



Getting Started Guide

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INSTALLING FILECENTER FOR THE FIRST TIME

1. System Requirements

Before you install FileCenter, please make sure that your system meets these minimum requirements:

Operating System: Windows 2000, XP, or newer

CPU: 300 MHz

Memory: 128 MB RAM

Hard Drive Space: 100 MB

2. Obtain Your Product Key

Before you can install the FileCenter software, you need to obtain a Product Key (it could be called an “Unlock Code” or a “Serial Number”). If you have not received a key, please request one at this location:

<http://www.lucion.com/filecenter-demo.cfm>

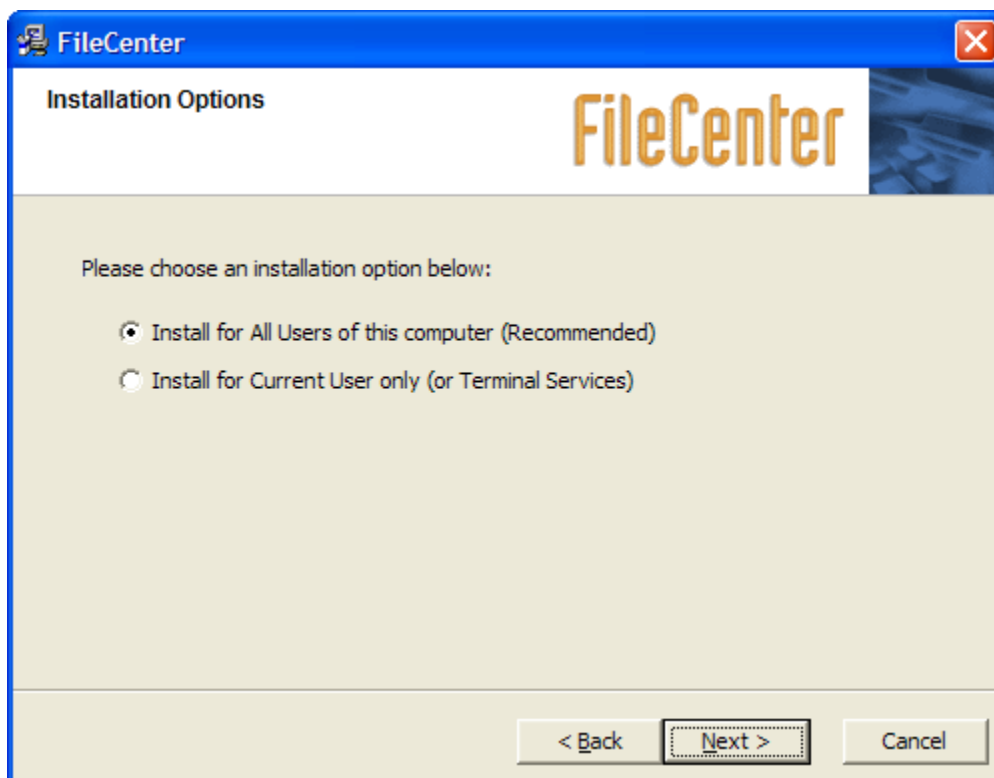
3. Begin Installation

You should have either downloaded the FileCenter installation file or received it on a disk. If you downloaded the file, locate and double-click it to begin installation. If you received a disk, place the disk in your drive; if setup does not begin automatically, locate the setup file on the disk and double-click it to begin installation.

When installation begins, click *Next* on the Welcome screen and again at the *License Agreement*.

4. Current User or All Users?

You must choose whether to install FileCenter for *All Users* or the *Current User Only*.

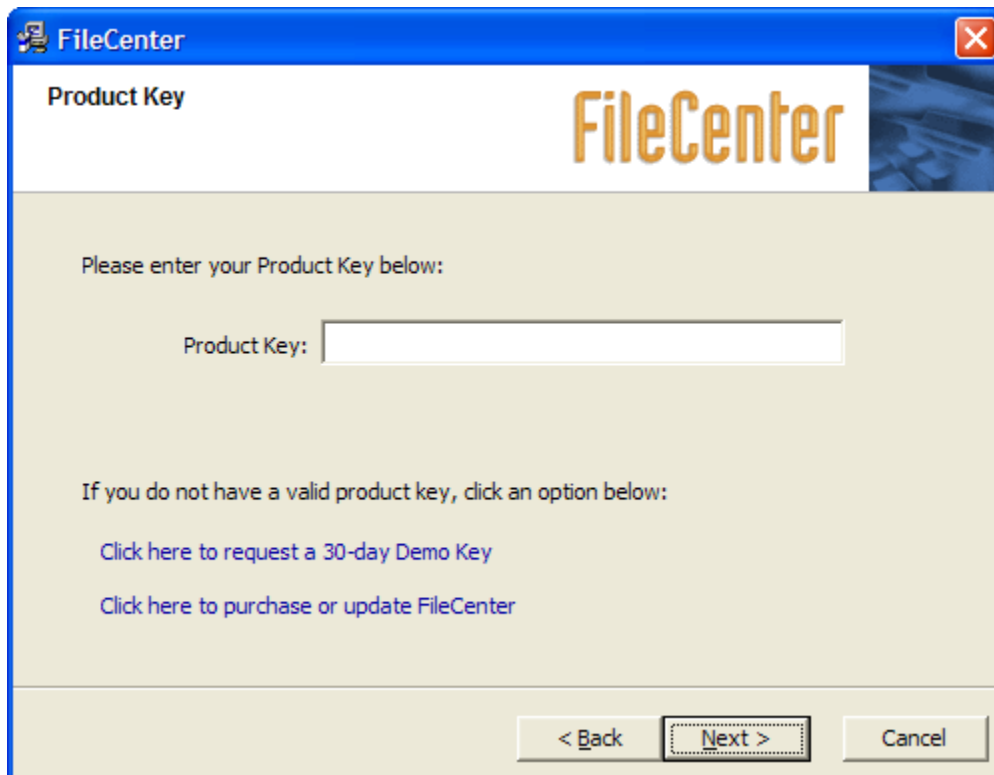


All Users. By installing FileCenter for all users, every user of the computer will share the same FileCenter settings. This means that if user A creates a cabinet or changes a setting, user B will see the same cabinet or setting change. If you are not sure which option to choose, select this one.

Current User Only. When you install FileCenter for the current user only, each user of the computer will have their own FileCenter settings. Select this option if there is more than one user of this computer and if each user should have independent settings. If you are setting up FileCenter on a Terminal Server, you should select this option.

5. Product Key

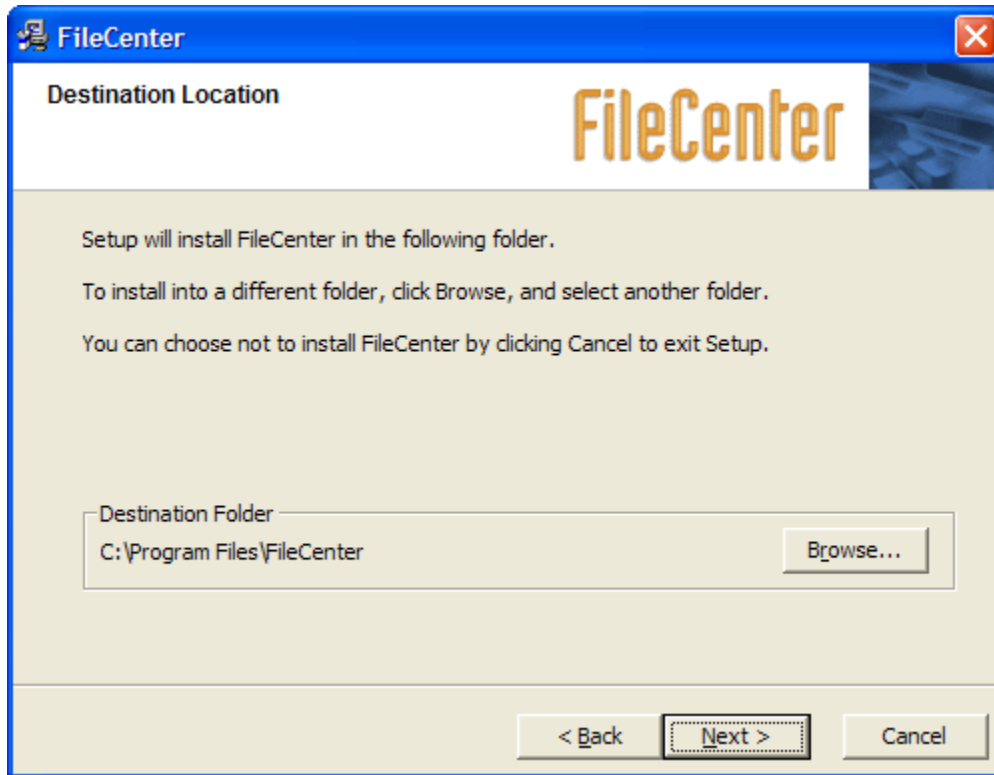
Next you will need to enter your Product Key. (Your product key may also be called an “Unlock Code” or a “Serial Number”). When prompted, type or copy/paste it into the field provided:



If you do not have a product key, you can use the links on the dialog to request a 30-day demo key or purchase FileCenter and receive a full product key. Your product key will be sent via e-mail.

6. Complete the Installation

Click *Next* to see the *Destination Location* option.



You can use this option to change where FileCenter is installed. By default, FileCenter will be installed in the “c:\program files\filecenter” folder. If you would like to change the destination folder, you may do that by clicking on “Browse.”

NOTE: The destination folder only controls where the FileCenter program files will be installed. It does not determine where the file cabinets or file data will be stored. You will have an opportunity to choose your data locations later.

Next you will confirm your choices and complete the installation.

SETTING UP YOUR FIRST CABINET

1. Start FileCenter

After the installation completes, locate the FileCenter shortcut on your desktop or find it in the Windows *Start* menu under *All Programs > FileCenter*. Use the shortcut to open FileCenter.

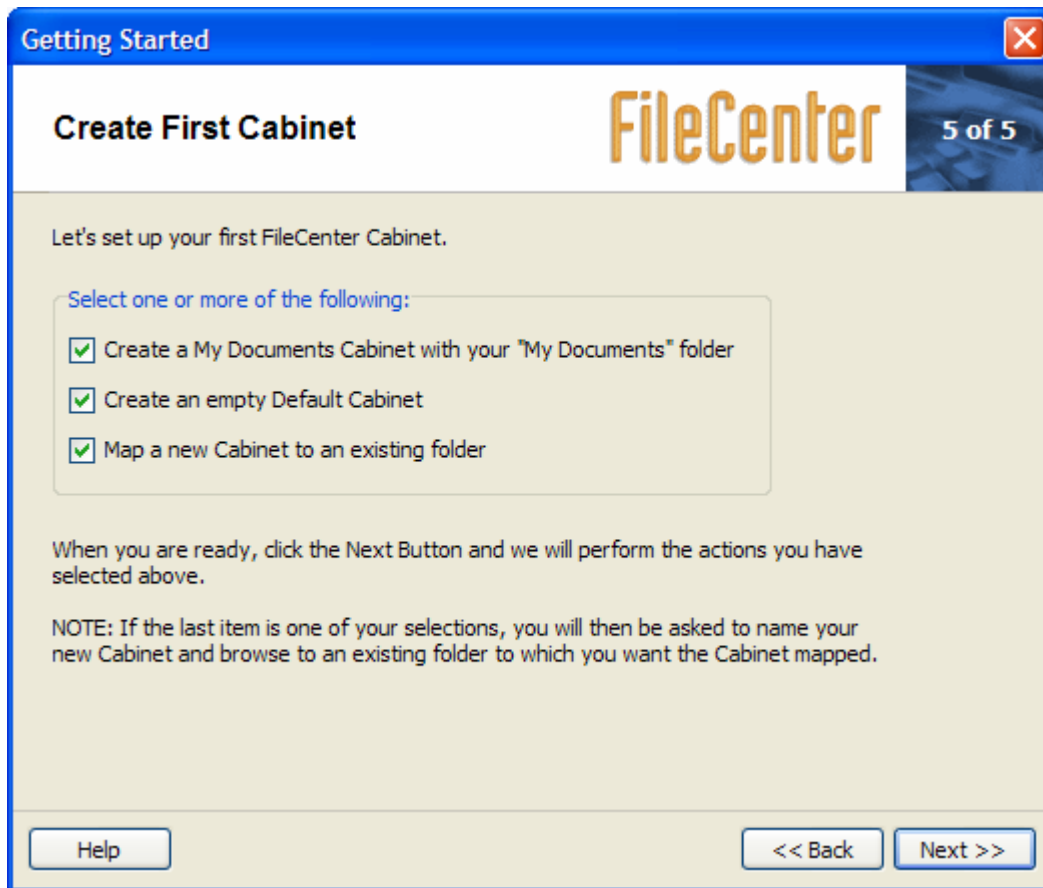
2. Create Your First Cabinet

FileCenter uses an electronic file cabinet metaphor. An electronic file cabinet contains its own drawers, folders and files.

You can create an unlimited number of file cabinets. File cabinets can easily overlay files and folders that are already on your computer, or you can create new, empty cabinets and fill them with new drawers, folders, and files.

Important: FileCenter cabinets do not alter your files in any way. They will not make your files inaccessible outside of FileCenter. If you discontinue using FileCenter, your files will remain just as they were before you started using FileCenter.

When you first run FileCenter, it will prompt you to create your first file cabinet:



There are three options available to you:

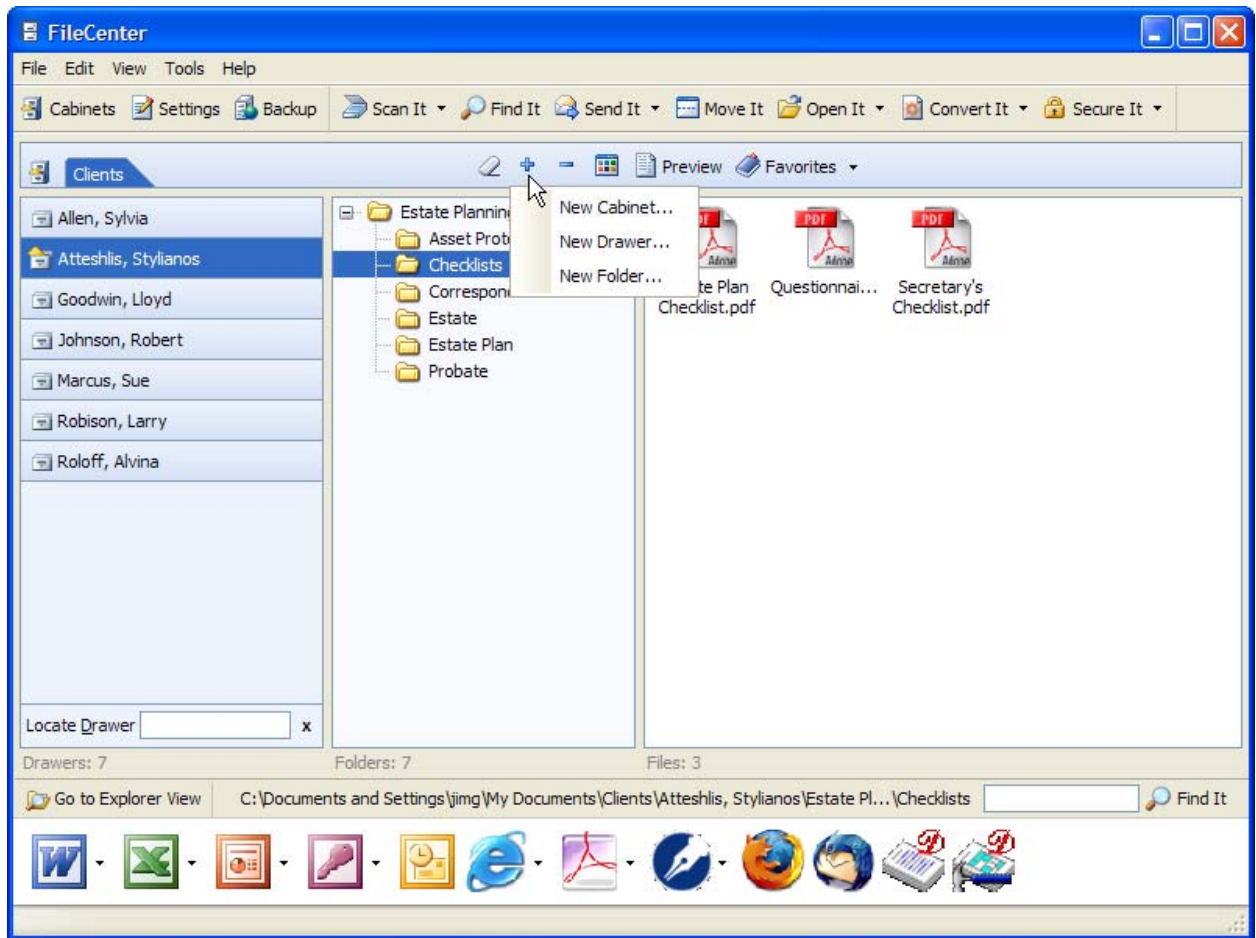
Option #1: Create a "My Documents" Cabinet. The first option is for users who store their documents in the Windows *My Documents* folder. This option will create a new cabinet to display your My Documents folder. This is the best option to select if you are not sure what to do.

Option #2: Create an empty "Default Cabinet". The second option is for users who want to begin from scratch with an empty cabinet. This option will create a cabinet called *Default* under *c:\my cabinets\default*. It is then up to you to add drawers and folders to the cabinet.

Option #3: Map a new Cabinet to an existing folder. The last option is for users who already maintain their documents in an organized folder tree. This option will display the Cabinet Creation Wizard to help you make a cabinet out of your existing folders. See *The Cabinet Creation Wizard* topic below for more instructions.

3. Add Cabinets, Drawers and Folders

Cabinets, drawers and folders can be created from the *Add* button:



Selecting *New Cabinet* will display the *Cabinet Creation Wizard*, which is described below.

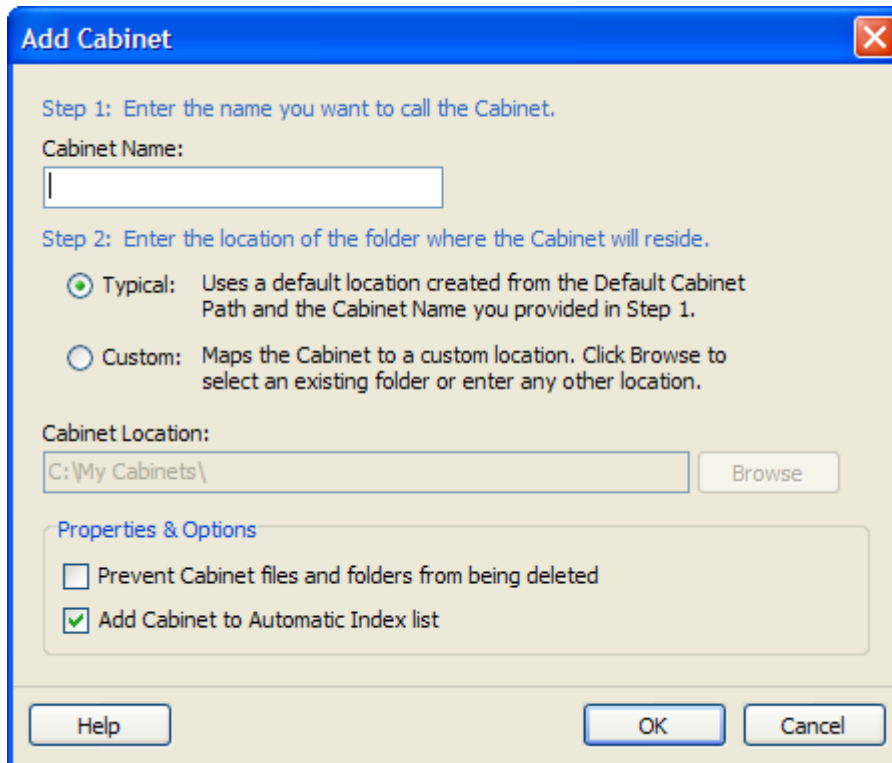
Adding a drawer will create a new drawer entry on the left side of the FileCenter window. The new drawer can hold its own folders and files.

To add a new folder, first select the drawer which will hold the folder. The folder will be created inside of the drawer. Folders can also be nested inside of other folders. To create a nested folder, first select the parent folder and then select the *New Folder* option. The new folder will be placed inside of the parent folder.

Files can be added to your cabinet in a number of ways. Usually you will save files directly into your file cabinet (see *FileCenter Save & Open Integration* below). If you mapped a file cabinet to a folder of existing data, it will automatically display all of the existing files. You can also drag and drop files into a drawer or folder.

THE CABINET CREATION WIZARD

When you add a cabinet from the *Add* button, or if you selected *Map a new Cabinet to an existing folder* when you first started FileCenter, you will be presented with the *Cabinet Creation Wizard*. This section describes the available options.



The screenshot shows the 'Add Cabinet' wizard dialog box. It has a blue title bar with the text 'Add Cabinet' and a close button. The dialog is divided into two steps:

- Step 1:** Enter the name you want to call the Cabinet. Below this is a text box labeled 'Cabinet Name:'.
- Step 2:** Enter the location of the folder where the Cabinet will reside. Below this are two radio button options:
 - Typical:** Uses a default location created from the Default Cabinet Path and the Cabinet Name you provided in Step 1. This option is selected.
 - Custom:** Maps the Cabinet to a custom location. Click Browse to select an existing folder or enter any other location.

Below the radio buttons is a text box labeled 'Cabinet Location:' containing the path 'C:\My Cabinets\'. To the right of this text box is a 'Browse' button. Below the text box is a section titled 'Properties & Options' containing two checkboxes:

- Prevent Cabinet files and folders from being deleted
- Add Cabinet to Automatic Index list

At the bottom of the dialog are three buttons: 'Help', 'OK', and 'Cancel'.

1. Cabinet Name

Each cabinet must have a unique name. The name may be as long or as short as you would like. The name does not need to match the *Cabinet Location*.

2. Cabinet Location

The most important setting for the cabinet is its location. A cabinet can be located at any folder or drive on your computer. The location can contain existing data. If it does, this data will be brought into your cabinet automatically. The data will not be changed or affected in any way by FileCenter.

There are two options for cabinet location:

Typical. The *Typical* option will create the cabinet under *c:\my cabinets*. This will be an empty cabinet. You will need to create drawers and folders to populate the cabinet.

Custom. Select the *Custom* option to browse to a specific location where you want to place the cabinet. You would use this option to place a cabinet on a network drive or separate partition, for example, or to place a cabinet on a folder of existing data.

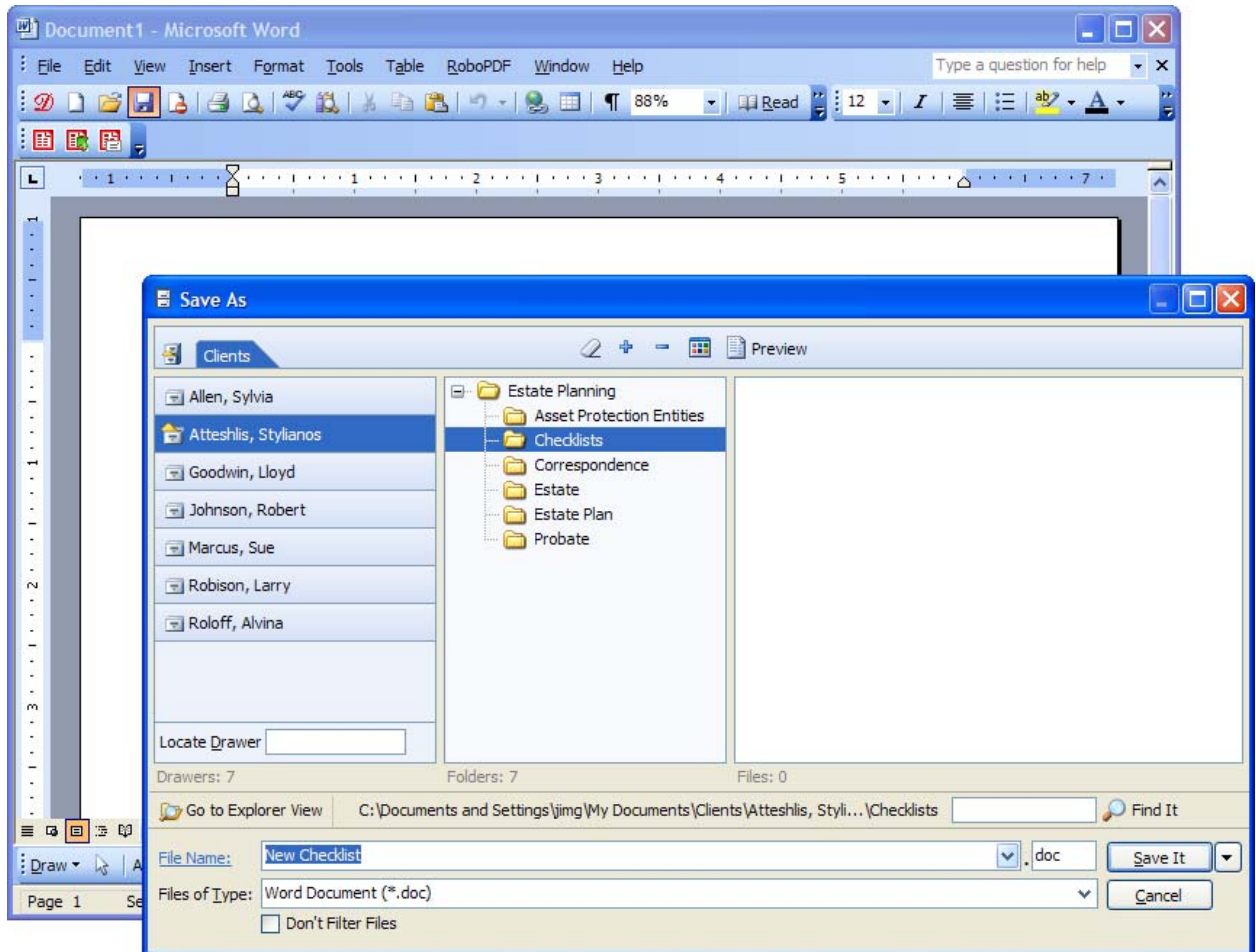
3. Properties & Options

Prevent Deletions: You can optionally disallow deletions in the cabinet. This will prevent users from deleting files through the cabinet interface. It will also prevent users from moving files.

Automatic Index List: If you plan to enable full-document searching in this cabinet, you should add the cabinet to the *Automatic Index List*. This ensures that the cabinet will be re-indexed on a regular basis. Indexing the cabinet is necessary for document searching.

FILECENTER SAVE & OPEN INTEGRATION

FileCenter can integrate with the Save and Open functions of nearly any Windows application. For applications where this is enabled, selecting *Save* or *Open* will present a file cabinet dialog rather than the application's native save or open dialog. Here is an example of saving a document from Microsoft Word:



This save and open integration allows you to directly access your file cabinets when you are working in other programs. You can store documents in their native format and open them again in their native application. More information on enabling or disabling the save and open integration is available in the FileCenter *User Guide*:

