



izidocs help

User Manual

Version 2.0.0

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1. Introduction

This document contains instructions on how to use izidocs Document Management Solution. You can use it in the following ways:

1. Read through it as an introduction to izidocs and its functionality.
2. Read through it while being logged into the actual solution and trying out the various buttons/actions. This way the user manual becomes your training manual.
3. Refer to it every time you need to remind yourself about specific tasks. Click the links in the Table of Contents to go directly to the specific section of interest. You can return to the table of contents by clicking [Back to top](#) at the end of every section.
4. Search for specific keywords using the search functionality of your browser or PDF viewer.

izidocs is browser based. For speed and security use the latest version of a browser such as

1. Google Chrome
2. Mozilla Firefox
3. Apple Safari
4. Microsoft Internet Explorer

For optimal user experience and to have access to the full izidocs functionality you need to download and install [Izidocs Desktop](#), as described in the appropriate section of this manual.

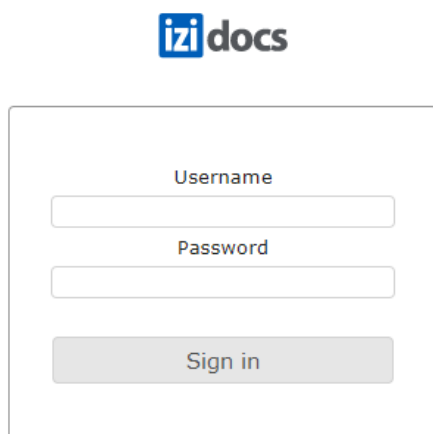
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2. Login

Open your browser and type in the login address. Izidocs Desktop opens at the correct page automatically.

The login address together with the required Username and Password is given to each user separately. Some companies use internal web addresses and some external web addresses, depending on where their solution is installed.

Once you enter the address provided you will reach the login page:



The image shows the Izidocs login page. At the top is the Izidocs logo, which consists of the letters 'izi' in a blue square followed by the word 'docs' in a dark blue font. Below the logo is a white rectangular box containing the login form. The form has three elements: a text input field labeled 'Username', a text input field labeled 'Password', and a grey button labeled 'Sign in'.

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Use your Username and Password to login. If you are logging in for the first time you will be asked to change your password. Each company defines its own rules on what can be used as a password in order to enforce the use of secure passwords.

Some companies use single sign-on solutions such as Microsoft Active Directory. In this case users only login to their PC once and are not required to use a separate password to use izidocs.

Please note that it is possible for the same user to be logged on to izidocs using the same username and password on different browsers, PCs, and/or tablets at the same time. Please keep in mind that some actions done on one device (such as creation of new folders, documents, versions) will not appear on the other, until you refresh the relevant section of the solution.

izidocs will log you out automatically after a certain period of inactivity, as defined by your company. If this happens, login again.

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3. izidocs screen areas

izidocs is one screen solution, where you can access all information, documents, actions, etc. If you move and let your mouse hover above any button you will see the name of the button, i.e. what it does.



On the very top of the screen, next to the logo, we have the search bar, the username and the settings button, which includes access to Reports, Tools, [Install Desktop](#), Utilities, Change Password, Sign Out, About izidocs and Help.

On the left (top) we have the folder finding and managing area.

On the left (bottom) we have the document list (of a particular folder/subfolder, or the search results).

Once a document is selected from the document list, its details, notes, folders, versions and preview can be seen on the right column.

search bar, username, settings area

folder finding and managing area

document list area

document details, folders, versions and preview area

ID	Name	Date	Last editor
400	Purchase plane.pdf	30/10/2014 09:33:55	system [system ID: 2]
448	Purchase hotel.pdf	05/11/2014 10:33:45	system [system ID: 2]
483	Purchase document management solu...	17/11/2014 21:15:07	system [system ID: 2]
840	Airport purchase.docx	11/05/2015 15:10:24	Administrator [Administrator User]...
343	Purchase of software.docx	06/11/2014 01:09:04	Administrator [Administrator User]...
131	Standard E...	...	system [system ID: 2]
130	Standard Eurostar Group Ltd T&Cs.pdf	24/10/2013 09:52:19	system [system ID: 2]
61	Procurement Management Plan.pdf	23/10/2013 15:45:34	system [system ID: 2]
120	Procurement Assistant (Temporary em...	24/10/2013 09:19:17	Administrator [Administrator User]...
902	Luxemburg.docx	04/05/2015 17:55:18	Administrator [Administrator User]...
74	Expense Report.xls	23/10/2013 15:51:47	Administrator [Administrator User]...
73	Expense Report.pdf	23/10/2013 15:50:42	system [system ID: 2]
200	Apple TV - technical specifications.pdf	11/11/2013 09:08:43	system [system ID: 2]
705	Pricing_for_Software_Product_Manage...	24/02/2015 16:16:29	system [system ID: 2]

Purchase plane.pdf
1 pages 13KB ID: 400
Date 30/10/2014 09:33:55

Notes:

Folders
/Company Management/PQRS Limited/Directors Resolutions

Versions

Type	Time	Editor
Modified	30/10/2014 09:34:04	Administrator [Administrator User ID: 3]
Modified	29/10/2014 22:19:34	Administrator [Administrator User ID: 3]
Created	29/10/2014 21:58:47	Administrator [Administrator User ID: 3]

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document details, folders, versions and preview area

PQRS Limited
(Registration number: 456789)

WRITTEN RESOLUTION OF THE DIRECTORS ON DD/MM/20YY

DIRECTORS:
Alison Gray, Director
Sarah Small, Director

It was resolved that:

A. Purchase of plane

1. PQRS Ltd will purchase a private jet for the needs of the company directors.

Signed:

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4. Document search

There are two ways to search for documents in izidocs

1. [Simple document search](#)
2. [Advanced document search](#)

You can use [wildcards](#) in your searches.

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4.1 Simple

The easier way to find a document is to use the search bar on the right of izidocs logo. This will be performing a “Google like” search on all documents that the user has access to and return the most relevant results.

Simple search checks all documents properties, inside documents, inside emails and in email attachments.

The search only displays folders and documents the specific user has access to.

The results of the search are displayed in the [document list area](#).

The screenshot shows the izi docs web interface. At the top left, the 'izi docs' logo is visible, with a search bar to its right containing the text 'maria'. The search bar is circled in red. Below the logo, there are navigation tabs: 'Tree', 'List', 'Recent', and 'Shortcuts'. The 'Tree' view is active, showing a folder structure on the left side. Below the folder structure, there is a search bar with the text 'Search: maria' and a result count of '[18 records]'. A table below the search bar displays the search results. The first row is highlighted, and a red arrow points to the 'Name' column of this row. The table has columns for 'ID', 'Name', 'Date', and 'Last edit'. The email preview on the right side of the interface shows the details of the selected document, 'Our lunch meeting.eml'. The preview includes the sender information, subject, and a preview of the email content. The preview content is circled in red.

ID	Name	Date	Last edit
991	Our lunch meeting.eml	14/05/2015 16:20:53	system [system][ID: 2]
982	Eleni.pdf	12/05/2015 11:26:55	system [system][ID: 2]
981	Test 345.xlsx	12/05/2015 11:15:34	Administrator [Admi]
529	Milk chocolate - Copy.docx	04/05/2015 17:58:39	Administrator [Admi]
894	Sample letter.doc	04/05/2015 12:45:07	Administrator [Admi]
891	Sample letter.doc	04/05/2015 12:33:04	Administrator [Admi]
889	Sample letter.doc	04/05/2015 12:17:11	Administrator [Admi]
751	BOD2 - Copy.docx	05/03/2015 10:26:19	Administrator [Admi]
608	Dinos.docx	05/02/2015 11:58:57	Administrator [Admi]

Our lunch meeting.eml

6KB ID: 991

From: Ares Neophytou <ares@telemobilo.com>
To: Emily White <emily@izidocs.com>
Date: 14/05/2015 16:20:53
Subject: Our lunch meeting

Notes:

Folders:

/Customers/128734/Email
/user/emily@izidocs.com/Email

Versions:

Type	Time	Editor
Created	14/05/2015 16:21:10	system [system][ID: 2]
Last modified	14/05/2015 16:21:10	system [system][ID: 2]

Preview

Dear Emily,

Can you please ask Maria to join us for lunch so that we can discuss our potential investment in her company.

Thanks
Ares

Ares Neophytou, Ph.D.
Director

Telemobilo Limited
5 Kimonos Street, Egkomi

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4.2 Advanced

The Advanced Document Search (see below) enables a user to specify search criteria such as folder/subfolder, from, to, date(s), document size, etc.

In the example below we are searching for emails that have attachments and that have the word “emily” in the To. This search would find emails sent to both emily@izidocs.com and emily.surname@gmail.com.

The results of the search are displayed in the [document list area](#).

The screenshot displays the izi docs interface with an Advanced Search dialog box open. The dialog box has the following fields and settings:

- ID(s):
- Internal ID(s):
- Related Emails for ID(s):
- From:
- To: emily
- Cc:
- Subject:
- All the folders:
- Any of the folders:
- Does not have:
- Creator(s):
- Last editor(s):
- Has attachment: Yes
- Show deleted: No
- Sort by: Date Desc
- Filename:
- All the words:
- Any of the words:
- Does not have:
- Date range:
- Received Date range:
- Original Date range:
- Creation Date range:
- Last Modified Date range:
- Size range:
- Pages range:
- Document type(s):
- File type(s):
- File extension(s):

The search results table shows 4 records:

ID	Has	To
974	Y	"emily@izidocs.co
972	Y	"emily@izidocs.co
968	Y	emily@izidocs.co
937	Y	Emily White <emil

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4.3 Wildcards

A wildcard is an advanced search technique that can be used to maximize your search results.

izidocs supports single and multiple character wildcard searches within single terms. Wildcard characters can be applied to single terms, but not to search phrases. You can also use the wildcard searches in the middle of a term.

Wildcard Search Type	Special Character	Example
Single character <i>(matches a single character)</i>	?	te?t will find both test and text corrup? will find corrupt, but not corruption or corrupted
Multiple characters <i>(matches zero or more sequential characters)</i>	*	corrupt* will find corrupt, corruption, corrupted, but not anticorruption *rupt will find corrupt or interrupt, but not corruption or interruption *rupt* will find corrupt, corruption, anticorruption, interrupt and interruption co*upt will find corupt or corrupt

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5. Folder finding and managing area

On the top of this area there are filters that assist the user to find a folder quickly, even among hundreds of thousands of folders.

At the top of the area you can use tabs to chose how to view folders:

1. Tree
2. List, where instead of viewing a folder/subfolder structure you view paths that match the folder search
3. Recent, where you see the folders you used recently
4. Shortcuts, where you can place shortcuts of folders you frequently use

The screenshot displays the izi docs interface. At the top, there is a search bar labeled "Folder search bar" containing "pq dir". To its right are "Folder search buttons" (refresh, back, forward, search) and "Folder actions" (up, down). The left sidebar shows a folder tree with "Directors Resolutions" selected, and a context menu is open over it, listing actions like Upload, Move, and Delete. The main area shows a list of folders and a preview of a document titled "Limassol apartment one.pdf".

ID	Has a	Pages	Name	Date
3381	Y	1	Limassol apartment one.pdf	02/02/2020
3296	Y	2	KOA asya.pdf	23/10/2019
3291	Y	1	Government grant 2.pdf	07/10/2019
3264	Y	1	Purchase boat.pdf	24/09/2019
3228	Y	1	Thalassa AAAAAAAA.pdf	21/09/2019
3116	Y	0	Directors resolution.docx	09/10/2019
3115	Y	0	Directors resolution.docx	09/10/2019
3106	Y	0	Directors resolution lowrise.docx	08/10/2019
3102	Y	0	Directors resolution highrise wqe cvhdhcfh.docx	08/10/2019
3045	Y	1	K-01 sgdsfgdsg.pdf	11/09/2019
2996	Y	1	Island coffee.pdf	26/09/2019
2994	Y	1	Espresso Coffee.pdf	20/09/2019
2942	Y	0	201802 Carnival Aglantzia program.jpg	13/09/2019
2941	Y	6	201802 Carnival Limassol program.pdf	08/09/2019
2932	Y	1	Oracle 23.pdf	14/09/2019
2846	Y	0	Sell shinvard.docx	21/09/2019

Document Preview: Page 1 of 1

PQRS Limited
(Registration number 456789)

WRITTEN RESOLUTION OF THE DIRECTORS ON 02/02/2020

DIRECTORS
AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA
BBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBBB

Alison Gray, Director
Sarah Small, Director

It was resolved that:

1. The Secretary is hereby instructed and authorised to give effect to the above resolutions and to file with the Registrar of Companies any forms or documents as required.

Signed:
Alison Gray, Director
Sarah Small, Director

You can also Pin folders to the top right of the “folder finding and managing area”. Tab Actions, the downward pointing triangle at the top right of the “folder finding and managing area”, allows you to manage your tabs and pins.

Start writing parts of a folder’s name in the folder search bar (or parts of a folder’s description) and the relevant folders will appear. You can spell a few letters of a folder’s name and continue with a few letters of a subfolder’s name separated by a space or slash (/) to get quickly to the folder you need.

In the example below by spelling “pq dir” we found the subfolder Director’s Resolutions, in folder PQRS Limited.

The folder search buttons, to the right of the folder search bar, provide the following functionality:

1. Clear: clears the search bar from any text
2. Refresh: refreshes the folder structure, which can be helpful in order to see a folder that has just been created by another user
3. Reset: closes all subfolders and shows only the top level of folders
4. Options: which allow you to choose whether to display folder description and how the folder search bar works

You can select any folder/subfolder by clicking on it, and then the [document list area](#) will list all documents in this specific folder/subfolder. In the tree view, in order to view the subfolders of a folder you need to click the triangle on the left of the folder icon.

You can access all Folder Actions with right mouse click on the folder or by selecting a folder and using the drop down menu (downward pointing triangle).

Folder actions include:

1. Upload (for documents - multiple documents can be uploaded simultaneously)
2. Upload Folder (uploads folders with their subfolders and documents)
3. [Scan to Folder Barcode](#)
4. Link to Folder (provides a link which you can email to somebody, so that they can open the folder directly on their PC, provided they have access to it)
5. Properties
6. Security (shows who has access to the folder, and what kind of access)
7. Folder actions such as Rename, New Subfolder, Edit, Copy (copies folders and subfolders, with or without documents), Move, Move to Main Folder, Merge (with another folder), Delete
8. Add to Shortcuts
9. Pin to Menubar (it may be better to add a folder to shortcuts and rename the shortcut to make it shorter, before you pin it to the top right of the “folder finding and managing area”)
10. New Main Folder

Please note that not all users can perform all actions to all folders.

Depending on the size of your screen, Folder Actions might include a scroll bar, which you have to use in order to see all available actions.

Each user gets his User Folder in “user”, which contains his Email folder, Inbox folder (working folder) and Personal folder (for his personal documents).

In some izidocs installations there are some types of folders (e.g. customers) that include automatic opening of subfolders. So, if for example a new customer folder is opened, then the predefined subfolders with the appropriate access rights are opened.

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6. Document list area

The document list displays the

1. documents in the folder/subfolder selected in the “folder finding and managing area”, or
2. the search results

On the top of the document list area you can find:

1. Drop down to choose how to sort the documents in the list
2. List and document actions (this menu also appears using right mouse click on documents), including:
 - a. Refresh (useful to see documents that are added/edited by others. Note that when you upload documents (can also use Drag and Drop) to a folder, the list changes to display only the documents you have just uploaded. Please “refresh” to see the complete list of documents
 - b. Search within this folder (opens an advanced search box to search within the specific folder)
 - c. Choose table columns and their order (you can drag and drop or use the buttons to customise your columns)
 - d. Document actions, such as Include Subfolders, New Document (also from [Templates](#)), Copy/Paste Document(s), Move, Download, Edit Properties and Delete

Please note that you can select multiple documents using SHIFT and CTRL buttons and then perform actions on all of them.

The screenshot shows the izi docs web interface. On the left, a folder tree is visible with 'Airbus A380' selected. Below it, a table lists documents with columns for ID, Has a, Pages, and Name. A dropdown menu is open over the table, showing 'Date Desc' as the selected sort option. To the right, a file explorer window shows a 'Test' folder on the desktop containing 'Calculations.xlsx', 'Christina.docx', and 'Maria.docx'. A blue arrow points from the 'Drag and drop to upload' text to the file explorer. Red arrows point to the 'Sorting' dropdown and the 'List and document actions' menu. A red arrow also points to the 'Select multiple' text.

ID	Has a	Pages	Name
3338	Y	0	Maria.docx
3315	Y	0	XAK.xlsx
3306	Y	1	AGM 123.pdf
3300	Y	0	Card collection.docx
3297	Y	0	Bank ΣΗΜΕΙΩΜΑ.docx
3302	Y	0	Athens 123.docx
3305	Y	0	ΚΑΘΗΜΕΡΙΟΝ.pdf

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7. Document details, folders, versions and preview area

This area displays the document selected in the Document List.

The top of the area displays the document name and document actions such as Lock (for other users), Download, Delete and a drop down menu with all other actions.

This area is divided in Panels which you can maximise or minimise, and display or hide according to which actions you usually perform. Note that your selection of what you display and how is saved for you, until you change it again using the drop down menu.

The panels are:

1. Properties
2. Notes
3. Folders
4. Versions
5. PDF tools
6. Preview

The screenshot shows the izi docs interface. The top bar displays the document name "Directors resolution dinos xxxyt.pdf" and the user "Administrator". Below this, there are tabs for "Tree", "List", "Recent", and "Shortcuts". The main area is divided into several panels: "Properties" (showing 1 page, 24KB, ID: 627, Date: 13/01/2015 12:43:06), "Notes" (kadsad adssd), "Folders" (listing various project folders), and "Versions" (a table of document versions). A "Preview" panel at the bottom shows the document content, which includes the text "KLMO Limited" and "WRITTEN RESOLUTION OF THE DIRECTORS ON DD/MM/20YY". A red circle highlights the "Actions" menu, which is open and shows a list of actions including Lock, Delete, Edit Properties, Edit Notes, Edit Folders, Refresh, Download, Add/Replace Pages, Add New Version, Scan New Version Barcode, Email as Attachment (Outlook), Email as Attachment (izidocs), Print, Open in New Window, Hide Properties, Hide Notes, Hide Folders, Hide Versions, and Show PDF Tools. Red arrows also point to the "Panels" section, which is a list of folders on the left side of the interface.

Type	Time	Administrator
Modified	08/04/2015 09:49:03	Administrator
Modified	08/04/2015 09:48:52	Administrator
Modified	21/01/2015 12:43:15	system [system]
Modified	21/01/2015 12:40:55	Administrator
Created	21/01/2015 12:39:19	Administrator

KLMO Limited
(Registration number: 345678)
WRITTEN RESOLUTION OF THE DIRECTORS ON DD/MM/20YY

DIRECTORS:
Alice Stewart, Director
Mary Jones, Director

It was resolved that:

The complete list of document actions is included in the the drop down menu (some actions are also shown as action buttons on the relevant panels):

1. Lock (locks document for other users in case you want to prevent others from working on it and from creating parallel versions. Please remember to unlock it when you finish your work)
2. Delete (it deletes the document from all folders where it resides)

3. Close (removes the document from display)
4. Edit Properties
5. Edit Notes
6. Edit Folders
7. Refresh (this will show changes done by other users, such as the upload of a new version)
8. Download
9. Add/Replace Pages
10. Add New Version
11. [Scan New Version Barcode](#)
12. Email as Attachment (Outlook)
13. Email as Attachment (izidocs). You can use this even if you normally use Outlook, if you happen to be accessing izidocs from a PC or a tablet where Outlook is not set up
14. Link to Document (creates a link that you can send to other users so that they can open the document directly, provided that they have access to it)
15. Print
16. Open in New Window: this allows you to see the full document as opposed to the low resolution image that is shown in the Preview
17. Panels Show/Hide

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7.1. Properties

The top of this panel shows an icon of the document type, the document number of pages, the file size and the document ID number.

You can edit all document properties which include name, from, to, cc, various dates, subject, description, keywords, internal ID and document type.

For certain document types such as emails it is not possible to edit properties such as from, to, cc and subject, because these are properties of the email which has already been sent/received and therefore can not be changed for compliance reasons.

A full history of who edited a document's properties and how is kept in the document's versions.

The screenshot displays the izi docs web interface. At the top, the user is logged in as 'Administrator'. The main area shows a document titled 'Directors resolution 2015-05.pdf' with a status bar indicating '1 pages 48KB ID: 998' and a date of '15/05/2015 16:37:53'. A red circle highlights the edit icon in the status bar. Below this, an 'Edit Document Properties' dialog box is open, showing fields for ID (998), Name (Directors resolution 2015-05), Auto Number, From, To, Cc, Date (15/05/2015 16:37:53), Received Date, Original Date, Subject, Description, Keywords, Internal ID, and Document Type. The dialog has 'Save' and 'Cancel' buttons. In the background, a folder tree on the left shows 'Company Management' > 'ABCD Limited' > 'Directors Resolutions'. A table below the tree lists documents with columns for ID, Name, and Date. The bottom of the screen shows a document preview with a signature block: 'It was resolved that: A. All is well. Signed: John Smith Director and Zoe Cook Director'.

ID	Name	Date
998	Directors resolution 2015-05.pdf	15/05/2015 16:37:53
529	Milk chocolate - Copy.docx	04/03/2015 11:51:44
902	Luxemburg.docx	04/03/2015 11:37:20
550	Dali.docx	04/03/2015 11:32:59
839	Horse1.doc	24/02/2015 10:44:01
820	africana.docx	20/03/2015 11:06:05
778	kykkos.doc	18/03/2015 11:51:44
777	Car.docx	12/03/2015 11:37:20
776	Laodikias.docx	12/03/2015 11:32:59
752	Larnaca.pdf	05/03/2015 10:44:01
680	Oracle.pdf	02/02/2015 10:36:35

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7.2. Notes

This is a text field for notes relating to the document. People with edit access to the document can add/edit these notes. A full history of who edited the notes field and how is kept in the document's versions.

The screenshot displays the izi docs web interface. At the top, the user is logged in as 'Administrator'. The main area shows a document titled 'Purchase hotel.pdf' with details: 1 page, 59KB, ID: 448, Date: 05/11/2014 10:33:45. A red circle highlights the 'Notes' field icon. A dialog box titled 'Edit Document Notes' is open, showing the document's ID (448) and name (Purchase hotel.pdf). The notes field contains the text: 'On 12/5/2105 at 18:00 I had a telephone call with the client and he mentioned that we should try and close this before June. Emily'. The dialog has 'Save' and 'Cancel' buttons. In the background, a file list table is visible with columns for ID, Name, and Date.

ID	Name	Date
840	Airport purchase.docx	18/05/2015 15:
1...	Directors resolution for moving to belgiu...	15/05/2015 18:
708	Rain.pdf	24/02/2015 17:
660	Renew driving license.pdf	01/02/2015 21:
626	New Microsoft Office Word Document.docx	21/01/2015 12:
627	Directors resolution dinos xxxyt.pdf	13/01/2015 12:
599	Coffee proposal.docx	17/12/2014 10:
448	Purchase hotel.pdf	05/11/2014 10:

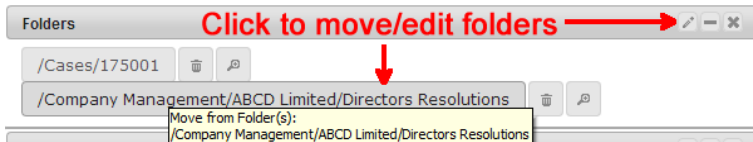
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7.3. Folders and moving documents

This panel displays all folders in which the document is located, which can be multiple.

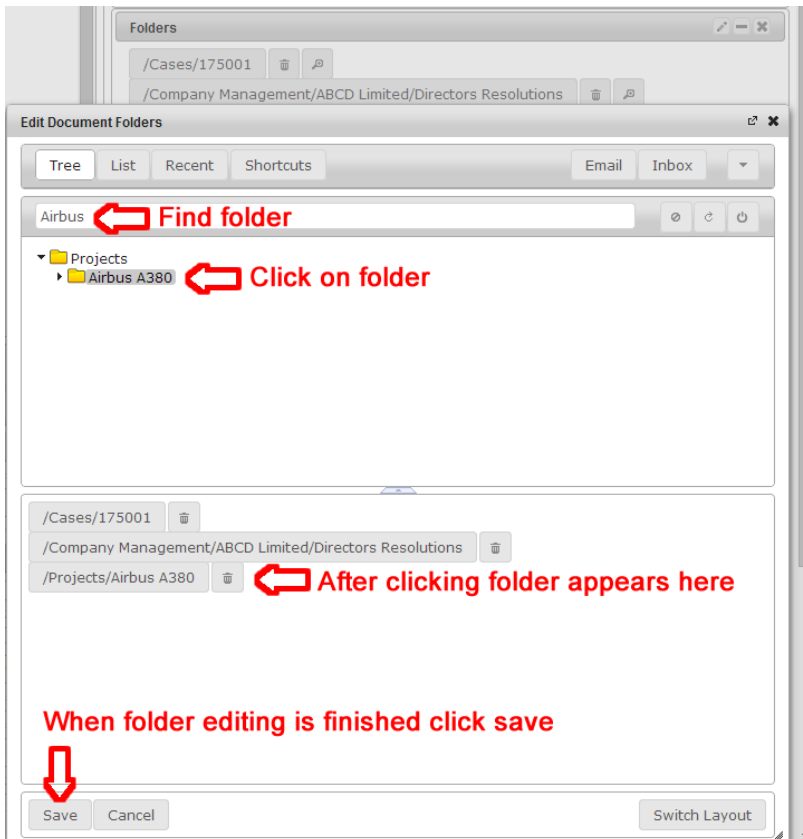
Note that even if a document is located in multiple folders it is only one document. Therefore any changes made to its properties, notes, and versions are reflected in all folders.

To move a document click on the folder you want to move it from. To add the document to more folders click on the Edit folders button.



In both cases the Edit Document Folders area opens. This looks a lot like the [Folder Finding and Managing Area](#) and you can use the same folder filters and folder shortcuts to choose the folders you want the document to be located in. At the bottom right, there is a button called Switch Layout, which displays Shortcuts and Recent folders separately of easy access.

Note that for emails that belong (sent/received) to multiple users within the company only one folder entry is displayed to avoid screen cluttering. If you hover your mouse above that entry you will see all relevant folders.



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7.4. Versions

This area displays the document's version history, i.e. who made what changes and when.

All changes made to the document properties, notes as well as the actual document (Word, Excel, Powerpoint, PDF, email, etc) are recorded.

On the top of the panel there are the version actions buttons:

1. Add/replace pages
2. Upload new version

For each version you can click on View Version. This will change the background to light blue to alert the user that he is looking at a previous version. When viewing the version all panels are adjusted to show the information relevant to that version. Exit this version viewing mode by clicking View Current Version (clock icon) at the top of the "Document details, folders, versions and preview area" to the right of the document name.

Clicking on the document icon next to the View version button makes a drop down menu appear with various options for the version:

1. Download
2. Restore
3. Copy, Copy to Inbox, Copy to current folder
4. View version details.

Version actions →

Created 15/05/2015 16:33:42 by Administrator [Administrator User][ID: 3]
Last modified 15/05/2015 16:38:00 by system [system][ID: 2]

Type	Time	Editor	
Modified	15/05/2015 16:38:00	system [system][ID: 2]	View version →
Modified	15/05/2015 16:34:10	Administrator [Administrator User][ID: 3]	📄
Created	15/05/2015 16:33:43	Administrator [Administrator User][ID: 3]	

Preview: Page 1 of 1

ABCD Limited
(Registration number: 123456)

WRITTEN RESOLUTION OF THE DIRECTORS ON 15/05/2015

DIRECTORS:

John Smith, Director
Zoe Cook, Director

Icon drop down menu

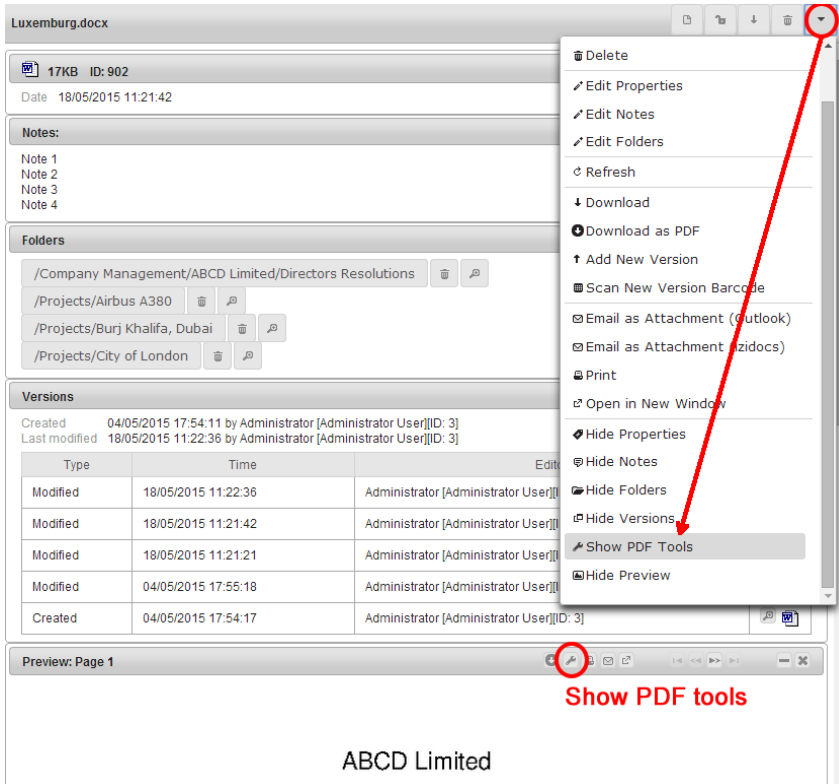
- Download
- Restore
- Copy
- Copy to Inbox
- Copy to current folder
- View Version Details

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7.5. PDF Tools

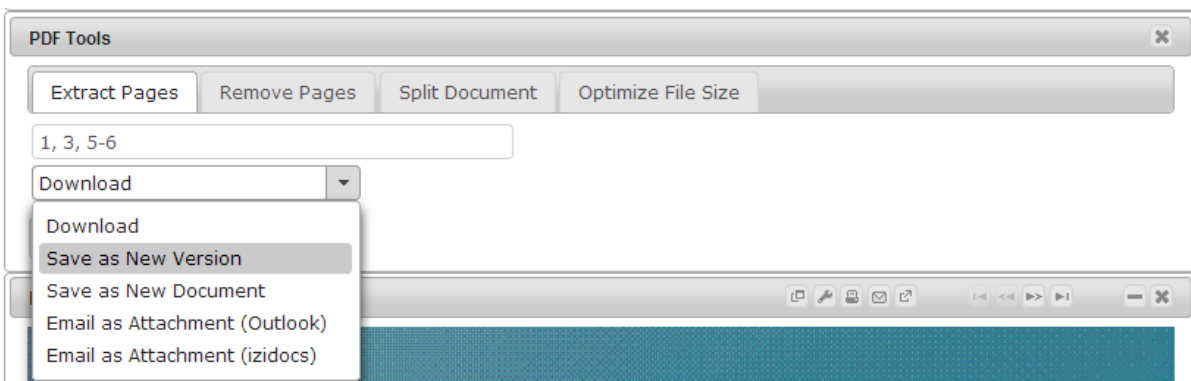
The PDF tools panel is usually hidden from view. You can open it when you are displaying a PDF document (or a document which can be converted into PDF such as Microsoft Office documents) by:

1. Clicking “Show PDF Tools” in Document Actions at the top right of the document area
2. Clicking “Show PDF Tools” in the document Preview Panel



PDF Tools include Extract Pages, Remove Pages, Split Document and Optimise File Size with color and resolution adjustment. The results of PDF Tools actions can be:

1. Downloaded
2. Saved as New Version or Document
3. Emailed as Attachment



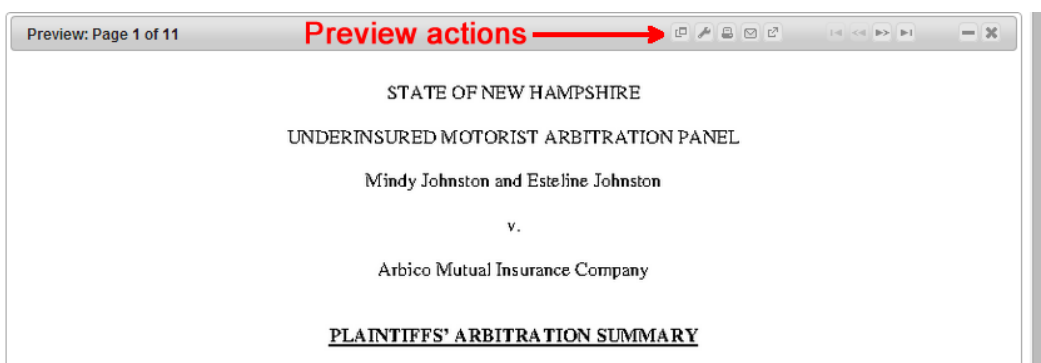
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7.6. Preview

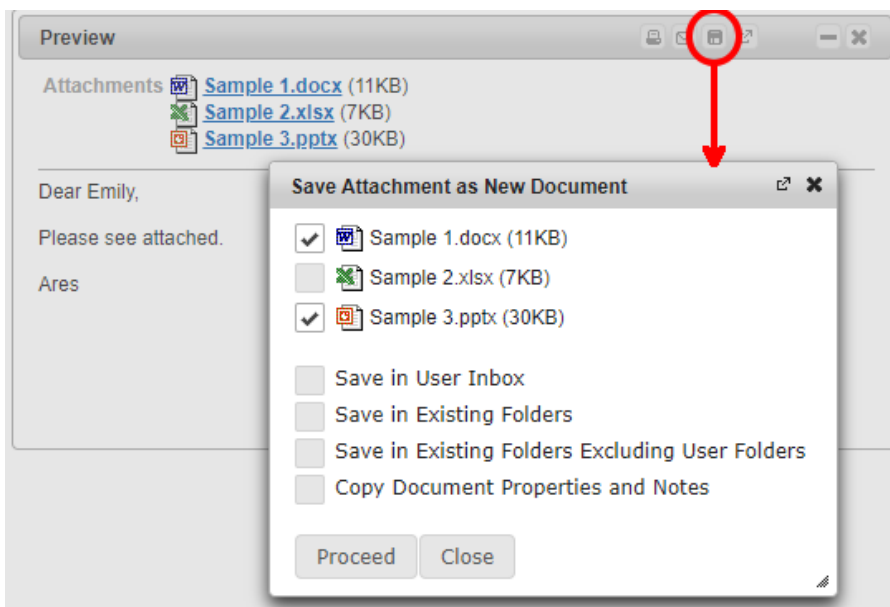
Document Preview shows low resolution images of the document. These low resolution images are intended to help you locate/identify a document quickly and take various actions.

Preview action buttons include:

1. Add/Replace pages
2. Show PDF Tools
3. Print
4. Email as Attachment
5. Open in New Window (to see a full resolution copy of the document)
6. Page navigation (First/Last, Previous/Next)



7. When you Preview an email document which has attachments, you also have the option to select and save some or all of the attachments.

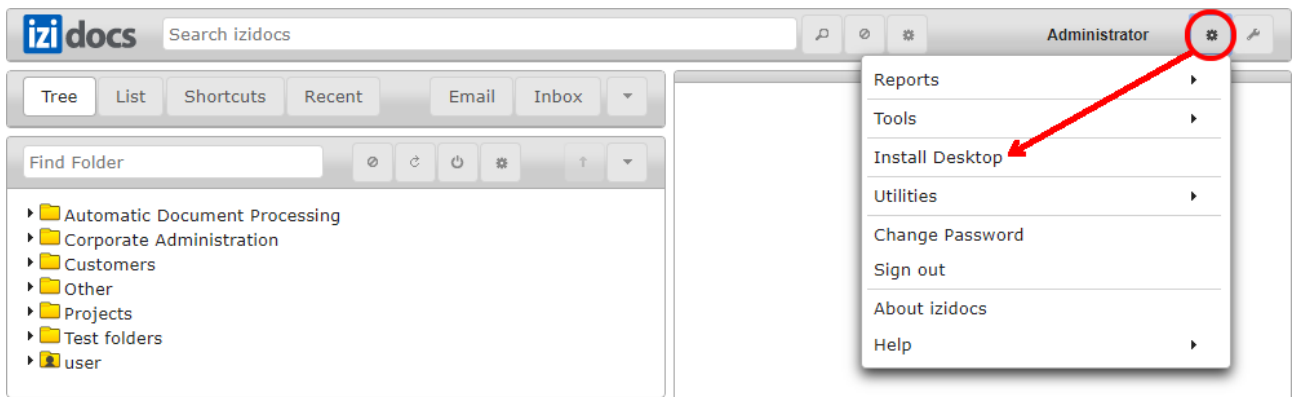


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8. Izidocs Desktop

Izidocs Desktop is a Windows application that offers additional izidocs functionality, because it integrates with your desktop in a way that normal browsers do not allow.

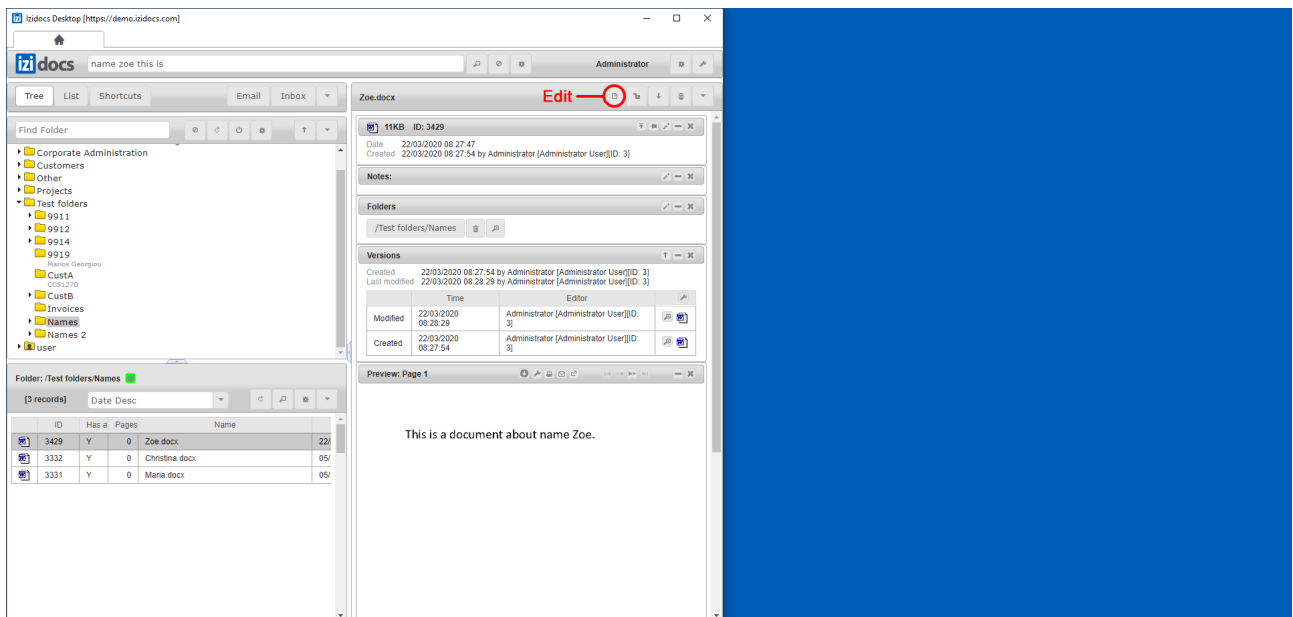
To install Izidocs Desktop, go to the user Settings menu next to the username at the top right of the screen and follow the instructions.



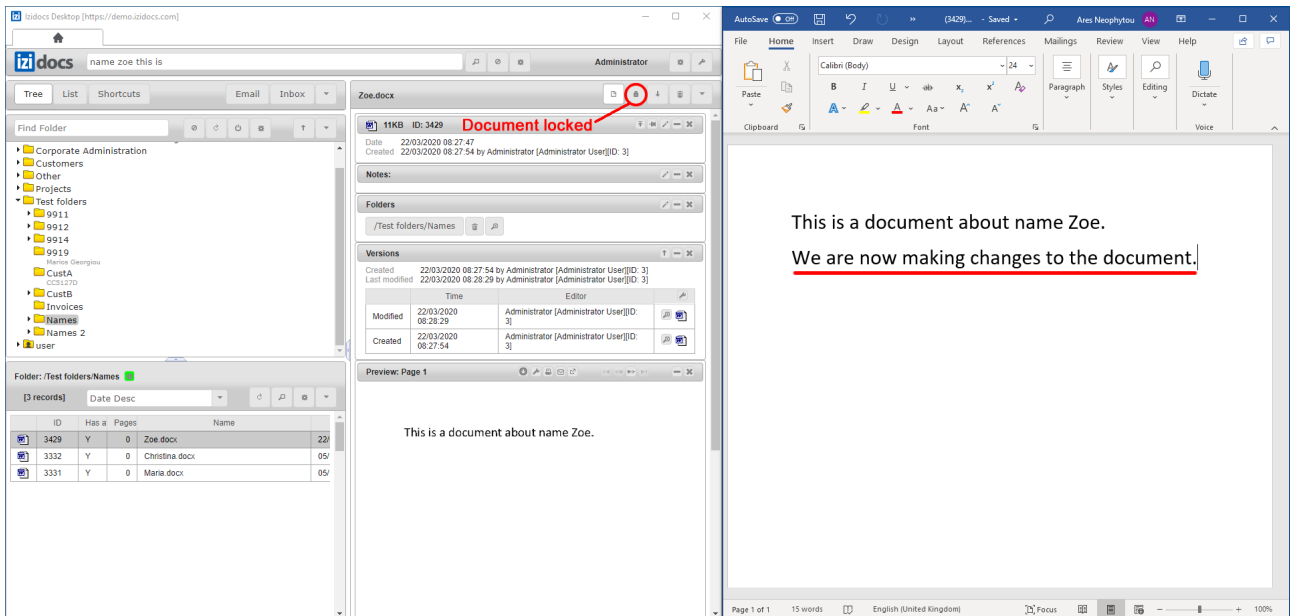
Izidocs Desktop is essentially a dedicated browser that only allows access to izidocs. Compared to a normal browser, it offers the following additional functionality.

Edit Microsoft Office and other documents directly from izidocs, with automatic version keeping

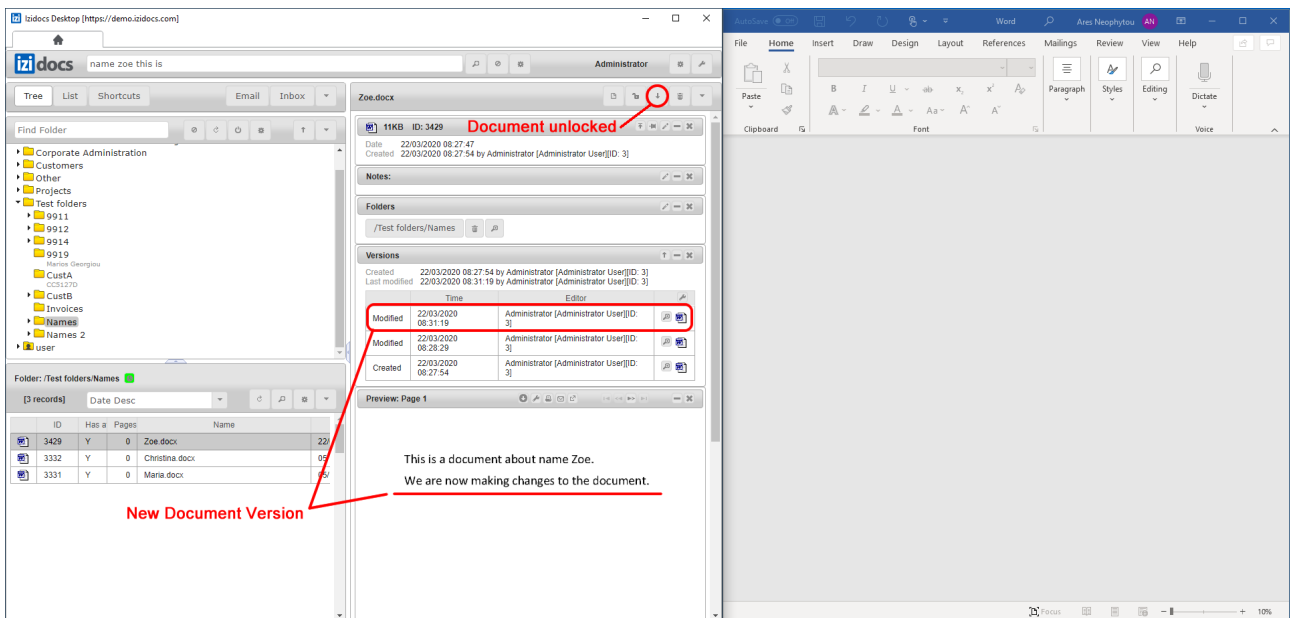
When a Microsoft Office or other document is selected in izidocs, the Edit button appears at the top of the document area.



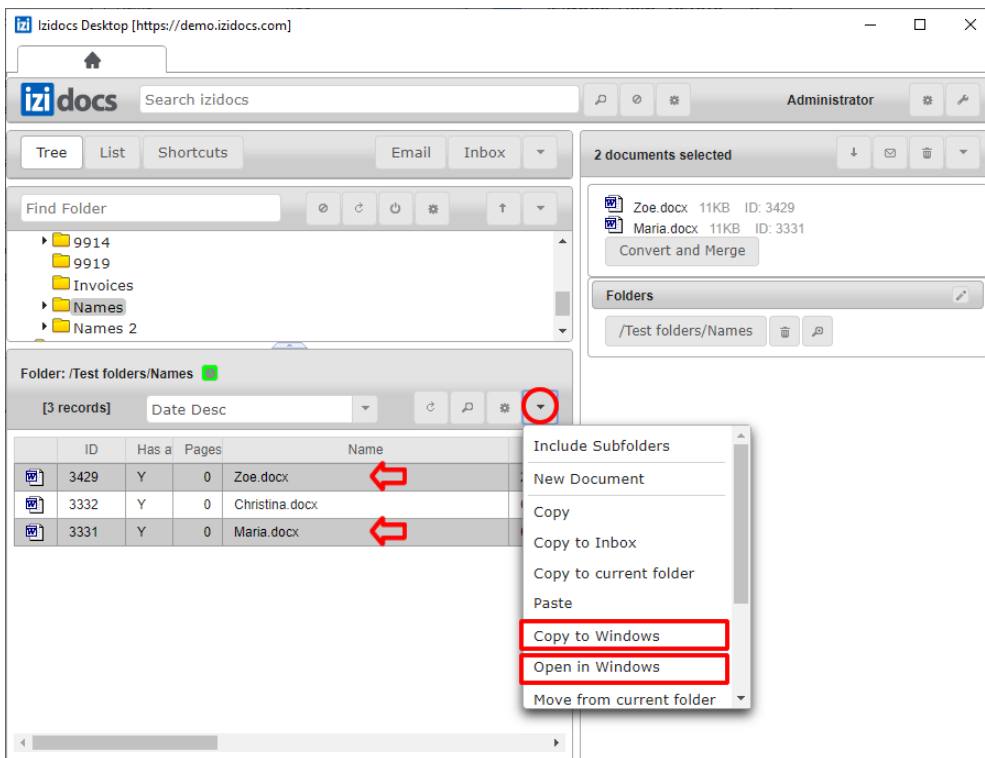
Press the Edit button and the document is opened on the PC, using the appropriate application. You can start working on the document. During this editing time the document is locked for other users. While editing, you can save the document as many times as you wish.



When you finish your edits, save the document and close it. Once you close the document, a new version of the document with all the changes will be uploaded to izidocs automatically. The document is unlocked for other users to be able to edit it.

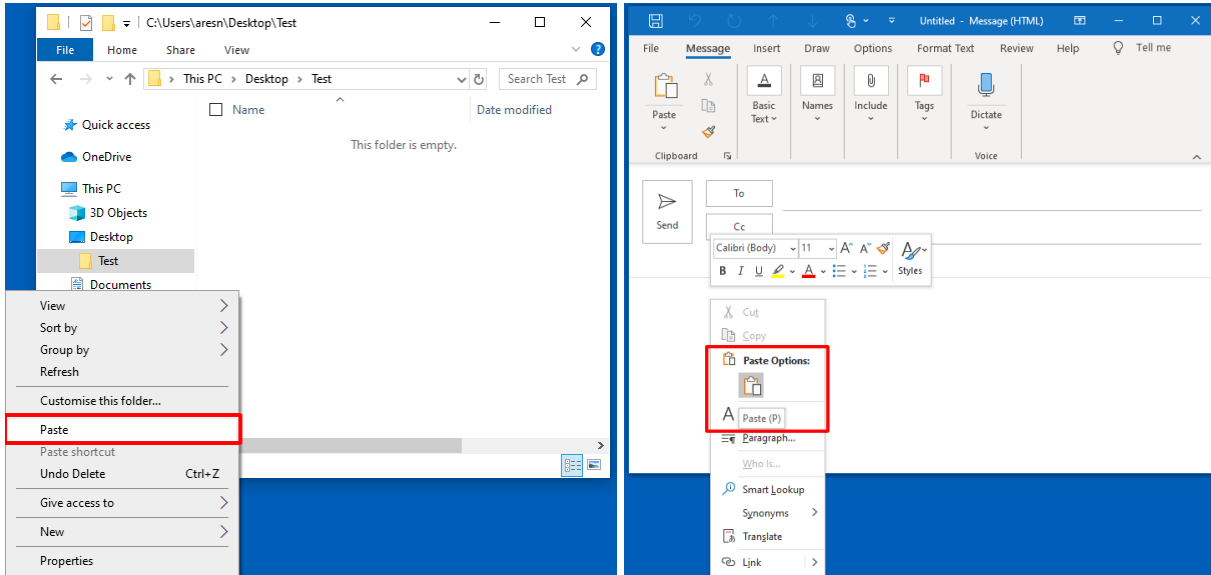


Select one or multiple documents in izidocs and copy them to Windows



The files are copied to Windows clipboard so that you can paste them directly to

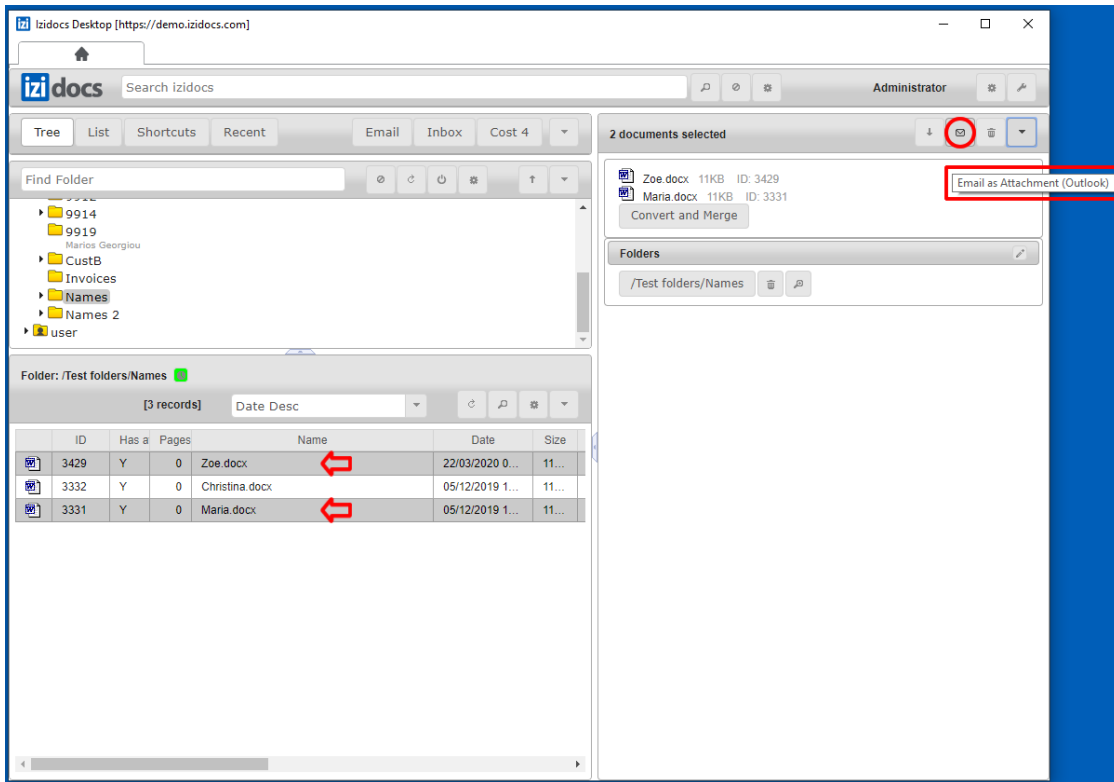
1. a folder in File Explorer
2. any email edited in Outlook



Open in Windows opens the selected document(s) in Windows in read-only mode, using the default application.

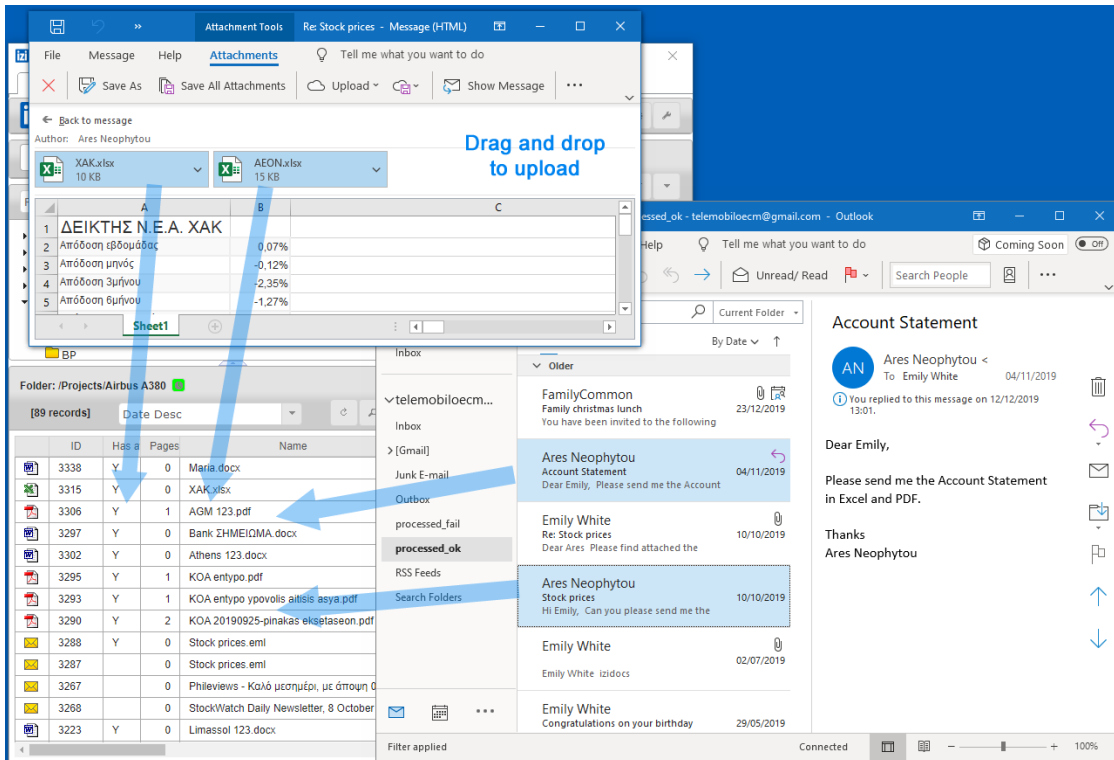
Select one or multiple documents in izidocs and email them as attachments.

This opens a new email in Outlook with the selected documents attached.



Drag and drop emails or email attachments from Outlook directly into izidocs folders

Please make sure the attachments are selected before dragging them.



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9. Templates

You can create document templates using Microsoft Office. These are stored in a special system folder, so that users can use them instead of blank documents to create new documents.

These templates can automatically fill in information regarding the customer or other entity in whose folder/subfolders a document is created in. You can create these automatically filled templates yourselves using your Microsoft Office Mail Merge functionality.

The data to fill in the templates can be placed in the folders themselves in folder property Data, in a pre-agreed Excel spreadsheet, or come from a different system. The automatically filled fields can also include dates, from, to, and a document barcode which helps to automatically process scanned documents.

The screenshot displays the izi docs interface. On the left, a folder tree shows 'KLMO Limited' selected. A 'View Folder' dialog box is open, showing the following data:

ID:	95
Name:	KLMO Limited
Description:	345678
Data:	Company Name: KLMO Limited Company Reg No: 345678 Company Address: 19 Bond Street, E1 7PW London, UK Shareholder 1: Alex Gray Shareholder 2: James Barrett Director 1: Alice Stewart Director 2: Mary Jones Secretary: Susan Little
System folder:	false
User folder:	false
Group subfolders:	false
Deleted:	false
Creation:	14/10/2014 16:45:32 by Administrator [Administrator User][ID: 3]
Last modified:	14/10/2014 16:45:32 by Administrator [Administrator User][ID: 3]
Size:	
Contains:	

On the right, a document preview is shown for 'Directors resolution for moving to belgium.pdf'. The preview includes a 'Versions' table:

Type	Time	Editor
Created	15/05/2015 18:11:18	Administrator [Administrator User][ID: 3]
Last modified	15/05/2015 18:18:00	by system [system][ID: 2]
Modified	15/05/2015 18:18:00	system [system][ID: 2]
Modified	15/05/2015 18:14:54	Administrator [Administrator User][ID: 3]
Modified	15/05/2015 18:13:38	Administrator [Administrator User][ID: 3]
Created	15/05/2015 18:11:20	Administrator [Administrator User][ID: 3]

The document preview shows the following text:

KLMO Limited
(Registration number: 345678)
WRITTEN RESOLUTION OF THE DIRECTORS ON 11/05/2015

DIRECTORS:
Alice Stewart, Director
Mary Jones, Director

It was resolved that:

- Go to Belgium again and again

Signed:
Alice Stewart
Mary Jones

At the bottom, a QR code is visible with the text: 'Page 1 of 1', '19 Bond Street, E1 7PW London, UK', and 'Private company registered in Cyprus under registration number 345678'. A red arrow points from the QR code to the text 'Auto process signed scanned document'.

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10. Email processing

Some companies use izidocs as an email archive solution. This means that all emails sent/received by the company are archived. Each user can only see (and search) the emails that belong to him, which can be found in his email folder.

In addition, there are procedures that can assist companies to automatically file emails in common or public customer (or other entity) folders.

These customer folders usually contain the customer number in the Folder Name or Folder Description.

The following types of automatic processing can be set up.

Code in email subject processing

When writing an email, anywhere in the email subject put a company specific prefix and the customer code, e.g. **XYZ999999**. The email will then be placed automatically in a subfolder named Email, within the folder of the specific customer. Replies to this email can also be automatically processed in the same way.

Email address processing

You can include domains (e.g. abcd.com) or email addresses (e.g. john@abcd.com) in the Description of a folder. All emails that include these domains or email addresses are then automatically placed in the specific folder.

You will normally need to wait a few minutes for the emails to be processed.

These procedures are specific to and need to be set up for each company that uses izidocs.

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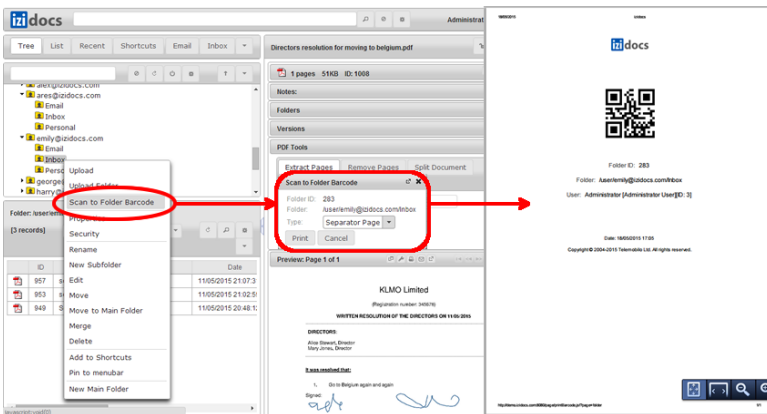
11. Barcode processing

You can create barcodes to

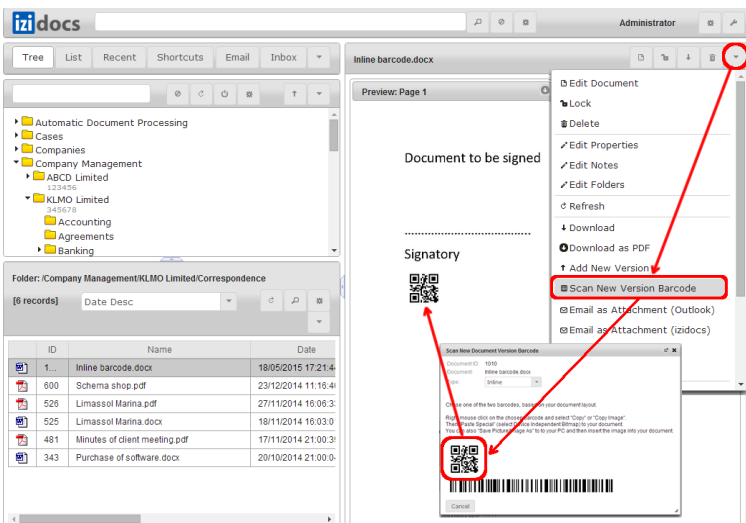
1. Scan to Folder (right click on a folder): these are folder specific
2. Scan New Version of a specific document (from the document action drop down menu)

Barcodes can be

1. Separator pages. You can print these and place them on top of a document and scan it. The pages following the separator page, up to next separator page or the next document barcode, will be automatically included in a single PDF and placed in the folder or as a new version of the document specified by the barcode.



2. Inline: These are images that can be downloaded and inserted in a document so that when you print, sign and scan the signed document, the scanned PDF is automatically placed in the folder or becomes a new version of the original Word document.



You can print different separator pages, insert multiple barcodes in documents, and then scan multiple paper documents into different folders or as versions of different documents in one scan operation.

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