

### General

**Q. I use Windows Explorer to manage my documents. I have a well thought out filing structure and I am very disciplined. Why would I need Scanstar or Filestar?**

**A.** A well defined filing structure and a disciplined approach to managing your documents may work for you now but consider how well that will work when:

- the number documents starts to increase (from hundreds to tens of thousands)
- the daily volume of documents starts to increase
- the number of people filing and using those documents increases (are they all as disciplined as you?)
- other users need to access those documents from other workstations

Also, Scanstar and Filestar are focused on managing 'business' documents and offers functionality that Windows Explorer simply does not offer. For example:

- Document Categories
- Automatic naming and filing
- Advanced search including fast content search
- Detailed audit trails – recording who, what, when, where for every document
- A simple and flexible permissions model
- Document version control

**Q. What kind of scanner can I use with Scanstar & Filestar?**

**A.** ScanStation can be used with any scanner that supports TWAIN or 'scan to Folder' scanning. Nearly all popular desktop scanners and business document scanners support TWAIN, and most Multifunctional copiers scan to network folder. To get the best from ScanStation we would recommend fast (> 10 page per minute), multi-page document scanners.

**Q. What kind of documents do Scanstar & Filestar support?**

**A.** You can manage any kind of document in FileStar - the type of document (e.g. MS Word, AutoCAD, MS Excel, PDF etc.) does not matter. However, when you want to view the document, you will need to have an application that is capable of viewing the document installed on your workstation. We will be introducing an optional module in the future that will allow you to view most types of types of document without having the relevant application installed.

If you manage a lot of Microsoft Office documents but don't want to install Microsoft Office on every workstation then you can install the free Microsoft Office document viewers - these support Word, Excel, PowerPoint, Access and Visio - find out more at <http://office.microsoft.com>

**Q. Most Document Management Systems are web-based - i.e. you can use them through your web-browser. Can I do this with Scanstar & Filestar?**

**A.** Our developers were one of the pioneers of web-based document management systems a decade ago and their applications are still used by thousands of users. And it is because of their experience in this area that Scanstar and Filestar are predominantly client/server based applications, with optional browser based access.

For most organisations use of client software to access documents and files is the most efficient and robust solution. However in some cases, e.g. where access from outside of the organisation is required, it is better to use browser based technology. In this case we provide a Web server module which gives individual's access to their Scanstar or Filestar system via Microsoft Internet Explorer. The Web Server module is wizard driven and ready to use in less than 10 minutes (subject to minimum specifications)

**Q. What is OCR?**

**A.** OCR (stands for Optical Character Recognition) but is generally used to describe the process by which the words within a scanned document image are converted to digital text.

When a document is scanned, what you see on your screen is a 'photograph' of the paper document - the words look like text as they would when you view a word-processed document (for example a Microsoft Word file) - but unlike a document that is created and viewed from a word processor the words from the scanned document are just pictures (as far the computer is concerned) - formed from lots of dots on the screen. What this means is that although our brains are able to interpret the document and read the text, we can not search the text using computer software.

Once the image has been processed by the OCR technology, the image is converted to a format that allows the textual content to be searched using our DMS software.

**Q. How can I use OCR with Scanstar or Filestar ?**

**A.** To use OCR you will need to purchase at least one Scanstation license. All Scanstar base packs come supplied with at least one Scanstation, Filestar Scanstations should be specified separately and can be purchased singularly.

The OCR option lets you save scanned documents in the 'PDF Image-on-Text' format - this means that when you view the PDF document, you will see the document in its original scanned form, but you will also be able to perform content searches on its text content.

An even more powerful tool that comes with the OCR option in Scanstation is the auto recognition template feature (sometimes known as forms recognition or zonal OCR). This lets you automatically recognise a scanned document and selectively 'read' items of information from it, such as customer name, membership number, invoice details etc. These items are then used to automatically name and file the document.

**Q. How will I know when an important document has been scanned or saved into the system?**

**A.** Filestar has the ability to automatically email a group of people or an individual when certain trigger events occur. Trigger events include the addition of a document, a document being viewed, a new document version being added plus a number of others.

## Licensing Scanstar and Filestar

**Q. How are Scanstar and Filestar licensed?**

**A.** Scanstar is controlled using client based licensing; Filestar is licensed using concurrent client licensing.

Where client licensing is used the licence control is based on each PC; provided a valid licence is found on the client PC it is allowed to connect to the server.

Where concurrent licensing is employed the control is server based. The server monitors the number of connected clients. Once the prescribed numbers are connected, no further clients are allowed access. Further clients attempting to connect will be given a message advising all licensed connections are in use.

For examples of how this works and further detail please see our document - Licensing Overview.pdf downloadable from:

[www.digitalworkplaceservices.com/downloads/documents/licensing\\_overview.pdf](http://www.digitalworkplaceservices.com/downloads/documents/licensing_overview.pdf)

**Q. How is ScanStation licensed?**

**A.** A license is required for each workstation (PC) that Scanstation is installed on. The license control is the same as for the main clients (above) please see our license overview document for further details.

**Q. Does this mean I will need to use a license key during the installation?**

**A.** When you are running the software as a trial you won't need to provide a license key. When you purchase the software you will receive by email a license key that needs to be entered when the software is run. Depending on which type of licensing you have purchased this will be entered on either each workstation or the server.

**Q. We have 100 users - most of them only search for and view the documents. Buying 100 licenses could be expensive and also difficult to manage. What is your recommendation?**

**A.** We wouldn't recommend you buy a100 licenses. Instead you will be better off purchasing as many client licenses as you need for users that manage the documents, for the others users you can purchase the Filestar Web Client. This will let your users search and view Filestar documents through their web browser.

**Q. Is there more than one type of client?**

**A.** Yes, there are 3 types of client; the native desktop client, the Microsoft Office client, and the desktop search client. Each provides the same level of access to search and browse documents. The native client provides additional administrative functionality so there must always be at least one native desktop client on any system. Outside of this client types can be mixed.

## Integration options for other software

**Q. We use Microsoft Office – is there a way of saving documents and emails into Filestar directly from MS Outlook, Word and the other Office applications.**

**A.** The Microsoft Office Client (add-in) will allow you to do this. You will be able to drag and drop your emails directly into Filestar folders whilst in Outlook, you can also search, open and save documents in the other Office applications using convenient buttons on the toolbar.

**Q. Most of my daily work is performed in an Accounting package and our CRM software – is there a way of accessing the documents stored in Filestar without having to leave my other software system.**

**A.** The Desktop Search client allows you to perform rapid searches of all documents held in Filestar whilst using other Windows based software. This is performed simply by highlighting the information you wish to search on screen e.g. customer name, reference number, invoice number etc, using your mouse and the [ctrl] key on the keyboard. Once you click the mouse button all relevant documents are displayed in a convenient list ready for you to use.

## Installing Scanstar and Filestar

**Q. Scanstar & Filestar are Client-Server based applications. What does that mean?**

**A.** We use the term Client-Server in particular to differentiate it from a Web-based application and to also describe its architectural model.

What this means in terms of installation and use is that there are two key components to each installation - 1) the server component and 2) the client component.

The server component is central to the system and needs to be installed first on a workstation or server - typically the server component is installed only once.

The client component is run on each workstation in order to access the system.

**Q. I don't have a dedicated server on which to install the server component. Will I still be able to use the software?**

**A.** In most cases you don't need a dedicated server for Scanstar or Filestar. Any workstation that meets the minimum installation requirements will do. The server will run invisibly behind the scenes. If other users need to access the system then they can install the client on their workstations and it will connect to the server running on your workstation automatically. The only caveat here is that your workstation (running the server) must be left running (you can log-off though) so that other users can continue to use Scanstar or Filestar

**Q. Do I need special user access on my workstation or server when I am installing the software?**

**A.** Yes. When you are installing Scanstar or Filestar on the server you will need Administration access - or be logged-in as the workstation or network Administrator.

**Q. Scanstar & Filestar use a database - does this mean I have to install and configure this myself?**

**A.** No. the software uses Microsoft SQL Server Express 2005 by default - the installation for this is provided as part of the setup routine. If SQL Server Express is already installed on your server then the setup wizard will detect this and use it. If you already have a full SQL Server implementation it is possible to install Scanstar and Filestar without SQL Express, and to use your existing SQL Server. This is detailed in the installation manual.