two fields.

```
Col1=c1 text
Col2=c2 text
```

### 7.1.2 UD\_Import\_Detail Schema

For each process record in the **UD\_Import\_Header** table, there should be one or more entries in the **UD\_Import\_Detail** table. Each of these entries specifies the mappings between the Source Import File and fields in the UltraDoc tables that are a target of the import process. Following is a description of each field.

Column Name	Data Type	Description
Import_ID	int (4)	UD_Import_Header identifier. Specifies the process to which this detail record belongs. See <a href="#">UD Import Header Schema</a> <sup>80</sup> .
Source_Column_Ordinal	int (4)	Column position in <i>Source Import File</i> . Data in this column is mapped to the field specified by <b>Destination Column Name</b> .
Destination_Table_ID	int (4)	Specifies the table, by its unique <b>Table_ID</b> , that receives the import data. <b>Table_ID</b> can be found in one of the following system tables (depending on its type):  <b>Collections</b> <b>Bundles</b> <b>Documents</b>
Destination_Type	int (4)	Type of table that will receive the import data.  <i>Possible values:</i> 1 = Document table 2 = Bundle table 3 = Collection table
Destination_Column_Name	char (128)	Column name in target table. The column specified here receives the data from the

		Source Import File column mapped in <b>Source Column Ordinal.</b>
--	--	--

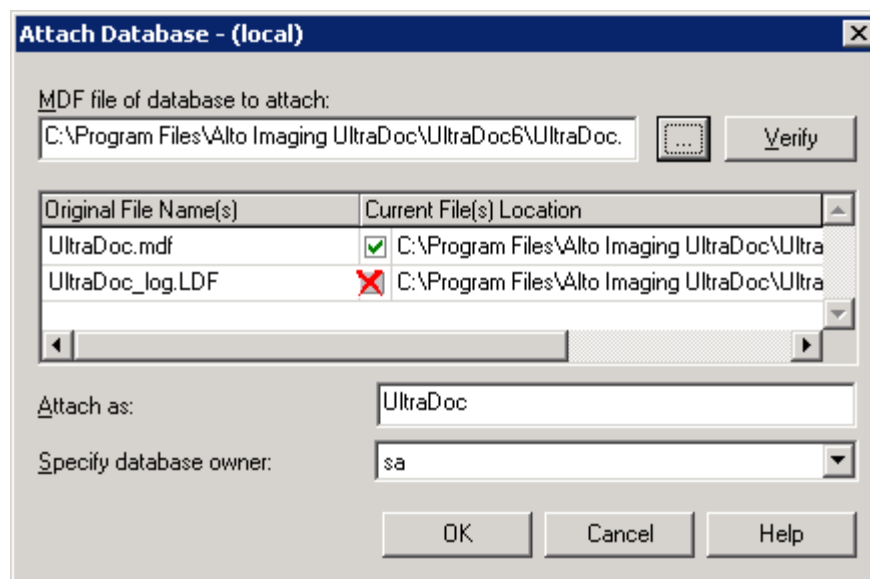
## 7.2 Attaching an UltraDoc Database

When you attach a database, you specify the name of the primary file. The primary file contains the data stored in the database. Attaching this file makes the database available to your SQL Server.

### To attach an UltraDoc database

1. [Launch SQL Server Enterprise Manager](#) <sup>73</sup>.
2. Right-click **Databases**, point to **All Tasks**, and then click **Attach Database**.
3. Type the name of the **MDF file of database to attach**:

**C:\Program Files\Alto Imaging UltraDoc\UltraDoc6\UltraDoc.mdf**



**Tip:** If you are not sure where the file is located, click browse (...) to search.

4. In the **Attach as** box, type: **UltraDoc**



**Warning:** The database name must not match any existing database names.

5. Select the database owner.



**Tip:** Select **sa** as the database owner whenever possible

6. Click **OK**. A database node for the newly attached database is created in the Database folder.

**Next:** [Add a SQL Server Login](#) <sup>16</sup>

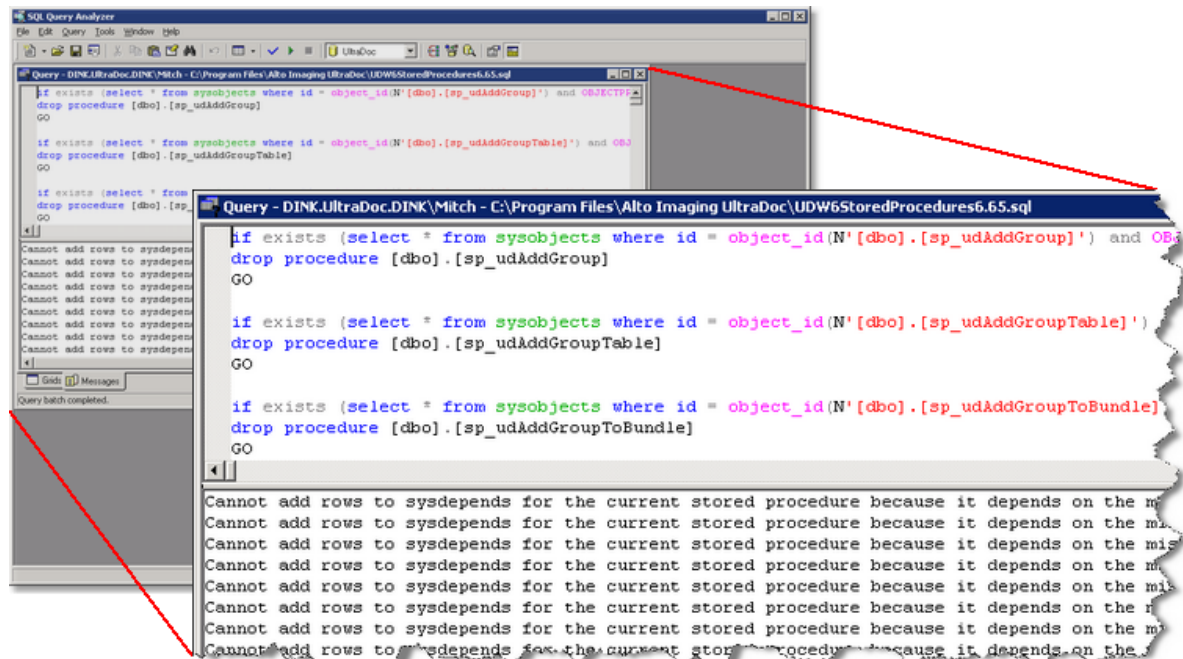
## 7.3 Creating UltraDoc Stored Procedures

UltraDoc uses a set of stored procedures to add, modify, and manage the content in your information store. You create these stored procedures by running a special script using SQL Query Analyzer.

### To create the stored procedures

1. [Launch SQL Query Analyzer](#)<sup>75</sup>.
2. Select your database from the list in the toolbar. Use the arrow to view the Change database list.
3. Click **Load SQL Script** on the toolbar.
4. Browse to **C:\Program Files\Alto Imaging UltraDoc** and select **StoredProcedures X.xx.sql**, where **X.xx** matches the version you are installing or updating.
5. Click **Open** to load the script into the query window.
6. Click **Execute Query** on the toolbar. The Results Pane displays several messages beginning:

Cannot add rows to sysdepends...



Next: [Grant permission to database objects](#)<sup>18</sup>

### Notes

- Download the latest stored procedures at: <ftp://ftp.altoimaging.com/uwc5>
- Always [grant permission](#)<sup>18</sup> after creating or updating the UltraDoc stored procedures





IMAGING TECHNOLOGIES INC.

3090 Dauphin Square Connector  
Mobile, AL 36607  
251.343.9339 Tel.  
251.343.4119 Fax.