

# Using the eDoc Manager

Now that your eDoc Manager is all set up and ready to go, it's time to let your users access it. The eDoc Manager features various functions to help you organize all your documents, share them with others or collaborate on files and folders.

## Logging in to the eDoc Manager as user

The following steps describe how to log in to the eDoc Manager as a user.

1. Open the web browser of your choice and enter the eDoc Manager's IP address in the address bar.



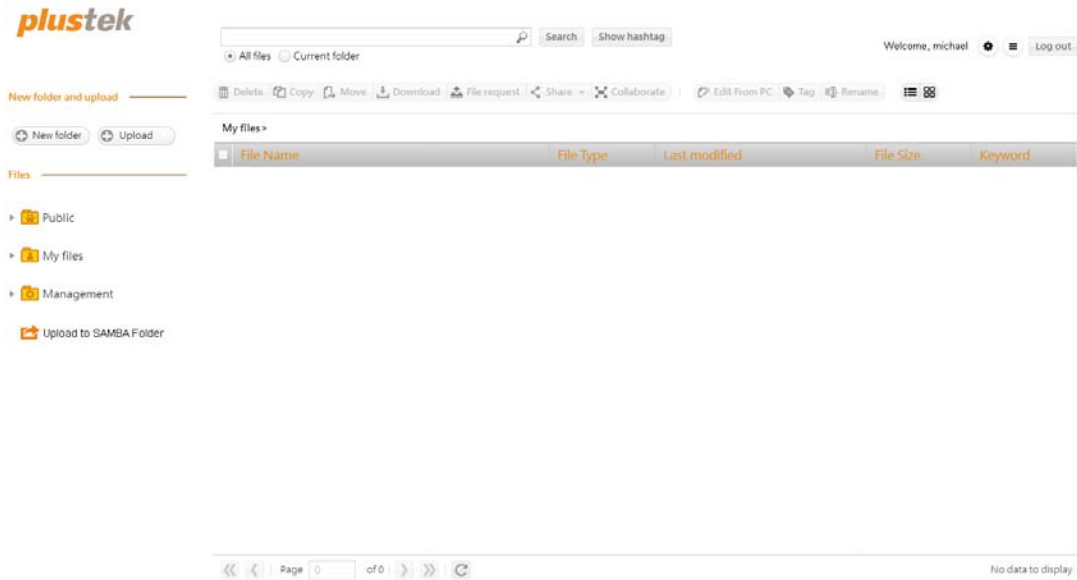
2. The eDoc Manager's login page will open. Enter your **Account** and **Password** and select your desired user interface **Language**.

Account	<input type="text" value="michael"/>
Password	<input type="password" value="....."/>
Language	<input type="text" value="English"/>
<input type="button" value="Login"/> <input type="button" value="Clear"/>	

3. Click on the **Login** button to log in to the eDoc Manager.

## User interface overview

This section will introduce you to the eDoc Manager's user interface and its many features. Be sure to visit each user interface element's dedicated section to master the eDoc Manager.





### Search box

Located at the top middle of the interface, the eDoc Manager's most powerful feature is the full text searching of all files that are stored on it. Common search operators can be used and you can narrow down your search to just files that are in the currently viewed folder. Click on the **Show hashtag** button to show keywords that you've already used.



### Settings and Log out

Located at the top right of the interface, you can access your personal user account's settings and activity log by clicking on the  cogwheel button. You can view all the notification information by clicking on the  button. When you are finished using the eDoc Manager, make sure to log out by clicking on the **Log out** button.



### Toolbar

Located in the middle below the **Search box** and above the **File browser**, the toolbar houses all of the eDoc Managers tools to interact with the files and folders stored on it.







## Side panel

Located on the left side of the interface, you can create new folders and upload files from here. Files and folders other users have invited you to collaborate on are accessed from here, as well as special views for your own files and folders.

### New folder and upload



### Files

- ▶  Public
- ▶  My files
- ▶  Management
  
-  Upload to SAMBA Folder

## File browser

Located in the middle of the screen below the **Search box** and **Toolbar** and to the right of the **Side panel**, the File browser is your main means of viewing and navigating through the files and folders you have stored on the eDoc Manager.

My files >

File Name	File Type	Last modified	File Size	Keyword
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## Settings and Log out

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This section contains the **Edit profile**, **Log records & inquiries**, **Tool** and **Rule settings** pages, where you can change some of your user account's settings and view the activity log. After logging in to the eDoc Manager, the first thing you should do is visit your settings page. If you logged in using the password your administrator provided, you should change the password as soon as possible.

### Edit profile

On this tab you can configure some settings that will only affect your own user account. Click the **OK** button in the bottom left part of the tab to save any changes.

Account: michael

Password:

Nickname:

Mailbox: michael@plustek.com.tw

Show preview:  Yes  No

- Preview mode:

- Preview display magnification:

OK

### Account

Your account name as set by the administrator. You cannot change it.

### Password

You can enter a new password here if you want to change it. The password must be at least 6 characters long. Leave the field blank to keep your current password.

### Nickname

You can enter a new nickname here if you want to change it.

## **Mailbox**

Your mailbox as set by the administrator. You cannot change it.

## **Show preview**

You can select whether to use eDoc Manager's quick preview feature.

## **Preview mode**


You can select the quick preview mode to utilize. **Floating** will cause the quick preview to move along to the right of your mouse curser, while **Fixed** will cause the quick preview to be fixed along the right edge of the browser window.

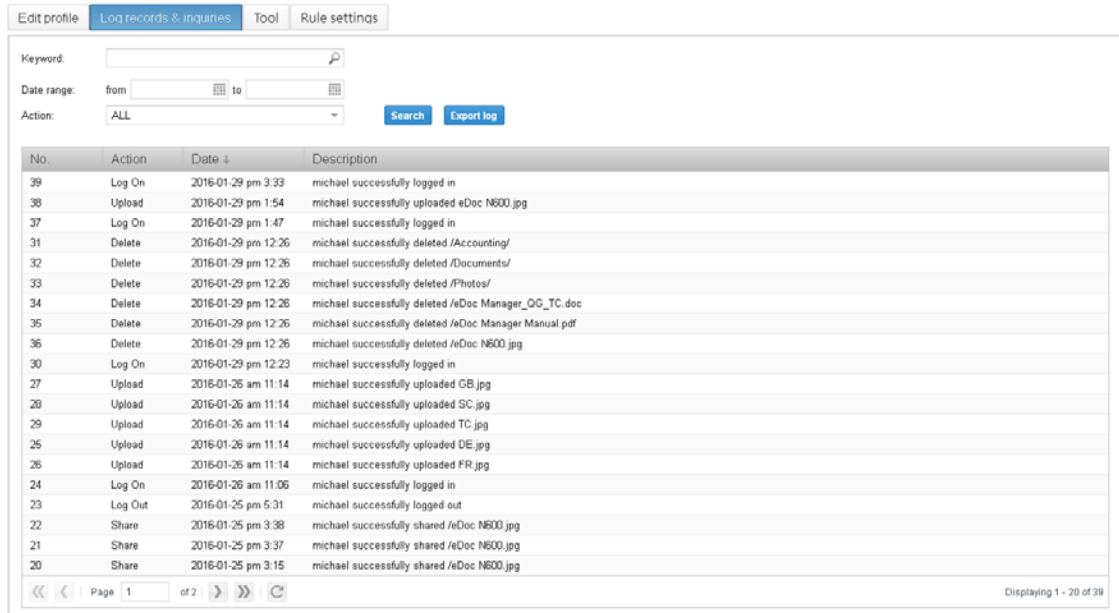
## **Preview display magnification**

You can select the magnification ratio - and in turn the size of the quick preview window – to show the previewed content with.

## Log records & inquiries



On this tab you can view, search and export your personal activity log. The eDoc Manager keeps a record of all actions performed, from logging in and out, to sharing files and folders. You can change the sorting order by clicking on the column headers.

Use the  navigation buttons at the bottom to move to another log page.



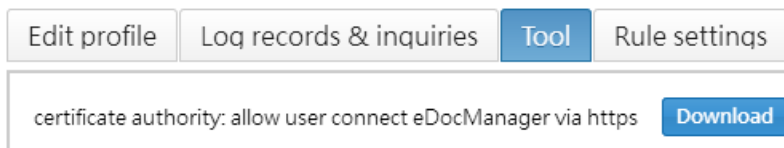
No.	Action	Date ↓	Description
39	Log On	2016-01-29 pm 3:33	michael successfully logged in
38	Upload	2016-01-29 pm 1:54	michael successfully uploaded eDoc N600.jpg
37	Log On	2016-01-29 pm 1:47	michael successfully logged in
31	Delete	2016-01-29 pm 12:26	michael successfully deleted /Accounting/
32	Delete	2016-01-29 pm 12:26	michael successfully deleted /Documents/
33	Delete	2016-01-29 pm 12:26	michael successfully deleted /Photos/
34	Delete	2016-01-29 pm 12:26	michael successfully deleted /eDoc Manager_OG_TC.doc
35	Delete	2016-01-29 pm 12:26	michael successfully deleted /eDoc Manager Manual.pdf
36	Delete	2016-01-29 pm 12:26	michael successfully deleted /eDoc N600.jpg
30	Log On	2016-01-29 pm 12:23	michael successfully logged in
27	Upload	2016-01-26 am 11:14	michael successfully uploaded GB.jpg
28	Upload	2016-01-26 am 11:14	michael successfully uploaded SC.jpg
29	Upload	2016-01-26 am 11:14	michael successfully uploaded TC.jpg
25	Upload	2016-01-26 am 11:14	michael successfully uploaded DE.jpg
26	Upload	2016-01-26 am 11:14	michael successfully uploaded FR.jpg
24	Log On	2016-01-26 am 11:06	michael successfully logged in
23	Log Out	2016-01-25 pm 5:31	michael successfully logged out
22	Share	2016-01-25 pm 3:38	michael successfully shared /eDoc N600.jpg
21	Share	2016-01-25 pm 3:37	michael successfully shared /eDoc N600.jpg
20	Share	2016-01-25 pm 3:15	michael successfully shared /eDoc N600.jpg

## Searching the log

You can search for specific log entries by entering a keyword in the **Keyword** field  and clicking on the **Search** button. You can narrow down your search results by selecting a specific **Action** from the drop-down list and by specifying a **Date range** using the  calendar context menu. To return showing the entire log, do a search with the **Keyword** and **Date range** fields empty and **All** selected in the **Action** drop-down list.

## Tool

On this tab you can download the certificate to access eDoc Manager via https.

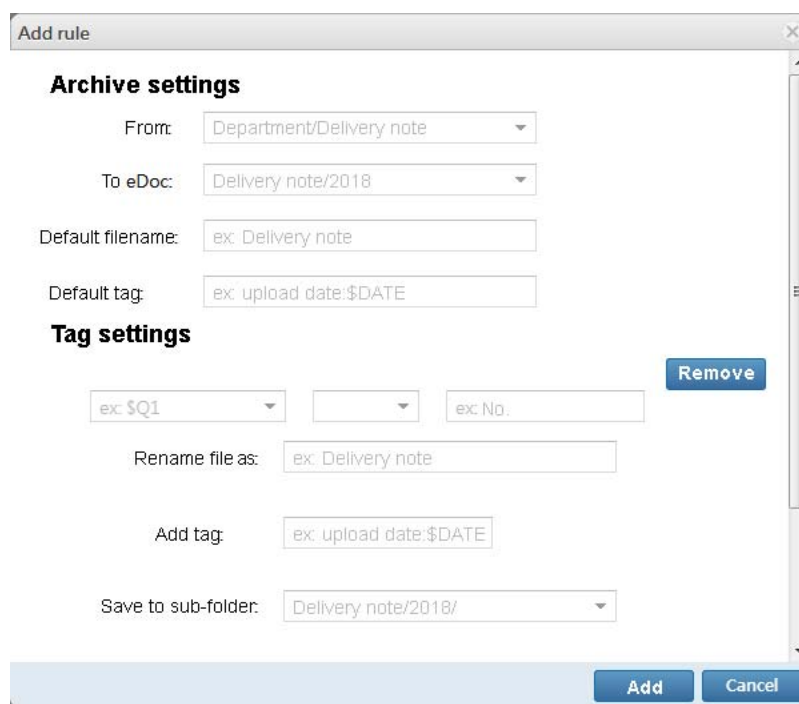


## Rule settings

On this tab you can set the rules for the archive location. This setting helps to sort and archive the files received through SAMBA protocol.



Click on the **Add rule** button to open the **Add rule** dialog. You may configure the **Archive settings** and/or **Tag settings**.



### Archive settings

- From: Select a folder you've created from **Upload to SAMBA folder**.
- To eDoc: Select a folder from **My files**.
- Default filename: Enter the default filename.
- Default tag: Enter the default tag.

### Tag settings

Select to use barcode or QR code and define relative criteria with numbers.

- Rename file as: Enter the filename.




- Add tag: Enter the tag.
- Save to sub-folder: Select a sub-folder from **My files**.

### **Enable settings**

Tick the check box of **Enable**.

### **Logging out of the eDoc Manager**

To log out of the eDoc Manager, click on the **Log out** button at the top right corner of the eDoc Manager interface.

	Please do NOT click on the  <b>Close</b> button of your browser to exit the eDoc Manager. Clicking on the  Close button will not log you out.
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## Side panel

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When you first log in to the eDoc Manager, it will most likely be empty. The **Side panel** is where you can start by creating new folders and uploading a few files. Once you have some files and folders on your eDoc Manager, you can use the **Side panel** to quickly jump between your folders and also view only those files and folders that you have shared with others or others have shared with you. Another view is available to help you find the files you most recently interacted with.





### New folder and upload

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### Files

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- ▶  Public
- ▶  My files
- ▶  Management
  
-  Upload to SAMBA Folder

## Creating new folders

You can use folders to help you organize your files. When you need to share many files or folders, it is also easier to move or copy them into a single folder and directly share that folder. All files and folders within that folder will inherit the access rights of the main folder.

1. Click on the **New folder** button to open the **Create new folder** dialog.

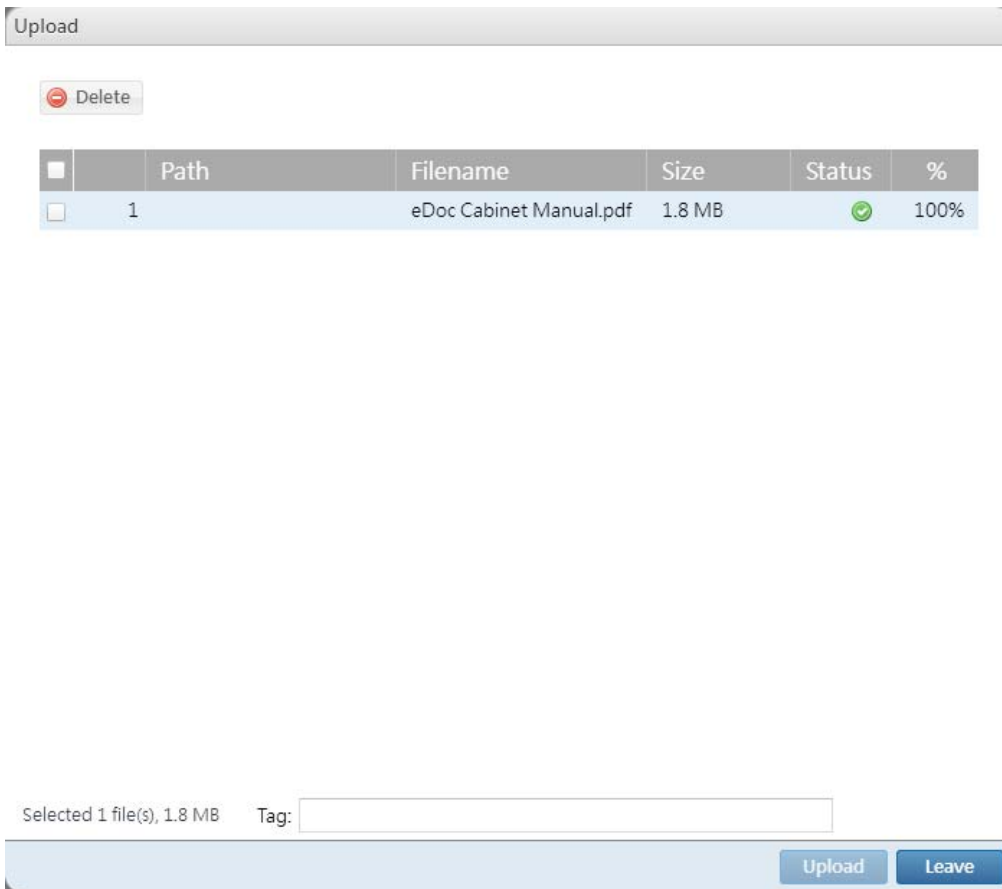
A dialog box titled 'Create new folder' is shown. It has a text input field for 'Folder name:' with the placeholder text 'Please enter name'. At the bottom right, there are two buttons: 'New' and 'Cancel'.

2. Enter the **Folder name** you wish to use.
3. Click on the **New** button to create the folder.

## Uploading new files and folder

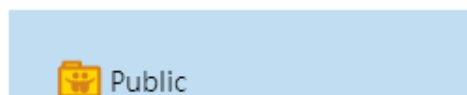
1. Click on the **Upload** button to open a context menu, you may select to upload file, upload folder or upload file to SAMBA folder.
2. Use the dialog to select one or more files/folder you wish to upload.
3. Click on the **Open** button to begin uploading the selected files/folder.

4. An **Upload** dialog showing you the status of your file/folder uploads will be shown. You may add desired keywords in the **Tag** field here.



5. While the uploads are in progress, you can delete files from the upload list by clicking on the checkboxes and then clicking on the **Delete** button.
6. Click on the **Leave** button to close the dialog and return to the main interface once the uploads are finished. If you click on the **Leave** button while files are still being uploaded, you will be prompted to confirm cancelling the uploads. Click on the **Yes** button to confirm and cancel the uploads and leave or click on the **Cancel** button to return to the dialog and wait for the uploads to finish.

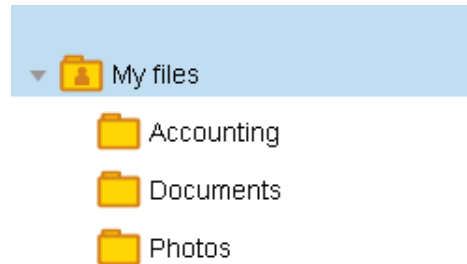
## Public



Only folders and files that you have collaborated with others or others have collaborated with you will be listed here.

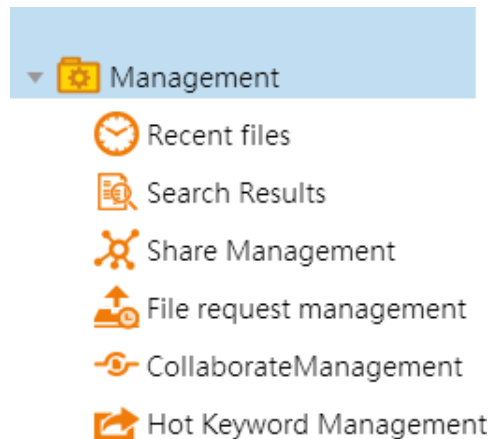
## My files

Any folders you have created will be listed here, including folders you have shared with others. You can click on the folders to quickly open that folder's contents in the **File browser**. You can hide and unhide this panel by clicking on the panel header.



If you perform any actions on files and folders you have shared with others, it will be reflected in the accounts of those users.

## Management



### Recent files

This special view will only show the most recent 30 files or folders you have copied, moved, downloaded, tagged or renamed. You can hide and unhide this panel by clicking on the panel header.

### Search Results

Display the search results.

### Share Management

You can edit and delete the shared file links, modify the expiration date, access times and the extraction code.

### File request management

You can edit and delete the request file links.

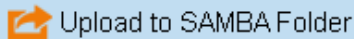
## Collaborate Management


You can edit and delete the collaborate information.

## Hot Keyword Management

You can create and delete keywords.

## Upload to SAMBA Folder

 Upload to SAMBA Folder

All files received through SAMBA protocol will be temporarily listed here. You may click on the  cogwheel button to edit **Rule settings** for file archiving.

## File browser

The eDoc Manager's File browser behaves similar to the file browser of other operating systems while adding some unique features. It is your main means of viewing and navigating through the files and folders you have stored on the eDoc Manager.

My files >

<input type="checkbox"/>	File Name	File Type	Last modified	File Size	Keyword
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Navigation icons: Page 0 of 0

No data to display



**Attention**

Your eDoc Manager will automatically generate preview files for supported file types so you can quickly preview or open them online to fully preview.

## Viewing files

You can change the sorting order by clicking on the column headers. Use the



navigation buttons at the bottom to move to another page.

## Navigating folders

To open a folder, simply click on it. To return to a previous folder level, click on the folder level in the **Path** line. You can also use the **Side panel** to navigate your folders.

My files> Documents>

File Name	File Type	Last modified	File Size
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## Smart file icons





The eDoc Manager has unique file icons for all supported file types so you can quickly identify each file's type.

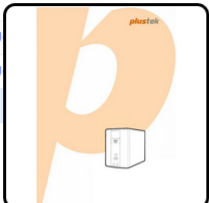


## Previewing files

The **File browser** has a quick preview mode that will display the first page of any supported file type in a floating window as soon you as you move your mouse cursor over the file name. Files that are supported and can be previewed will have their file names displayed in blue. You can use this quick preview to quickly identify your files. The magnification of the quick preview can be adjusted and the feature can also be turned off entirely if desired.

My files> Document>

File Name	File Type	Last modified	File Size	Keyword
 Feedback	doc	2016-03-14 pm 4:42	19 KB	eDoc
 eDoc Manager_U	pdf	2018-10-22 pm 4:01	2.1 MB	UG,eDoc
 eDoc Manager_U	pdf		2.4 MB	UG,eDoc
 eDoc N600	jpg	2015-05-27 pm 5:38	56.3 KB	eDoc



## Selecting files

Files are selected by clicking on the small box at the very front of each file. Clicking on the file name will instead open the file in the eDoc Manager's document viewer.

My files > Document >

	File Name	File Type	Last modified	File Size	Keyword
<input type="checkbox"/>	Feedback	doc	2016-03-14 pm 4:42	19 KB	eDoc
<input checked="" type="checkbox"/>	eDoc Manager_UG_GB	pdf	2018-10-22 pm 4:01	2.1 MB	UG_eDoc
<input type="checkbox"/>	eDoc Manager_UG_TC	pdf		2.4 MB	UG_eDoc
<input type="checkbox"/>	eDoc N600	jpg	2015-05-27 pm 5:38	56.3 KB	eDoc

Page 1 of 1

Displaying 1 - 4 of 4

## Online previewing files

Clicking on the file name of supported file types will open the file using eDoc Manager's document viewer. Use this to fully preview the entire content of the file, not just the first page.



## Toolbar

Once you have learnt how to create new files and folders and how to view and navigate them, it's time to learn about using the eDoc Manager's organizational features. Apart from the expected delete, copy, move and rename commands, the eDoc Manager offers additional commands to download, share and collaborate, since it is a network based system.



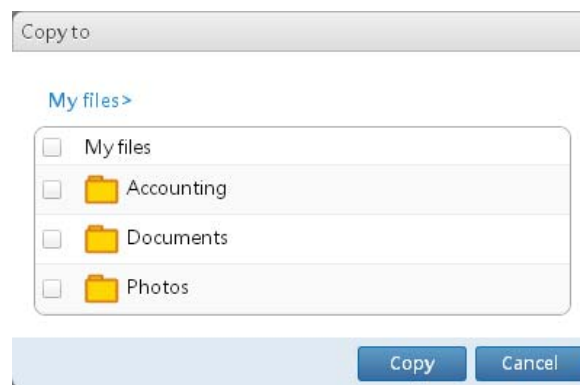
## Deleting files and folders

1. Select at least one file or folder and click on the **Delete** button.
2. You will be prompted to confirm deleting the selected data. Click on the **Yes** button to confirm and delete the selected data.

## Copying files and folders

This action requires that you have created at least one folder.

1. Select at least one file or folder and click on the **Copy** button.
2. Use the **Copy to** dialog to select the target folder where you wish to copy the selected data. Select the target folder by clicking on the small box at the front of the folder.

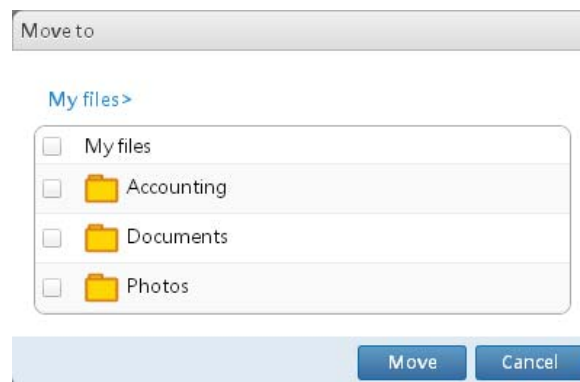


3. Click on the **Copy** button to copy the selected data to the target folder.

## Moving files and folders

This action requires that you have created at least one folder.

1. Select at least one file or folder and click on the **Move** button.
2. Use the **Move to** dialog to select the target folder where you wish to move the selected data. Select the target folder by clicking on the small box at the front of the folder.



3. Click on the **Move** button to move the selected data to the target folder.

## Downloading files and folders

If you select only one file, the file will be downloaded as is. If you select multiple files and folders, the eDoc Manager will put them in a ZIP file first and then let you download the ZIP file.

1. Select at least one file or folder and click on the **Download** button.
2. The saving folder of the downloaded files differs depending on the browser you use.

## Requesting files

If you want to ask a non-eDoc user to upload files, you can use this request files function.

1. Select one folder and click on the **File request** button.
2. Enter the file description in the pop-up **File request** dialog. If it is necessary, you may set the password for uploading files.

The location of the file being stored:  
My files > Document >

Please enter description for file(s) you are requesting :

Password required to upload the file :

or send to email :

This is the link of file request:  
<http://60.250.121.157/ask/rm14z>  
Please press CTRL + C to copy link

OK

3. Or you may enter the receiver email address, and click on the **OK** button. The receiver can now upload the necessary files to the specific folder as you requested.

## Sharing files and folders

Being a network based system, you can use the eDoc Manager to share your files and folders with other people. There are 3 methods to share files and folders: **by link**, **by QR code** and **by e-mail**. Sharing differs from collaborating in that sharing will let other people download a copy of the file or folder. Collaborating means that you invite other people to work on your files and folders, and any changes made by you or the others will be reflected across all collaborators.





**Information**

- Since you can only share 1 file or folder per action, we recommend putting all files and folders you wish to share into a single folder first and directly sharing that folder.
- The **Expiration date** determines how long the file or folder can be downloaded by others.
- To change the **Expiration date** of a file or folder you have already shared, please share that file or folder again. The **Expiration date** you set this time will overwrite the old one.

## Sharing by link

1. Select one file or folder and click on the **Share** button.
2. Select **by link** from the context menu to open the **Share by link** dialog.

Share by link

URL:

Please press CTRL + C to [copy link](#)

Last Update:

Expiration date:

Access times:

Tip: 0 equal unrestricted

Extraction code:

OK

3. If desired, adjust the **Expiration date**, **Access times** and **Extraction code** of the link.
4. Press Ctrl+C on your keyboard to copy the link to your system's clipboard.
5. Click on the **OK** button to close the dialog. Open a program of your choice and press Ctrl+V to paste the link from your system's clipboard to your program.

## Sharing by QR code

1. Select one file or folder and click on the **Share** button.
2. Select **by QR code** from the context menu to open the **Share by QR code** dialog.

**Share by QR code**
✕

Last Update:

Expiration date:

Access times:

Tip: 0 equal unrestricted

Extraction code:



3. If desired, adjust the **Expiration date**, **Access times** and **Extraction code** of the link.
4. Use your mobile device to scan the QR code. You can then share the QR code / link from your mobile device. You can also save the QR code image to your computer and insert it into your documents and presentations. The QR code can then be scanned by anyone with the document (i.e. flyer, poster, etc) or viewing the presentation (i.e. meetings, speeches).
5. Click on the **OK** button to close the dialog.

### Sharing by e-mail

1. Select one file or folder and click on the **Share** button.
2. Select **by e-mail** from the context menu to open the **Share by e-mail** dialog.

**Share by e-mail**
✕

Expiration date:

From:

To:

Subject:

Access times:

Tip: 0 equal unrestricted

Extraction code:

3. If desired, adjust the **Expiration date**, **Access times** and **Extraction code**.
4. Enter the recipient address. You can enter multiple recipient addresses by separating them with a “;”. You can alter the **From:** and **Subject:** lines if you wish.
5. Click on the **Send** button to send an e-mail with the link and close the dialog. A prompt will inform you of the result.

## Collaborating on files and folders

You can use the eDoc Manager to collaborate on your files and folders with other people. Collaborating means that you invite other people to work on your files and folders, and any changes made by you or the others will be reflected across all collaborators. Everyone will be working on the same copy of a file or folder.

- **Alias name:** You may enter an alias name for others to easy understand the content.
- **Permission status:** You may select to inherit the parent folder’s permission settings, modify the permission settings, or unpublic the content.

Collaborate

My files > Document > Project

Alias name:

Permission status: Modify

Invite group Invite user

Select group Select user

Group permission settings

Name	Type	<input type="checkbox"/> New, Edit	<input type="checkbox"/> Download, Copy	<input type="checkbox"/> Delete, Move	Remove

OK



Since you can only collaborate on 1 file or folder per action, we recommend putting all files and folders you wish to share into a single folder first and directly sharing that folder.

## Collaborating with groups

1. Select one file or folder and click on the **Collaborate** button.

2. Select a group you wish to invite from the **Invite group** drop-down list.
3. Select which permissions to give the group by clicking on the respective options. If you added multiple groups, you can click on the option in the column header to give all groups the respective permission. To remove a group, click on the **Remove** button.
4. Click on the **OK** button to save the changes and close the dialog.

The file or folder you shared with the group will appear under your **Public** panel.

### **Collaborating with users**

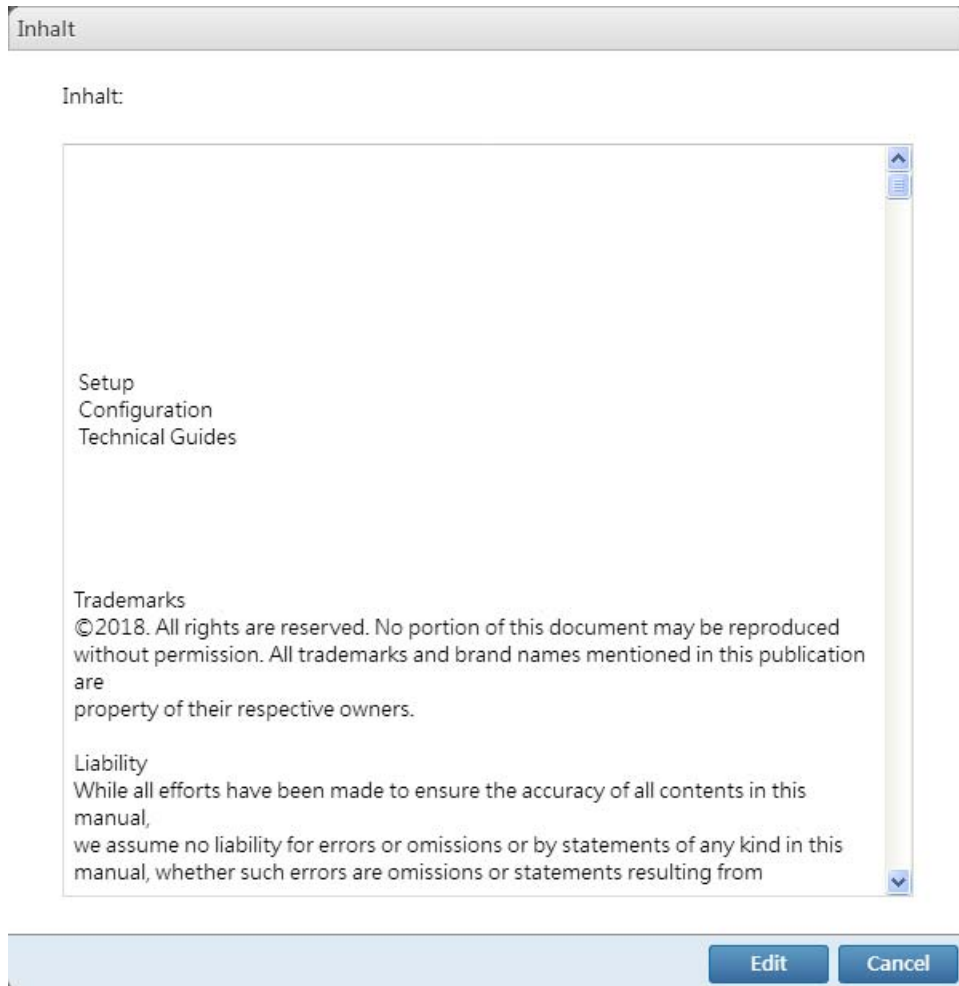
1. Select one file or folder and click on the **Collaborate** button.
2. Select a user you wish to invite from the **Invite user** drop-down list.
3. Select which permissions to give the user by clicking on the respective options. If you added multiple users, you can click on the option in the column header to give all users the respective permission. To remove a user, click on the **Remove** button.
4. Click on the **OK** button to save the changes and close the dialog.

The file or folder you shared with the user will appear under your **Public** panel.

## Editing files

When uploading files in a supported file type, the eDoc Manager will identify all words in the document. This won't alter your files in any way but allows the eDoc Manager to quickly search through them. You can edit those texts manually in this dialog. This action cannot be performed on folders.

1. Select one file and click on the **Edit From PC** button to open the **Inhalt** dialog.

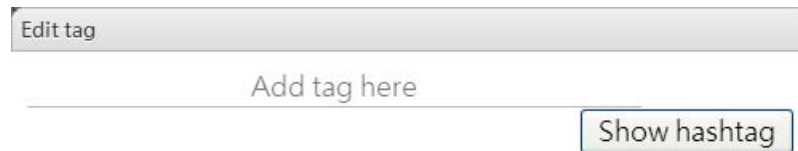


2. You may modify the texts if necessary.
3. Click on the **Edit** button to save the changes and close the dialog.

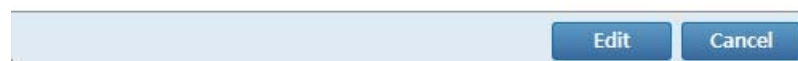
## Tagging files

You can edit tags and manually add additional ones in this dialog. This action cannot be performed on folders.

1. Select one file or more files and click on the **Tags** or **Batch tagging** button to open the **Edit Tag** dialog.



The screenshot shows a dialog box titled "Edit tag". Below the title bar is a text input field containing the placeholder text "Add tag here". To the right of the input field is a button labeled "Show hashtag".



The screenshot shows the bottom portion of the dialog box, which is a light blue bar containing two buttons: "Edit" and "Cancel".

2. When selecting multiple files, only the tags that all selected files have in common will be shown in the **Tags** dialog. Each file will retain their individual tags. Enter any tag you wish to add to the file or files in **Add tag here**.
3. Click on the **Edit** button to save the changes and close the dialog. You can now search for the file or files using the original tags and the ones you added.

## Renaming files and folders

1. Select one file or folder and click on the **Rename** button to open the **Rename** dialog.



The screenshot shows a dialog box titled "Rename". Below the title bar is a label "New Name:" followed by a text input field containing the text "Partnervertrag VEMA". At the bottom of the dialog are two buttons: "Rename" and "Cancel".

2. Enter a new name for the file or folder.
3. Click on the **Rename** button to save the changes and close the dialog.

## Display mode


Click on  button to switch the display modes from List and Thumbnail.

## Search box

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The eDoc Manager's most powerful feature is the full text searching of all files that are stored on it. When uploading files in a supported file type, the eDoc Manager will identify all words in the document and add those words to the file as tags. This won't alter your files in any way but allows the eDoc Manager to quickly search through them. You can also add your own tags to files by using the Tags tagging function.

### Searching for files

You can search for specific files by entering a keyword in the **Search** field  and clicking on the  magnifying glass or **Search** button. The common search operators "or" and "and" can be used as well. You can further narrow down your search to just files that are in the currently viewed folder.

### Searching with operators

Searching for multiple keywords separated by a 'blank' or '**or**' will return results that match *any* of the words. Searching for multiple keywords separated by a '**and**' or '**+**' will only return results that match *all* of the words.

### Searching within all files

Searching through all files that are stored on the eDoc Manager is the default behavior. If you switched to searching within your current folder before, you can return to searching within all files by clicking on the **All files** option. Click on the **Show hashtag** button to show keywords that you've already used.



All files  Current folder

### Searching within current folder

You can limit your search to just files that are in the currently viewed folder by clicking on the **Current folder** option.

## Using the eDoc Cabinet

The eDoc Cabinet is a companion program to the eDoc Manager that you install on your personal computer. Once installed, you can use it to configure folders on your computer that automatically sync to and from folders on the eDoc Manager. This way you don't need to log in to the eDoc Manager interface every time you want to upload something for example. Combine automatically syncing folders with eDoc Manager's function to collaborate with other users on folders and you got yourself a serious productivity tool.

### Installing the eDoc Cabinet

The eDoc Cabinet program needs to be installed on your computer before you can configure folders to sync with the eDoc Manager.



#### Attention

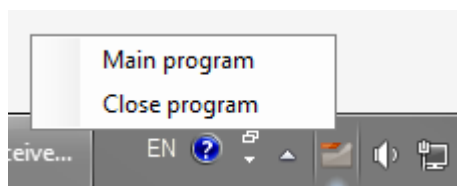
If you are updating the eDoc Cabinet program, please uninstall any previous versions and restart your computer before installing a new version.

1. Insert the installation disc that came with the eDoc Manager.
2. Open the eDoc Cabinet installation file.
3. Follow the on-screen instructions to install the eDoc Cabinet program.
4. After the eDoc Cabinet program is installed, you can open it using the shortcut from the **Start Menu > All Programs > Plustek > eDoc Cabinet** folder.

### Logging in to the eDoc Manager with eDoc Cabinet

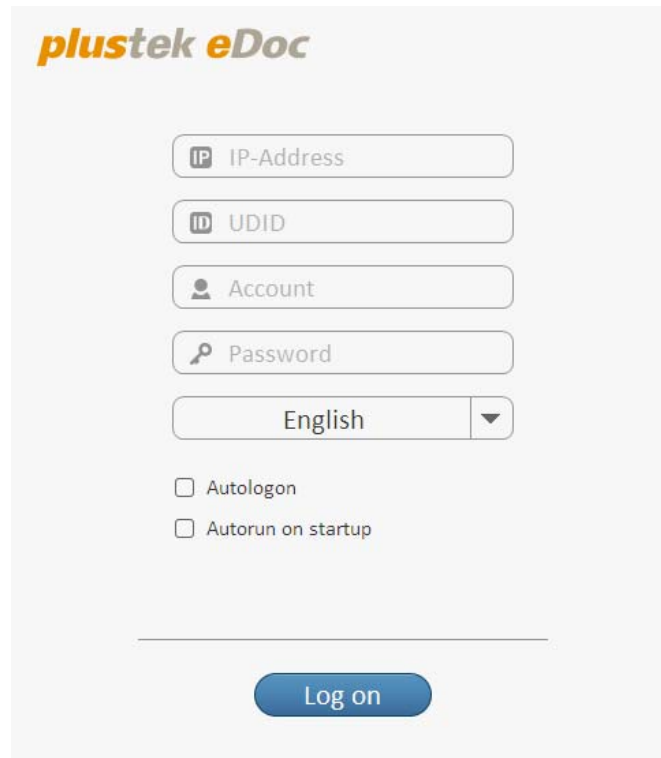
You need to log in to the eDoc Manager with the eDoc Cabinet program before you can configure folders to sync. The same credentials are used as if you were directly logging in to the eDoc Manager. You can set the program to automatically run on Windows startup and log you on.

1. Open the eDoc Cabinet program using the shortcut from the **Start Menu > All Programs > Plustek > eDoc Cabinet** folder.
2. The eDoc Cabinet program's user interface won't open directly; it will start minimized in your notification area. Click on the eDoc Cabinet icon in your notification area and select **Main program** to open the program interface.





3. Enter the **IP address** or **UDID** of your eDoc Manager, your **Account** and **Password** and select your desired user interface language, then click on the **Log on** button to log on to the eDoc Manager.



The screenshot shows the login page for plusTek eDoc Manager. At the top left is the logo "plusTek eDoc" in orange and black. Below the logo are five input fields: "IP-Address" with an IP icon, "UDID" with an ID icon, "Account" with a person icon, "Password" with a key icon, and a language dropdown menu currently set to "English". Below these fields are two checkboxes: "Autologon" and "Autorun on startup". At the bottom center is a blue "Log on" button.

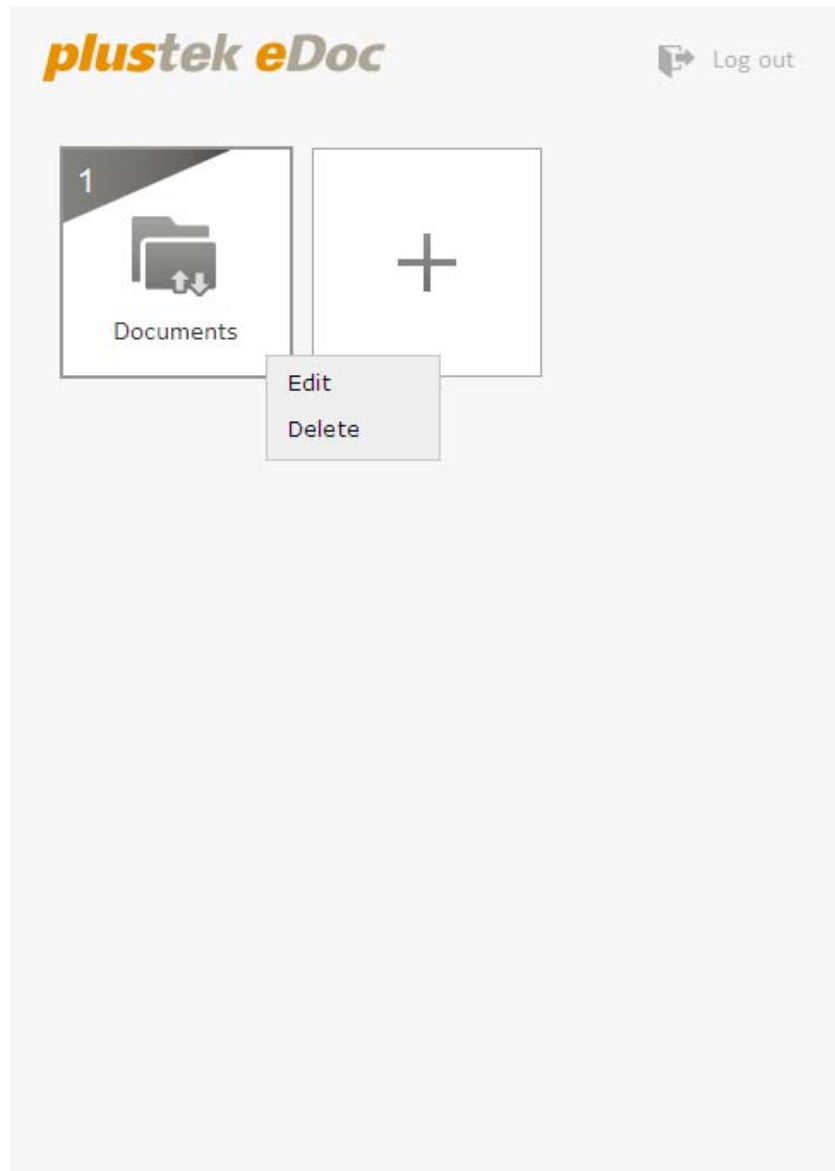
  
**Information**

If you are using the UDID to connect to the eDoc Manager, you may be prompted to allow the program through the Windows Firewall. Please click on the **Allow access** button to allow it.

## Viewing folder links

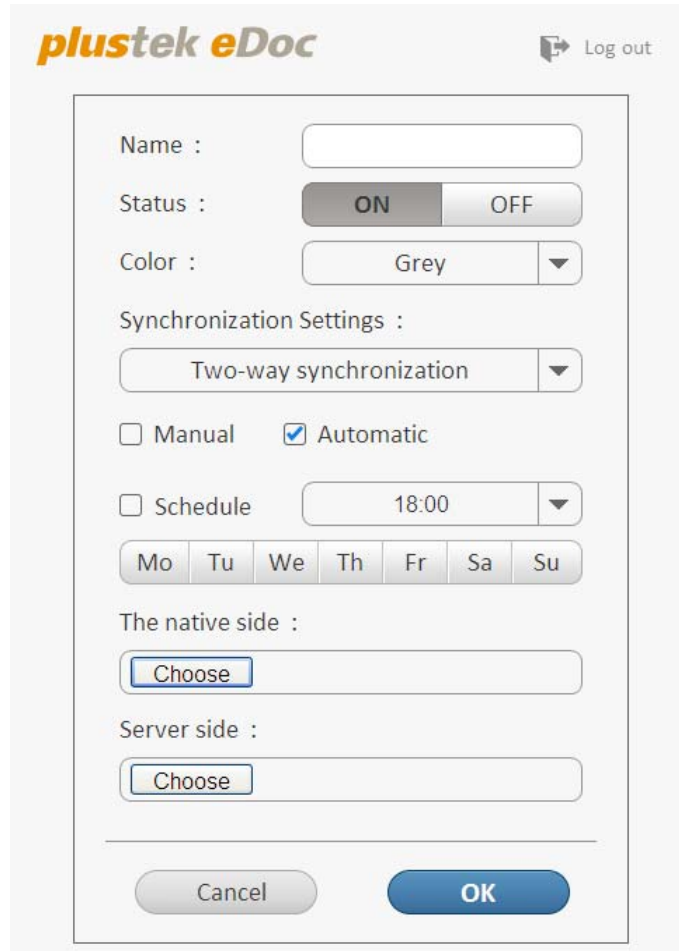
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When you first log in with the eDoc Cabinet, it will most likely be empty. You start by creating different folder links depending on your desired results by clicking on the big **+** tile. When right-clicking on a folder link tile, you have the option to **Edit** or **Delete** the folder link. To quickly open the folder link's local folder on your hard disk, double click on its tile. You can log out of the program by clicking on the **Log out** button.



## Creating and editing folder links

This section will introduce you to the various settings that are available when creating and editing folder links. The interface for creating and editing folder links is the same.



The screenshot shows the 'plusTek eDoc' interface. At the top left is the logo, and at the top right is a 'Log out' button with a right-pointing arrow. The main content area is a form with the following fields and controls:

- Name :** A text input field.
- Status :** A toggle switch with 'ON' (selected) and 'OFF' options.
- Color :** A dropdown menu showing 'Grey'.
- Synchronization Settings :**
  - A dropdown menu showing 'Two-way synchronization'.
  - Radio buttons for 'Manual' (unchecked) and 'Automatic' (checked).
  - Radio buttons for 'Schedule' (unchecked) and a time dropdown menu showing '18:00'.
  - A row of seven buttons for days of the week: Mo, Tu, We, Th, Fr, Sa, Su.
- The native side :** A text input field with a 'Choose' button.
- Server side :** A text input field with a 'Choose' button.

At the bottom of the form are two buttons: 'Cancel' and 'OK'.

### Name

Enter the desired name you wish to assign this folder link. This is only to identify this particular link within the eDoc Cabinet program.

### Status

You can use this to toggle the folder link **ON** and **OFF**. This way you can keep a particular link setting around without having to delete it.

### Color

Select a desired color from the drop-down list. This color is only for cosmetic purposes and can help you with more quickly distinguishing your folder links.

### Synchronization Settings

Arguably the most important setting when creating or editing folder links, this setting determines how your local and server-side folders behave. Below is a breakdown of the available options.

## Two-way synchronization

Files and folders are copied to and from the eDoc Manager whenever changes are made. The files and folders on your local computer and on the eDoc Manager will be identical.

## One-way upload

Files and folders are copied to the eDoc Manager whenever changes are made on your local computer. If changes are made using the web interface of the eDoc Manager, they will not be copied to your local computer.

## One-way download

Files and folders are copied to your local computer from the eDoc Manager whenever changes are made on the eDoc Manager. If changes are made on your local computer, they will not be copied to the eDoc Manager.

## Automatic file conversion (PDF)

Files will be uploaded to the eDoc Manager and converted to PDF files. This will create a second file on the eDoc Manager in addition to your original file. You can select to perform **OCR (Optical Character Recognition)** when using this mode.



**Attention**

You must install the OCR software ABBYY FineReader bundled with Plustek scanner on your computer before you can use the OCR function.

## Automatic file conversion (ePub)

Files will be uploaded to the eDoc Manager and converted to ePub files. This will create a second file on the eDoc Manager in addition to your original file. You can select to perform **OCR (Optical Character Recognition)** when using this mode.



**Attention**

You must install the OCR software ABBYY FineReader bundled with Plustek scanner on your computer before you can use the OCR function.

## Manual or Automatic

Select to manually or automatically synchronize the folder. If you select to manually synchronize the folder, the folder can be synchronized by selecting **Synchronize with eDoc** from the right-click context menu in your Windows Explorer. If you select to automatically synchronize the folder, the folder will synchronize its contents with those on the eDoc Manager without your interaction.

## Schedule

Select if you wish to synchronize the folder using a schedule. Select the time and the weekdays to perform the synchronization.

## The native side

Select the folder on your local computer to use for this folder link. You can also use the dialog to directly create a new folder. You cannot select the same folder for more than 1 link.

## Server side

Select the folder on your eDoc Manager to use for this folder link. You can also use the dialog to directly create a new folder. You cannot select the same folder for more than 1 link.

## Using your local folders

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After creating a folder link, you can open the local folder on your computer by double-clicking the folder link's tile in the eDoc Cabinet. Depending on the synchronization mode and the local and server folders you selected, you may see different things happening with your folder. Small icons attached to your files and folders indicate the synchronization status of the respective file or folder.

## Uploading and downloading files and folders

Using folder links is the fastest way to upload and download files and folders to your eDoc Manager. Set a folder link with the **Synchronization Settings to Two-way Synchronization** and you can upload simply by putting files into the local folder on your computer. Any file you put into the eDoc Manager folder will automatically be downloaded to your computer. After a file is uploaded or downloaded, you can move it to another folder. The original file will automatically be deleted from your local folder (when uploading) or your eDoc Manager folder (when downloading).

## Viewing the synchronization status

Small icons attached to your files and folders indicate the synchronization status of the respective file or folder. Here we'll go over the different icons and the status they indicate.



**Green**

The file or folder has been synced with eDoc Manager.



**Black**

The file or folder has not been synced with eDoc Manager yet.



**Blue**

The file or folder is newer than the copy on the eDoc Manager and has not been synced yet.



### **Orange**

The file or folder is older than the copy on the eDoc Manager and has not been synced yet.