Welcome to eNoteFile

Help and Getting Started Guide

Contents

Welcome to eNoteFile

eNoteFile is structured notation filing software enabling the synchronisation and sharing of documents between users within an organisation.

What is eNoteFile?

eNoteFile is Microsoft Windows-based software that securely records, manages, searches and shares detailed notations and related documentation, in a seamlessly online and offline environment.

All data is efficiently stored and encrypted, and synchronises with eNoteFile's cloud-based infrastructure – ensuring your notation files are always available, whether you are online or offline.

Why eNoteFile?

eNoteFile overcomes many of the drawbacks users have previously had with going paperless – while incorporating all the advantages you'd expect such as handwriting recognition, keyword search and easy communication.

The fast, visual filing system means finding your notes as quickly as you could on paper using the eNoteFile Slider - save hours of time filing and storing.

Features such as instant infrastructure allow one-click synchronisation of your notes for remote access on any computer or to share with other users.

Functions that are only available electronically such as Mandatory Fields, Modified Date audits and Notation Search are all on the free Standard version.

You can backup and login securely, features that paper notes simply do not offer.

This is perfect for industries with the highest note taking standards such as healthcare.

Help Structure

This help document is structured into each functional area of eNoteFile, and should be sufficient to get you started. Further information is available on http://enotefile.com.

My eMemos

eMemo enables you to quickly and easily jot down notes without the need to store them in a specific file.

eMemos are private, secure and only visible by you. They are synchronized and available remotely.

Should an eMemo be assigned to a file, it will then be available for all users to see.

eMemo can be used for:

- Quickly jotting down an address while on a phone call.
- Creating to-do lists.
- Recording meeting minutes.

What would you like to do?

- Create a new eMemo
- Remove an existing eMemo
- Move an eMemo into a File
- Restoring a previously removed eMemo
- Learn how to use the document canvas
- Rename an eMemo
- Email an eMemo to a colleague

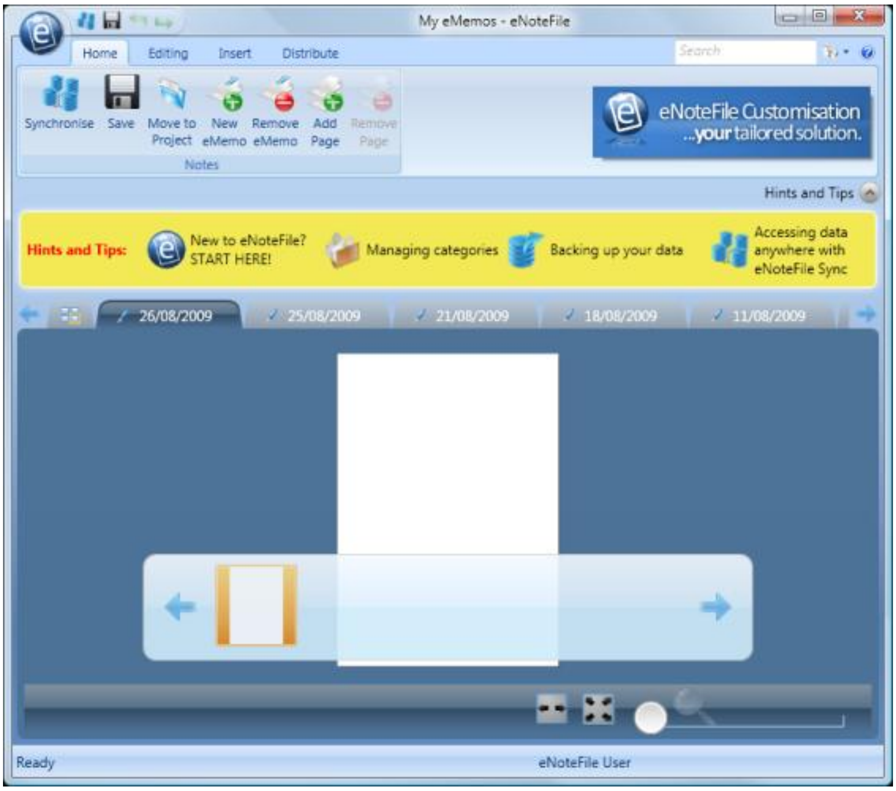


Figure 1 - My eMemos

Create a new eMemo

1. Ensure that the **Home** ribbon tab is selected.
2. Click the **New eMemo** button.

Remove an existing eMemo

1. Select the eMemo which you wish to remove.
2. Ensure that the **Home** ribbon tab is selected.
3. Click the **Remove eMemo** button.
   A message box will appear asking you to confirm that you wish to remove the eMemo.
4. Click the **Yes** button.

Move an eMemo into a File

1. Select the eMemo which you would like to move.
2. Ensure that the **Home** ribbon tab is selected.
3. Click the **Move to Client** button.
   The **File Search** windows will open. For further information on the **File Search** window, see File Search.
4. Enter the details of the file you wish to move the eMemo into.
5. Click the **Search** button.
   All files matching the search criteria will be displayed.
6. Click on the file you wish to move the eMemo into.
7. Click the **OK** button.
   The eMemo will now disappear from **My eMemos**. If you currently have the destination file open, you may need to refresh the windows – see Refresh the window.

Renaming eMemos

When created, eMemos are automatically assigned a name based on the date. If this name is not appropriate, it is possible to change it by following these steps.

1. Click once on the edit icon on the tab of the eMemo you wish to rename.
   The name of the tab will now become a text entry field that can be directly edited.
   
2. Type the desired name into the text box.
3. Click once on the disk icon on the tab header.
   The text box will now disappear.

The eMemo will have now been renamed.

Customising eNoteFile

What would you like to do?

- Add a new Project Field
- Remove an existing Project Field
- Reorder Project Fields
- Change the way in which files are named
- Create a Category (document template)
- Remove the Hints and Tips bar

Project Fields

Based on the edition of eNoteFile you have downloaded you will have predefined for you a set of "Project Fields".

Project Fields apply to every File that is created within eNoteFile.

For example; if you selected the "Healthcare" edition the following fields will have been defined:

- First Name,
- Last Name,
- Identification Number,
- Date of Birth,
- Address,
- Contact Number,
- Email,
- Height,
- Weight,
- Next of Kin,
- Other Details, and
- Comments

These project fields can be modified at any time – although we recommend you configure them initially and only modify them if it is absolutely necessary.

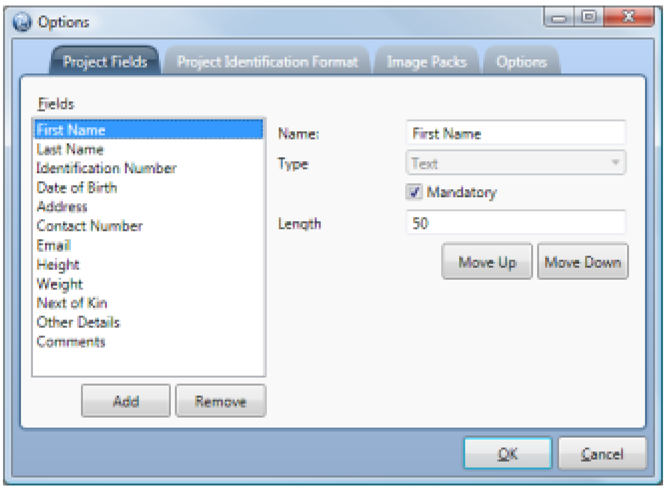


Figure 2 - Options - Project Fields

Add a new Project Field

1. Click on the **eNoteFile Button**, point the arrow next to or hover the stylus over **Tools**, and then click **Options**.
   The Options window will then be displayed with the **Project Fields** tab selected.
2. Click the **Add** button.
   A new, empty Project Field will be added to the list on the left.
3. Replace the text “<New Field>” within the **Name** textbox with the desired name of the Project Field.
4. Select the type of information that will be stored within this field from the **Type** dropdown.
   It is important that you carefully select the data type correctly the first time as once saved the data type for a field cannot be changed.

   The following data types are avaialble:
   - Check Box
     Check Box fields allow the user to tick off certain items (e.g. and).
   - Currency
     Currency fields allow the user to enter monetary values.
   - Date
     Date fields allow the user to select a date from a dropdown calendar.
   - Multiline Text Area
     Multiline Text Area fields allow the user to enter multiple lines of text such as that required for comments or addresses.
   - Number
     Number fields allow the user to enter only numeric data.
   - Text
     Text fields will be displayed as single line text entry fields.
5. If you require the field to be populated on each file before the file can be saved, place a tick in the **Mandatory** check box.
6. If you selected “Text” as the data type for the field, you will now need to specify the maximum length of the value that a user can enter within this field in the **Length** text box.
7. You may now reposition the field in relation to the other fields by using the **Move Up** and **Move Down** buttons. As you click one of these buttons, the field will move in the corresponding direction within the list on the left.
8. Click the **OK** button to save your changes.

If you have any files open at this point, you may notice that the Project Fields do not reflect the changes you have just made. If you have previously saved the File you may click the **Refresh** button on the **Home** ribbon tab (see Refresh the project for further directions). If the project is new and has not yet been saved you can either discard the project by clicking the **Remove Project** button on the **Home** ribbon tab or completing the displayed Project Fields and clicking the **Save** button on the **Home** ribbon tab followed by the **Refresh** button.

It is strongly recommended that you synchronise immediately following any changes to Project Fields. This is to ensure that all users within your organisation are operating with the same set of fields.

Removing an existing Project Field

WARNING: Removing a Project Field will delete all information stored within the field from every file. Please perform this action with great caution.

1. Click on the **eNoteFile Button** , point the arrow next to or hover the stylus over **Tools**, and then click **Options**.
   The Options window will then be displayed with the **Project Fields** tab selected.
2. Click once on the Project Field you wish to remove within the list on the left.
3. Click the **Remove** button.
   You will then be prompted to confirm the remove action.
4. Click the **Yes** button to permanently delete the project fields and any information stored within on all files.

Following the removal of a Project Field, it is a good idea to verify that the removed field is not present within the Project Identification Format as this may make files very hard to locate.

It is strongly recommended that you synchronise immediately following any changes to Project Fields. This is to ensure that all users within your organisation are operating with the same set of fields.

Reorder Project Fields

This process will allow you to reorder the display of the Project Fields within each File.

1. Click on the **eNoteFile Button** , point the arrow next to or hover the stylus over **Tools**, and then click **Options**.
   The Options window will then be displayed with the **Project Fields** tab selected.
2. Click once on the Project Field you wish to reorder.
3. Click either the **Move Up** or **Move Down** button.
   The Project Field will move either up or down within the list on the left depending upon your selection.
4. Continue the above process until you are happy with the ordering of your Project Fields.

It is strongly recommended that you synchronise immediately following any changes to Project Fields. This is to ensure that all users within your organisation are operating with the same set of fields.

Change the way in which files are named

As eNoteFile allows you to customise the Project Fields, it is necessary to instruct the application on how to name your Files. This is achieved by setting the Project Identification Format.

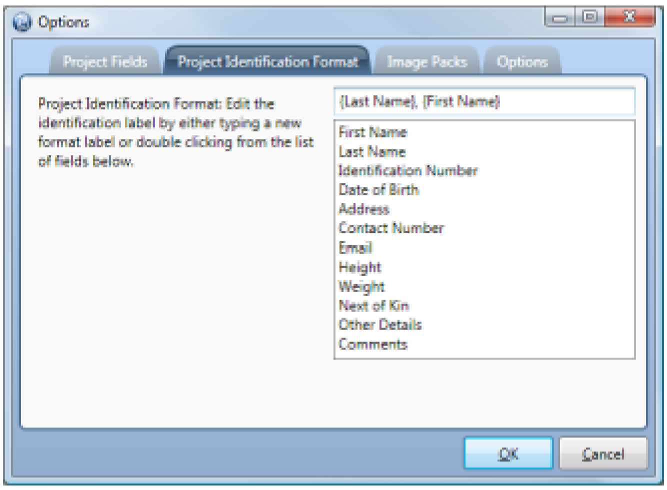


Figure 3 - Options - Project Identification Format

1. Click on the **eNoteFile Button**, point the arrow next to or hover the stylus over **Tools**, and then click **Options**.
   The **Options** window will then be displayed with the **Project Fields** tab selected.
2. Click the **Project Identification Format** tab.
   This tab is composed of two main areas – the first being the actual Project Identification Format itself and the second, a list of the available Project Fields that have been created.
3. Select all of the text within the top text box and then press the backspace or delete button on your keyboard. If you are using a styless, you may use the Windows Tablet PC Keyboard popup.
4. Double-click on the Project Fields in the large list box for which you would like your Files to be named after. This will result in the Project Field name being inserted into the top text box surrounded by curley braces ({ & }).
5. When all of the fields you would like to base your file names on have been entered into the text box, you may add any additional formatting that you may require.

   For example; if you would like all of your files named after patients:

   - Double-click on the Last Name Project Field
   - Double-click on the First Name Project Field
   - Insert a comma (,) between the {Last Name} and {First Name} tags

   Resulting in a Project Identification Format of “{Last Name}, {First Name}”.

It is strongly recommended that you synchronise immediately following any changes to the Project Identification Format. This is to ensure that all users within your organisation are operating with the same project naming strategy.

Customising Settings

By default, eNoteFile will automatically save your notations every five minutes and also display the Hints and Tips bar. If you are not happy with these settings, they can be changed by following the steps detailed in this section.

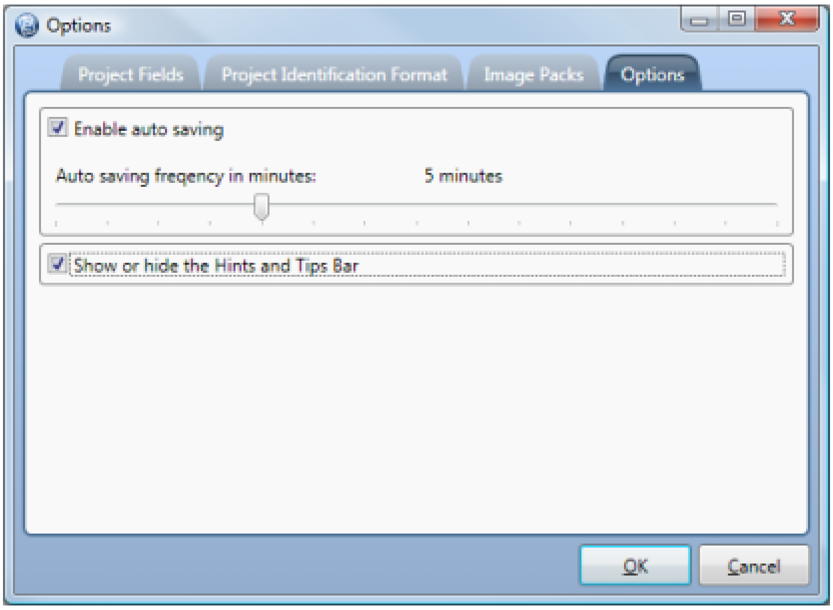


Figure 4 – Options tab

1. Click on the **eNoteFile Button**, point the arrow next to or hover the stylus over **Tools**, and then click **Options**.
   The **Options** window will then be displayed with the **Project Fields** tab selected.
2. Click the **Options** tab.

   - If you wish to enable or disable **Auto Save,** add or remove the tick from the **Enable auto saving** check box by clicking on it once.
   - If you wish to change the frequency of the **Auto Save** functionality, drag the slider until the desired frequency is displayed above.
     If you are unable to move the slider, please ensure that **Auto Save** is enabled by placing a tick in the **Enable auto saving** check box.
   - If you wish to remove the **Hints and Tips** bar so that you have more room to work with your notaions, you may remove the tick from the **Show or hide the Hints and Tips Bar** checkbox by clicking on it once.

3. Click the **OK** button.

Your settings are now saved.

Managing Categories

A Category is basically a document template that can dramatically simplify the day-to-day operation of eNoteFile.

Categories allow you to define templates that contain images, merge fields and data input controls that will automatically appear on all documents created within this category.

What would you like to do?

- Create a new Category
- Rename a Category
- Modify an existing Category
- Remove a Category
- Learn about the different merge fields that can be used
- Learn about the different input controls that can be used

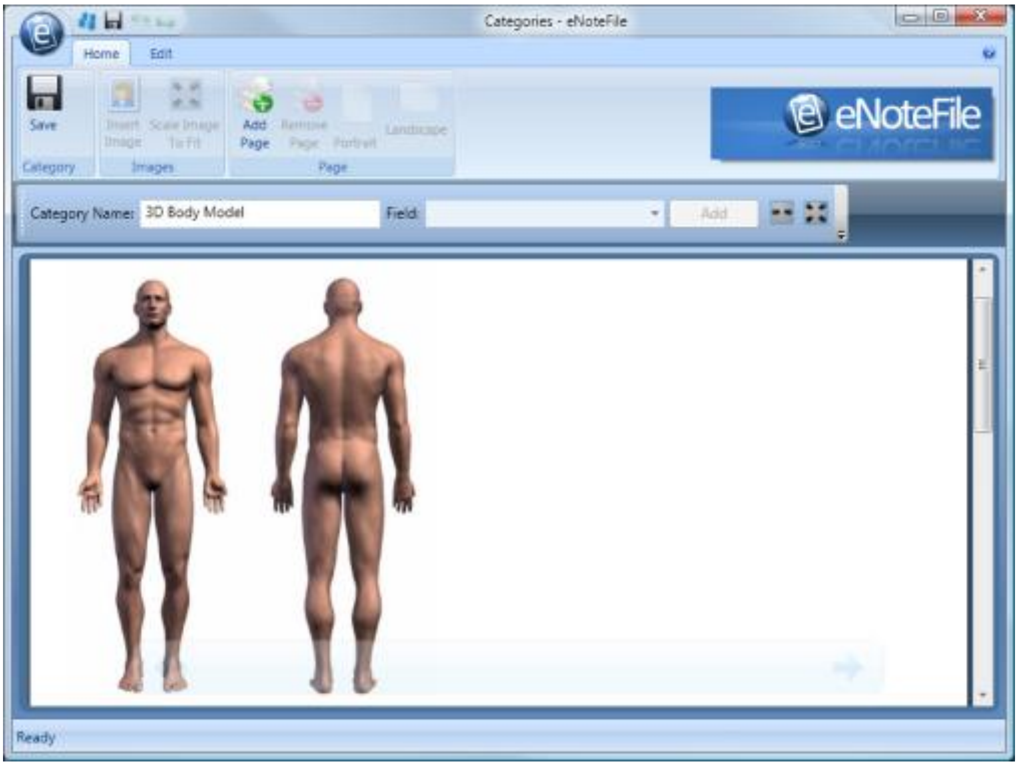


Figure 5 - Category Window

Creating a new Category

1. Click on the **eNoteFile Button** and then click **Manage Categories**.
   The Category Explorer window will then open.
2. Click the **Create New Category** button.
   The Category Explorer window will now close and the Categories window will open.
3. Enter a name for the Category in the **Category Name** text box (on the Category Toolbar) replacing the “<New Category>” text.

4. Select the desired page orientation by clicking on either the **Portriat** or **Landscape** buttons on the **Home** ribbon bar.
5. If you would like to insert an image, you can do so by clicking on the **Insert Image** button on the **Home** ribbon tab. For more information on working with images see Using Images.
   Once the image has been inserted, you may move and resize it by first clicking once on the image and then using the available handles to manipulate the image.
6. If you would like to insert an input control or a project merge field you can do so by selecting the type of item you wish to insert from the **Field** dropdown and then clicking the **Add** button (See Using Merge Fields & Using Input Controls).
7. Click the **Save** button on the **Home** ribbon tab when finished to save your changes.

Modifying an existing Category

Modifying an existing category will not result in the changes being applied to existing documents. Documents, when created, contain a snapshot of the Category at that point in time. Only new documents will contain any additional modifications.

1. Click on the **eNoteFile Button** and then click **Manage Categories**.
   The Category Explorer window will then open.
2. Select the Category that you would like to modify by clicking once on the thumbnail image.
3. Click the **OK** button.
   The Category Explorer window will now close and the Categories window will open.

Renaming a Category

1. Complete the steps listed in Modifying an existing Category.
2. Change the text as required within the **Category Name** text box.
3. Click the **Save** button.

It is strongly recommended that you synchronise immediately following any changes to existing Categories. This is to ensure that all users within your organisation are operating with the same document templates.

Remove an existing Category

You may remove Categories at anytime without affecting existing documents. Once a document is created within a specified Category, all of the settings are copied into that document and will never change.

Removing the Category will just ensure that no new documents can be created of this type.

1. Click on the **eNoteFile Button** and then click **Manage Categories**.
   The Category Explorer window will then open.
2. Select the Category that you would like to remove by clicking once on the thumbnail image.
3. Click the **Remove Category** button.
   You will then be prompted to confirm the remove operation.
4. Click the **Yes** button to continue.

Using Merge Fields

Merge fields enable you to define place holders for File level Project Field information that will be automatically populated within a document when it is created.

The available fields will vary depending on the Project Fields that have been configured for your organisation (see Project Fields). The following fields will always be available:

- **Created Date**
  This field will display the date and time the document was created.
- **Modified Date**
  This field will display the date and time the document was last modified.
- **Created by User**
  This field will display the name of the user that originally created the document.
- **Modified by User**
  This field will display the name of the user that last modified the document.

Inserting a Merge Field

1. Select the desired merge field from the **Field** dropdown.
2. Click the **Add** button.
   The merge field will now be added to the category page. You may move the merge field to the desired location by clicking once on the field and then dragging on the border of the field.
3. If you would like a descriptive label to be displayed in front of the merge field, select “User Defined Label” from the **Field** dropdown and continue below.
4. Click the **Add** button.
   The label control will now be added to the category page.
5. Position the label by clicking once on it and then dragging the border of the control to the desired location.
6. Click once on the label and type the text you wish for the label to display.

Using Input Controls

Input controls provide placeholders for documents where the user can specify information at the time the document is created. These placeholders can be made to be mandatory – meaning that the entire file will not be able to be saved until the required information has been specified.

The following Input Control types are available:

- **Check Box**
  A check box is a two state control that is either empty or ticked (e.g. ☐ and ☑).
- **Mandatory Check Box**
  A mandatory check box, like the Check Box, is a two state control that MUST be ticked before the user will be allowed to save the file.
- **User Defined Label**
  This control allows users creating and maintaining Categories to enter some text that will be displayed on all documents of this type. The value cannot be changed on the document. This control is handy for the labelling of other merge fields and input controls placed upon a category.
- **Single Line Text Box**
  This control provides a placeholder for users to enter a single short amount of text on a document.

- **Multiple Line Text Box**
  This control provides a placeholder for users to enter a large amount of text that can span multiple lines.
- **Mandatory Single Line Text Box**
  This control is the same as the Single Line Text Box but forces users to provide a value when attempting to save.
- **Mandatory Multiple Line Text Box**
  This control is the same as the Multiple Line Text Box but requires a value before the user is able to save the file.

Inserting an Input Control

1. Select the desired input control from the **Field** dropdown.
2. Click the **Add** button.
   The input control will now be added to the category page. You may move the input control to the desired location by clicking once on the field and then dragging on the border of the field.
3. If you would like a descriptive label to be displayed in front of the input control, select "User Defined Label" from the **Field** dropdown and continue below.
4. Click the **Add** button.
   The label control will now be added to the category page.
5. Position the label by clicking once on it and then dragging the border of the control to the desired location.

Working with Files

Depending on the edition of eNoteFile you selected to download, a file may be labelled Project, Client or Subject. For the purpose of this document we will use the Project edition of eNoteFile.

*Notice the screenshot in Figure 6. The **Home** ribbon tab has two buttons labelled **New Project** and **Remove Project**. If you had downloaded the Education edition of eNoteFile, these buttons would be labelled **New Subject** and **Remove Subject** respectively.*

What would you like to do?

- Create a new File (Project / Client / Subject)
- Open an existing File (Project / Client / Subject)
- Remove a File
- Create a new document
- Learn how to use the document canvas
- Add a page to an existing document
- View an older document
- Email a notation to a colleague

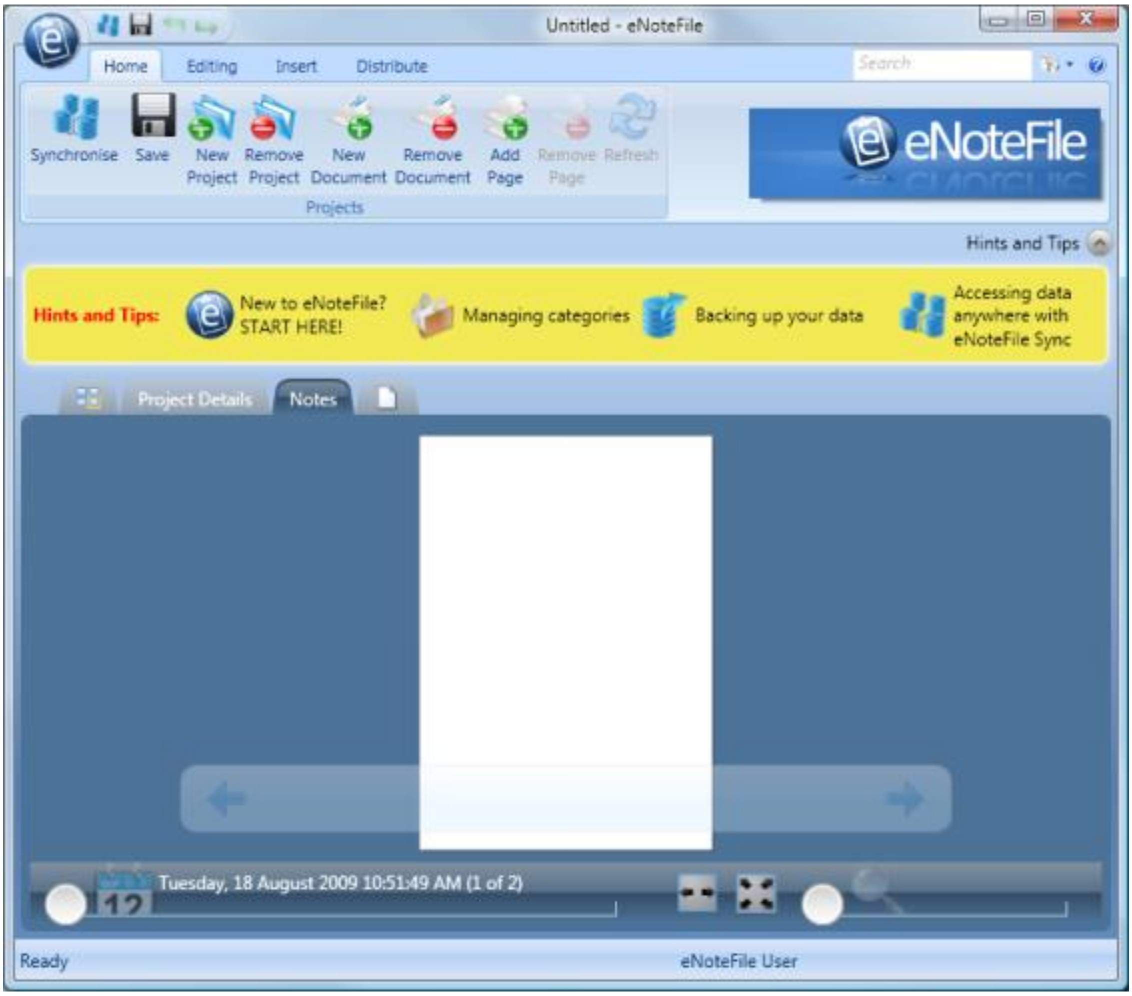


Figure 6 - Project Window

Creating a new File

1. Click on the **eNoteFile Button** and then click **New File**.
   A new File window will be displayed.

You may immediatly start notating on the displayed Notes tab that is added to each file automatically.

It is recommended that you complete the required File Details as soon as possible. This will enable to Automatic Save feature to regularly save your notations.

File Details

The File Details tab displays each of the Project Fields that have been configured for you organisation.

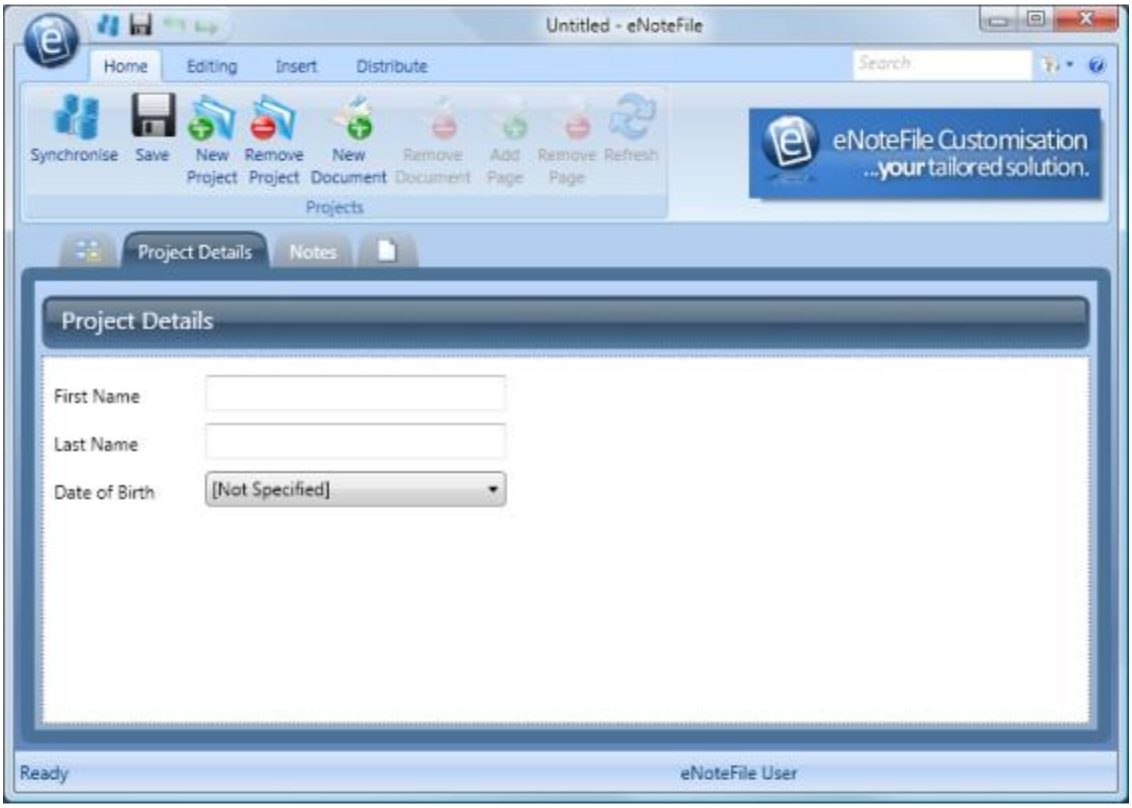


Figure 7 - File Details Tab

It is more than likely that some of these fields have been configured as Mandatory fields. This means that the entire File cannot be saved until values have been entered into all Mandatory fields.

It is recommended that you complete the required File Details as soon as possible following the creation of a new File. This will enable to Automatic Save feature to regularly save your notations.

To complete the File Details:

1. Select the **File Details** tab.
2. Enter or select the appropriate details.
3. Click the **Save** button.

Creating Documents

There are two ways in which you may create a new document.

Method 1

Use this method where the file you are currently working with does not yet have a document in the desired Category.

1. Click the **New Category** tab.
   The **Category Explorer** will then be displayed.

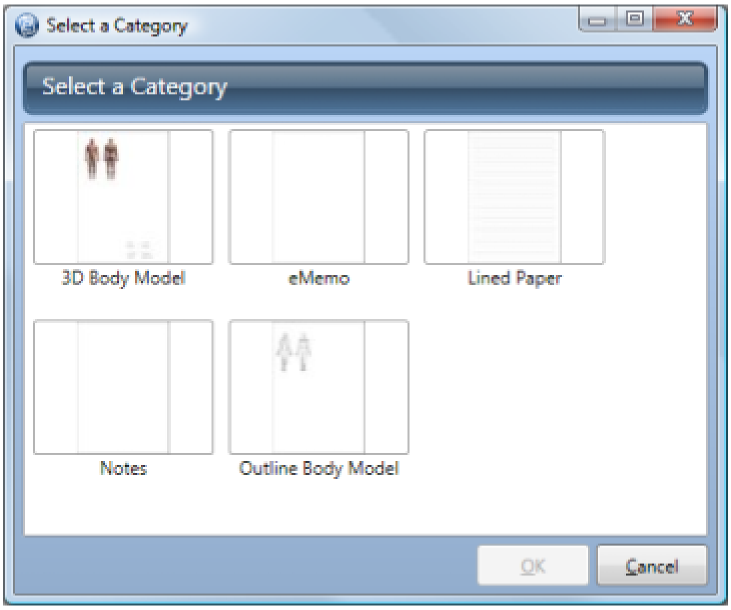


Figure 8 - Document Category Selection

1. Click once on the Category within which you wish to add a document.
2. Click the **OK** button.

The **Category Explorer** window will close and the new document displayed.

Method 2

Use this method where the file you are currently working with has a document in the same Category in which you would like to create your new document.

1. Click on the **Category** tab for the type of document you would like to create.
2. Ensure that the **Home** ribbon tab is selected.
3. Click the **New Document** button.

The new document will now be displayed.

Using the Document Canvas

The Document Canvas is the region within eNoteFile in which notations are taken.

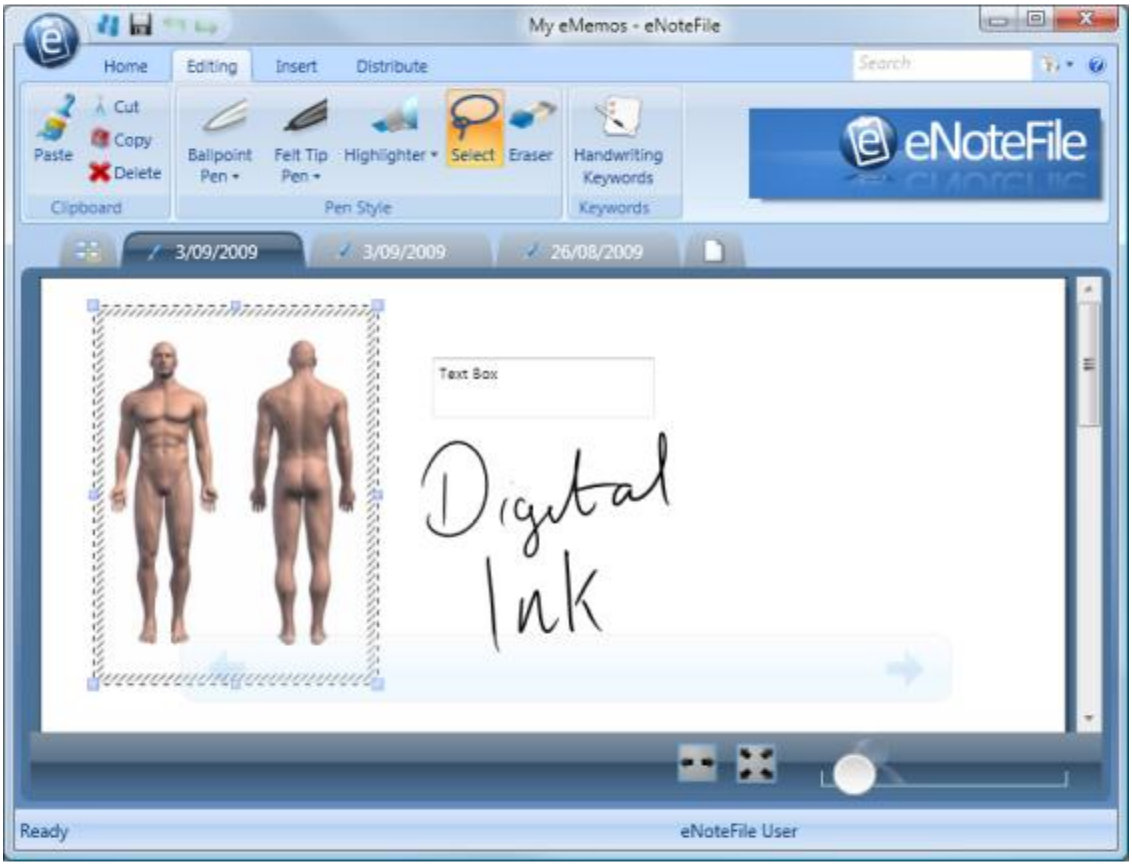


Figure 9 – Document Canvas

The Document Canvas allows you to notate using Digital Ink, add and arrange Images and Text Boxes.

What would you like to do?

- Learn about the different pens
- Change the colour of the pen
- Change the size of the pen
- Insert an Image
- Insert a Text Box
- Reposition an Image or a Text Box
- Resize an Image or a Text Box
- Undo my changes
- Zoom in or out
- Display the keywords that will be generated for the current page

Pens

There are three different types of pens available within eNoteFile:

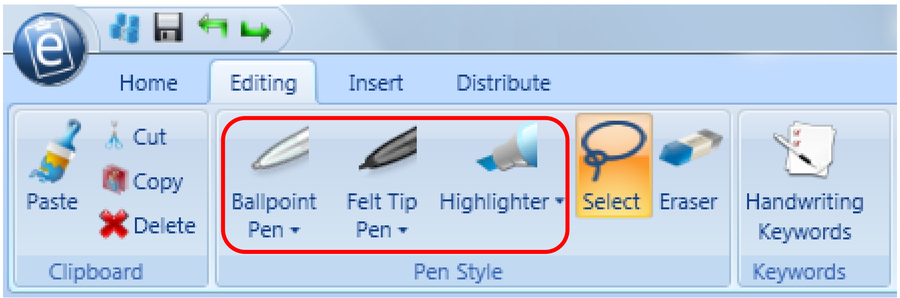


Figure 10 - Pens

- *Ballpoint Pen* – A round nibbed pen.
- *Felt Tip Pen* – A square nibbed pen.
- *Highlighter* – A large translucent pen

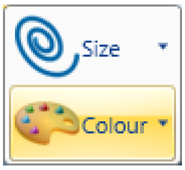
Pens allow you to draw or notate directly onto the document canvas using either the mouse of stylus.

You can customise the size and colour of each of the pens by following the procedures detailed below.

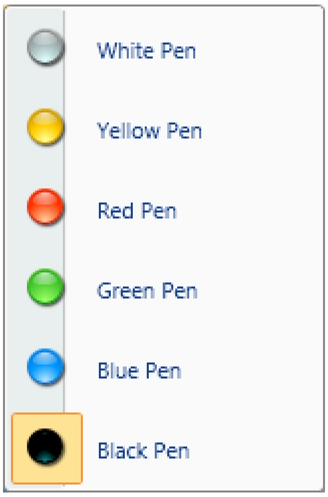
TO SELECT A PEN:

1. Ensure that the **Editing** ribbon tab is selected.
2. Click once on the desired pen's button.

TO CHANGE THE COLOUR OF A PEN:

1. Ensure that the **Editing** ribbon tab is selected.
2. Click once on the text of the desired pen's button.
   A drop-down menu will be displayed.
   

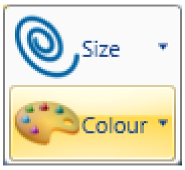
3. Click once on the **Colour** item.
   The Pen Colour Picker will then be displayed.



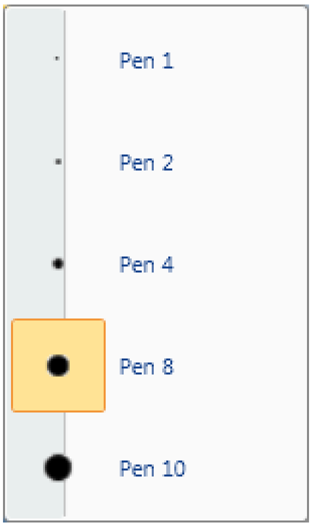
4. Click once on the desired colour.

TO CHANGE THE SIZE OF A PEN:

1. Ensure that the **Editing** ribbon tab is selected.
2. Click once on the text of the desired pen's button.
   A drop-down menu will be displayed.



3. Click once on the **Size** item.
   The Pen Size Picker will then be displayed.



4. Click once on the desired size.

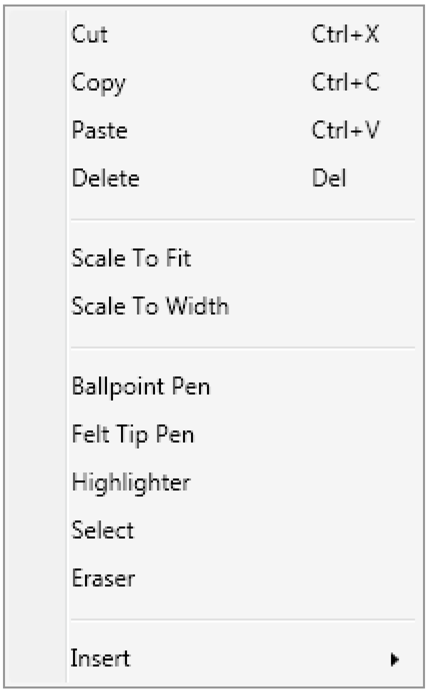


Figure 11 - Document Canvas Context Menu

Inserting Text

You can type text directly onto the document canvas in three ways;

Automatically adding Text Boxes

1. Ensure that the **Editing** ribbon tab is selected.
2. Set the current Pen Style to the **Select** tool.
3. Click on the document canvas where you wish to insert text.
   A caret or cursor will begin flashing.
4. Type the text you wish to insert.
   A Text Box will automatically be inserted surrounding your text. You may reposition or resize the new text box (see Repositioning Items and Resizing Items).

Should you erase all of the content with a text box that has been added automatically, the text box will be deleted.

Manually adding Text Boxes

1. Ensure that the **Insert** ribbon tab is selected.

Figure 12 - Insert Ribbon Tab

2. Click the **Insert Textbox** button.
   A Text Box will then be added to the top of the document canvas. You may reposition or resize the new text box (see Repositioning Items and Resizing Items).
3. Once you have positioned the text box you may enter text by clicking once on the text box.

Unlike automatically added text boxes, manually added text boxes are not removed when all of the text is erased.

Resizing Items

Should you need to resize an image, text box or notation, you can do so by following the below procedure.

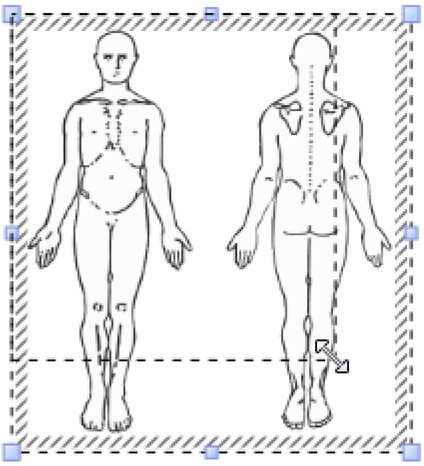


Figure 13 - Resizing Handles

1. Ensure that the **Editing** ribbon tab is selected.
2. Click the **Select** Pen Style.
3. Click once on the item which you wish to resize.
4. Drag any of the resize handles until the item is sized to your requirements.

Repositioning Items

Should you need to move an image, text box or notation, you can do so by following the below procedure.

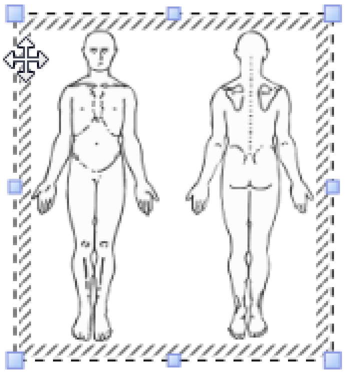


Figure 14 - Moving Cursor

1. Ensure that the **Editing** ribbon tab is selected.
2. Click the **Select** Pen Style.
3. Click once on the item which you wish to move.
4. Hover the mouse or stylus over the border of the item until the cursor changes to the move cursor .
5. Drag the item to the desired position.

Undo / Redo

Should you make a mistake or wish to undo your last action(s) while working with the document canvas you may use the Undo feature.

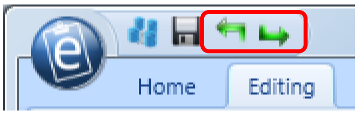


Figure 15 - Undo / Redo buttons

The Undo and Redo buttons are located at the top of both the File and eMemo windows within the Quick Access Toolbar.

To undo an action:

1. Click the **Undo** button once, or
   Press **CTRL+Z** on the keyboard.

If you have just undone an action and wish to redo it:

1. Click the **Redo** button once, or
2. Press **CTRL+Y** on the keyboard.

Zooming In and Out

Should the document canvas appear too small or too large, you may use the zoom controls to scale it to the desired size.

The zoom controls are located at the bottom right-hand corner of the File, eMemo and Category windows.

Predefined zoom settings

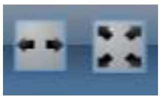
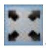


Figure 16 – Scale Buttons

If you wish to resize the document so that its width fills the window, you may press the **Scale to Width** button .

To resize the document so that the entire document can be viewed, you may press the **Scale to Fit** button .

Manual zoom

Figure 17 - eZoom Slider

If either of the above predefined zoom settings does not meet your requirements, you may use the **eZoom** slider to select a specific zoom setting.

Keyword Recognition

To preview the keywords that will be generated for the current document page you may press the **Handwriting Keywords** button.

1. Ensure that the **Editing** ribbon tab is selected.
2. Click the **Handwriting Keywords** button.
   A message box will then be displayed containing a list of the keywords that have been recognised.

If certain words have not been recognised correctly, you may wish to erase the corresponding notation and re-write it.

Navigating Document Revisions

Each of the Category tabs within a File may contain multiple Documents. The way in which you navigate between these Documents is by using the **eNoteFile Slider**.

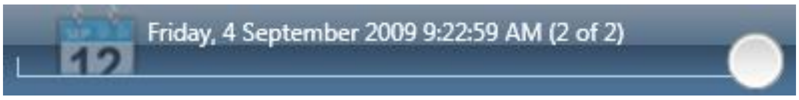


Figure 18 - eNoteFile Slider

The eNoteFile Slider is located at the bottom of File windows. It displays the creation date of the current Document, the number of the current Document together with the total number of Documents stored within the current Category in brackets.

Documents within Categories are stored chronologically. Moving the slider to the left will result in older documents being displayed and, to the right - more recent Documents.

Where there is currently only one Document within a File's Category, "(1 of 1)" will be displayed and the eNoteFile Slider will not operate.

Adding a Page

If you run out of room while working with a document or just wish to spread your notes out over multiple pages, you may add pages.

To add a page to a document:

1. Ensure that the **Home** ribbon tab is selected.
2. Click the **Add Page** button.

A new blank page has been added to your document and is displayed.

Navigating Multi-Page Documents

To navigate between pages within a multiple page document, use the Page Navigation Popup.

When a document is first opened, the Page Navigation Popup will be expanded, allowing you to see if the document contains multiple pages.

1. Move the arrow over the translucent collapsed popup control (see Figure 19) at the base of you document.

Figure 19 - Page Navigation Popup – Collapsed

The Page Navigation Popup control will then expand (Figure 20).

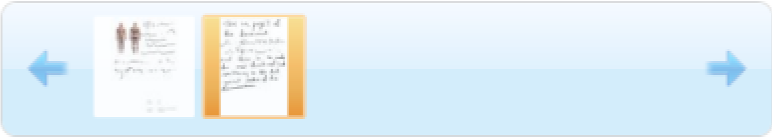


Figure 20 - Page Navigation Popup

2. Click once on the thumbnail of the page you wish to navigate to.

The selected document page will then be displayed.

Collapsing the Page Navigation Popup

When a document is first opened, the Page Navigation Popup will be displayed. To collapse it:

1. Move the arrow over the Page Navigation Popup.
2. Move the arrow off the Page Navigation Popup.

Opening Files and Searching Documents

There are a number of tools available to help you locate the files in which you are interested.

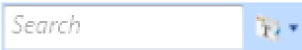
- Keyword Search
  Ideal for quickly locating documents containing specific words or phrases
- File Search
  A fine-grained search that allows you to locate those projects that have specific project fields set to specific values. Handy, for example if you need to locate the file for John Smith (for which there may be many) that has a birth date of January 12th 1967.
- Notation Search
  Ideal when you would like to locate documents that contain notations within a specific region. Great for health professionals for finding all knee related injuries for example.

Keyword Search

Use Keyword Search to locate files and documents containing a specific words or phrases.

Keyword search can be accessed in one of two ways:

- In the top right-hand corner of the File and eMemo windows.

  This method offers the greatest efficiency as search terms can be typed directly into the **Search Box**.
- Via the **eNoteFile Button**.

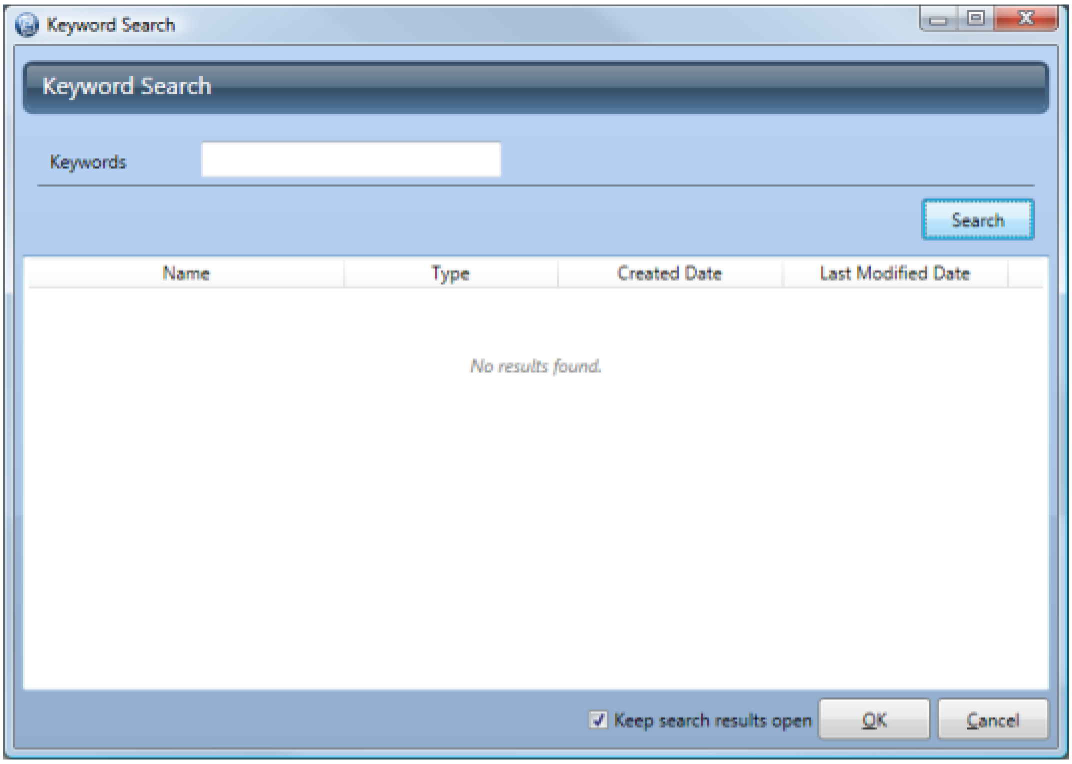


Figure 21 - Keyword Search window

Using the Search Box

1. Type the desired search terms directly into the **Search Box** in the top right-hand corner of the window.
2. Press the **Enter** key on the keyboard or click once on the icon to the right of the **Search Box**.
   The **Keyword Search** window will open and any matching items will be displayed.
3. If you wish to keep the search results open following the opening of a document or file, place a tick in the **Keep search results open** check box.
4. If you have located the file you wish to open, click once on the row containing the item.
5. Click the **OK** button.

The selected item will then be opened.

Via the eNoteFile Button

1. Click on the **eNoteFile Button** and click on the **Keyword Search** menu item.
   The **Keyword Search** window box will be displayed.
2. Type the desired search terms into the **Keywords** text box.
3. Click the **Search** button.
   The search will now be performed and the results listed below.
4. If you wish to keep the search results open following the opening of a document or file, place a tick in the **Keep search results open** check box.
5. If you have located the file you wish to open, click once on the row containing the item.
6. Click the **OK** button.

The selected item will then be opened.

File Search

File Search is a fine-grained search that allows you to locate those projects that have specific project fields set to specific values.

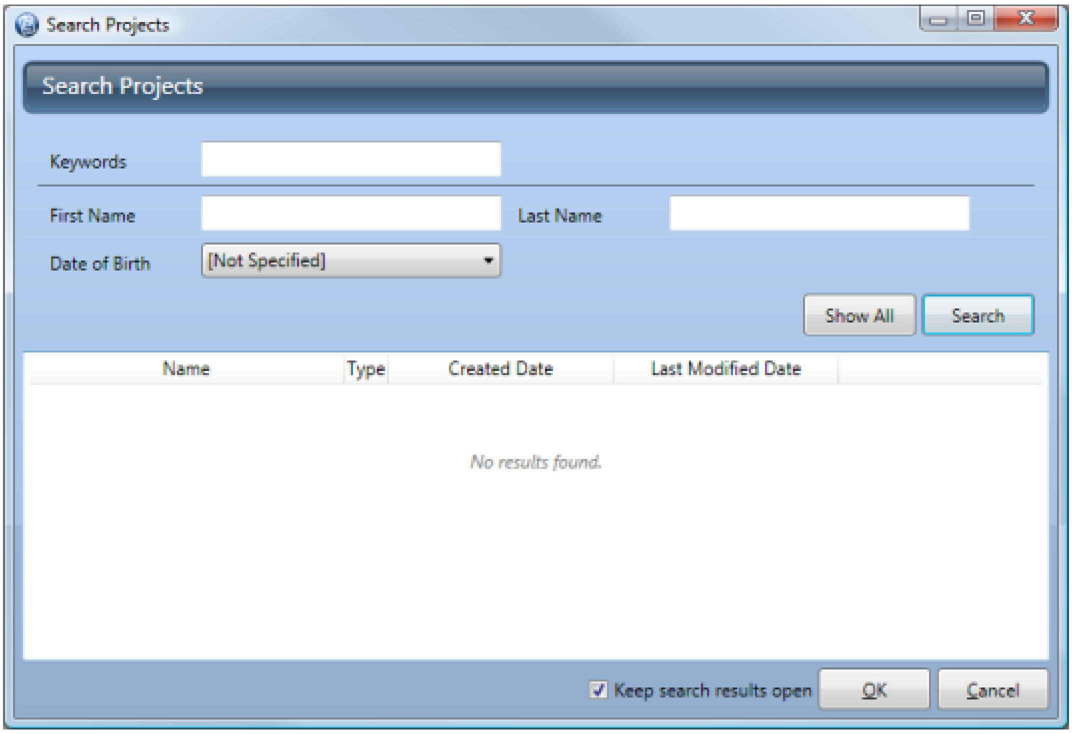


Figure 22 - File Search window

1. Click on the **eNoteFile Button**, point the arrow next to or hover the stylus over **Keyword Search** and click the **Search Files** menu item.
   The **Search Files** window box will be displayed.
2. Enter the desired search terms into the relevant text boxes.
   The text boxes displayed in your **Search Files** window may differ than those in Figure 22 depending on the Project Fields that have been configured for your organisation.
3. Click the **Search** button once.
   The search will then be performed and the matching files displayed below.
4. Once you have located the file in which you are interested you may open it by clicking once on the row containing the item.
5. If you wish to keep the search results open following the opening of a document or file, place a tick in the **Keep search results open** check box.
6. Click the **OK** button once.

The selected file will open.

If you would prefer to list all of the files for your organisation, you may click the **Show All** button once. All files will then be listed below.

Notation Search

Notation Search allows you to locate documents containing notations within a specific region of interest.

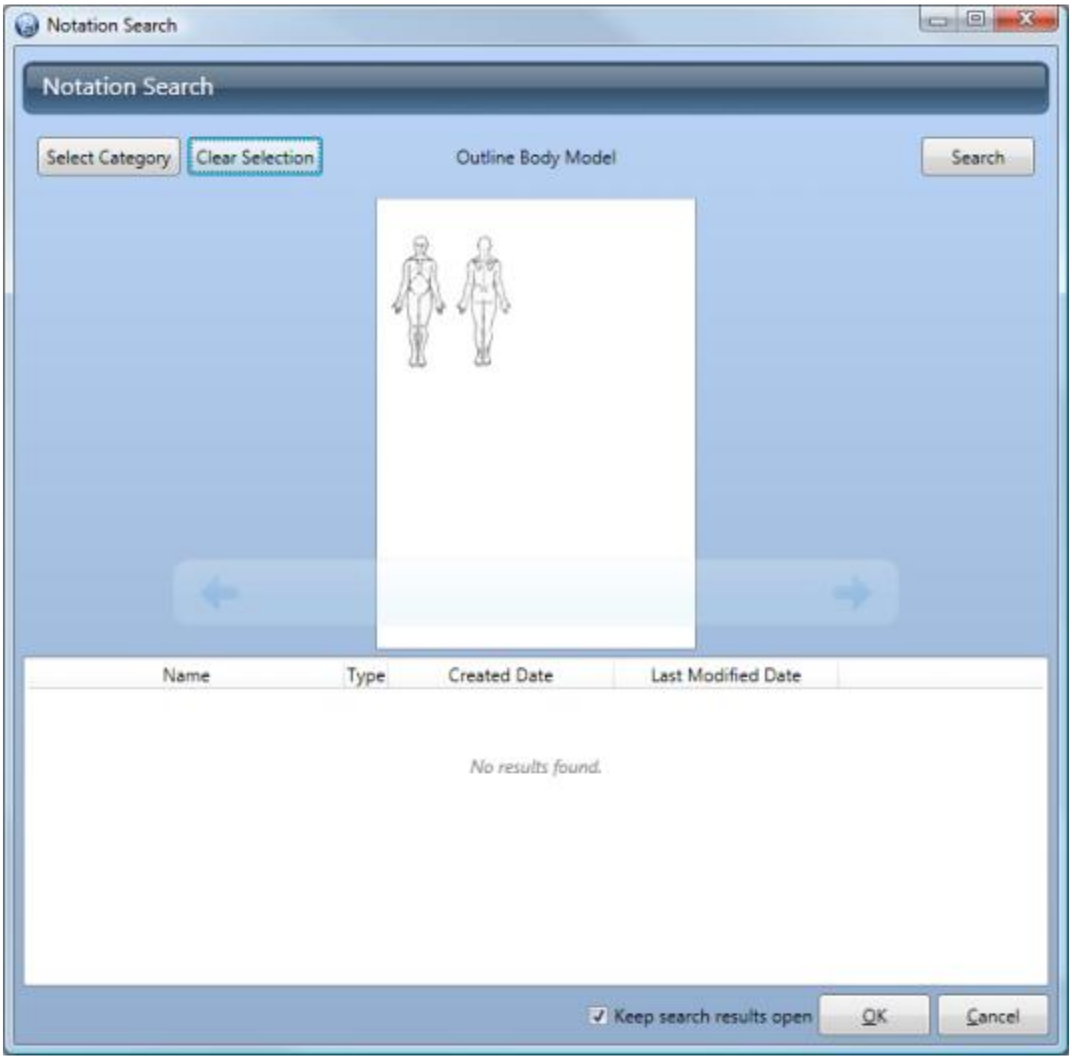


Figure 23 - Notation Search

1. Click on the **eNoteFile Button** , point the arrow next to of hover the stylus over **Keyword Search** menu item and click the **Area Search** menu item.
   The **Notation Search** window box will be displayed.
2. Click the **Select Category** button.
   The Category Explorer window will be displayed.
3. Click once on the Category in which you would like to search.
4. Click the **OK** button.
   The Category Explorer window will now close and you will be returned to the **Notation Search** window.
5. Using the mouse or stylus, circle the area of the canvas in which you would like to search.
   The area to be searched will be highlighted in yellow.
   If you are not happy with the selection, click the **Clear Selection** button.
6. Click the **Search** button.
   The search will now be performed and matching documents will be listed below.

7. Click once on the item for which you wish to open.
8. If you wish to keep the search results open following the opening of a document or file, place a tick in the **Keep search results open** check box ☑.
9. Click the **OK** button.

The selected document will now open.

Removing a File

If you wish to remove a file from your organisation, you must first locate it:

1. Using either the File Search, Keyword Search or Notation Search, open the File which you wish to remove.
2. Once you have the desired File window open, Ensure that the **Home** ribbon tab is selected.
3. Click the **Remove File** button.
   A message box will be displayed, prompting you to confirm your action.
4. Click the **Yes** button.

The File has now been moved to the Recycle Bin. If you wish to permanently delete the file, see Permanently delete a removed item.

Using Images

Images can be inserted into Documents, eMemos and Categories.

What would you like to do?

- Insert an image
- Insert a new image
- Remove an image
- Remove an image from the Image Gallery
- Rename an image within the Image Gallery
- Scan a paper document into eNoteFile

Image Gallery

The Image Gallery shows images that have been imported into eNoteFile for use when defining Categories and those currently in use within the current File or eMemo.

Images that have been used within Category definitions can be viewed by selecting **My Categories** in the left pane of the window.

If you are currently working within an eMemo, the images currently in use by the eMemo can be viewed by selecting **My eMemo** in the left pane.

If you are currently working within a File, images currently in use by the File can be viewed by selecting **My Project, My Client** or **My Subject** depending on the eNoteFile edition selected during registration.

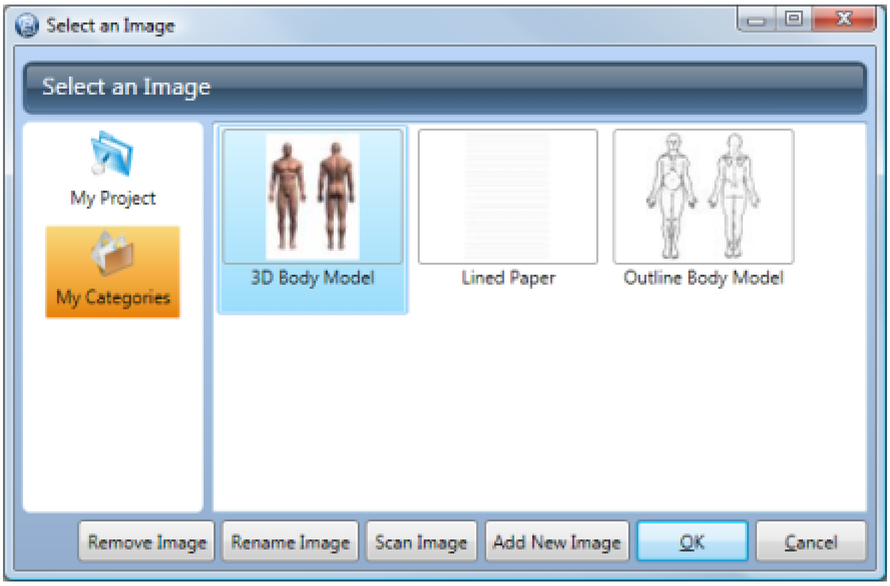


Figure 24 - Image Gallery

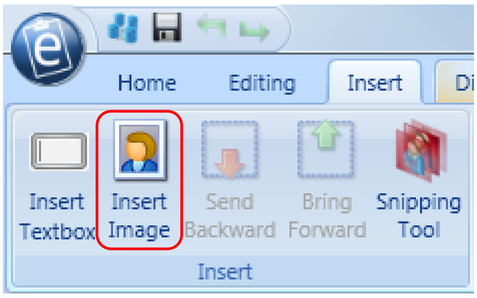


Figure 25 - Insert Ribbon Tab

Insert an image

1. Ensure the **Insert** ribbon tab is selected.
2. Click the **Insert Image** button.
   The Image Gallery will open.
3. Click on the image you wish to insert.
   If the image you wish to insert is not available, see Insert a new image below.
4. Click the **OK** button.
   The image will then be added to your document.

You may now move and resize the image within your document as required.

Remove an image

To remove an image from a document:

1. Click once on the image you wish to remove.
2. If you have access to a keyboard, press the **Del** or **Delete** button.
   If you are using a stylus or prefer to use the mouse, ensure that the **Editing** ribbon tab is selected and click the **Delete** button.

The image is now deleted.

Insert a new image

1. Ensure the **Insert** ribbon tab is selected.
2. Click the **Insert Image** button.
   The Image Gallery will then open.
3. Click the **Add New Image** button.
   An open dialog will then be displayed.
4. Browse your computer for the desired image.
5. Click on the image.
6. Click the **OK** button.
   The open dialog will now be closed and you will return to the Image Gallery.
7. Click on the image.
8. Click the **OK** button.
   The image will then be added to your document.

You may now move and resize the image within your document as required.

Removing an image from the Image Gallery

To prevent an image from being displayed within the Image Gallery in future, you may remove it.

1. Ensure the **Insert** ribbon tab is selected.
2. Click the **Insert Image** button.
   This Image Gallery will then open.
3. Select the image you wish to remove by clicking once on the image thumbnail.
4. Click the **Remove Image** button.
   A message box will then be displayed prompting you to confirm the removal.
5. Click the **Yes** button.
   The image will now have been removed from the Image Gallery.

Renaming an Image

When an image is added to the Image Gallery it is automatically named after the file. This name may not always make sense and you may wish to assign a friendlier name – This can be achieved by renaming the image.

Figure 26 - Rename Image window

1. Ensure the **Insert** ribbon tab is selected.
2. Click the **Insert Image** button.
   The Image Gallery will then open.
3. Click once on the image that you wish to rename.
4. Click the **Rename Image** button.
   The **Rename** Image dialog box will then open prompting for the new image name.
5. Enter the desired name for image.
6. Click the **OK** button.

The image is now renamed.

Scanning

eNoteFile allows you to scan documents directly into your files. To scan an image:

1. Ensure the **Insert** ribbon tab is selected.
2. Click the **Insert Image** button.
   This Image Gallery will then open.
3. Click the **Scan Image** button.
   The **Scan an Image** window will be displayed.

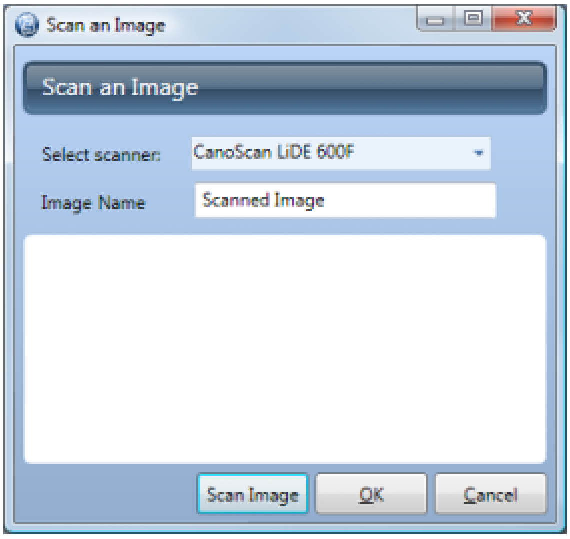


Figure 27 - Scan Image window

4. Select the scanner you wish to use in the **Select scanner** dropdown list.
5. Type a name for the new image in the **Image Name** text box.
6. Click the **Scan Image** button.
   eNoteFile will now start your scanner's acquisition program.
7. Scan your image using the scanners software.
   As scanning software differs from device to device, please consult your scanners manual if you are unsure on how to use it.
   Once the image has been acquired, it will appear within the **Scan an Image** window.
8. If you are satisfied with the image, click the **OK** button.
   The image will now be displayed with the **Image Explorer** window.
9. If you wish to insert the scanned image into the current notation, click the image thumbnail once and click the **OK** button.

Synchronisation

Synchronisation allows you to share your notations will colleagues within your organisation, securely backup your files and to work efficiently on multiple computers.

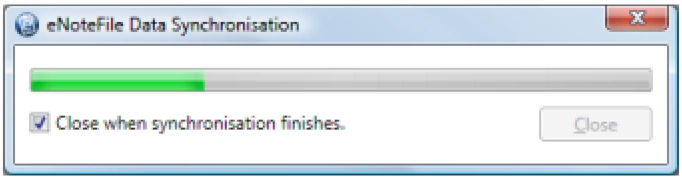


Figure 28 - Synchronisation window

1. Ensure that any open files have been saved.
   This will automatically happen prior to a synchronisation; however it is often easier to perform this step manually as there may be open files with mandatory/required fields that have not been completed which will prevent the synchronisation from occurring.
2. Click on the **eNoteFile Button** and then click **Synchronise**.
   The **eNoteFile Data Synchronisation** window will be opened and the progress of the synchronisation process displayed.
3. If you have removed the tick from the **Close when synchronisation finishes** check box, the window will remain open when the synchronisation completes. Click the **Close** button when ready.

If another user within your organisation has made changes to a document for which you have also made changes, a warning message will be displayed stating this. You will also be directed to check the **Page Popup** of the affected windows as pages may have been duplicated to prevent data loss.

Backing up and restoring your Data

You should regularly synchronise your data to prevent any loss of data should anything happen to your computer.

If you are not connected to the Internet and as such are unable to synchronise your data, you should regularly create backups. As soon as you reconnect to the Internet you should synchronise.

Restoring a backup that was created prior to a synchronisation is not recommended and should be avoided as it may result in unexpected behaviours.

What would you like to do?

- Backup my notations to the eNoteFile Synchronisation Servers
- Create a backup of my data
- Restore a previously created backup file

Backup

eNoteFile Backup allows you to create a file that you may store on a USB memory key, CD or other removable storage device to safeguard your data.

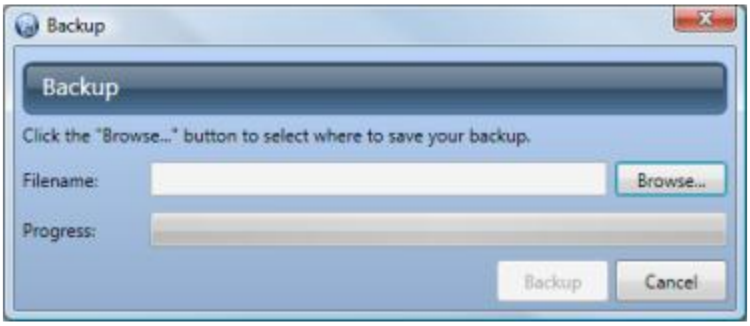


Figure 29 - Backup window

7. Click on the **eNoteFile Button** , point the arrow next to **Tools**, and then click **Backup**.
   The **Backup** window will be displayed.
8. Click once on the **Browse...** button.
   The **Backup to...** dialog box will be displayed.
9. Browse your computer and locate the folder in which you wish the backup file to be saved into.
10. Type a name for the backup file in the **File Name** text box.
11. Click the **OK** button.
    If the file name you have specified already exists in the folder, you will be prompted to overwrite the file. Click the **Yes** button if you would like to overwrite the file of click the **No** button to select another file name.
    The **Browse to...** dialog box will close and return you to the **Backup** dialog.
12. Click the **Backup** button once.
    Please wait while eNoteFile creates the backup file.
    Once the Backup operation completes a message box will appear stating so.
13. Click the **OK** button on the message box.
    The **Backup** window will close.

The Backup has now been completed.

Restore

If you have previously created a backup file containing your eNoteFile data, you may restore it at any time.

WARNING: Restoring a backup created prior to your last data synchronisation is not recommended and may result in unexpected behaviours. Only restore backups where you have been working offline and have yet to synchronise.

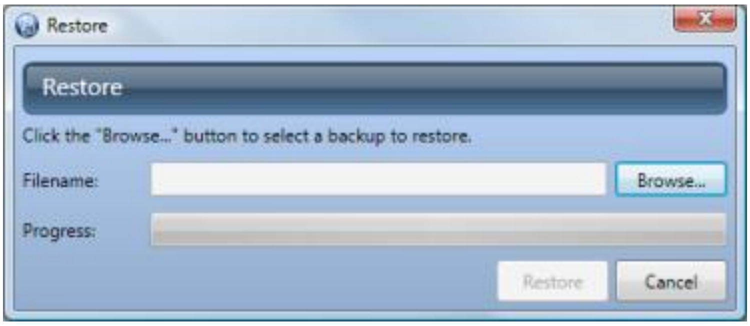


Figure 30 - Restore window

To restore a previously created backup:

1. Click on the **eNoteFile Button**, point the arrow next to **Tools**, and then click **Restore**.
   The **Restore** window dialog box will be displayed.
2. Click once on the **Browse...** button.
   The **Restore from...** dialog box will be displayed.
3. Browse your computer and locate the backup file you wish to restore.
4. Select the backup file by clicking once on its file name.
5. Click the **OK** button.
   The **Restore from...** dialog box will close and return you to the **Restore** dialog.
6. Click the **Restore** button once.
   You will then be prompted to comfirm the restore.
7. Click the **OK** button.
   All open windows will close and the restoration operation will commence.
   Once the Restore operation completes a message box will appear stating so.
8. Click the **OK** button on the message box.

The Restore has now been completed.

Exporting and Distributing Documents

eNoteFile allows you to export and distribute your notations as PDF files that can be viewed using the readily available Adobe Reader application.

What would you like to do?

- Export a document to a PDF file
- Email a document to a colleague

Document Export

This section describes the steps required to export a document as a PDF file.

1. Open the file containing the document you wish to export.
   For further information see Opening Files and Searching Documents.
2. Navigate to the Category and document revision that you wish to export.
3. Ensure the **Distribute** ribbon menu tab is selected.
4. Click the **Save as PDF** button.
   The **Save as PDF** window will be displayed.
5. If you wish to password protect the file, place a tick in the **Password Protect PDF (Optional)** check box and type a password into the **Password** text box.
6. Click the **OK** button.
   A **Save As** dialog box will be displayed.
7. Browse your computer for the folder in which you would like to export the document to.
8. Type a file name in the **File name** text box.
9. Click the **OK** button.
   The **Save As** dialog box will now close.
   If a file with the same name already exists in the selected folder, you will be prompted to overwrite the file. Click the **Yes** button to overwrite the existing file or **No** to specify a different file name.

The document has now been exported.

Emailing a Document

This section describes the steps required to email a document as a PDF file. If you use a Web based email provider (such as Hotmail or Gmail), please follow the steps in Document Export above to prepare a PDF document that can be manually attached to your email.

1. Open the file containing the document you wish to export.
   For further information see Opening Files and Searching Documents.
2. Navigate to the Category and document revision that you wish to export.
3. Ensure the **Distribute** ribbon menu tab is selected.
4. Click the **Email as PDF** button.
   The **Email as PDF** window will be displayed.
5. If you wish to password protect the file, place a tick in the **Password Protect PDF (Optional)** check box and type a password into the **Password** text box.
6. Click the **OK** button.
7. Your email application will now launch and display a new email with the document attached as a PDF file.

8. Complete and send your email.

Recycle Bin

The Recycle Bin operates in much the same way as the Windows Recycle Bin. It enables you to restore items that have previously been removed.

What would you like to do?

- Restore a previously removed item
- Permanently delete a removed item
- Empty the Recycle Bin

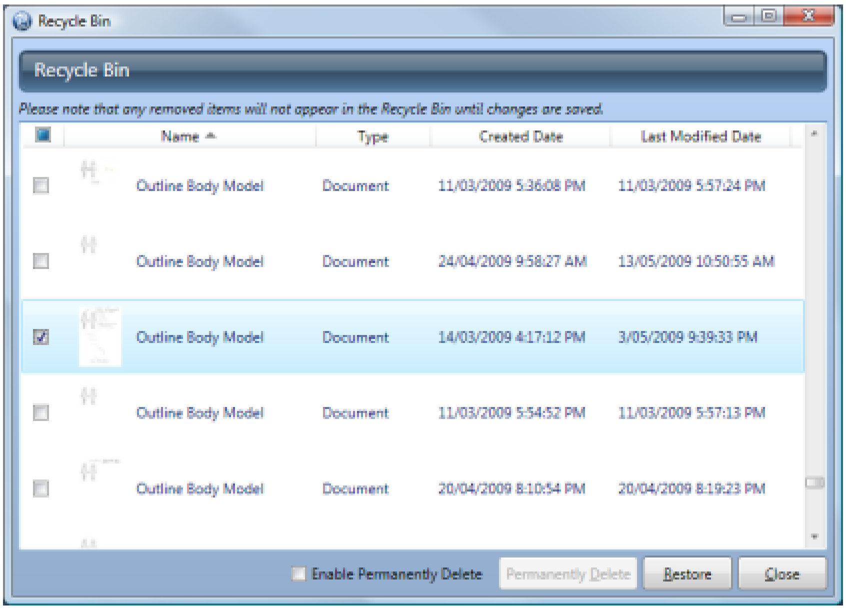


Figure 31 - Recycle Bin

Restore a previously removed item

1. Click on the **eNoteFile Button**, point the arrow next to **Tools**, and then click **Recycle Bin**. The Recycle Bin window will open.
2. Select the check boxes of the items wish to restore.
3. Click the **Restore** button.

The selected items will now have been restored to their original locations.

Permanently delete a removed item

1. Click on the **eNoteFile Button**, point the arrow next to **Tools**, and then click **Recycle Bin**. The Recycle Bin window will open.
2. Place a tick in the box ☐ that corresponds to the items you wish to delete.
3. Place a tick in the **Enable Permanently Delete** box ☐.
4. Click the **Permanently Delete** button. You will then be prompted to confirm the delete operation.

5. Click the **Yes** button if you understand the ramifications and wish to proceed with the delete operation.

WARNING: Permanently deleting items is (as the name suggests) permanent. There is no way in which Permanently Deleted items can be restored.

Empty the Recycle Bin

1. Click on the **eNoteFile Button** , point the arrow next to **Tools**, and then click **Recycle Bin**.
   The Recycle Bin window will open.
2. Place a tick in the box in the table header
   This will select all items.
3. Place a tick in the **Enable Permanently Delete** box .
4. Click the **Permanently Delete** button.
5. You will then be prompted to confirm the delete operation.
6. Click the **Yes** button if you understand the ramifications and wish to proceed with the delete operation.

WARNING: Permanently deleting items is (as the name suggests) permanent. There is no way in which Permanently Deleted items can be restored.

Managing your Organisation

In order to manage the organisation, you need to be a member of the Organisation Administrators role. This role is automatically assigned to the user that initially signed-up with eNoteFile.

You are entitled to create an additional nine user accounts for your organisation without further charge.

What would you like to do?

- Add an additional user to your organisation
- Remove an existing user from your organisation
- Enable a user to perform administrative functions
- Remove the ability for a user to perform administrative functions
- Merge my organisation with another so that notations can be shared

Adding a User

1. Open your favorite Web Browser and navigate to http://enotefile.com/.
2. Click on the **Login** link at the top of the page.
3. Enter your email address and password in to the relevant fields.
4. Click the **Login** button.
   You will then be taken to the **My Account** page.
5. Click the **Manage User Accounts** link on the right-hand side of the page.
   The **Organisation Users** page will then load and display a list of the current users that have been associated with your organisation.
   If a user has yet to receive their confirmation email and activate their account, the **Active** column for the user account will display **No**.
6. Click the **Create new user** button.
   The **Create User** page will then be displayed.
7. Complete each of the displayed input fields with the relevant details.
8. If you would like this new user to be able to also manage your organisation, you may place a tick in the **Organisation Administrator** check box ☐.
9. Click the **Create** button.
   An email will now automatically be sent to the email address specified to confirm that the email address has been entered correctly.

The user has now been added to your organisation.

It is important to note however, that the user will be unable to login to eNoteFile until their email address has been activated by the user.

Activating your Account

You will not be able to login to eNoteFile until your email address has been verified and your account activated.

To activate your account, click on the **Activation Link** within the email that will have been sent to you as part of the **Create User** process.

You may now login to eNoteFile.

Removing a User

1. Open your favorite Web Browser and navigate to http://enotefile.com/.
2. Click on the **Login** link at the top of the page.
3. Enter your email address and password in to the relevant fields.
4. Click the **Login** button.
   You will then be taken to the **My Account** page.
5. Click the **Manage User Accounts** link on the right-hand side of the page.
   The **Organisation Users** page will then load and display a list of the current users that have been associated with your organisation.
6. Click the **Select** link that coressponds to the user account that you wish to remove from your organisation.
   The **User Details** page will now be displayed.
7. Click the **Delete** button.
   A message box will then be displayed, prompting you to confirm the delete operation.
8. If you are sure, click the **OK** button.

The user account will now have been removed from your organisation, preventing that particular user from access your notations.
Should this user return to their **My Account** area on the eNoteFile website, they will be allowed to download the eNoteFile application and activate their own organisation.

Managing Organisation Administrators

There are a number of administrative tasks within eNoteFile that only a certain number of users should be assigned. Such tasks are:

- Managing the Organisation's Details,
- Managing user accounts within the organisation,
- Requesting and approving organisation merges, and
- Permanent removal of unwanted notations.

To enable a user to perform the above actions or prevent them from doing so it is necessary to:

1. Open your favorite Web Browser and navigate to http://enotefile.com/.
2. Click on the **Login** link at the top of the page.
3. Enter your email address and password in to the relevant fields.
4. Click the **Login** button.
   You will then be taken to the **My Account** page.
5. Click the **Manage User Accounts** link on the right-hand side of the page.
   The **Organisation Users** page will then load and display a list of the current users that have been associated with your organisation.
   If a user has yet to receive their confirmation email and activate their account, the **Active** column for the user account will display **No**.
6. Click the **Select** link that coressponds to the user account that you wish to add or remove the Organisation Administrations role to/from.
   The **User Details** page will now be displayed.
7. Place a tick ☑ within the **Organisation Administrator** check box to assign the role to the user, or clear the tick ☐ to remove the role from the user.
8. Click the **Update** button.

The user account's role memberships are now updated.

Organisation Merge

eNoteFile allows you to merge your organisation with another – allowing users from both organisations to view, edit and share notations.

What would you like to do?

- Submit a request to merge with another organisation.
- Approve a request from another organisation to merge with my organisation.
- Reject a request from another organisation to merge with my organisation.

Request an Organisation Merge Request

To request to merge with another organisation:

1. Open your favorite Web Browser and navigate to http://enotefile.com/.
2. Click on the **Login** link at the top of the page.
3. Enter your email address and password in to the relevant fields.
4. Click the **Login** button.
   You will then be taken to the **My Account** page.
5. Click the **Merge Organisations** link on the right-hand side of the page.
   The **Merge Organisations** page will then load.
6. Enter the email address of an Organisation Administrator user within the organisation you wish to merge with.
7. Click the **Submit** button.
   The **Pending Merge Request** page will then load and emails sent to all Organisation Administrators in both organisations.
8. You should now notify all users within your organisation to synchronise their notations. For further information, see Synchronisation.
9. Click the **Approve** button.

At least one Organisation Administrator from each organisation must approve the merge before it will take place.

Should a single Organisation Administrator reject the request, the merge will be aborted.

Should an Organisation Administrator from each organisation approve the request, it will be processed within 24 hours.

WARNING: Failure for everyone within your organisation to synchronise prior to the organsation merge may result in the loss of data. If you are uncertain as to if all users have indeed synchronised, it is often safer to reject the merge request (see Rejecting an Organisation Merge Request).

You will receive an email notification once the merge process has completed containing further instructions.

Approving a Merge Request

Should you receive an email notification informing you that another organisation has requested to merge with your organisation, you may approve the request by following the below steps:

1. Click on the hyperlink in the email that you received.
   A web browser will then be launched and navigated to the eNoteFile login page.
2. Enter your email address and password to login.
   The Pending Merge Request page will then load. If you are taken to the **My Account** home page, click the **Merge Organisations** link on the right-hand side of the page.
3. Instruct all users within your organisation to synchronise their notations. For further information, see Synchronisation.
4. Read the instructions on the screen and click the **Approve** button.

Once both organisations have approved the request, the merge will take place within the next 24 hours unless rejected by any Organisation Administrator.

WARNING: Failure for everyone within your organisation to synchronise prior to the organsation merge may result in the loss of data. If you are uncertain as to if all users have indeed synchronised, it is often safer to reject the merge request (see Rejecting an Organisation Merge Request).

You will receive an email notification once the merge process has completed containing further instructions.

Rejecting an Organisation Merge Request

Should you receive an unsolicited merge request email from eNoteFile you have two choices;

1. You may ignore the email
2. You may reject the request.

Ignoring the email will in effect reject the merge as at least one Organisation Administrator from your organisation must approve the request before it will be actioned. If there are multiple Organisation Administrators within your organisation, it is often safer to explicitly reject it.

To reject the request:

1. Click on the hyperlink in the email that you received.
   A web browser will then be launched and navigated to the eNoteFile login page.
2. Enter your email address and password to login.
   The Pending Merge Request page will then load. If you are taken to the **My Account** home page, click the **Merge Organisations** link on the right-hand side of the page.
3. Click the **Reject** button.

The merge request will now be rejected and your organisations will not me merged.

Troubleshooting

A File or eMemo is not showing up in my search results

If you have recently created the File or eMemo, it may not be available for searching immediately. Please wait for two minutes and try again.

If you have just recently logged in to an Organisation for the first time, please allow 12 hours (of eNoteFile running) for all Files and eMemos to be available.

To access a File immediately, please use the File Search.

I am unable to print documents

If you have attempted to print a Document by clicking the Print button and yet the document doesn't print, contact your printer manufacturer for an XPS enabled printer driver.

Alternatively, you may export the document to a PDF file and then print. To export a document to PDF, see Document Export.