



Ohio EPA eDoc Training

Login Credentials:

Username	State of Ohio Employee ID
Password	State of Ohio Employee ID Password

Disclaimer:

This document is intended for use by all Ohio EPA user groups. Depending on your user rights you may not have access all the functionality explained in this manual.

Ohio EPA eDoc Training

Contents

Ohio EPA eDoc Training	3
Logging into eDoc.....	4
Navigating the Unity Client	5
Scanning a Document into eDoc.....	9
Indexing the Scanned Document.....	14
Retrieving a Document from eDoc	21
Viewing Documents in a New Window.....	Error! Bookmark not defined.
Reviewing Keywords on a Document in eDoc	26
Viewing Cross References in eDoc.....	27
Retrieving a Document Using eDoc Folders.....	29
Viewing Folders.....	30
Additional Practice Utilizing eDoc Folders to Retrieve Documents.....	33
Searching for Folders	34
Utilizing Full Text Search to Retrieve Documents.....	37
Envelopes	40
Definitions.....	43

Logging into eDoc

The first step to testing the solution is to launch the eDoc Unity Client and Log in.

1. Launch the Unity Client by double-clicking the icon on your desktop:

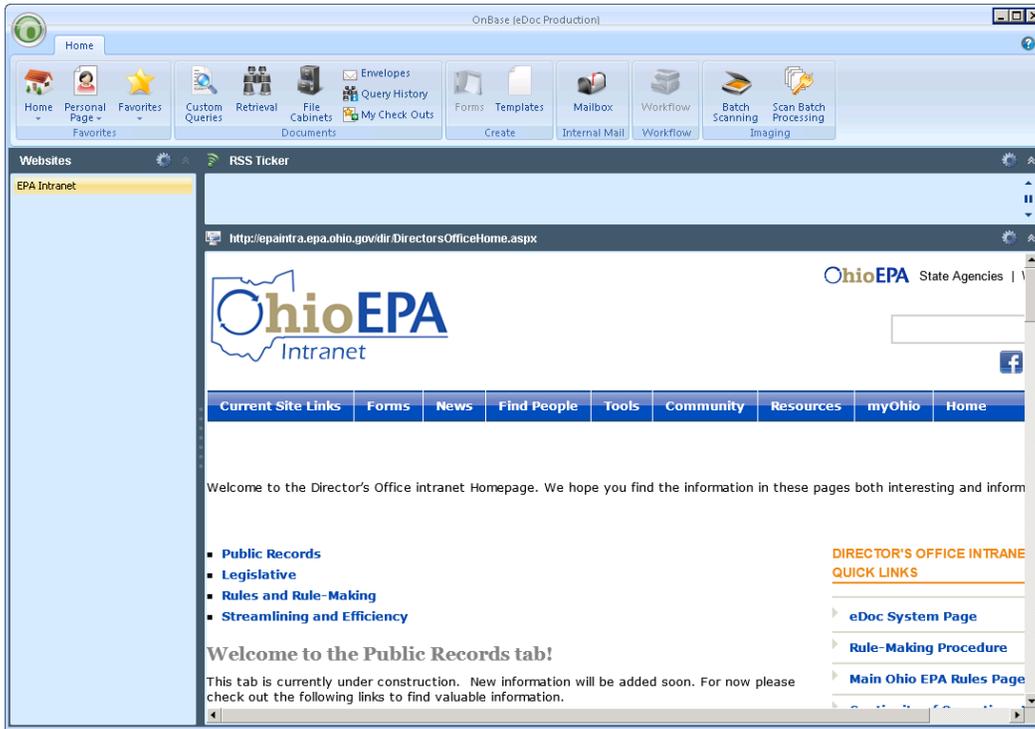


2. After you launch the module, the following dialog box is displayed:



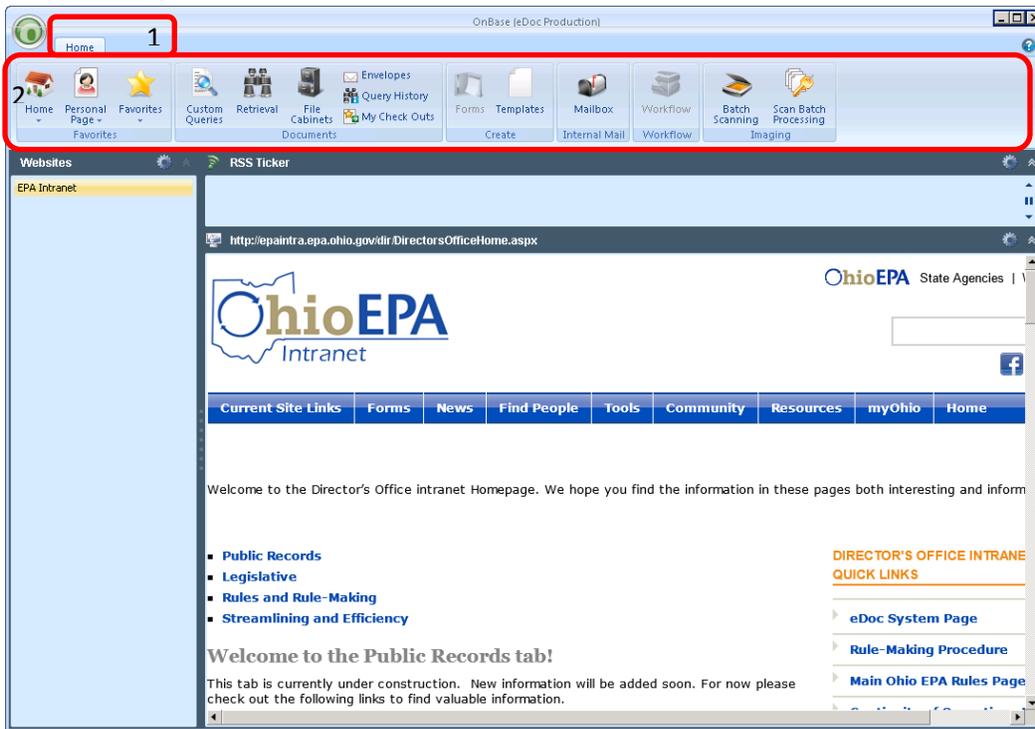
3.  Enter the username you have been assigned.
4.  Enter the password associated with the username.
5. Click **Login**.

6. The Unity Client will open.



Navigating the Unity Client

The eDoc Unity Client



	Region	Description
1	Tabs	Clicking on a tab will display a ribbon with buttons related to the available user actions
2	Ribbon	A ribbon is displayed by clicking the corresponding tab. Each ribbon is divided into ribbon groups. In the above screen shot, the Home tab is displayed. The contextual ribbon displays available user actions based on the currently displayed layout.

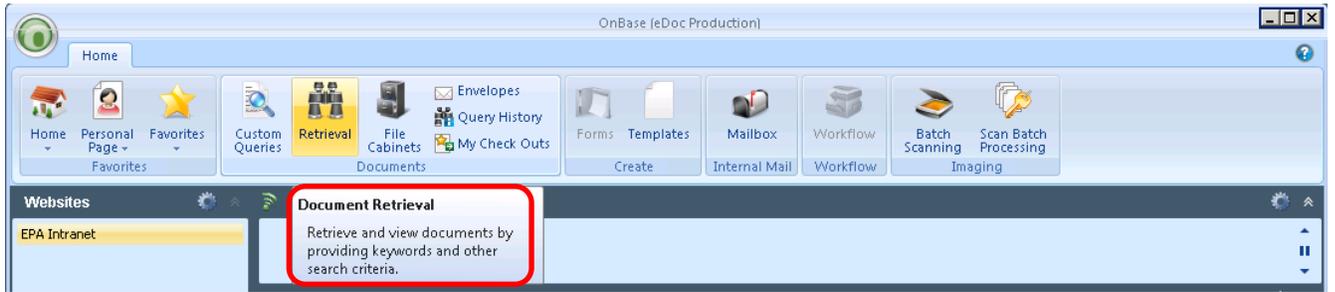
Home Ribbon Explanations



	Description
	The home layout will contain the Ohio EPA website and Rich Site Summary (RSS) feed of updated information of the agency.
	Personal Page gives the ability to access shortcuts and frequently used features from one single page.
	eDoc items can be added to the favorites page for favorite items
	Access to Custom Query search Quick access to the most frequently retrieved documents by conducting pre-defined searches.
	eDoc Document Retrieval Give the ability to retrieve documents by Grouping, Document Type, Keyword, Date, or by Full-Text search
	Access to File Cabinet Search File Cabinets allow users to view documents electronically, as they would with a folder of paper documents.
	Access to user envelopes. Envelopes provide a way to bundle documents together for easy access, or to easily e-mail the group of documents at one time.
	The query history displays a list of Document Retrieval and Custom Query searches performed during the current eDoc session.

 My Check Outs	Feature not available in Phase 1
 Forms	Feature not available in Phase 1
 Template	Feature not available in Phase 1
 Mailbox	Used for mail that is received from within the eDoc system. Send a file to another user by using the Send To -> Mail Recipient option from the Documents Menu
 Workflow	Feature not available in Phase 1
 Batch Scanning	<p>If licensed for a scanner, this icon will be active.</p> <p>Will allow for scanning of documents into the eDoc system.</p>
 Scan Batch Processing	Open eDoc Batch Processing. This will allow users to index documents that have been scanned into the system.

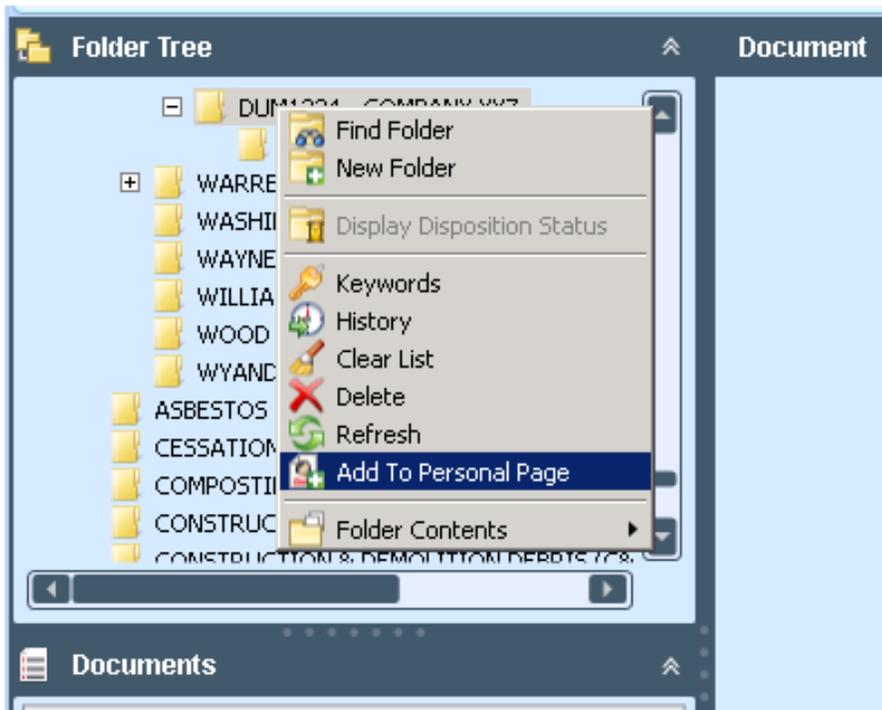
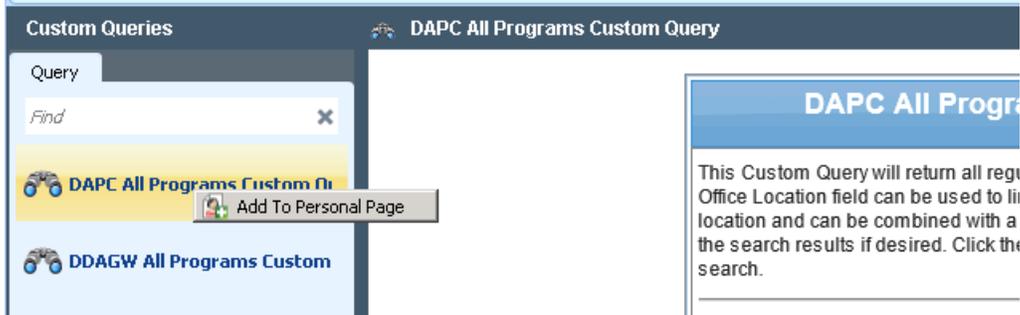
1. Place your cursor over each button to view the contextual help that is displayed.



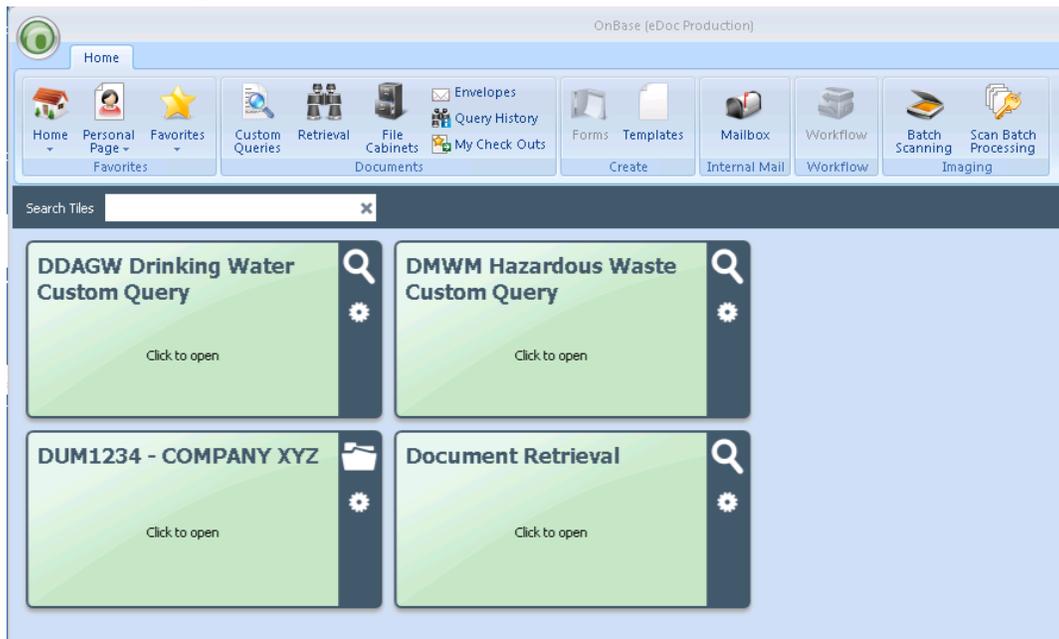
Creating Personal Pages

If you would like to modify the pages that are available by default, eDoc components can be set to a personal page for easy access.

1. To add items to the personal page, right click on it and select **Personal Page**



2. Once items are added, the personal page can be set as the home page of eDocs. First navigate to the Personal Page.



3. Then select the drop down under **Home** and then **Make this layout my Home Page**



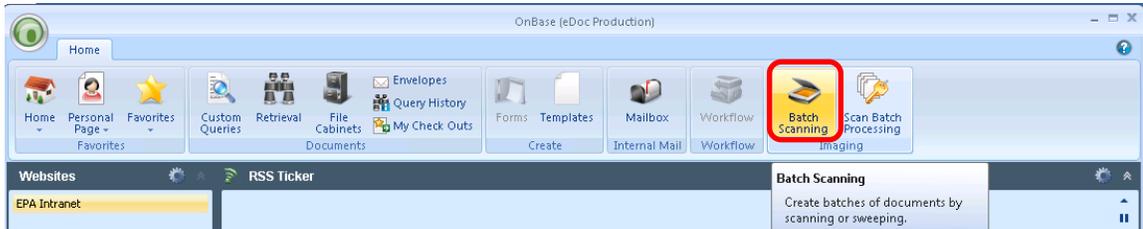
4. The next time eDocs is opened, the personal page will be the starting point.

Scanning a Document into eDoc

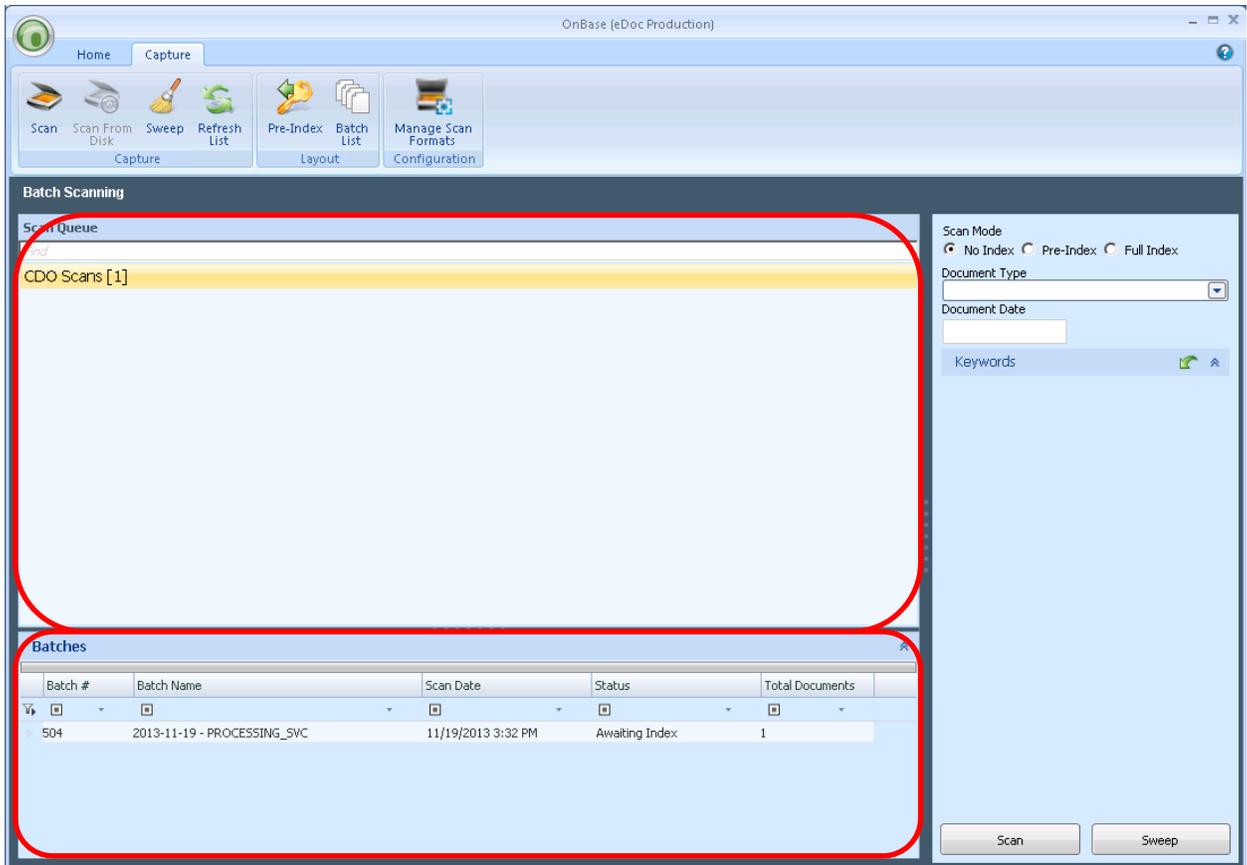
The Ohio EPA eDoc solution includes scanning. This feature of eDoc allows users to utilize a piece of hardware (a scanner) to create an electronic version of a document which can be stored in eDoc. If using an Multi-Functioning Device (MFD) (BizHub or Copier/Scanner), you would scan the documents using the eDoc profile set up on the MFD, then skip to “Indexing the Scanned Document.”

In this example we will scan a batch of documents into eDoc.

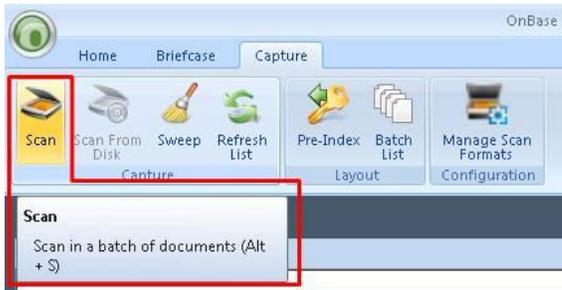
1. In the EDoc Unity Client, click the **Batch Scanning** button on the **Imaging** ribbon.



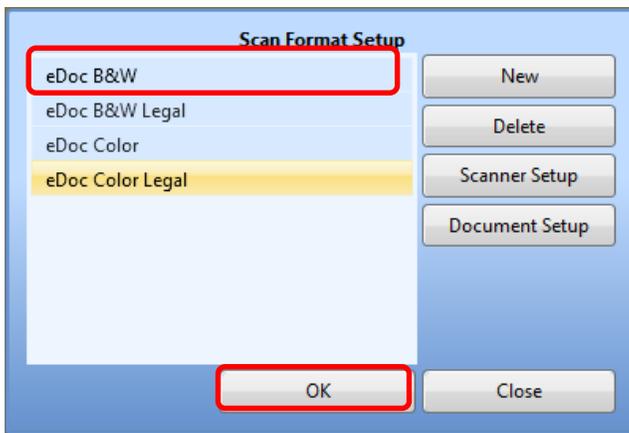
- 2.
3. The **Batch Scanning** interface will display. This dialog contains 3 panes. **Scan Queues** define the document types and settings for the documents being imported. **Batches** display the groups of documents that have been scanned into EDoc as well as their current status.



4. Click the **Scan** button.



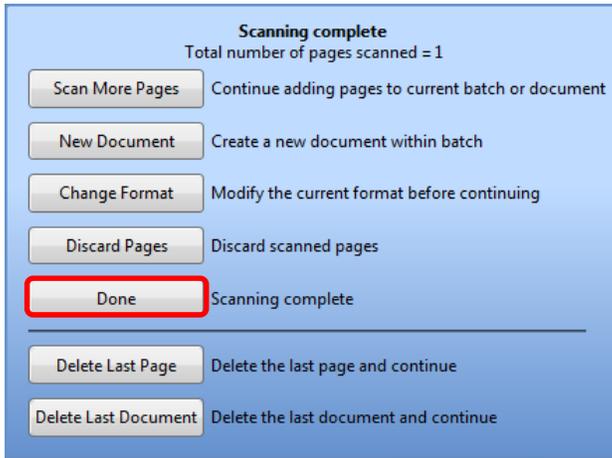
5. Choose the Scan Format that best matches the documents that will be scanned into EDoc. In this case there are two Scan Formats, one for black and white documents and another for color documents.
6. Click **OK**.



7. The documents will be scanned into EDoc and, depending on the settings in each location, a preview of the document may be displayed.



8. Once the scanning is complete click **Done**.

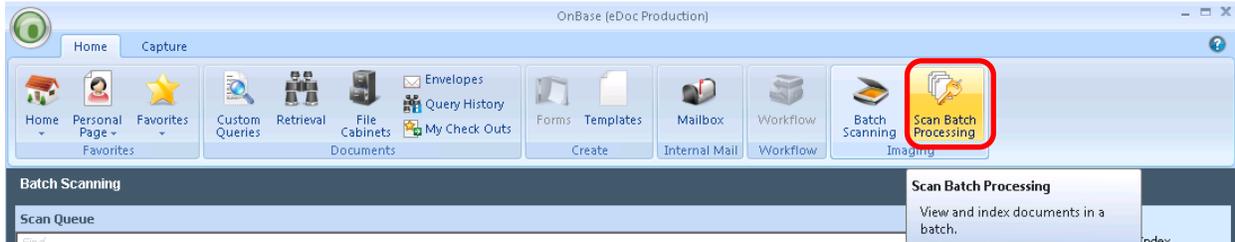


Indexing the Scanned Document

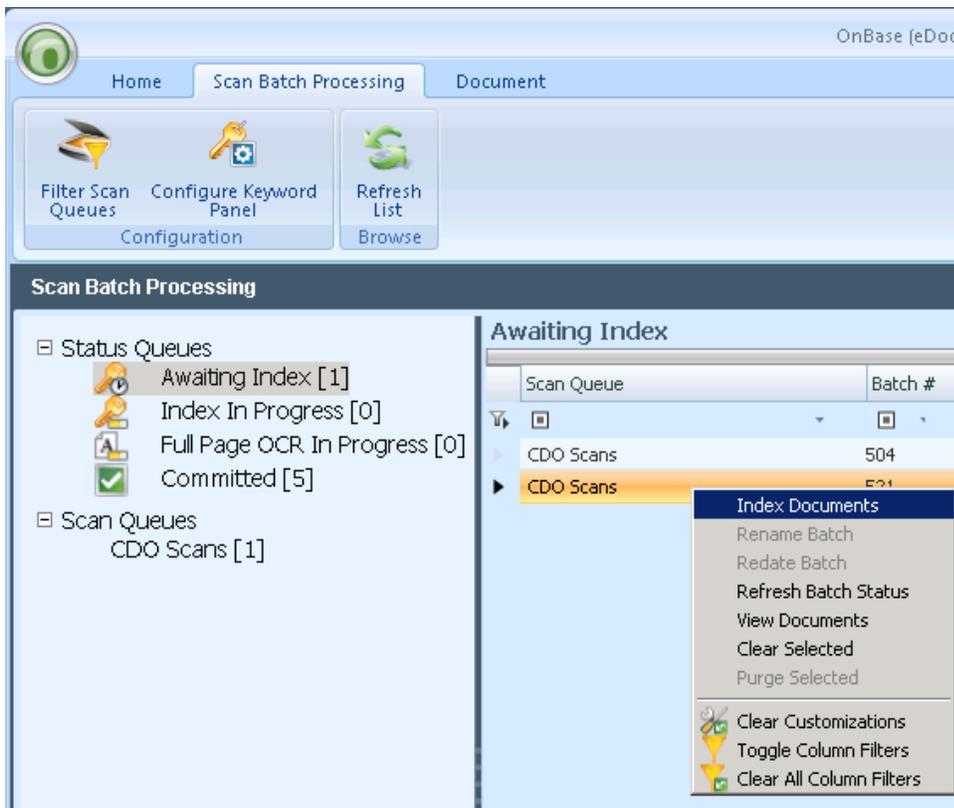
In order to allow users to retrieve the document it must be assigned to a **Document Type** and any applicable **Keyword Values** should be populated.

Indexing is done in the **Batch Scanning**.

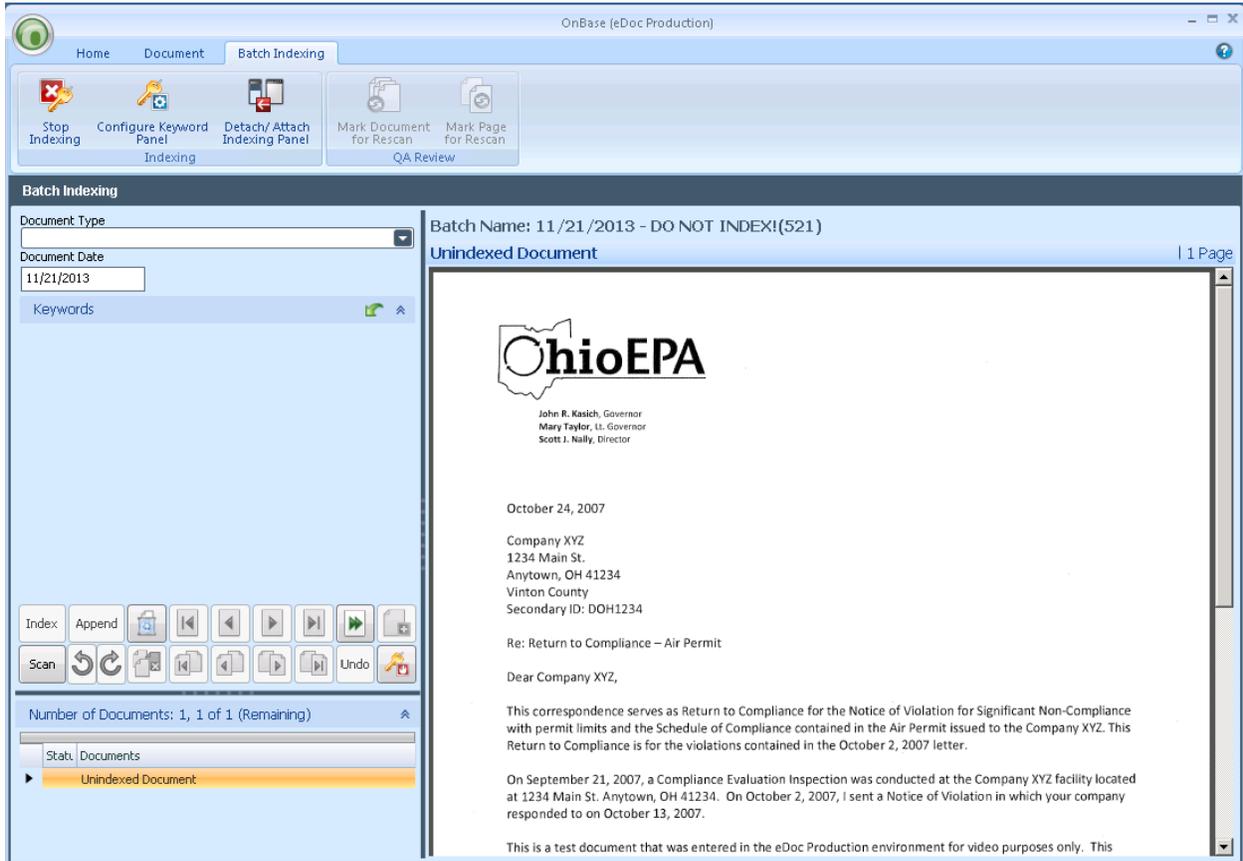
1. Select **Scan Batch Processing** from the **Home Ribbon**.



2. Documents that have been scanned into eDoc's will reside in the Awaiting Index queue in batches. To index the batch, **right click** one and select **Index Documents**.



3. The indexing window will appear. This is where you will want to QA the document. Here are some of the items you will want to look for:
 - a. Are the pages properly rotated? If not, use the green rotate buttons.
 - b. Is this a complete document? If it is not, you may want to purge batch and rescan.
 - c. Are blank pages included? If so, use the delete page.



4. The first document that appears is the first document of the batch. Each time a new document appears, the correct document type must be selected before the document can be indexed. From the Document Type drop-down list, select the Document Type to be assigned to the document by eDocs. After selecting a Document Type, eDocs automatically displays fields for Keyword Types that are used to index documents of that type.

Batch Indexing

Document Type

BCA
DFFO
Judicial Order
NOV
Rescission
RTC
Warning Letter

Document Type

5. The keyword panel is now displayed

Batch Indexing

Document Type
NOV

Document Date
11/21/2013

Keywords

Date on Document

Secondary ID

Core ID

Facility Name

County

NOV Subtype

Program

Confidentiality Status
PUBLIC RECORD FOR PUBLICATION

Note: Some **Document Types** are configured to require **Keyword Values** to be entered in order to create and/or retrieve documents. **Required Keyword Values** are displayed in **red** for these operations, which may include the following: Document Retrieval, Upload, and Add/Modify Keywords.

Some keywords are also **Read Only** meaning they cannot be indexed. Keywords that are Read Only are grayed out.

All Phase 1 documents will have a **Confidentiality Status** set to 'Public Record for Publication'

6. Enter the Date on Document keyword. The Document Date keyword should be ignored.

Date on Document
11/21/2013

7. Add in the secondary ID, then hit TAB

Secondary ID
DOH1234

8. Hitting TAB will cause the Autofill to launch. If the autofill returns one set of values, they will be populated directly onto the indexing panel. If there is more than one option, the appropriate set must be selected.

Select Keyset

Secondary ID	Core ID	Place Type	Facility Name	County
OH3001212	17967	FACILITY	BYESVILLE PWS PLANT 2	GUERNSEY
OH3001212	18180	FACILITY	BYESVILLE PWS PLANT 1	GUERNSEY
OH3001212	61637	CUSTOM DEFINED AREA	BYESVILLE, VILLAGE OF	GUERNSEY

OK Cancel

Secondary ID
OH3001212

Core ID
17967

Facility Name
BYESVILLE PWS PLANT 2

County
GUERNSEY

a. If the Secondary ID does not bring back any values, the document can still be indexed without a Core ID or Facility Name. The County keyword **must** still be indexed.

Secondary ID
DOH1234

Core ID
|

Facility Name
|

County
|

b. Documents that are indexed without a Core ID will go to an exception queue for the BSA to review and add the appropriate information.

9. If the document has a sub-type, please enter in the appropriate value.

NOV Subtype

NOV
RELATED CORRESPONDENCE

10. Enter in the correct program by using the values found in the dataset.

Program

AIR PERMIT

Date on Document	
Secondary ID	
Core ID	
Facility Name	
County	
Sub-type (if there is one)	
Program	
Confidentiality Status	

11. Click the **Index** button to import the document into eDocs.

The screenshot shows the OnBase eDoc Production interface. The 'Batch Indexing' tab is active, displaying document metadata and a preview of the document content. The 'Index' button is highlighted with a red box.

Batch Indexing

Document Type: NOV
 Document Date: 11/21/2013
 Keywords: [empty]
 Date on Document: 11/21/2013
 Secondary ID: DOH1234
 Core ID: [empty]
 Facility Name: [empty]
 County: VINTON
 NOV Subtype: NOV
 Program: AIR PERMIT
 Confidentiality Status: PUBLIC RECORD FOR PUBLICATION

Batch Name: 11/21/2013 - DO NOT INDEX!(521)

Unindexed Document | 1 Page

OhioEPA
 John B. Kasich, Governor
 Mary Taylor, Lt. Governor
 Scott J. Nally, Director

October 24, 2007
 Company XYZ
 1234 Main St.
 Anytown, OH 41234
 Vinton County
 Secondary ID: DOH1234

Re: Return to Compliance – Air Permit

Dear Company XYZ,

This correspondence serves as Return to Compliance for the Notice of Violation for Significant Non-Compliance with permit limits and the Schedule of Compliance contained in the Air Permit issued to the Company XYZ. This Return to Compliance is for the violations contained in the October 2, 2007 letter.

On September 21, 2007, a Compliance Evaluation Inspection was conducted at the Company XYZ facility located at 1234 Main St. Anytown, OH 41234. On October 2, 2007, I sent a Notice of Violation in which your company responded to on October 13, 2007.

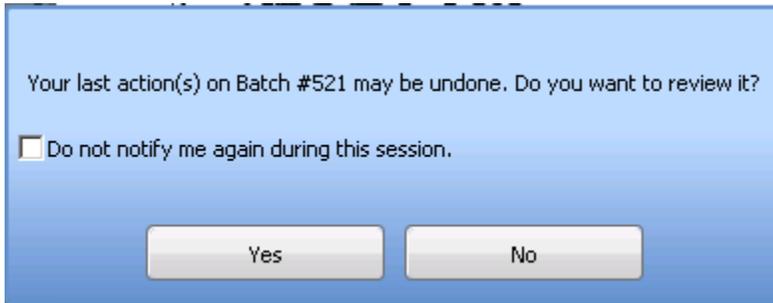
This is a test document that was entered in the eDoc Production environment for video purposes only. This

Index Append [Navigation icons]

5 Mark the Current Document as Indexed (Alt + I, Alt + X) [Navigation icons]

Number of Documents: 1, 1 of 1 (Remaining)

12. If the document indexed in the batch is the last document of that batch, the following prompt may appear for the first time of the session. Please check the 'Do not notify me again during the session.' box if you would not like it to appear again.



Your last action(s) on Batch #521 may be undone. Do you want to review it?

Do not notify me again during this session.

Yes No

13. If you would like to review the document once it has been index, the document will now reside in the Committed queue.

Scan Batch Processing

Committed

Scan Queue	Batch #	Batch Name	Scan Date	Commit Date	Total Documents	# to be Indexe
CDO Scans	489	2013-11-19 - PROCESSING_SVC	11/19/2013 9:08 AM	11/19/2013 9:33 AM	2	0
CDO Scans	490	2013-11-19 - PROCESSING_SVC	11/19/2013 9:09 AM	11/19/2013 9:35 AM	2	0
CDO Scans	491	2013-11-19 - PROCESSING_SVC	11/19/2013 9:16 AM	11/19/2013 10:04 AM	4	0
CDO Scans	493	2013-11-19 - PROCESSING_SVC	11/19/2013 9:49 AM	11/19/2013 10:06 AM	2	0
CDO Scans	505	11/19/2013 - 10022972	11/19/2013 3:36 PM	11/19/2013 3:59 PM	2	0
CDO Scans	521	11/21/2013 - DO NOT INDEX!	11/21/2013 11:39 AM	11/21/2013 12:07 PM	2	0

14. Open the batch, look for the document in question and select keywords to review.

OnBase (eDoc Production)

Home Document Scan Batch Processing

Keywords Cross-References Revisions History Properties Send To Check Out Actions View Notes List Delete Note Privacy Options

Scan Batch Processing

Status Queues: Awaiting Index [1], Index In Progress [0], Full Page OCR In Progress [0], Committed [5]

Scan Queues: CDO Scans [1]

Batch Name: 11/21/2013 - DO NOT INDEX!(521) Number of Documents: 2

Documents:

- [2] - NOV - 11/21/2013 - AIR PERMIT - VINTON - DOH1234
- [1] SYS Verification Reports - 11/21/2013 BATCH FULL PAGE OCR

- NOV - 11/21/2013 - AIR PERMIT - VINTO... | 1 Page | 2 Revisions Latest Revision: 11/21/2013

OhioEPA

John R. Kasich, Governor
Mary Taylor, Lt. Governor
Scott S. Nally, Director

October 24, 2007

Company XYZ
1234 Main St.
Anytown, OH 41234
Vinton County
Secondary ID: DOH1234

Re: Return to Compliance - Air Permit

Dear Company XYZ,

This correspondence serves as Return to Compliance for the Notice of Violation for Significant Non-Compliance with permit limits and the Schedule of Compliance contained in the Air Permit issued to the Company XYZ. This

Add/Modify Keywords

Document Type: NOV

Document: - NOV - 11/21/2013 - AIR PERMIT - VINTON - DOH1234

Document Date: 11/21/2013

Keywords:

Date on Document: 11/21/2013

Secondary ID: DOH1234

Core ID:

Facility Name:

County: VINTON

NOV Subtype: NOV

Program: AIR PERMIT

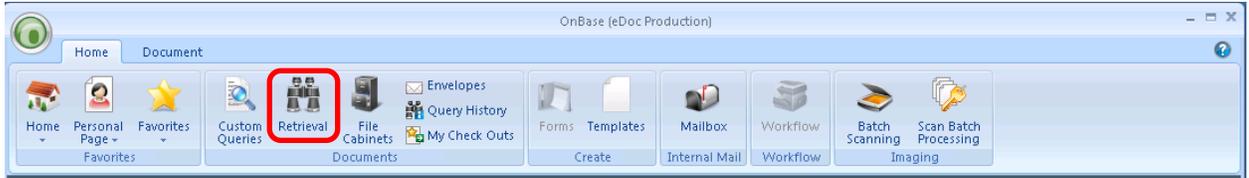
Save Keywords

Close

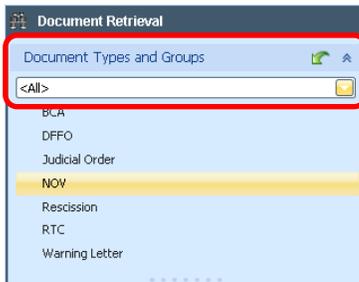
Retrieving a Document from eDoc

You can retrieve documents from eDocs. For this example we will retrieve the document we indexed in the last example.

1. On the Home tab, click **Retrieval**.



2. From the **Document Retrieval** pane select a **Document Type Group** from the dropdown menu.

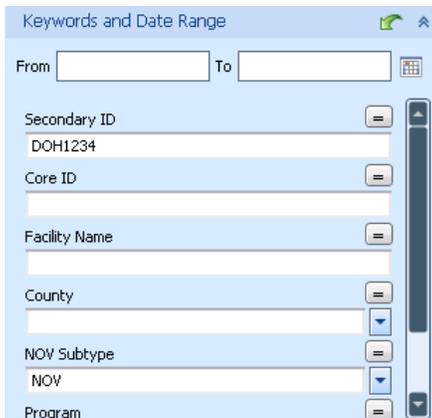


Note: After selecting a Document Type Group, eDoc automatically filters the available Document Types in the Document Type drop-down list.

3. Select the **Document Type** that corresponds to the document to be retrieved.

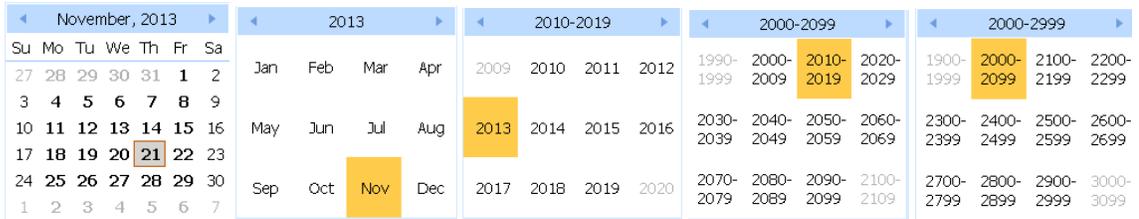


4. From the **Keyword and Date Range** dialog, enter either a date range and/or enter keyword values for one or more of the keywords related to the Document Type(s) being retrieved.

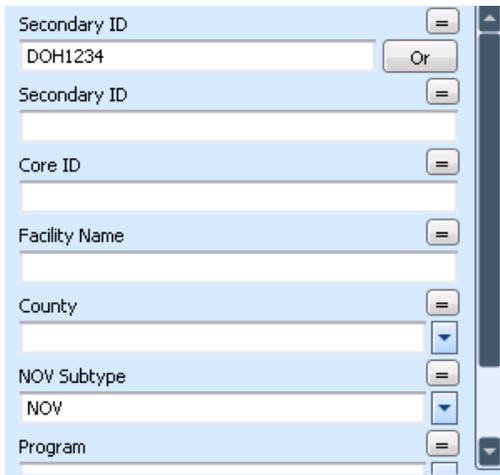


Note: The keywords displayed in the **Keyword and Date Range** pane may differ between Document Types. Only Keywords assigned to the Document Type selected in the **Document Types and Groups** pane will be displayed.

- A. If using a date range, the calendar drop down may be utilized rather than entering in a date. By using the heading of the calendar, you can scroll through past months and even years.

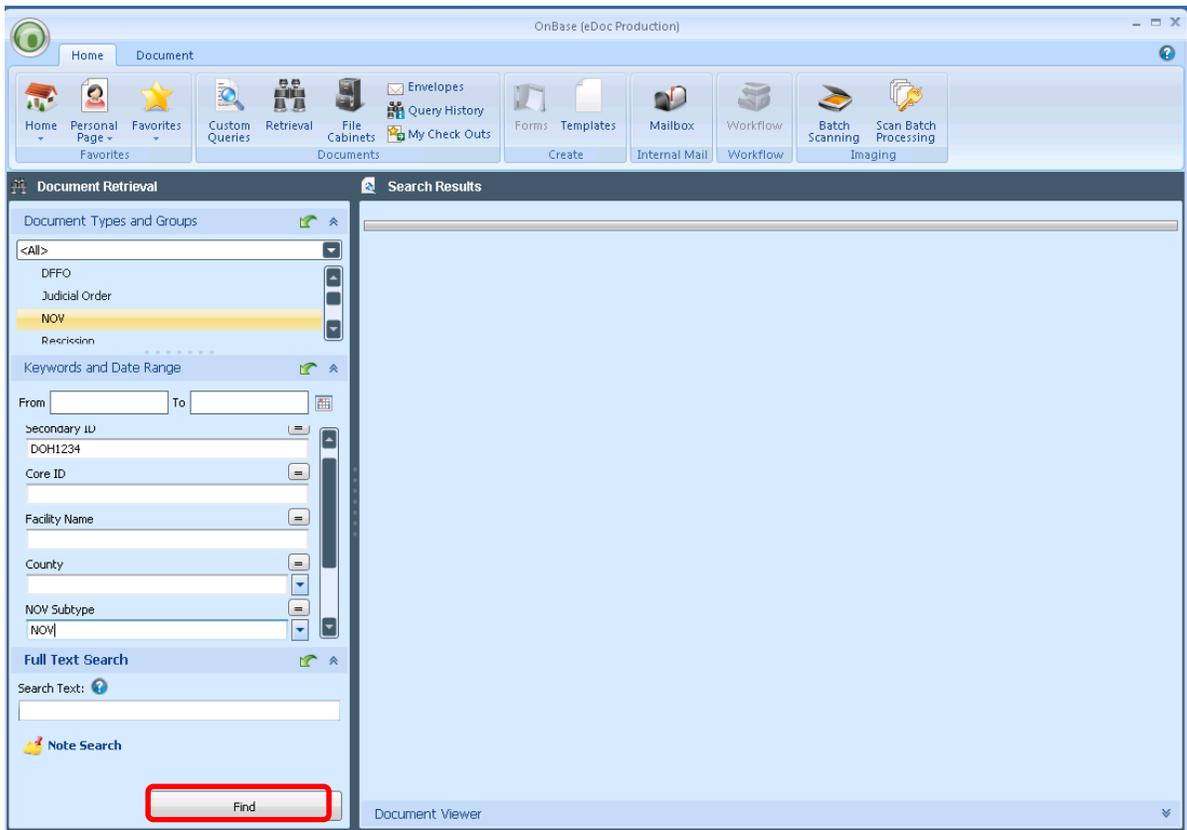


- B. If more than one of the same keyword is to be searched on at the same time, the f6 key can be pressed from within the keyword that would need to be duplicated. Use the AND/OR operator to determine how the search would be conducted.



- C. If the keyword set is to be cleared, use the  icon.

5. Click the **Find** button once the date range and/or keywords have been entered.



6. All documents that match the search criteria are displayed in a **Search Results** list.

The screenshot displays the OnBase (eDoc Production) interface. The top navigation bar includes 'Home' and 'Document' tabs. Below this is a ribbon with various icons for document management, such as 'Home', 'Personal Page', 'Favorites', 'Custom Queries', 'Retrieval', 'File Cabinets', 'Envelopes', 'Query History', 'My Check Outs', 'Forms', 'Templates', 'Mailbox', 'Workflow', 'Batch Scanning', and 'Scan Batch Processing'.

The main interface is divided into two panes. The left pane, titled 'Document Retrieval', contains several sections: 'Document Types and Groups' with a dropdown menu set to '<All>', showing options like 'DFFO', 'Judicial Order', 'NOV', and 'Rescreann'; 'Keywords and Date Range' with 'From' and 'To' input fields; 'Secondary ID' with a dropdown set to 'DOH1234'; 'Core ID', 'Facility Name', and 'County' input fields; 'NOV Subtype' with a dropdown set to 'NOV'; and 'Full Text Search' with a 'Search Text' input field and a 'Find' button. There is also a 'Note Search' icon.

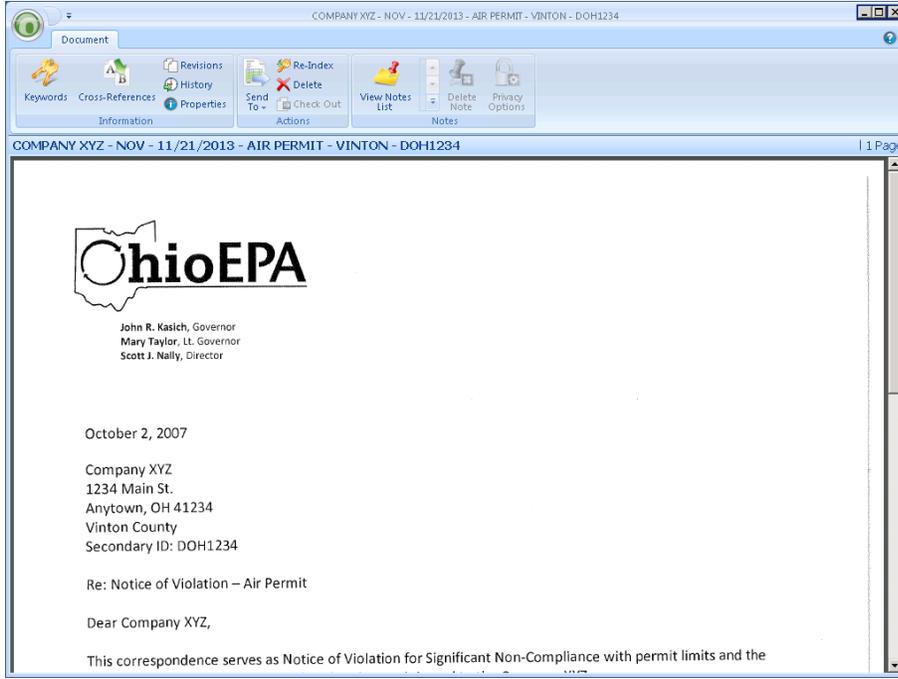
The right pane, titled 'Search Results: 1 Document(s)', displays a table with the following data:

Icon	Name	Type	Date
	COMPANY XYZ - NOV - 11/21/2013 - AIR PERMIT - VINTON - DOH1234	NOV	11/21/2013

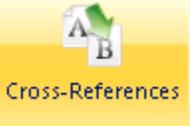
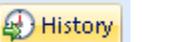
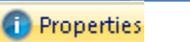
The table row is highlighted with a red border. The bottom of the interface shows a 'Document Viewer' label and a dropdown arrow.

Viewing a Document in eDoc

Double-clicking on a document will open the document in a new window with the **Document** tab and ribbon displayed.



The Ohio EPA eDoc solution will commonly utilize the following buttons on the **Document** tab:

	<p>Keywords displays the Add/Modify Keywords pane in the task pane. From this pane a user can view keyword values.</p>
	<p>View documents that are related to the current document. The same document will always be returned with the result set.</p>
	<p>View document history</p>
	<p>View advanced properties of the current document</p>
	<p>Send To displays many options. This option will be used to create new documents, send internal mail, creating files, printing, and sending documents to an envelope.</p> <p>When using the Send To with saving a file, saving the file name will not save the file to the file location. To make sure the file is actually saved, click the large  button.</p>

Reviewing Keywords on a Document in eDoc

While viewing a document in eDoc, users can utilize the **Add/Modify Keywords** pane to view.

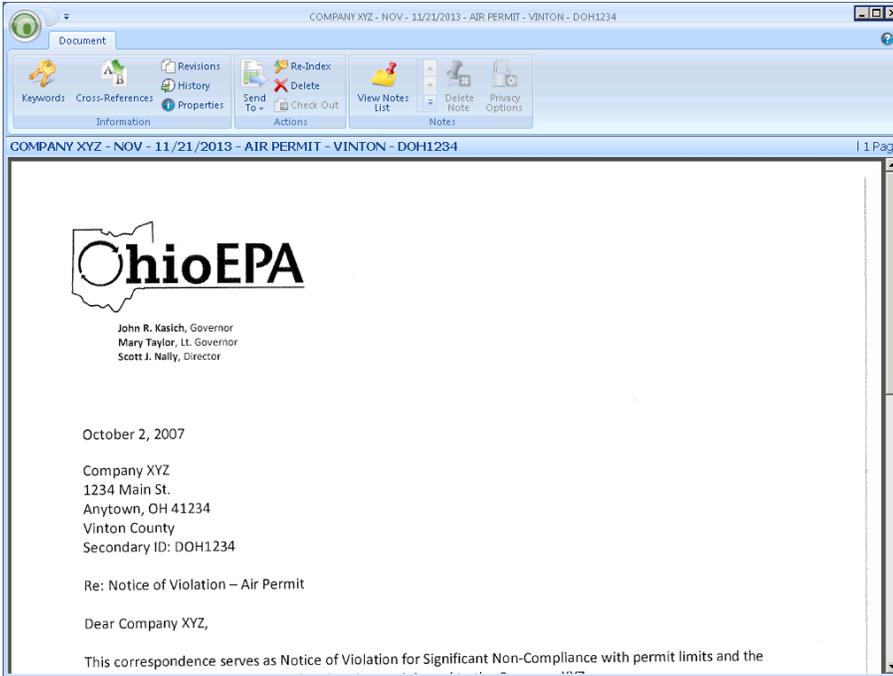
1. While viewing a document click on the **Keywords** button on the **Document** tab to view the **Add/Modify Keywords** pane.

The screenshot displays the eDoc interface. The main window shows a document titled "COMPANY XYZ - NOV - 11/21/2013 - AIR PERMIT - VINTON - DOH1234". The document content includes the OhioEPA logo, contact information for John R. Kasich, Mary Taylor, and Scott J. Nally, and a notice of violation dated October 2, 2007. On the right side, the "Add/Modify Keywords" pane is open, showing fields for Document Type (NOV), Document (COMPANY XYZ - NOV - 11/21/2013 - AIR PERMIT - VINTON - DOH1234), Document Date (11/21/2013), and Keywords (Date on Document: 11/21/2013, Secondary ID: DOH1234, Core ID: DUM1234, Facility Name: COMPANY XYZ, County: VINTON, NOV Subtype: NOV, Program: AIR PERMIT). A "Save Keywords" button is visible at the bottom of the pane.

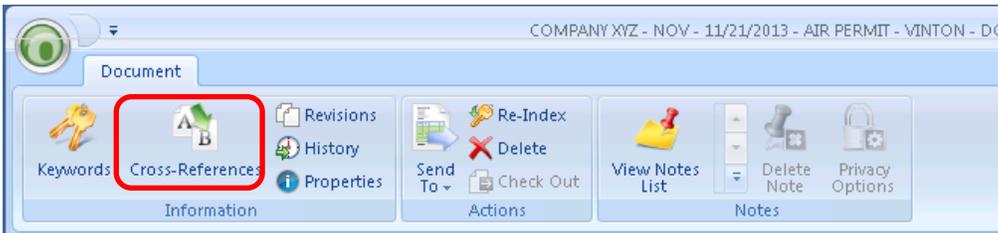
Viewing Cross References in eDoc

While viewing a document in eDoc, users can view all related documents of the current document by the Core ID.

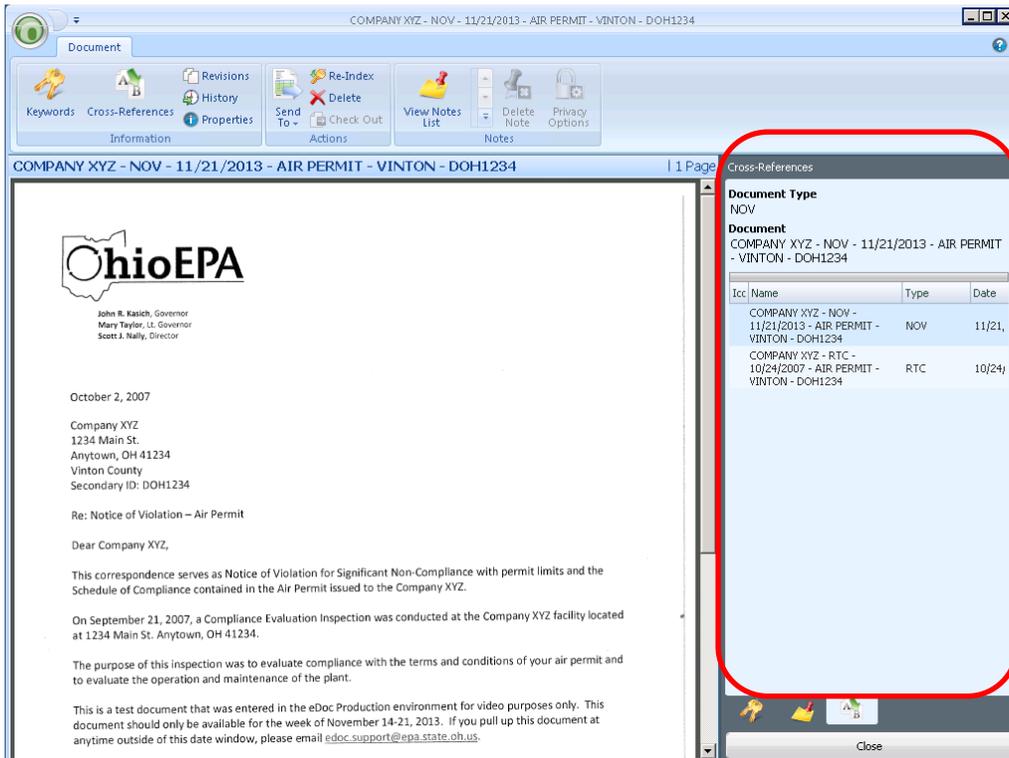
1. Open the document that will be used to cross reference.



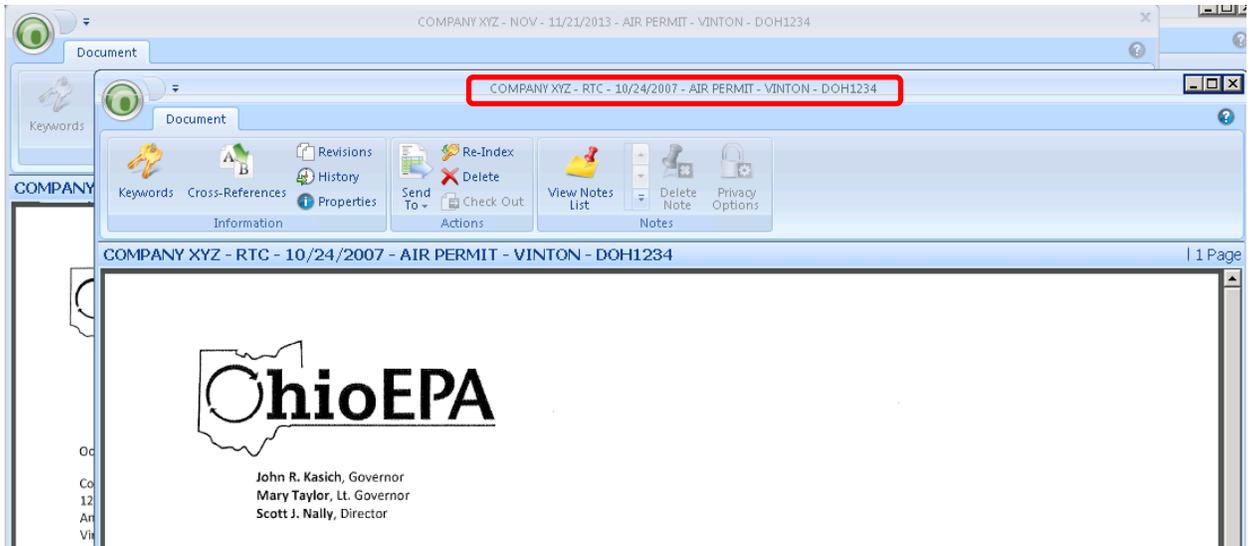
2. Select the Cross-References



- All related documents will be displayed on the docked panel. Note: Original document will appear as well.



- Double click on a reference to open it.



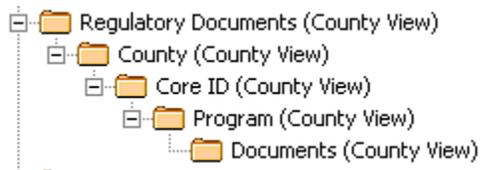
Retrieving a Document Using eDoc Folders

eDoc folders allow users to view and organize documents electronically, as they would with a folder of paper documents, but with the added benefits and security of eDoc. Users can access related documents in a way that is familiar, logical, and easy to use.

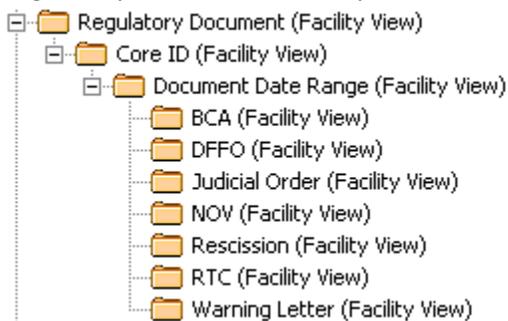
Because each document can reside in multiple folders, departments that prefer different folder structures can access the same document in different locations. Because there is only one actual document, changes to the document are reflected in all locations, even when the document resides in many folders.

The Ohio EPA eDoc solution includes several folders:

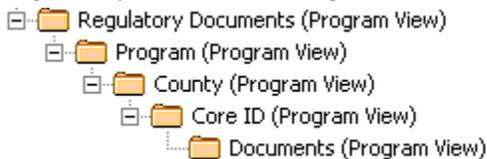
- Regulatory Documents (County View)



- Regulatory Documents (Facility View)



- Regulatory Documents (Program View)



For this example we will retrieve the document imported earlier and view the document through each foldering solution.

Recall the keywords for the document imported earlier:

Keywords

Date on Document
11/21/2013

Secondary ID
DOH1234

Core ID

Facility Name

County
VINTON

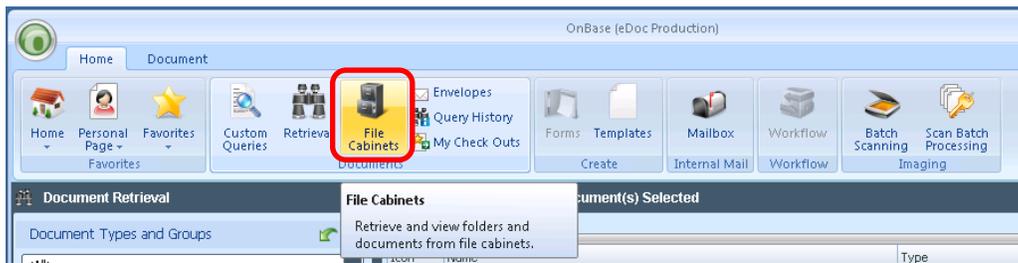
NOV Subtype
NOV

Program
AIR PERMIT

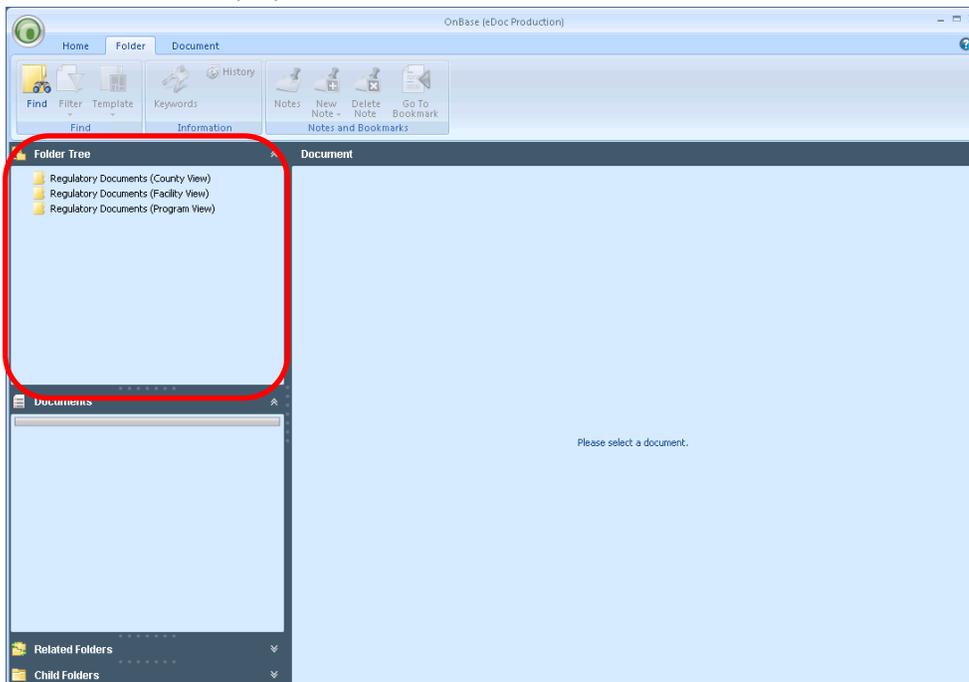
Confidentiality Status
PUBLIC RECORD FOR PUBLICATION

Viewing Folders

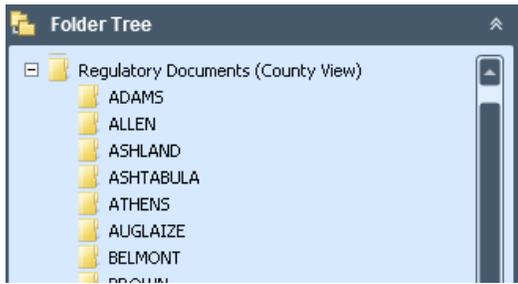
1. To access eDoc folders, select the **File Cabinets** button on the **Documents** ribbon.



2. The **Folder Tree** displays the available Folders.



3. Select the **Regulatory Documents (County View)** folder to expand the folder and view sub-folders.

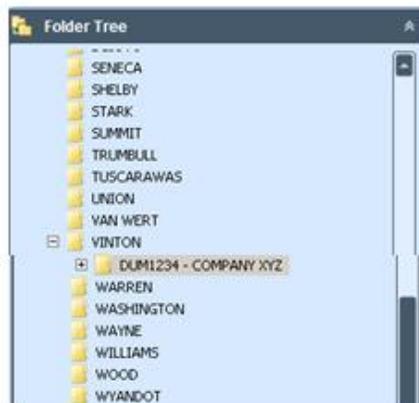


Note: The list of counties populates based on the documents in the system.

4. Select the folder that represents the county of the document imported into eDoc earlier in this session.

What county did you select? _____

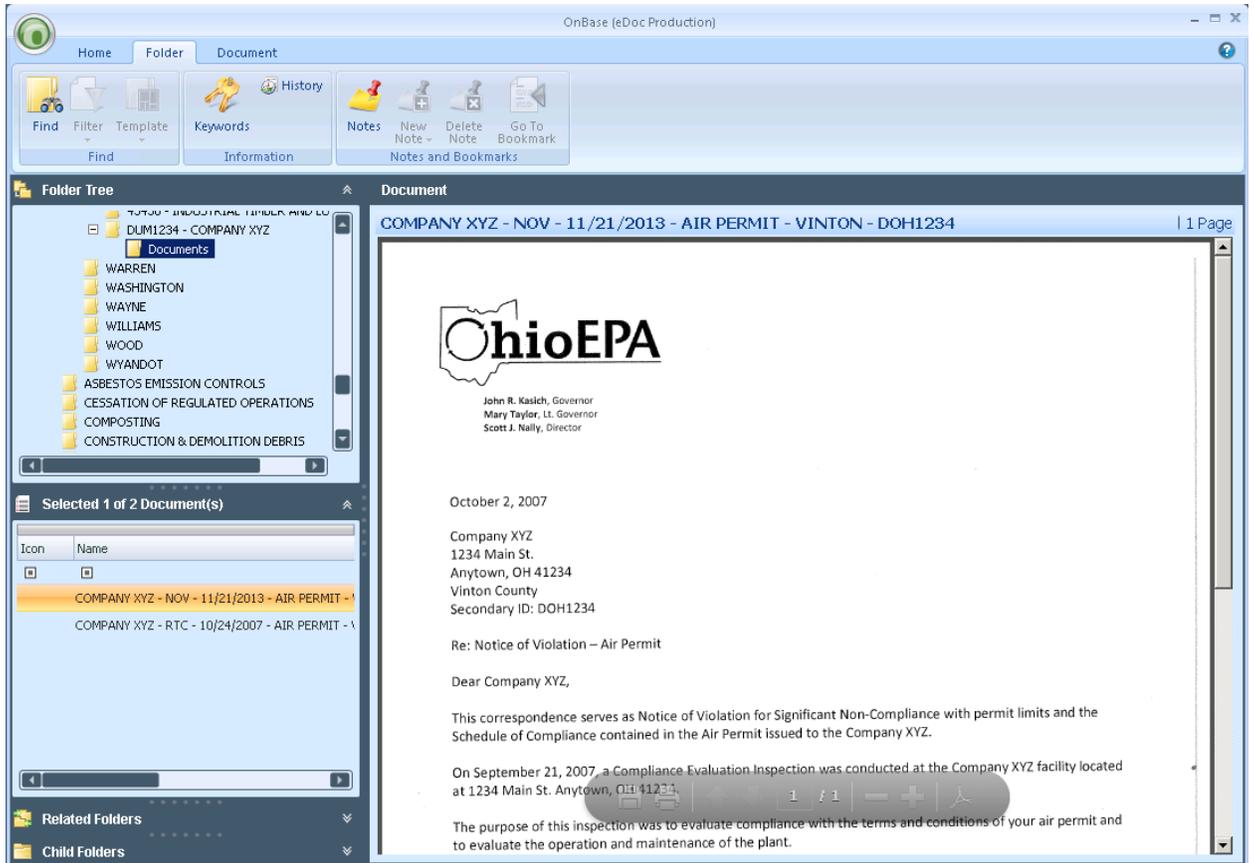
5. The folders displayed under each county represent the **Core ID**. Folders are created dynamically. This means that a folder will only exist if a document with a corresponding **County** and **Core ID** exists in eDoc.



6. Select the **Core ID** folder to drill father into the Regulatory Documents in eDoc. The folders displayed under each **Core ID** represent the **Program**. Folders are created dynamically. This means that a folder will only exist if a document with a corresponding **County**, **Core ID** and **Program** exist in eDoc.



The **Documents** folder found under the **Program** folder will contain documents that meet the criteria of the folder structure. In this example the **document** imported earlier in the class should be available in the **Documents** pane.



Additional Practice Utilizing eDoc Folders to Retrieve Documents

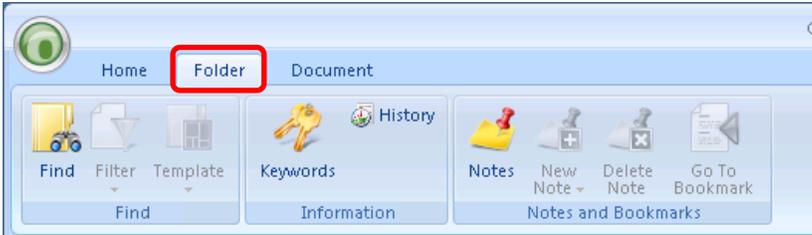
Navigate to the **document** again, this time using the **Regulatory Documents (Program View)**. This folder structure will lead users to the same document, but through a different route. The **Program** is the highest folder. Fill in the information below detailing the structure of the **Regulatory Documents (Program View)**.

Searching for Folders

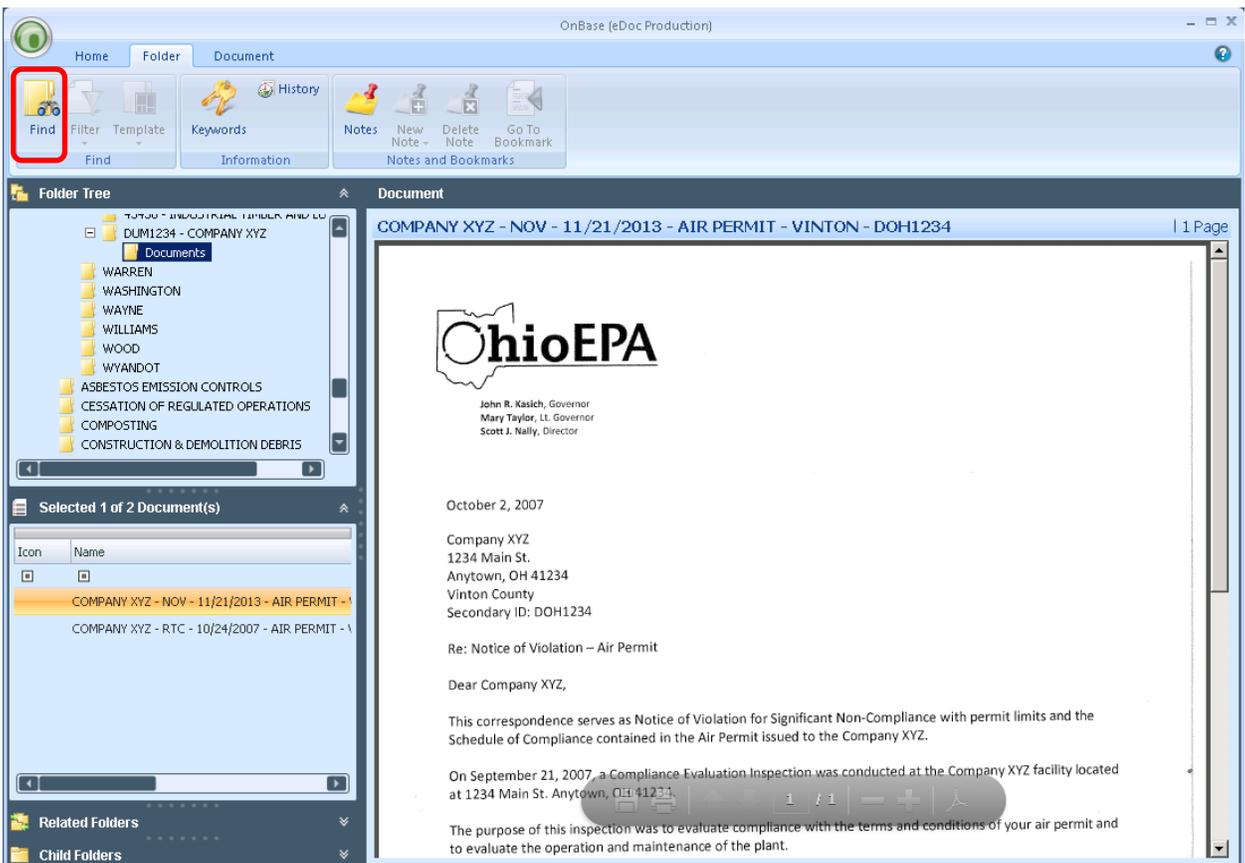
You can search for folders using the **Find Folders** dialog box, which is displayed when you initiate a folder search from the **Folders** window or when you open a folder that is set up for child folder searching.

In this example we will look for all documents related **the document previous indexed**.

1. Navigate to the **Folder** tab.



2. Click on the **Find** button on the **Find** ribbon.

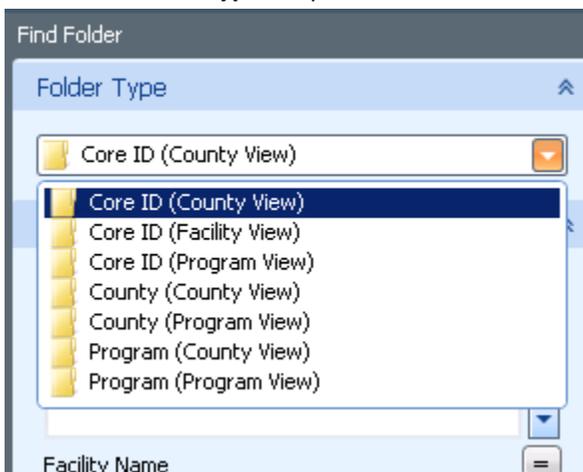


3. The **Find Folders** pane is displayed.



The screenshot shows the 'Find Folder' dialog box. At the top, the title is 'Find Folder'. Below it is a 'Folder Type' section with a dropdown menu currently set to 'Core ID (County View)'. Underneath is a 'Keywords' section with three input fields: 'Core ID', 'County', and 'Facility Name'. Each field has a small icon to its right. At the bottom of the dialog, there is a 'Results' section with a dropdown arrow and three buttons: 'Find', 'Clear', and 'Cancel'.

4. From the **Folder Type** drop-down, review the folder options available.

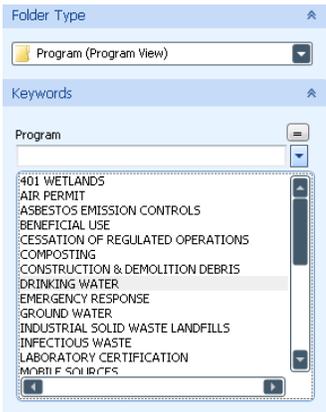


The screenshot shows the 'Find Folder' dialog box with the 'Folder Type' dropdown menu open. The dropdown list contains the following options: 'Core ID (County View)', 'Core ID (Facility View)', 'Core ID (Program View)', 'County (County View)', 'County (Program View)', 'Program (County View)', and 'Program (Program View)'. The 'Core ID (County View)' option is currently selected and highlighted. Below the dropdown, the 'Facility Name' input field is visible.

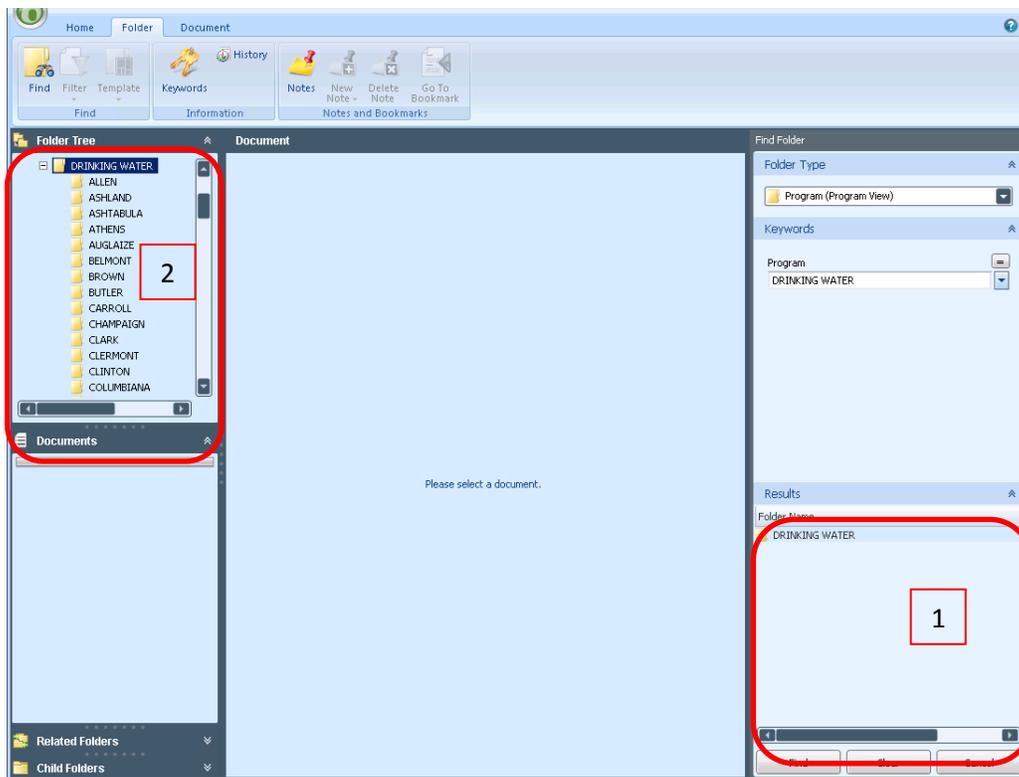
Each **Folder Type** in the drop-down is named based on the search criteria and the folder results that will be displayed. For example, the **Core ID (County View)** prompts users to enter a **Core ID**, **County** and/or **Facility Name** keywords. When the user selects the **Find** button at the bottom of the **Find Folder** pane, the **Results** pane displays any folders that have documents matching the criteria entered.

This functionality is very useful when there are a large number of folders in the eDoc solution.

- To locate the documents related to the program, find the **Program (Program View) Folder Type** and select a program from the **Program** drop-down.



- Click the **Find** button.
- The Results will be displayed in two places:
 - The **Results** pane will display the **Folder Name** that is related to the search.
 - The **Folder Tree** will open to the resulting folder and will highlight the folder.



Note: If a document does not have a **Core ID** it will **NOT** appear in any folders. Every folder requires that the documents contained within will have a **Core ID**. In the event that the **Core ID** is unknown at the time the document is imported, it will be routed to a workflow and a specified user will determine the **Core ID**.

Utilizing Full Text Search to Retrieve Documents

The Ohio EPA eDoc solution will allow users to utilize text search to perform document retrieval. For example, a user may be trying to find an **RTC** (Return to Compliance) document for a case in the city of Anytown that happened in October of 2007. Because city is not a keyword for the document, users cannot filter the results by the city. Using a Full Text Search users can enter “Anytown” in the **Search Text** under the **Full Text Search** pane as well as any keywords know, to retrieve documents with the word “Anytown” anywhere on the document.

1. Navigate to the **Home** tab and click the **Retrieval** button.
2. Select the **RTC** Document Type and enter the following date range into the **Keywords and Date Range Range** pane.

Keywords and Date Range

From To

Secondary ID

Core ID

Facility Name

County

Program

If you know what **County** Anytown is in, you can enter it in the **County** keyword field.

3. Additionally, enter **Anytown** as the **Search Text** in the **Full Text Search** pane.

Full Text Search

Search Text:

- a. In addition to a default search, Full Text searching allows users to use complex searches. The following table will explain the complex search types:

Exact Phrase

Use double quotes around an exact phrase to return only documents that contain that exact phrase.

For example, **“bob jones”** will not return a document that contains the phrase “Bob Smith and Sally Jones” but will return a document with the phrase “Bob Jones and Sally Smith.”

The following items also apply to exact-phrase searches:

	<ul style="list-style-type: none"> • When highlighting the results returned, special characters may be ignored by the Autonomy IDOL service. This means that while the results returned are accurate, some phrases that contain special characters may also be highlighted as if the special characters had been contained in the exact search. • If a word in the phrase contains a suffix (such as s, ing, ed), results may also be returned for documents that contain the root word. For example, the phrase roots rock will accurately return and highlight documents that contain the exact phrase roots rock, but may also return documents that contain root rock, though root rock will not be highlighted in those documents.
Boolean	<p>Use boolean operators to limit search results.</p> <ul style="list-style-type: none"> • AND: Both terms must match. • OR: Either term can match. • NOT: The term must not match. <p>For example, Tom AND Jerry returns only those documents that contain both Tom and Jerry; Tom OR Jerry returns documents that contain either Tom or Jerry or both; and Tom NOT Jerry returns documents that contain Tom, but only if they do not also contain Jerry.</p>
Soundex	<p>Construct a Soundex search to return documents that include the search term entered and any variations that sound like, or whose letter pattern is similar to, the term entered. Soundex searches are constructed using the S operand and enclosing the search term in curly brackets: S{term}.</p> <p>For example, a search for S{King} will return King, Kong, Kuang, and Kuong.</p> <p>Note: Words must start with the same letter as the term you entered to be returned. In the example above, Ling would not be returned.</p>
Fuzzy	<p>Construct a Fuzzy search to return documents that include the search term entered and any variations based on that term. Fuzzy searches are constructed using the F operand and enclosing the search term in curly brackets: F{term}.</p> <p>For example, a search for F{department} will return department, departments, departmentalize, and departmental.</p>
Near	<p>Construct a Near search to return documents that include the search terms entered within close proximity to each other, as defined by the input. Near searches are constructed using the N operand and</p>

	<p>enclosing a comma-separated list of terms that should be close to each other in curly brackets: N3{term1, term2}. The proximity of the terms is defined by the number immediately after the N operand.</p> <p>For example, a search for N3{term1, term2} will only return results where term2 is found within three words of term1.</p> <p>Note: Not all words are counted when determining proximity. Common words (such as I, am, the, a, an, and, and etc.) are not counted when determining proximity.</p>
Thesaurus	<p>Construct a Thesaurus search to return documents that include the term entered, as well as any other terms that have been configured as synonyms of the term entered.</p> <p>Note: Full-Text Indexing Server for Autonomy IDOL does not include a default thesaurus. If a thesaurus has not been configured for the term entered, thesaurus results are not returned.</p> <p>Thesaurus searches are constructed using the T operand and enclosing the term to search for and match synonyms for in curly brackets. For example, T{car} returns documents with car and automobile, as long as the thesaurus has been configured correctly.</p>

4. Click **Find**.
5. The **Search Results** for a Full Text Search include columns for **Score, Name, File Type,** and **Summary**.

Score	Name	File Type	Summary
96.28	COMPANY XYZ - RTC - 10/24/2007 - AIR PERMIT - VINTON - DOH1234	PDF	oioEPA John R. Kasich, Governor Mary T

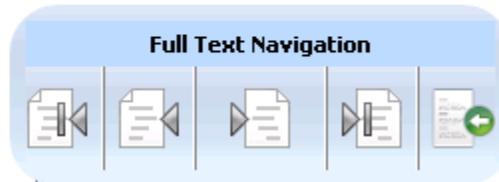
Note: The **Score** indicates how closely the document matches the search criteria. The score is a percentage based on the number of matches compared to the total amount of text in the document. The higher the score, the more likely it is the document the user is searching for.

6. Double-click on the document to open it.

7. The PDF rendition of the document will open. The value entered in the **Full Text Search** will be highlighted in yellow.

October 24, 2007

Company XYZ
1234 Main St.
Anytown, OH 41234
Vinton County
Secondary ID: DOH1234



Re: Return to Compliance – An return

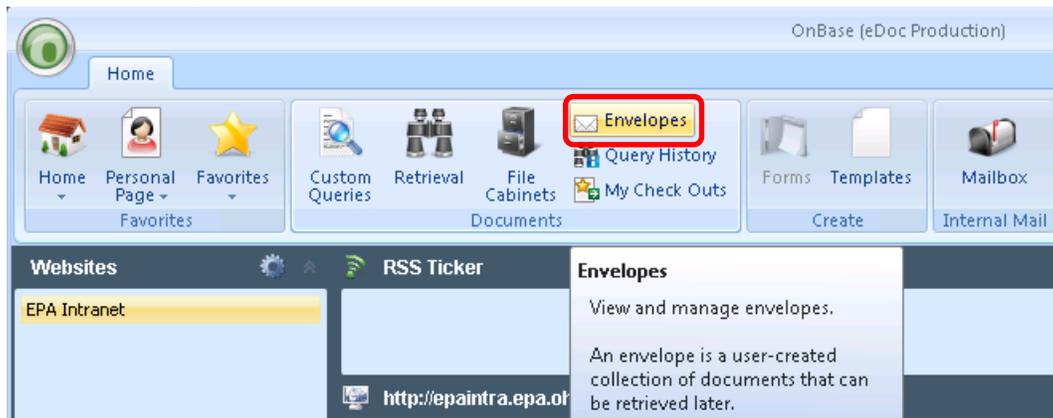
Envelopes

Envelopes provide a way to bundle documents together for easy access.

For example, an inspector may want to pull up a **NOV** (Notice of Violation) for a facility and doesn't want to search for the document every time. Inspectors may even create envelopes for each facility.

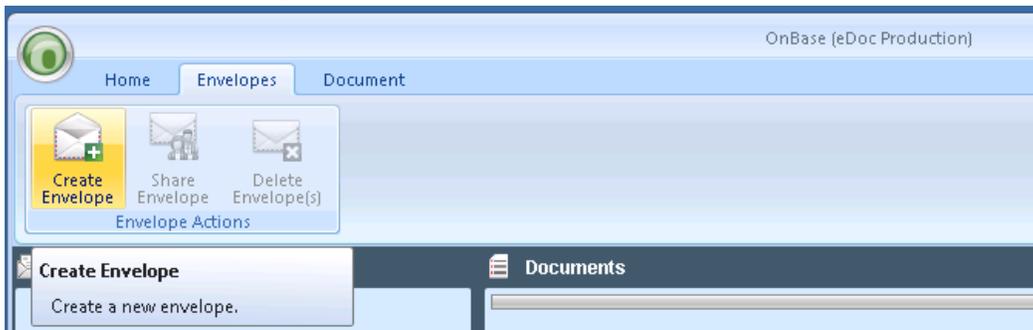
In this example users will create an envelope for Company XYZ, add documents to the envelope and retrieve the envelope.

1. Click the **Envelopes** button on the **Documents** ribbon.

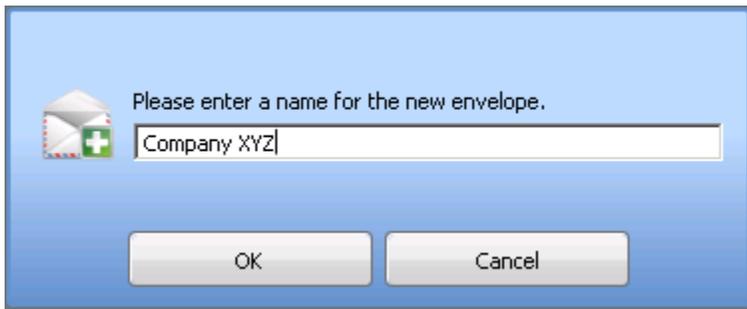


2. The **Envelopes** tab will display.

3. Click the **Create Envelope** button.



4. Enter **Company XYZ** for the name of the new envelope.



5. Click **OK**. eDoc will confirm that the envelope has been created.

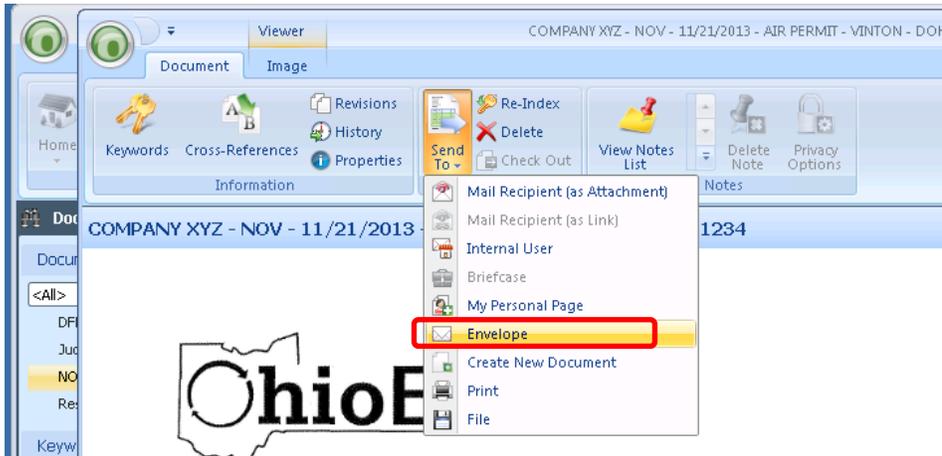


6. Verify that the envelope has been created.

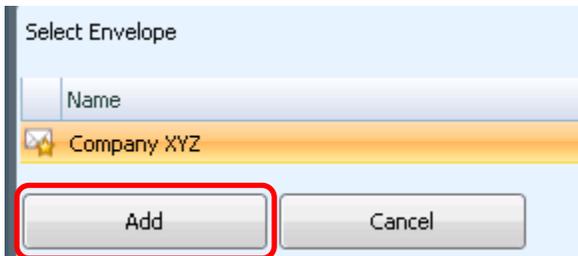


7. Return to Document Retrieval.
8. Utilizing a Full Text Search, retrieve all **NOV** documents for **Company XYZ**.

9. Select the document(s) from the hitlist and click the **Send To** button and select **Envelopes**.



10. Select the **Hertz** envelope and select **Add**.



11. Return to the **Home** tab and select the **Envelopes** button.

12. Verify that the document(s) reside in the envelope.



Definitions

AutoFill Keyword Set

AutoFill Keyword Sets are used to automate and standardize data entry. When applied to Document Types, AutoFill Keyword Sets increase the speed and accuracy of indexing, especially when indexing large volumes of documents.

- An AutoFill Keyword Set is a configuration of Keyword Types that includes a Primary Keyword Type and one or more Secondary Keyword Types.
- If an AutoFill Keyword Set is assigned to a Document Type, each set of Keyword Values (the Primary Keyword Value and its corresponding Secondary Keyword Values) can be considered an instance.
- A value entered into the Primary Keyword Type field during indexing of a document triggers the population of the remaining Secondary Keyword Types.

Document

A document is a piece of information that your organization has chosen to store electronically in the system. Letters, contracts, scanned images of contracts, photographs, and e-mail messages are all examples of documents.

Documents can be retrieved based on Keyword Values that are associated with the document. Storing documents in the system eliminates the need for paper documents. Documents can be revised, viewed, annotated, and tracked within the system.

Document Type

Each document that is brought into the system is assigned to a Document Type. Document Types group together documents with similar characteristics. For example, a Document Type of **Judicial Order** might be used to define image files of judicial orders. Document Types allow you to work with groups of documents rather than individual documents. For example, you can limit your document searches to only those documents of a certain Document Type.

Document Type Group

A Document Type Group represents a logical grouping of Document Types in the database. Document Type Groups allow the system to organize, search for, and locate a document more efficiently.

Envelope

You can place any documents you want into an envelope, regardless of whether they have anything in common. When an envelope is opened, it displays a list of documents that have been placed in it. Envelopes provide you with a way to group documents together for easy access. Only the envelope's creator can view that envelope. Envelopes are an alternate way to retrieve documents; the documents remain accessible through standard document retrieval methods.

File Cabinet

A file cabinet is the highest organizational unit in a folder hierarchy. The file cabinet helps organize folders for easy retrieval. You can place eDoc folders into different cabinets just as you would physically with paper folders.

Image Documents

Image documents, such as pictures of real estate can come from several native file formats, such as .tiff, .jpg, or .bmp. Once they are imported into the system, they are stored in their native file format. If the file does not have a native file format when imported, it will be stored as the chosen File Type.

Keyword Types

Keyword Types and Keyword Values provide the ability to assign descriptions to documents. Effective indexing and classification of Document Types is essential for efficient document management and retrieval.

The system administrator assigns all Keyword Types to documents in your system.

Every Document Type has associated Keyword Types. For example, the **Warning Letter** Document Type has the **Secondary ID**, **Core ID**, **Program**, and **County** Keyword Types assigned to it.

A Keyword Type may be used for many different types of documents. For example, you can use a Keyword Type Amount for almost any Document Type for which you need to store an amount.

The system administrator sets up Keyword Types for each Document Type.

Keyword Values

Keyword Types and Keyword Values provide the ability to assign descriptions to documents. Effective indexing and classification of Document Types is essential for efficient document management and retrieval.

When a document is indexed, its Keyword Types are assigned Keyword Values. A Keyword Value is the specific value that helps to identify documents in the system.

- Some Keyword Types require their values to be a specific format, such as a date, a number, or a currency value.
- Some Keyword Types will have default values assigned to them, so when you import a document into the system, the default value is displayed in the Keyword Type field.
- Some Keyword Values display automatically on an open document.

Text Documents

Text-based documents have special features available for selecting or searching text. Examples of text-based documents in the system are ASCII files, PCL documents, text renditions of image documents, text-based documents such as checking statements that have been imported into the system, and system reports or verification reports created during processing.

All text documents in the system are read-only, thus the contents of the text documents themselves can never be modified or deleted. The associated attributes however, such as Keyword Values, notes, file types or Document Types, can be modified by a user with the appropriate rights. Users with Delete

document rights can delete the whole text document, not delete its contents.

Text documents have specific buttons, which are different from the buttons and options available to image documents.

User

Each person using the system is known as a user. When a user logs onto the system, he or she supplies a unique user name and a password.

This allows greater flexibility for system operation. For example, each user can configure his or her workstation settings with personal preferences.

User Group

A system User Group is similar in concept to a user group on your network. User Groups are granted rights to access system functionality.

Access to various resources, such as scan queues and Document Types are controlled by User Group rights. A user can be a member of multiple User Groups, in which case the user has access to the sum of all functionality granted for each group.

User Groups provide easier administration because new users inherit the access rights of the group to which they are assigned.