Pinnacle

Knowledge Management System

Client Tools for Windows

User's Manual

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Welcome to Pinnacle

Pinnacle™ is document management made simple - easily share, track, secure, and manage the documents and records your organization depends on.

By leveraging an active and innovative open source community, Pinnacle provides an easy-to-use, production-ready, enterprise document management solution for use by corporations, government institutions, medium to small businesses, and many other organizations. Pinnacle's open source architecture allows organizations to easily customize and integrate their document management system with their existing infrastructure, providing a more flexible, cost-effective alternative to proprietary applications.

Pinnacle is available in two editions:

- Pinnacle SMB Edition (20 users)
- Pinnacle Enterprise Edition (unlimited users)

Pinnacle **SMB** and **Enterprise** Edition are known collectively as **Pinnacle Commercial Editions**. Pinnacle Commercial Editions are the certified versions of Pinnacle Open Source Edition, and are sold with commercial support and extended functionality that provides access to the
Pinnacle document repository from Windows® Explorer and Microsoft® Office® applications.

To find out more about Pinnacle, call +703-385-0101, email info@vircosoft.com, or visit http://www.vircosoft.com

For detailed information about installing and configuring Pinnacle, please see the **Pinnacle Administrator Manual**, and the **Pinnacle Installation Guide**.

Features in Brief

Pinnacle provides:

- A central document repository with audited document content version control
- Powerful document metadata management and versioning
- Sophisticated document authoring management and workflow
- Full-text indexing technology allowing search within document contents
- Powerful security group and role-based security model and integration with enterprise directory servers

About this Guide

The **Pinnacle™ Client Tools for Windows User Manual** is a guide to using the **Pinnacle Document Management System from a Windows Client**. These instructions are intended for end users of the Pinnacle Document Management System.

Please Note:

This document is a working draft that is continually being updated. We welcome your contributions to help us document Pinnacle. Please post your comments and suggestions by creating a Documentation ticket for the Pinnacle project on http://support.vircosoft.com

If you don't find the information you're looking for in this document, please ensure that you have the latest version of the **Pinnacle User Manual**. You can download the latest version from www.vircosoft.com.

Getting Help

Pinnacle Commercial Editions subscribers receive priority commercial support from the Pinnacle support staff.

Find out more about support and subscriptions for **Pinnacle SMB Edition** and **Pinnacle Enterprise Edition** at the Pinnacle website.

Getting help for Pinnacle Open Source

Community support is available at the **Pinnacle Community Forums**. Post your questions at http://forums.Pinnacle.com/, where our support staff, developers, and a wide number of Pinnacle community members, endeavor to answer questions around installing, managing, and using Pinnacle.

The Pinnacle website provides a variety of links to useful resources for all Pinnacle users.

Introduction

Organizational Hierarchy

Pinnacle™ users are organized into **Units**, **Groups**, and **Roles**.

Only a user who has been added to a group or to a role is allowed to access and work with content in the repository. This is because permissions are allocated at the group and role level, and not to individual users.

- **Units** - these are the top level folders that model the organization's logical business units, e.g. Marketing, Finance, Research and Development. Units are also used to create divisions based on, for example, geographical regions. Units may be internally administered - an administrative user has the permissions of the Pinnacle system administrator, but only within their Unit.

- **Groups** - contains one or more users. Any user may belong to more than one group. Groups may also be allocated to Roles on a per-directory basis.

- **Roles** - roles are typically used where one user or group performs a specific task - e.g. editor, or publisher. Roles are particularly useful in workflows.

Note: *Only the Pinnacle system administrator is allowed to create, modify, or delete these groupings.*

Content Organization

Pinnacle uses **metadata**, and a flexible folder structure, to organize documents in the repository.

Security

Access to content in the Pinnacle™ repository is controlled through the system's Permissions structure.

Permissions are set up at the following levels:

- **Group** - all users in the group acquire the permissions assigned to the group

- **Role** - permissions are assigned to the role, and the role is assigned to the user, who then acquires the permissions of the role.

- **Folder** - users are only able to read/write to folders if they belong to a group or to a role that has the appropriate permissions on the folder. Folder permissions apply also to content in the folder (unless otherwise specified); by default, new child folders inherit the permissions of the parent folder, and any changes made to the parent folder is passed on to the child folder/s, unless the 'inherit permissions' feature is disabled.

__Note:__ Only users who have the __Manage Permissions__ permission on a folder may use enable/disable/inherit permissions on the folder.

Non-administrative users use the **Permissions** link on the **Folder Actions** menu in **Browse Documents** to view permissions set up for specific folders.

The Permissions Set - See Administrator's Manual

Version Control

Pinnacle[TM] includes version control mechanisms to ensure that content is changed in a controlled and audited manner.

Check out / Check in

Check out

Checking out a document locks the file and makes it **read only**. Other users can view the file, but they cannot change it.

Check in

Files must be checked into the repository to make them available to other users. The **cancel check out** function reverses the check-out action and restores the document to the state it was in before it was checked out. Alternatively, the system administrator can force check in a document if the document is required urgently and the user who checked out the document is unavailable.

Incremented Versions

By default, new documents are version number 0.1. Each time a document is checked out, the version number increments by 0.1 if the change is minor - e.g. version 0.9 becomes 0.10 - or, if this is a major change, the version increases to 1.0 or 2.0 etc. The **Version History** link in the **Document info** menu provides a history of version changes for the currently selected document.

Pinnacle Commercial Editions

Pinnacle SMB Edition and **Pinnacle Enterprise Edition** are known collectively as **Pinnacle Commercial Editions.**

Note: *A* ***Pinnacle SMB Edition subscription*** *provides access to Pinnacle for up to* ***20*** *named, active users - excluding the default admin user and anonymous users. A* ***Pinnacle Commercial Enterprise subscription*** *provides access to an* ***unlimited*** *number of users.*

Pinnacle Commercial Editions offer extended functionality through components that provide a familiar Windows® Explorer and Microsoft® Office® view of the Web-based repository. (See Pinnacle ClientTools for Windows Manual.

Pinnacle Commercial Editions include:

- **Pinnacle Integration Server** - a server-side component that seamlessly integrates Pinnacle's Web-based repository with Microsoft applications through Pinnacle Explorer.

- **Pinnacle Client Tools for Windows** - a set of client-side tools for Windows users that allows you to work with content in the repository as you're working on your local computer. Pinnacle Tools for Windows includes:

  - **Pinnacle Explorer** - provides a familiar, Explorer-type view of the Web-based repository.

  - **Pinnacle Desktop Imaging** - a scanner tool within Pinnacle Explorer that allows the upload of hard copy documents into the repository.

  - **Pinnacle Office Integration** - provides access to the Pinnacle repository from within Office applications by providing Pinnacle buttons and a menu on the Office toolbar (in Excel, PowerPoint, and Word). Files can be saved (checked in), checked out. and opened from within Office.

  - **Pinnacle Outlook Integration** - allows saving of incoming and outgoing emails and attachments directly to the Pinnacle repository; files are selected from within Outlook to send as attachments with outgoing messages in Outlook.

  - **Pinnacle Integration Server** - a server component that allows users to access the repository through Pinnacle's Explorer interface.

Pinnacle Tools for Windows provides integration with Microsoft Office applications, such as Word (Office Plugin), and Microsoft Outlook (Outlook Integration). It also provides an Explorer-type interface to the Pinnacle repository, which includes a scanner tool (Pinnacle Desktop Imaging) that lets you scan hard-copy documents directly into Pinnacle.

Important

Subscriptions-based Access

Pinnacle Commercial provides two license options - SMB and Enterprise:

- A **Pinnacle SMB Edition Subscription** allows permissions-based access to the repository (via Pinnacle Explorer or via the Web Interface) to up to 20 named, active users, plus the default admin user, and, if configured in the system, to any anonymous user.

- A **Pinnacle Enterprise Edition Subscription** allows permissions-based access to the repository (via Pinnacle Explorer or via the Web Interface) to an unlimited number of users, including the default admin user, and, if configured in the system, any anonymous user.

Pinnacle Client Tools for Windows

This section provides information on working with content in the repository using Pinnacle Commercial Edition's **Pinnacle Client Tools for Windows.**

The Pinnacle Client Tools toolset contains:

- **Pinnacle Explorer** - a Windows Explorer-type application that provides a file browser view of the document repository.

- **Pinnacle Office Plugin** - a Microsoft Office Add-in that adds Pinnacle menus to the Office toolbar to allow you to access Pinnacle functionality from within Microsoft Office applications.

- **Pinnacle Outlook Integration Plugin** - a Pinnacle plugin that adds Pinnacle menus and buttons to Microsoft Outlook to allow integration of the repository with the email client.

- **Pinnacle Desktop Imaging** - a tool that allows you to scan documents directly into the Pinnacle repository.

Note: *The **Advanced Search** feature is currently not available for Pinnacle Tools for Windows.*

Pinnacle Explorer

Pinnacle Explorer provides a familiar Explorer-type view of the Pinnacle repository, where users are able to work with content in Pinnacle as though they're working on their local computer.

Figure: Pinnacle's Explorer Interface

Figure: Pinnacle's Web-interface

Working in the Pinnacle Explorer Interface

File / Folder Structure

Pinnacle Explorer uses the same hierarchical file and folder structure as Pinnacle's Web-interface, and they share the same 'look and feel' - folders display in the left pane, and the contents of a currently selected folder displays in the right pane.

Right Pane Columns

Name	**Content**
Filename	The unique name of the file on the file system.
Size	The size of the file.
Display Name	A user defined title for the document. This is the name that displays in the **Title** column in the **Browse Documents** tab of the Web interface of the DMS. The default is the filename.
Status	Defines whether or not the document is checked out, and by whom.
Permissions	Indicates the permissions you have on the file.
Type	The document type.
Modified	The last date this document was edited.
Modified By	The name of the last user who edited this document.
Created	The date this document was first added to the repository.
Author	The Pinnacle user name of the user who added the document to the repository.
Description	A user defined description of the content of the file. The description defaults to the file name.

Opening Pinnacle Explorer

This procedure opens **Pinnacle Explorer** via the Pinnacle Integration Server.

Note: *If you are unable to log in, the Pinnacle administrator should ensure that your user profile is added to the system and is enabled. If your **Pinnacle SMB** subscription has reached the maximum filled user slots, your administrator will need to disable another user to allow access to your user profile; alternatively, your organization can upgrade to the **Pinnacle Enterprise** subscription.*

Note: *The default admin user that is created during the installation should be reset as soon as the installation is complete. Additionally, administrative users can configure the system to enable or disable users, including anonymous users, and they define permissions that protects content in the repository from unauthorized viewing.*

Note: *Using **Pinnacle Client Tools for Windows** (which includes **Pinnacle Explorer**), requires all of the following pre-requisites:*

- *Pinnacle Commercial Edition Installed - one Installer for SMB or Enterprise*
- *Pinnacle Commercial Edition Subscription installed - SMB or Enterprise*
- *Pinnacle Client Tools for Windows installed - on each client machine where it will be used*
- *Valid connection configured with the Pinnacle server*
- *Your user profile added to Pinnacle and enabled*

Note: *Speak to your systems administrator if you're unsure whether or not your scenario meets all of these prerequisites.*

Perform the following steps:

1. Click the Pinnacle Explorer icon on your desktop, or click **Start - Programs - Pinnacle - Pinnacle Explorer** to launch Pinnacle Explorer.

2. Pinnacle Explorer opens, and displays the files and folders that have loaded from the Web-based Pinnacle Document Management System.
   Note: *Pinnacle Explorer displays the same file and folder hierarchy as in the Pinnacle DMS. This is a permissions-based view - you will only see the content for which you have at least 'read' permissions in the DMS.*

Actions

Toolbar: Menus, Fields, Buttons

Location menu	*Connect*		Opens the **KT Server Connections** dialog, where you can configure (add/remove/test) server connections with the Pinnacle Document Management System; or select a connection to use.
	Browse	*Open Pinnacle*	Opens Pinnacle's Web interface.
		Show My Check-outs	Opens the **Checked Out** folder on your local computer, where you can view all the files you currently have checked out of the repository.
		Show My Downloads	Opens the **Downloaded** folder on your local computer, where you can view all the files you have downloaded.
	New	*Document*	Opens the **Open** dialog box, where you can navigate to the document on your local computer, that you want to add to the repository.
		Folder	Opens the **Folder Properties** dialog box, where you can define a name for the new folder. Click **Ok** to add the folder.
	Refresh		Reloads content from the repository to provide an updated view.
	Close		Closes Pinnacle Explorer.

Tools menu	*Reload Tools*	If you have added plugins, clicking **Reload Tools** updates the plugins list, and activates the plugin to make it usable. ***Note:*** *By default, the plugins list is automatically updated when Pinnacle Explorer is closed. New plugins are activated the next time you open the system.*
	Scan Document into this location	Launches Pinnacle Desktop Imaging, and opens the native interface of your scanner hardware. Use this tool to scan hard-copy documents directly into the repository.
Help menu	*Pinnacle Commercial Support*	Opens Pinnacle's issue management system - where you can log an issue or request assistance.
	Online Manuals and User Guides	Opens the Pinnacle website, where you can download Pinnacle documentation.
	Reactivate Hints	Activates the pop up hints that exist for some actions in Pinnacle Explorer. Deactivate Hints by selecting the **Do not show this message again** check box in the **Hint** dialog box.
	Network Diagnostics	Opens the operating system's Network Diagnostics page at the Help and Support centre, where you can perform a system scan for a report on network usage and conditions. When scan completes, save the report to file for error analysis. ***Note:*** *You may be asked to send this file to a specific re questing member of Pinnacle Support. The file contains private information about your network and should not be distributed to anyone other than the requesting Pinnacle support staff member.*
	About Pinnacle	Opens the Pinnacle website.
	About Pinnacle Tools	Opens the system information screen for your version of Pinnacle Explorer.
Connect button		Opens the **KT Server Connections** dialog box, where you can define or select the server connection to the Web-based Pinnacle repository.

Location field

Displays the path to the currently selected file/folder. You can also type the path in this field and click the arrow to locate a specified file/folder.

Quick Search field

Click in the field to specify a search term; then, click the adjacent icon to display search results.

Note: *The* ***Advanced Search*** *feature is currently not available in the Pinnacle Tools for Windows.*

Note: *Pinnacle is only able to search the text of scanned documents if you are using Pinnacle Tools with Microsoft Office 2003.*

Copy

Copies the item you select in the window to the clip board.

Paste

Pastes the item you copied or cut, from the clipboard.

Delete selected items

Removes the items you selected from the server.

Toggle the different view modes

Click the down arrow adjacent to the toolbar icon to display toggle options in the drop down menu.

Navigate to root folder

Goes to the root folder for the currently selected docu ment or folder

Navigate to the current folders parent

Goes to the parent folder for the currently selected folder.

Toggle the folder browser on the left side

Toggles the left pane folder view to display or hide it.

Left Pane: Right Click Menu

Click...	to ...
Open in Browser	open Pinnacle's Web-interface at the location of the currently selected file/folder. ***Note:*** *You need to enter your login credentials at the* ***Login*** *page to gain access to the repository via the Web interface.*
New Folder...	open the **Folder Properties** dialog box, where you can define a folder name; then, click **Ok** to add the folder.

Right Pane: Right Click Menu

Click...	**to ...**
Open a readonly copy for viewing	save a read-only copy of the file locally, to the **My Pinnacle Downloads** folder, and to open the document.
Check-Out and Open for Edit	save a read/write copy of the file to the **MyPinnacleDocuments \ CheckedOut** folder and to open the file for editing. ***Note:*** *This action changes the status of the file in the repository to* ***Checked out by ...[name of user]****.*
Open in Pinnacle Web	open Pinnacle's Web-interface at the **Login** page. Log in the view the currently selected document's **Display Details** page in **Browse Documents**.
Browse My Pinnacle Documents	open the **My Pinnacle Documents** folder, to accesses checked out and downloaded documents.
New *Document*	navigate to a document on your local computer in order to add the document to Pinnacle.
Folder	opens the **Folder Properties** dialog box. Define a folder name; then, click **Ok** to add the folder.
Save a copy Locally...	open the **My Pinnacle Documents\Downloaded** folder in your operating system's **Save As** dialog box. Click **Save** to store the file at this location, or browse to select an alternative save location. ***Note:*** *The document is read-only, so any changes you make to the file locally won't change the version in Pinnacle.*
Copy URL	place the URL link to the currently selected document onto your clipboard - e.g. http://localhost:8080/view.php?fDocumentId=4
Copy	copy a read-only version of the currently selected document to the clip board.
Paste	paste a document you copied or cut from a location in Pinnacle Explorer another location on your local computer, or paste it elsewhere in Pinnacle Explorer.
Rename	open the **Details** tab in the Document Properties dialog box, where you can change the document's short name, description, and file name.
Delete	remove a currently selected document from the server.
Refresh	update the document with any changes that have been made since you started your current working session in the repository.
Check-In ***Note:*** *This option is greyed out in the menu if the file is not available for check in (i.e. it may already be checked in).*	check the document back into the repository from the **CheckedOut** folder on your local computer.

Check-Out to Location	check out a document to the **CheckedOut** folder on your ***Note:*** *Documents that have been checked out of the repository are highlighted.*
Cancel Check-Out ***Note:*** *This option only displays if the document is currently checked out.*	override the check-out status of the selected document and restore the pre-checkout version in the repository. Any changes that have been made to the document while it was checked out are not saved.
Copy within KT	open a new connection to Pinnacle Explorer. Navigate to the destination folder. Click **Ok** to complete the action.
Move within KT	open a new connection to Pinnacle Explorer. Navigate to the new location for the document you're moving. Click **Ok** to complete this action.
Properties	open the currently selected document's **Document Proper ties** dialog box, where you can view and/or edit various information.

Viewing/Editing Document Properties

The **Document Properties** dialog box in Pinnacle Explorer allows the user to view or edit descriptive information and functions for a currently selected document.

Note: *To open the* ***Document Properties*** *dialog, right click on the document where you want to view or edit properties; then, select* ***Properties****.*

Note: *Your user profile needs to have been added and enabled in the DMS in order to work with Pinnacle Tools for Windows. Please ask your Pinnacle systems administrator for assistance.*

Viewing/editing document properties

The following actions are available in the **Document Properties** dialog box:

Tab	**Configuration**
Details	changing the document display name changing the document description changing the file name viewing document properties ***Note:*** *The following information is displayed - file size, display name, status, permissions, file type, document type, last modified date, user responsible for last modification, author, description, document id, version, URLs to the Pinnacle server and to the location of the folder and file on the server.*
Workflow	selecting a workflow starting a workflow viewing the document's current workflow state
Transactions	viewing a transaction history for the currently selected document
Versions	viewing a content and metadata version history for the currently selected document

Custom Properties	viewing the document metadata (the document type and associated metadata) ***Note:*** *The Categorized, Alphabetic, and Property Pages buttons are a filtering mechanism that allows the user to change the sort order of fields that are displayed in the Properties section.* changing the document type and associated metadata ***Note:*** *When changing a document type, previously stored metadata is lost.* *The fields that display for the selected document type are predefined by the Pinnacle admin istrator and are not user-configurable. Only the actual metadata in a field is editable on this tab - e.g. it's possible to change the name in the 'Author' field, but you can't remove the 'Author' field.* ***Note:*** *To change the metadata for a field, select the field in the Properties section; then, tab to the right of the field where you can define or select alternative metadata for the field.*

You can select the following tabs in this dialog box:

- Details tab
- Workflow tab
- Transactions tab
- Versions tab
- Custom Properties tab

Details Tab

You use this tab to view and/or edit the document name, file name, and various document properties and their values.

Figure: Details Tab

The following information is editable on the Details tab:

- display name
- description
- file name

The following document properties and their values are displayed on the Details tab:

- the size of the file
- the display name
- document status - checked out or checked in
- permissions that this user has on the document
- the document file type
- the Pinnacle document type
- the date this document was last modified
- the user who last modified this document
- the document author
- description
- document ID
- version number
- content author
- the URL of the document on the Pinnacle server
- the URL for the document's folder location on the Pinnacle server
- the Pinnacle URL

Workflow Tab

This tab displays the document's workflows, and the current workflow state.

Figure: Workflow Tab

Starting a Workflow

Select a workflow for this document from the **Workflow** drop down menu; then, click the **Start Workflow** button.

Transactions Tab

This tab displays a list of all transactions that have been performed on this document since it was first added to Pinnacle.

Figure: Transactions Tab

Versions Tab

This tabbed page displays a content and metadata version history for the currently selected document; it also provides the name of the user who created each version, the create date of the version, the name of the file, and the size of the file.

Figure: Versions Tab

Custom Properties Tab

This tab displays the current document type and its associated metadata - the fields and fieldsets that are associated with the document type. The document type can also be updated on this tab.

Figure: Custom Properties Tab

Changing the document type

To change the document's document type, click the down arrow at the **Document Type** field to view a list of predefined document types. Select a document type; then, click **Update** to change this document's document type. The metadata fields associated with the new document type now populate the Properties section. Select a field to configure the metadata - add the required metadata on the right of the field in the Properties section.

Figure: changing metadata

Pinnacle Office Plugin

The **Pinnacle Office Plugin** is a component of Pinnacle Client Tools for Windows. This tool allows you to access documents in the repository, to to save documents to the repository, from within Microsoft Office applications - including PowerPoint, Excel, and Word.

Figure: Pinnacle buttons and menus added to the Office toolbar

Pinnacle Office Integration: Toolbar Functions

This section describes the functionality of the Pinnacle menu and buttons that are added to the toolbar in Microsoft Office to provide integration between Pinnacle Microsoft office applications.

Actions

Toolbar: Pinnacle menu

Click	... then select	Result
Pinnacle menu	***Open***	Launches Pinnacle Explorer, and opens the Pinnacle File dia log, where you can select the file that you want to open in Office.
	Save As	Checks the currently open document back in to the repository, or adds a new document to the repository.
	Save	Checks in/adds the currently open document to the Pinnacle repository.
	Update Properties	Updates the metadata of the local copy of the open document, with the metadata properties currently recorded for the version stored in the repository.
	Browse	Launches an active working session within the Pinnacle Explorer interface of the DMS, so that the currently logged in user can work with content in the repository.
	Pinnacle Online	Launches the Pinnacle website.
	My Connections	Opens the KT Server Connections dialog box, where you can add new server connections, or modify or remove existing server connections.
	About KTtools	Opens a system screen that provides information about the currently installed version of KT Explorer.

Toolbar: Pinnacle Buttons

Click	**... to**
KT Open	open the **Pinnacle File ...** dialog box to locate the file you want to open in Microsoft Office. The file is checked out to the **.../CheckedOut** folder on your hard drive, and the file is opened in Microsoft Office for editing. The status of this file in the repository is set to **Checked out by ...**[name of user who checked out the file].
KT Save	checks in the currently open Office document back to the repository, and changes the file on your hard drive to read only.

Check in/Add Documents to Pinnacle from Office

This procedure checks in a currently checked out file, and adds new files to Pinnacle from within Microsoft Office applications - either PowerPoint, Excel, or Word.

Note: *By default, when checking in a document from within Microsoft Office, Pinnacle moves the document from the* ***...\CheckedOut*** *folder on your local computer back into the repository to update the Pinnacle version of the file, and the copy on your local computer becomes read-only.*

Perform the following steps:

1. Open the file in Microsoft Office.

2. Click **KT Save** on the Office application's toolbar.

3. **Is this the first time you're adding this file to the repository?**
   - **Yes.** A system message advises that the file is new, and that you need to select a storage location in the repository. Click **Ok** to open the **Pinnacle File** window in Pinnacle Explorer.

   - **No.** Go to step 4.

4. **Are you logged in to Pinnacle Explorer?**
   - **No.** The **KT Server Connections** dialog box opens. Select the server connection to use. Enter your username and password; then, click **Connect** to open the **Pinnacle File...** dialog box. Go to step 5.

   - **Yes. The Pinnacle File...** dialog box opens immediately. Go to step 5.

5. Navigate to the required destination folder; then, click **OK**.

Open/Check out Documents from Office

This procedure checks a file out of Pinnacle from within Microsoft Office, and opens the file for editing in Office.

Note: *By default, when checking out a document from within Microsoft Office, Pinnacle checks the document out to the following folder on your local computer:* ***My Documents\My KT Documents\CheckedOut****. Having edited the document, you need to click the* ***KT Save*** *button on the Office toolbar in order to check the file back into Pinnacle and update the version of this document in the repository.*

Perform the following steps:

1. Open your Microsoft Office application.

2. Click **KT Open** to open the Pinnacle File window in Pinnacle Explorer.

3. Navigate to the file through the folder structure. Having located the file, select it; then, click **Ok** to open the file for editing in Office.

4. Click **Ok** on the system message that confirms the check out of the file to the *My Documents\My KT Documents\CheckedOut* folder on your local computer. Any changes you make to the file while it is checked out are not saved to the file version in the repository until the file is checked in.

Pinnacle Desktop Imaging

Pinnacle Desktop Imaging is a scanning tool in the Pinnacle Tools for Windows toolset that allows you to scan documents directly into the Pinnacle repository from within **Pinnacle Explorer**.

How are images acquired?

Images are acquired from an external imaging device (scanner), in one or both of the following ways:

- **one page, manually** - place the page you want to scan face down on the scanner flatbed, then launch the **Document Imaging Scan Wizard**.

- **multiple pages, automatically -** if your scanner has an Automatic Document Feeder (ADF), you can place all pages in the ADF tray attached to your scanner; then, launch the Scan Wizard. All pages are scanned in and can be viewed by browsing from one image to the next using a **View Previous**/**View Next** function.

__Note:__ You can only specify whether to scan pages from the flatbed or ADF if your imaging device includes both of these options.

Can I re-order scanned images?

During scanning (i.e. after a page is scanned, but before the document is saved and submitted to Pinnacle), the Desktop Imaging tool maintains a queue of scanned pages. An onscreen counter displays the number of images in the queue (e.g. page 1 of 1; or, page 5 or 10, etc.).

You can't change the order of pages that have already been scanned and are in the queue in a particular order, but you can remove or add pages anywhere in the queue. Pinnacle Desktop Imaging includes **Insert Pages Before**/**Insert Pages After** buttons that allows scanning of pages anywhere into an existing queue. So, lets say you scanned pages in the wrong order - i.e. page 2, then page 1. And let's say page 1 and page 2 are part of a document of 18 pages in total. You won't need to re-scan the entire document, just delete page 1 and page 2 and then re-scan those two pages, one at a time, to the correct location in the document.

You can:

- view any image in the queue
- delete an image from the queue
- insert images at any point in the queue

How are scanned images compiled and uploaded to Pinnacle?

Having scanned all the required pages, the user defines a document title, file type, document type, and the destination folder location.

__Note:__ Pinnacle allows you to select the document type after saving the document. Currently (September 2006), Pinnacle Desktop Imaging provides the option of saving scanned images as file type __PDF__ or __TIFF__, and document type __Default__. Additional options will be built into later releases of the tool. Check the Pinnacle website for updates.

What about Search?

Pinnacle allows **search** that includes the text of scanned documents only when you're using Pinnacle Tools for Windows in an Office 2003 environment. If this is the case, relevant scanned documents are included in search results, if the reader has at least the 'read' permission on the document.

Scanning Documents

This procedure scans one or more pages from your imaging device (scanner) directly into the Pinnacle Document Management System.

Pre-requisites

You must have *all* of the following:

- Pinnacle Commercial Edition installed - SMB or Enterprise
- Pinnacle Tools installed
- Valid connection to Pinnacle Explorer
- Your user profile added and enabled in the system
- External Twain-compliant imaging device (scanner), connected to your computer

Note: *Users are enabled by default when they're added to the system. The* ***Pinnacle Commercial Edition Enterprise*** *subscription provides access to an unlimited number of enabled users. However, the* ***Pinnacle SMB*** *subscription for Pinnacle Commercial Edition limits the number of users that can be enabled at any time to 20 active, named users. Thus, the SMB subscription provides access to only 20 enabled users at any time. The systems administrator can disable currently enabled users in order to free up user slots for other users requiring access to the system. However, if your organization requires ongoing access for more than 20 users, we recommend that you upgrade your Pinnacle subscription to Enterprise.*

Perform the following steps:

1. Log in to Pinnacle Explorer.

   Note: *Launch Pinnacle Explorer by clicking the Pinnacle Explorer icon on your desktop; or, use the* ***Start*** *menu (****Start - Programs - Pinnacle Tools - Pinnacle Explorer****).*

2. **Are you using ...**

   - **a flatbed scanner?** Place the first page face down on the flatbed. Go to step 3.

     Note: *You can only scan one page at a time when using a flatbed.*

   - **a scanner with an Automatic Document Feeder (ADF)?** Place all pages, in the correct order, into the tray attached to the scanner. Go to step 3.

     Note: *If your scanner has flatbed and ADF functionality and you're scanning from the ADF, please note that some scanners with this dual input functionality are unable to scan successfully from the ADF while there are pages still lying on the flatbed. This is a hardware issue related to your imaging device that can be corrected by removing the pages from the flatbed when scanning from the ADF. The problem occurs when pages on the flatbed obscure the scanner light, and prevent light from reaching the ADF feeder aperture.*

3. Click the **Tools** menu; then, select **Scan Documents into this location** to open Pinnacle Desktop Imaging.

4. Click **Launch Scan Wizard** to open your scanner's user interface.

   Note: *The Pinnacle Desktop Imaging tool's scan function applies the options you define in your scanner's native GUI.*

5. Define scan options on the page; then, perform the scan.

   Note: *The scanner interface that displays is specific to your external device. Refer to your scanner documentation for more information about defining scan options on this interface.*

6. When the page/s have scanned, Pinnacle Desktop Imaging's Scanner Wizard opens **Review Pages**, where you can view all the pages you scanned for this document.

7. **Do you need to scan more pages before uploading the document?**

- **Yes.** View the pages already scanned to decide on the location of the next scanned page/s - use the **View Previous Page** / **View Next Page** buttons to 'page' through the current order of scanned pages; then, click **Insert Pages Before Here / Insert Pages After Here** to scan the new page/s to the correct location in the queue. Go to step 5.
- **No.** Go to step 5.

8. Click **Continue** to open the **Metadata** page of the **Document Scanner Wizard**.

9. Enter the title of the document in the **Document Title** field; then, select a **File Type** - pdf or TIFF.

10. Click **Continue** to submit the file to the repository.

11. The **Document Properties** dialog box opens. Define metadata for the document on the tabbed pages of this dialog box.

10. Select the destination folder location; then, click **OK**.
 A system message confirms that the document has been checked in to Pinnacle.
 Note: *All scanned documents are added to the repository, where they are available for download, check out, email, etc. (depending on the permissions set for different users).*

Pinnacle Outlook Integration

Pinnacle™ Outlook Integration provides integration between Microsoft Outlook and the Pinnacle repository.

Pinnacle menus and buttons are added to the Outlook interface to allow users to save emails and attachments directly to Pinnacle repository, or attach files from the repository to outgoing emails.

Note: *The Outlook user interface has two levels, or windows. The main (explorer) window loads when Outlook starts. The Inspector window opens when an email item is opened.*

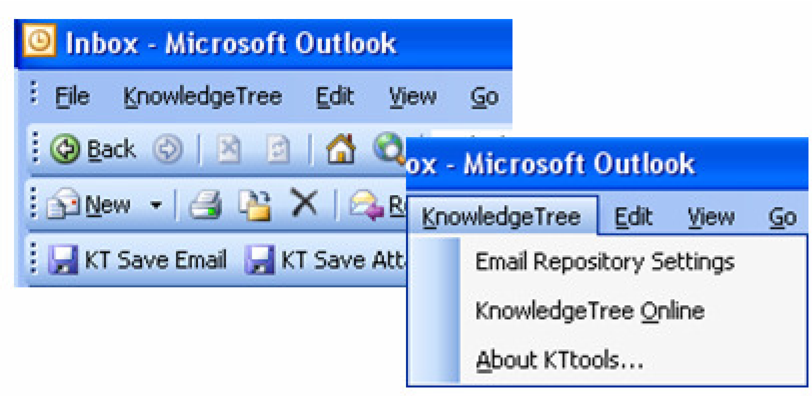


Figure: Pinnacle buttons and and Pinnacle menu in Outlook

Pinnacle Outlook Integration: Toolbar Functions

When installing Pinnacle Tools for Windows, the installer adds the following Pinnacle buttons and menus to the Microsoft Outlook toolbar:

Button / Menu **Function**

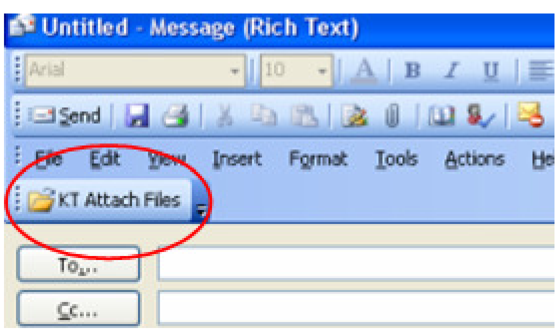
KT Save Email

KT Save Attachment

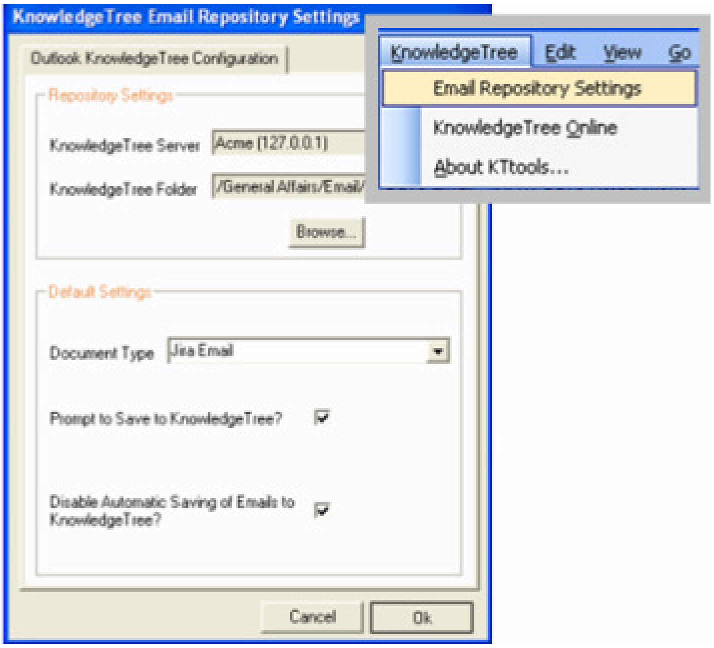
The **KT Save Attachment** button saves attachments to the repository. A system dialog allows you to select a location when saving the attachment.

Attach Files from Pinnacle

This button opens Pinnacle Explorer, where you can locate a file to attach to the outgoing message you're compos ing.



Pinnacle   ***Email Repository Settings***



This menu item opens the **Email Repository Settings** dialog box to define the following settings:

- location of the Pinnacle server
- location of the folder used to store emails
- the default email document type
- whether or not to display Save prompt
- whether or not to disable automatic Save

Pinnacle Online

The menu item opens the Pinnacle website.

About KTtools

This menu item displays system information relevant to the currently installed version of Pinnacle Client Tools for Windows.

Note: *Relevant buttons are also added to the toolbar in an open Inspector window - e.g. When opening a new incoming email that includes an attachment, the* ***KT Save Email*** *button and the* ***KT Save Attachment*** *button displays on the toolbar of the Inspector Window.*

Buttons enabled / disabled based on currently available functionality

Pinnacle Outlook Integration toolbar buttons are only enabled when the currently selected email requires the action allowed by the button. For example, the **KT Save Email** button is enabled only when the user selects a previously unsaved email message; however, when selecting a saved email that contains an unsaved attachment, the **KT Save Attachment** button is enabled, and the **KT Save Email** button is disabled.

Pinnacle Outlook Integration: Key Features

Pinnacle Outlook Integration provides the following features:

Feature	Function
email archiving (including attachments)	Saves emails, including attachments, to a user-selected or predefined location in the Pinnacle repository. ***Note:*** *This feature allows you to optionally add metadata.*
Attach files from the repository	Allows the user to locate a file in the repository, from within Outlook, to attach to an outgoing email.
Email archive prompt	Configure Pinnacle Outlook Integration repository configuration settings to define whether or not to display a system message that asks the user whether or not they want to save (archive) an unsaved email message that they're attempting to close.
Email metadata	Extracts and populates the following email metadata in Pinnacle: Subject, To, CC, Date, Sent. ***Note:*** *The Pinnacle administrator defines Email document types on the server - this allows the setting of the metadata to Pinnacle.*

Email Document Types

Document types are defined in the **DMS Administration** module in Pinnacle's web-interface. Email document type names all end with the word **Email**.

When configuring email document types, the administrator sets up a fieldset called **Email**, which must be associated with all Email document types. The **Email fieldset** should contain the following fields - these fields must not be marked as 'required':

- Sender Email
- Sender Name
- Cc
- Send Date
- Subject
- Size

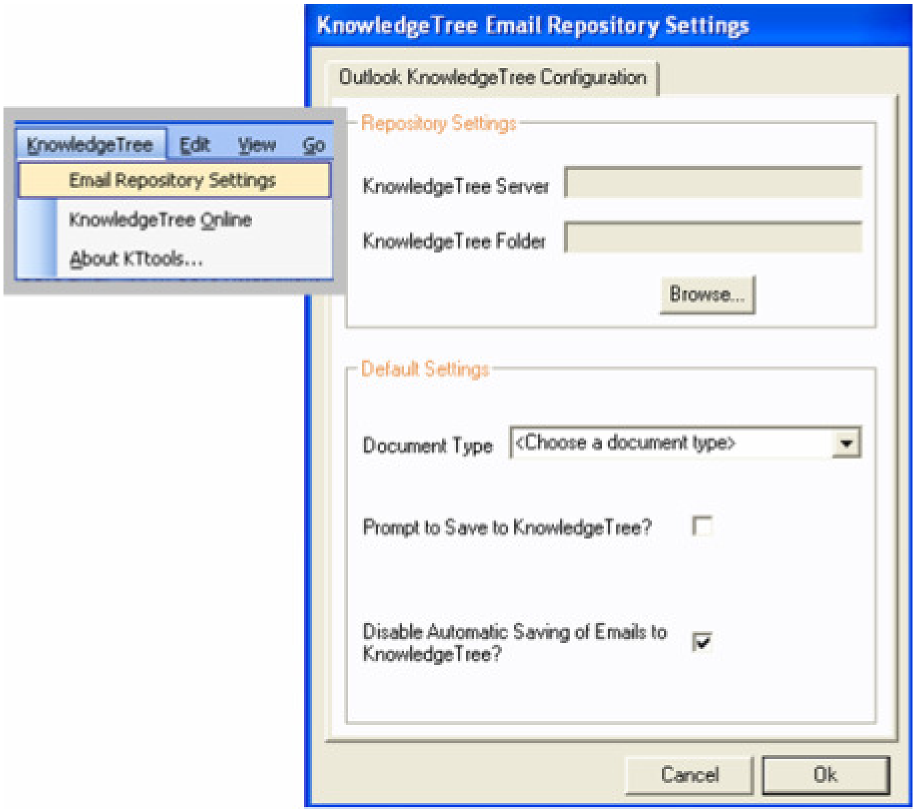
Configuring Email Repository Settings

This procedure defines Email Repository settings for Pinnacle Outlook Integration.

Perform the following steps:

1. Open the Microsoft Outlook client.

2. Click the **Pinnacle** menu on the Outlook toolbar; then, select **Email Repository Settings** to open the **Pinnacle Email Repository Settings** dialog box.



3. Do you want to ...

3.1. define or change the Pinnacle server and the folder location used by Outlook?

3.1.1. Click **Browse** to open the KT Server Connections dialog box.

3.1.2. Do you already have a default server connection set up?

- **Yes.** Log in. The Select Email Repository Folder dialog box opens. Locate the folder to use.

- **No.** Select an existing connection, or add a new server connection. Having connected to the server, the Select Email Repository Folder dialog opens, where you can select the folder for emails.
  Note: *For more information on configuring Server connections, see the Pinnacle Installation Guide.*

3.2. change the default document type for saved emails? Click the down arrow at the **Document Type** pick list to select a document type from the list. The default document type is used when the system is not configured to prompt you to define a document type for the email you're saving.
Note: *The pick list is populated only when there is a connection to Pinnacle. Only email document types that are configured on the selected server are included in the list.*

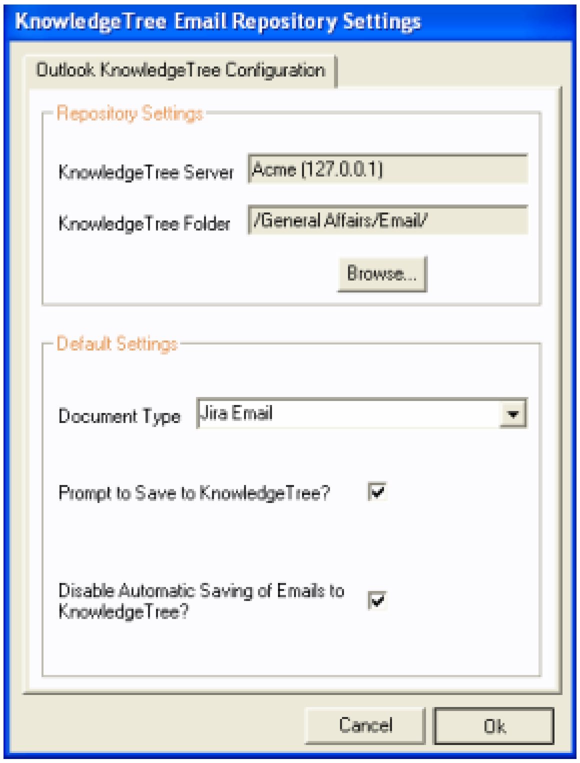
3.3. define whether or not the system displays a prompt for saving emails to Pinnacle?

- Deselect the **Prompt to Save to Pinnacle** check box to allow the system to automatically save all emails to the default folder location specified in Repository Settings.
- Select the **Prompt to Save to Pinnacle** check box to enable this feature. When the prompt is enabled, the user can decide whether or not to save the email, and select a save folder location and document type.

3.4. define whether or not to disable automatic saving of emails to Pinnacle?

- Select the **Disable Automatic Saving of Emails to Pinnacle** check box to activate automatic saving of emails to the repository.
- Deselect the **Disable Automatic Saving of Emails to Pinnacle** check box to enable the feature.

4. Click **Ok**.



Performing Actions on Multiple Items

Pinnacle Outlook Integration processes actions - save email, save attachment - on a maximum of 10 simultaneously selected emails.

When multi-selecting emails to perform an action, the action is performed on each email where the action is appropriate.

Example

Suppose you select three emails in the Outlook Inspector window. One of these emails is saved to Pinnacle. The saved email contains two attachments. One of the unsaved emails contains an attachment, the other unsaved email has no attachment. In this case, clicking **KT Save Emails** saves the two unsaved emails to Pinnacle. Clicking the **KT Save Attachments** button saves each of the three attachments to Pinnacle.

Emailing Attachments from Outlook

This procedure retrieves a file from the Pinnacle repository, and attaches the file to an outgoing email message.

Perform the following steps:

1. Compose a new email message in Microsoft Outlook.
2. Click **KT Attach Files**.
3. **Are you currently connected to Pinnacle?**
   - **Yes.** The **Select files to attach to the email** dialog box opens. Go to step 4.
   - **No.** The **KT Server Connections** dialog box opens. Select the server; then, enter your username and password. Click **Ok** to open the **Select files to attach to the email** dialog box. Go to step 4.
4. Navigate to the required file; then, click **Ok**.
5. Verify that the file was added to the **Attach header** field in the outgoing message.

Known Issues in this Version

Configuring Outlook as the Editor for Email Messages Hides Pinnacle Outlook Integration buttons in the Inspector Window

When using **Microsoft Office** or **Microsoft XP** to read rich text emails, the **KT Save Email**button and the **KT Attach Files** button are not displayed on the email inspector window. To resolve this issue, change the editor for email messages; or, save emails and attachments from the Outlook Explorer window.

To change the editor for email messages in Microsoft Outlook, click **Tools - Options** to open the Options dialog box. Then, click the **Mail Format** tab to open the Mail Format tabbed page, where you deselect **Use Microsoft [Office 2003 / XP] to read Rich Text e-mail messages**.

Outlook Issues When Exiting Word when the normal.dot Word Template is 'Read Only'

Users who are using a 'read only' normal.dot Word template may experience issues when exiting Word. This is because the Office Add-in modifies the normal.dot template.

To resolve this issue, open Microsoft Word; then, click **Tools - Options** to open the Options dialog box. Click the **File Locations** tab; then, select **User Templates**. Click **Modify**. Set the path to: C:\Documents and Settings\<user>\Application Data\Microsoft\Templates. Finally, replace `<user>` with the name of the user of the machine where Outlook Integration is in use. If there is no normal.dot file in this directory, one will be created for you.