



Central Office Portal User Manual

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PaperClip Internet eXpress

PaperClip Internet eXpress (eX4) is an Internet based electronic document package delivery service designed to interconnect trading partners Integrated Document Management solutions. Exchange electronic documents as easy as paper today eliminating the need to scan and index.

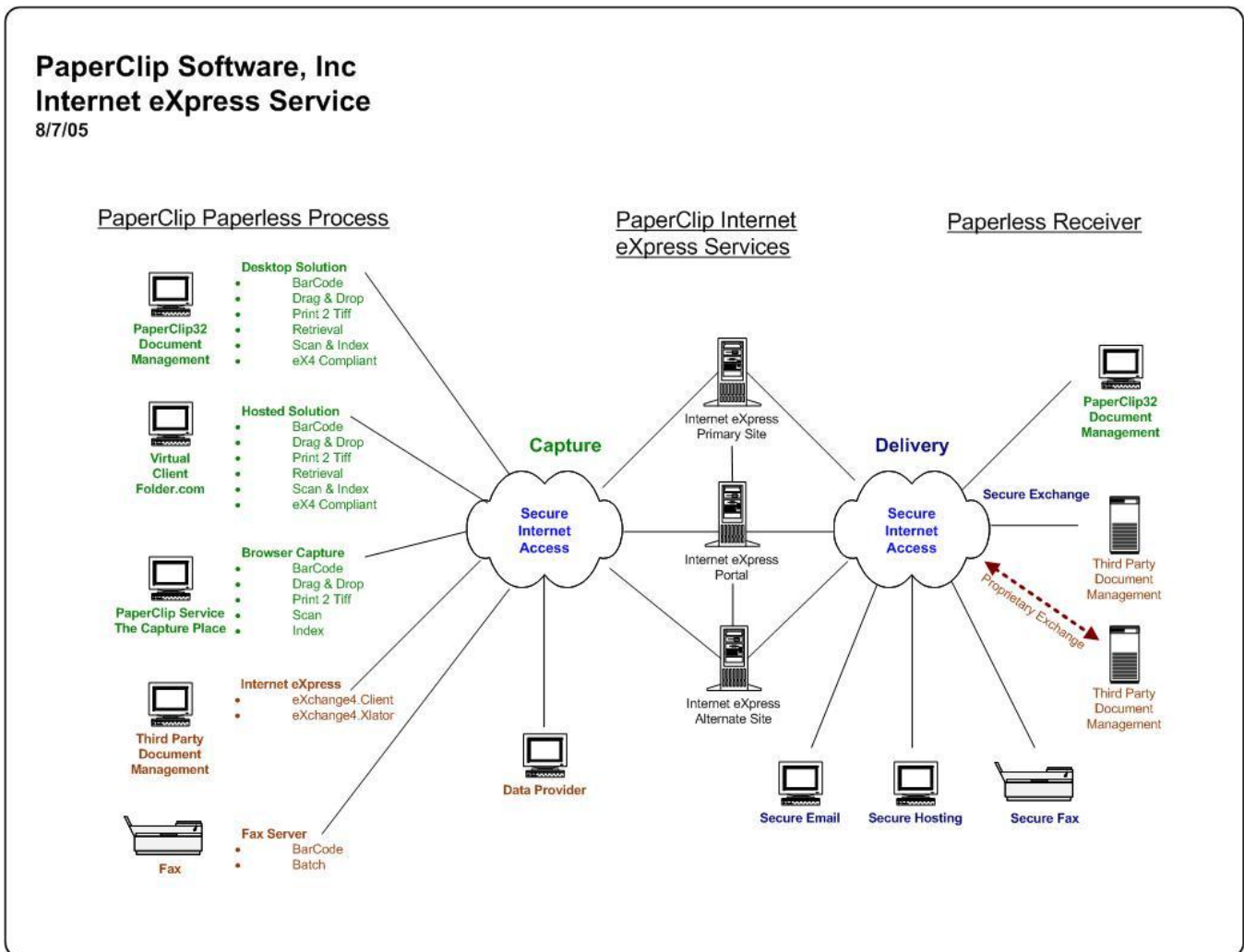
eX4 transports electronic document packages across the SSL communication network providing security and tracking. Utilizing the public standard *Electronic Document eXchange* version 3.0 for packaging electronic documents, any EDX V3.0 compliant system can connect to the eX4 network seamlessly. Non-EDX compliant IDM solutions can take advantage of eX4's powerful Xlator (translator) for end system compatibility.

Now you can connect company workflow and integrated document management solutions to business partners and branch offices around the world. Standards driven, eX4 cuts cost and reduces time to process.

PaperClip Internet eXpress service provides subscribers with many features:

- ✓ eX4 SSL Network is a secure network ensuring the most efficient transfer of documents while preserving their integrity.
 - Support for the EDX V3.0 and V2.0 Open standards.
 - EX4 Client software designed to attach to the eX4 SSL communications network for encrypted document delivery.
 - Integrated Tracking Software for delivery confirmation.
 - Microsoft Windows 2000, Windows 2003 & Windows XP platform support.
- ✓ Internet eXpress Central Office host a “market place” data dictionary vertically defining the trading communities nomenclature and content rules.
 - Public data dictionary defines paired values common across market place trading partners eliminating the need to define and maintain trading terms.
 - Define your IDM solution once to the data dictionary and send electronic business to any other subscriber immediately.
- ✓ eX4 IDM translator provides interoperability among popular IDM solutions.
 - EX4 Client can translate EDX Package standard format to host IDM solution for seamless integration requiring no custom code or modification.
 - Proprietary IDM formats are supported through the Xlator's Output Wizard.
 - Print on Receipt included. Print TIFF images when they arrive to the eX4 Client.
 - Automatically export eX4 system and package Metadata upon receipt.
- ✓ eX4 Portal provides dynamic tracking status which allows for up to date end to end tracking of electronic packages.
 - eX4 Client can display or print tracking reports.
 - Track packages up to the minute from your browser.

- Analyze tracking data for custom reports.
- E-Mail support for secondary delivery receipts.
- ✓ Electronic Reconciliation provides synchronization of sending and receiving eX4 Clients.
 - Package synchronization ensures receipt of the latest Package.
 - Metadata synchronization compares the content of the sending eX4 Client to the receiving eX4 Client and flags any discrepancies.
- ✓ Many to Many Connectivity
 - EX4 Client has connected 7 plus dissimilar IDM solutions; PaperClip32, FileNet, Eastman, Optika, DocuPac, FisH, DST AWD and others.



The eX4 Portal

The eX4 Portal web interface is designed to track packages and documents. The Portal is organized in several categories, Install, Current Status, Searching, Email Reporting and Subscriber Administration. The Portal is a secure site enforcing a SSL connection with three values required to login.

Logon starts with the unique Subscription ID provided at time of registration. The User Name provided by your Subscription Administrator and your password. Passwords are assigned by the rules below:

Password Rules:

- ✓ Must be seX4 or more characters.
- ✓ Cannot have leading or trailing blanks.
- ✓ Can have no more than 2 consecutive identical characters.
- ✓ Must be different from name.
- ✓ Cannot end or start with a digit.
- ✓ Cannot be changed more than once a day.
- ✓ Cannot be the same as any of the seX4 previous passwords.
- ✓ The hint cannot contain the password.

PaperClip Software, Inc eX4 Test Server - TCO

Welcome to PaperClip Software, Inc eX4 Test Server.

Subscription:

User Name:

Password:

Press [Get Hint](#) if you've forgotten your password.
Your account will be locked after five failed attempts to log in.

Powered by PaperClip eX4 © Copyright 2003-2007 PaperClip Software, Inc.

Home Page

The eX4 Home Page is divided into three sections, yellow highlighted for install resources and downloads, green highlight logged in use information and pink highlight for more tasks.

eX4 Test Server

Sat, Mar. 2008 12:15:54 AM

User: SES\Scott
Company: PaperClip Testing South
Contact: Scott

Home
Status
Find Packages
Find Documents
Email Reports
Address Book
Subscription
Users
My Password
Logout
Help
About

Welcome to the PaperClip Software, Inc eX4 Test Server Home page.

How do I ...?

How do I start sending documents?

Documents are transported in EDX packages. You will need to install the Package Processor at your facility before you can start sending documents. Go to [Package Processor Installation](#) to get the latest Package Processor.

How do I view the contents of this EDX file I just downloaded?

EDX package files can be viewed using the PaperClip EDX Package Viewer. Go to [Viewer Downloads](#) to get the latest viewer.

When I browsed this web site my browser didn't recognize the web site certificate?

When an SSL connection is made, the browser examines a certificate from the web server and if it recognizes the certificate the browser will trust the server. By downloading and installing the certificate from our Certificate Authority your browser will recognize our web site.

Download the certificate from [Downloads](#)

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Install resource will download the latest version of the Package Processor. The Package Processor communicates with the Internet eXpress Central Office for package transfer and information exchange. Install will also require the downloading of the PaperClip SSL Certificate.

The EDX Package Viewer provides the feature of opening an EDX file extension and displaying the contents of an EDX Package.

Note: Inactivity time out is twenty minutes.

Status

Package Status is a filter quickly isolating the status on a package such as Errors.

Pending are current packages waiting for Complete, Canceled and Error.

Queued is a package at the Package Processor waiting to be pushed to the IECO.

Staged is a package waiting at the IECO to be picked up by the receiver's Package Processor.

Confirmed represents a package has been received by the IECO in good order.

First Notice represents a secure Email receiver which received an email notice of a package to pickup.

Second Notice is released 36 hours after the first notice if not picked up.

Third Notice is released 36 hours after the second notice if the package remains not downloaded.

Third Notice is also the final notice and the package will be purged in 36 more hours from the third notice.

Complete is the final notice status indicating the package transaction was completed successfully.

Canceled is when a user stops or cancels a package transaction. Error Status indicates the IECO or the Subscribers' Package Processor are alerting to an error condition.

All displays all statuses.

The screenshot shows the eX4 Test Server web application. At the top, there is a navigation bar with the eX4 Test Server logo and the text "eX4 Test Server - TCO". Below this, there is a user information section showing the user is "SESIScott" from "PaperClip Testing" in "South".

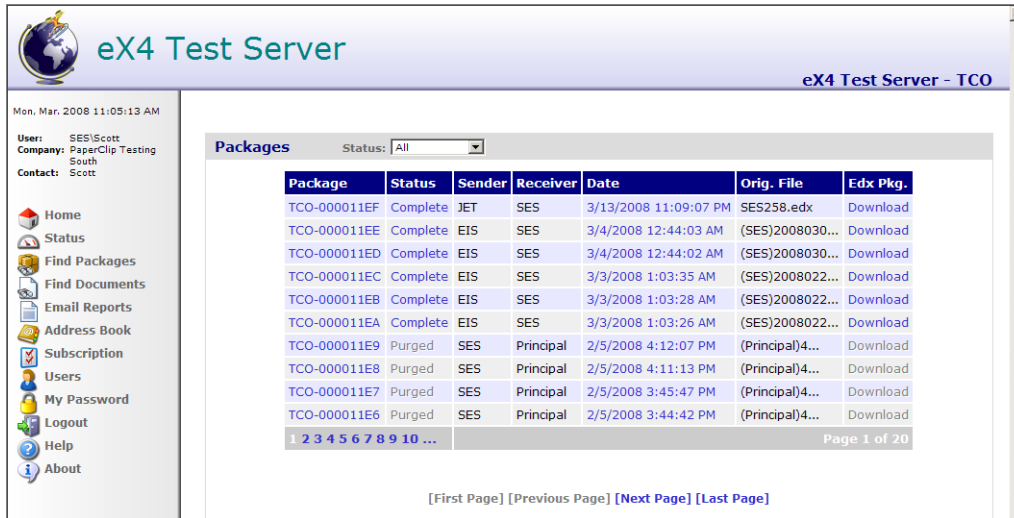
A dropdown menu is open, showing the following status options: Pending, Queued, Staged, Confirmed, First Notice, Second Notice, Third Notice, Complete, Canceled, Error, and All. The "Pending" option is currently selected.

The main interface displays a table of packages. The table has the following columns: Package, Status, Sender, Receiver, Date, Orig. File, and Edx Pkg. The table contains 10 rows of data, with the first row being "TCO-000011EF" with a status of "Complete".

Package	Status	Sender	Receiver	Date	Orig. File	Edx Pkg.
TCO-000011EF	Complete	JET	SES	3/13/2008 11:09:07 PM	SES258.edx	Download
TCO-000011EE	Complete	EIS	SES	3/4/2008 12:44:03 AM	(SES)2008030...	Download
TCO-000011ED	Complete	EIS	SES	3/4/2008 12:44:02 AM	(SES)2008030...	Download
TCO-000011EC	Complete	EIS	SES	3/3/2008 1:03:35 AM	(SES)2008022...	Download
TCO-000011EB	Complete	EIS	SES	3/3/2008 1:03:28 AM	(SES)2008022...	Download
TCO-000011EA	Complete	EIS	SES	3/3/2008 1:03:26 AM	(SES)2008022...	Download
TCO-000011E9	Purged	SES	Principal	2/5/2008 4:12:07 PM	(Principal)4...	Download
TCO-000011E8	Purged	SES	Principal	2/5/2008 4:11:13 PM	(Principal)4...	Download
TCO-000011E7	Purged	SES	Principal	2/5/2008 3:45:47 PM	(Principal)4...	Download
TCO-000011E6	Purged	SES	Principal	2/5/2008 3:44:42 PM	(Principal)4...	Download

Below the table, there are navigation links: [First Page] [Previous Page] [Next Page] [Last Page].

At the bottom of the page, there is a footer that reads: "Powered by PaperClip eX4 © Copyright 2003-2007 PaperClip Software, Inc."



Package Id Link

Displays the packing list for the package.

Status Link

Displays a screen describing the status of the package. If the Package has an error, the Error screen will describe the error and give the user options for reprocessing the package. See Appendix A Package Status for more information.

Sender

The Subscriber ID of the Sender.

Receiver

The Subscriber ID of the Receiver.

Date Link

Displays the Package History. See Appendix A Package Status for more information.

Original File

Original EDX File name assigned by the Sender.

Download Link

After a package has been delivered to a package processor, or after the First Notice has been sent, packages can be downloaded from this link.

Packing List for package TCO-000011ED

Org : Express Imaging Services Job : Default Date : 3/4/2008 12:44:02 AM
 Timestamp : 20080303212637 Creator : FileSize : 116412

From To	Drawer	Last Name	First Name	SSN	DOB	CaseNo	F16	F17	F18	F19	F10	PolNum	FD2	FD3	FD4	FD5	FD6	FD7	FD8	FD9	F	
EIS	SES	Express Imaging Services	GUSTAVSON	SEAN	111-77-8888	11/11/1969							180036402	BAN								
EIS	SES	Express Imaging Services	SERLUCO	JANET	222-99-7777	12/12/1956	5180456															

Package History

The package transfer functions by date time stamp.

Package ID Link

Package ID Link will display the EDX Version 2.0 Standard contents for the EDX Package.

Package History for package TCO-000011EF

Date	Status
3/13/2008 11:09:01 PM	Queueing
3/13/2008 11:09:01 PM	Queued
3/13/2008 11:09:02 PM	Uploading
3/13/2008 11:09:07 PM	Staged
3/13/2008 11:09:19 PM	Downloading
3/13/2008 11:09:21 PM	Delivered
3/13/2008 11:09:22 PM	Confirmed
3/13/2008 11:09:22 PM	Post-Processing
3/13/2008 11:09:29 PM	Complete

Find Package

Find Package searches for packages which can be filtered by the below criteria.

- ID** EDX Package ID if know.
- Status** Select Status to tighten search.
- Subscriber** Select Subscriber represent To and From.
- Date** Explicit date or ranges.
- Search** Executes Search as defined above and displays result as above in Status.

Select Subscriber

229	Sig Sauer
ACME	ACME Insurance Company
AGI	AccessIT Group Inc.
BIS	Bisys
DKT	Paperclip North NJ
EIS	Express Imaging Services, Inc.
FCL	Genworth
HMH	PaperClip Central
IIC	Prudential ImageIn Test
IN2	LabOne Imaging

Cancel

Find Packages

ID: Wildcard '*' (i.e. *MMA0001*)

Status:

Subscriber

From: ...

To: ...

Date:

All

Today

Yesterday

Current Week

Previous Week

Current Month

Previous Month

Range

thru

Find Documents

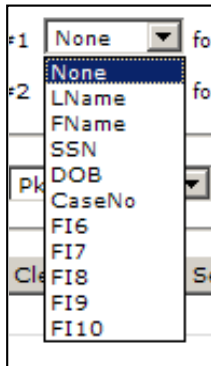
Documents can be searched for based on the metadata used to describe the document. PaperClip standardized on the NAILBA Imaging Implementation Guide.

Package ID Enter complete or partial name of EDX Package. Leave blank to search all.

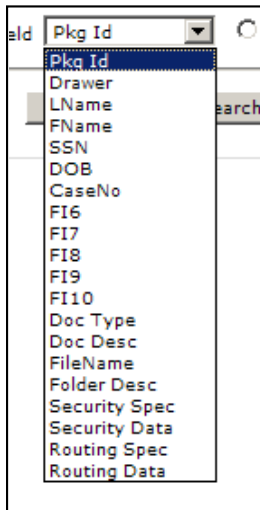
Subscriber ID Defaults to the Subscriber ID used to login with.

Field #1 A drop down list of metadata values to search on.

Field #2 Second condition A drop down list of metadata values to search on.



Sort By: Sort the result set by a selected value.



Find Document Search Screen:

Find Documents

Package Id: Wildcard '*' (i.e. *MMA0001*), leave blank to search all

Subscriber: Sent Received

Search: Field #1 for Select field/value to search
 Field #2 for Select field/value to search

Sort By: Field ASC DESC

Find Document Results:

Documents											
Pkg Id	From	To	Drawer	LName	FName	SSN	DOB	CaseNo	FI6	FI7	FI8
TCO-000011DD	SES	Principal	Clients	Workman	Sondra	489-65-8166	01/22/1969	15426597			
TCO-00000E97	SES	L48	Clients	Dworkin	Terri	473-55-7991	06/05/1942	4253700			
TCO-00000D68	SES	FCL	Clients	Workman	Robert	493-55-4796	10/15/1946	15473466			
Pkg Id	From	To	Drawer	Last Name	First Name	SSN	DOB	CaseNo	FI6	FI7	FI8
TCO-000011EF	JET	SES	New Business	Workman	Russell	344-28-9711	19700410	14391305			

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Note: Metadata is purged after 30 days of Complete Status.

Email Reports

Email Reports will push Daily, Weekly, or Monthly Metadata Reports. These emails contain Non Public Information and therefore are delivered via PaperClip eM4 Compliant Email solution. Subscriber Administrator logon required to schedule email reports.

Schedule Delivery of Document Metadata Reports

Monthly Metadata Report (Active)

Documents?: Sent Received Pending Error

Formats?: PDF CSV Both

Emails?: (use ';' to separate email addresses)

Note: Monthly reports will be executed on the first day of the new month.

Weekly Metadata Report (Active)

Documents?: Sent Received Pending Error

Formats?: PDF CSV Both

Emails?: (use ';' to separate email addresses)

Note: Weekly reports will be executed after midnight Saturday.

Daily Metadata Report (Active)

Documents?: Sent Received Pending Error

Formats?: PDF CSV Both

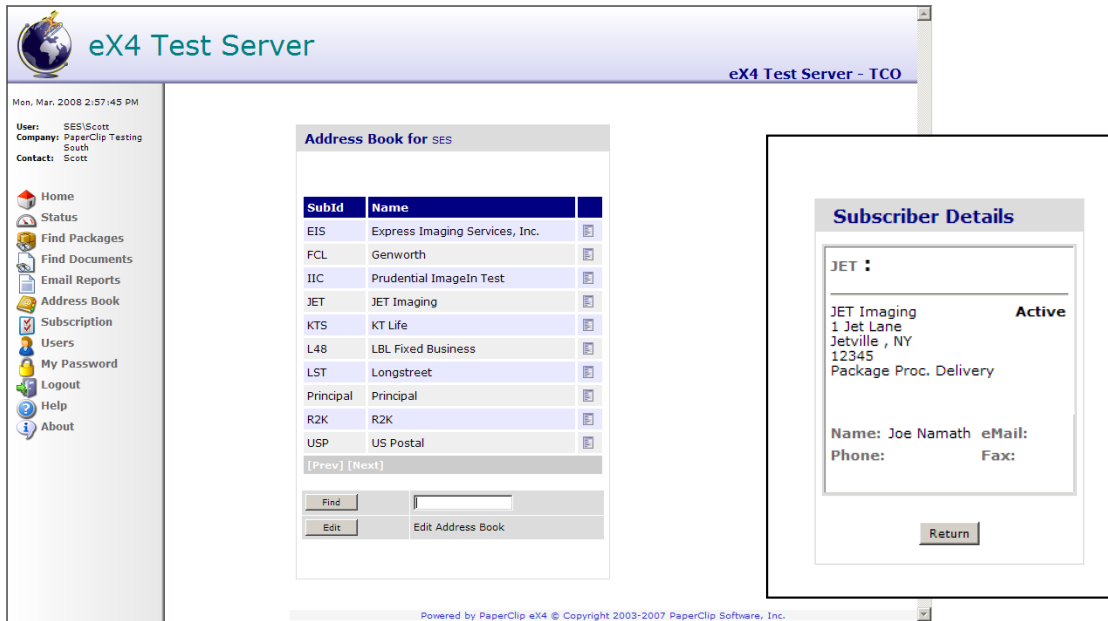
Emails?: (use ';' to separate email addresses)

Note: Daily reports will be executed after midnight Daily.

- Documents** Metadata report including Sent, Received, Pending and Errors. Sent & Received include packages in a Complete Status. Pending includes all other statuses.
- Format** Report output is an attachment to the encrypted eM4 email deliver. Select file format as Adobe PDF, Coma Separated Value (CSV) or both. CSV can be opened by most spreadsheet applications.
- Emails** Email address to mail report to. Multiple addresses can be added when separated by a semi-colon (;).
- Note:** Daily Reports are queued and run after midnight. Weekly Reports are executed after midnight Saturday. Monthly Reports are executed on the first day of the new month.

Address Book

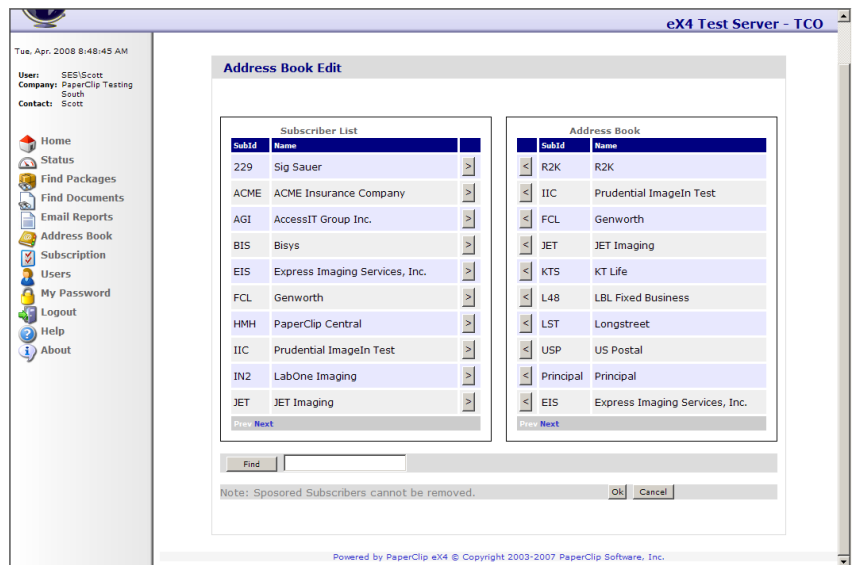
Address Book represents all the published Subscribers one can send or receive from. PaperClip enters Full Subscribers. Users can view the contact name for any Subscriber that completes it.



Subscribers can edit their local Address Book to list the set of Subscribers they want to exchange with.

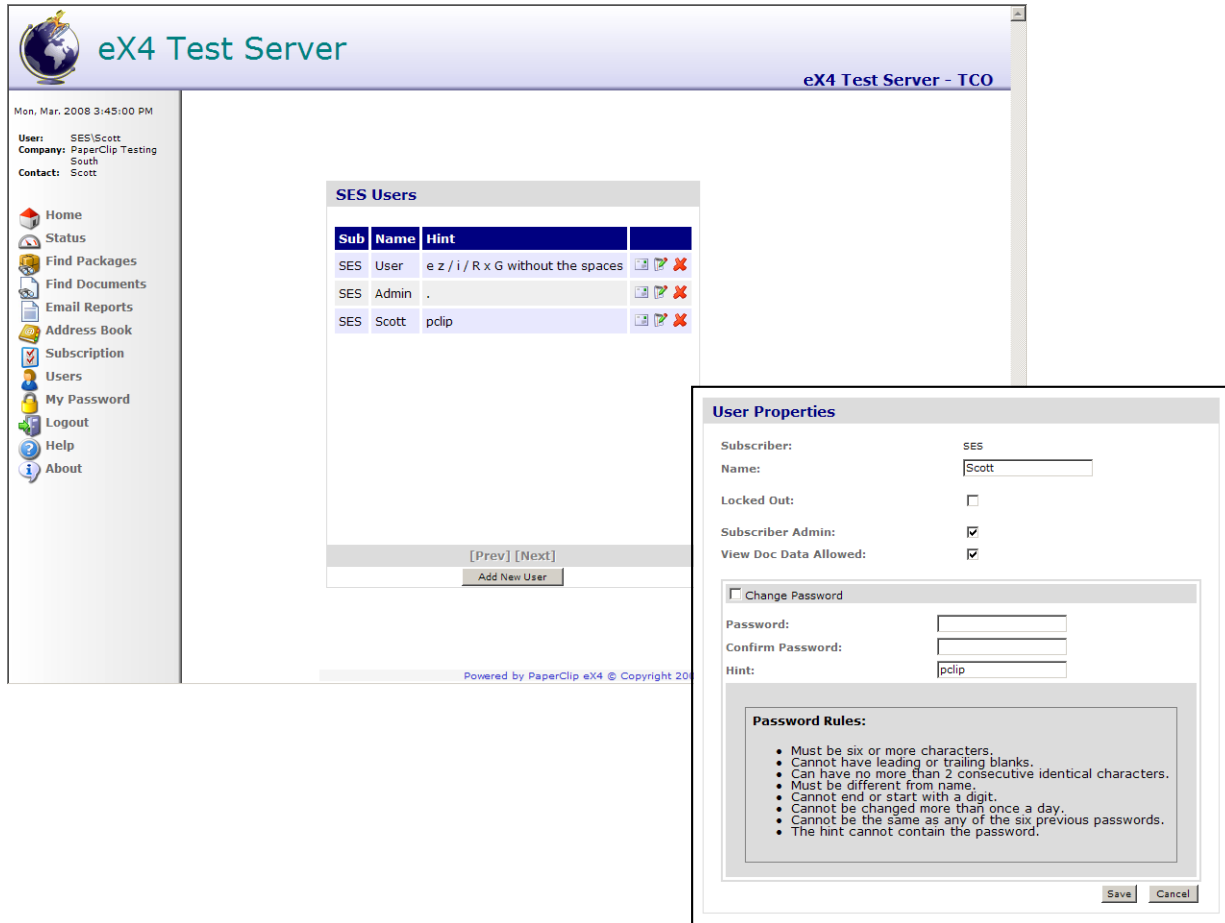
Subscriber (Left) Move Subscribers to Address Book by moving Left to Right.



Address Book (Right) Delete Addresses by moving Subscriber out of the list by moving Right to Left.



Users

Subscriber Administrator can add more users as needed. Administrators can manage Subscription details while users can only search metadata for documents. By default, a new Subscription creates “Admin” and “User” accounts.



- Send Hint** Administrator can send the User an email with their Hint.
- Edit User Properties** Add/Edit user properties. Subscriber Admin or User View Doc or both can be selected.
- Locked Out** Admin or Users whom fail to properly login more than 3 times will have their account locked. PaperClip Admin is the only login who can unlock Subscriber’s administrators. Subscriber Admin can unlock User accounts.
- Password** Create User password with confirmation. Password can also support a Hint.
- Re-set Password** Send Password Re-Set email to user 
- Delete User** Delete User by clicking red “x” icon 

My Password

This will allow the logged in user to change their password. We highly recommend that users change their password as frequently as possible. User must know their old password to change.

Change My Password

SES\Scott

Current Password:

New Password:

Confirm Password:

Password Hint:

Password Rules:

- Must be six or more characters.
- Cannot have leading or trailing blanks.
- Can have no more than 2 consecutive identical characters.
- Must be different from name.
- Cannot end or start with a digit.
- Cannot be changed more than once a day.
- Cannot be the same as any of the six previous passwords.
- The hint cannot contain the password.

Save Change

Appendix A – Package Status

Package History	
Status	Description
Found	The Package Processor has detected a package file and will ready it for upload to the server.
Queuing	The Package Processor is in contacting the Central Office to queue the package for transmission.
Queued	The package has been assigned a Package Id and is ready for upload to the Central Office.
Uploading	The Package Processor is copying the package to the Central Office file server.
Staged	The package has been copied fully to the Central Office and is available for download.
Downloading	The recipient Package Processor is in the process of copying the package file from the Central Office server.
Delivered	The package has been fully copied by the recipient Package Processor and is ready for confirmation.
Confirmed	The package integrity has been tested and passed.
Post Processing	The recipient package processor has initiated the process of giving the package contents to the destination document management system.
Post Processed	Post Processing has been completed successfully.
Complete	The package has been delivered successfully.
Canceled	Delivery of the package was canceled.
Error	An error has been detected while processing the package that requires user intervention before the package can continue.
Purged	The package file has been deleted from the Central Office.
Email Delivery	
FirstNotice	The first notice email has been sent the package is available for download.
SecondNotice	The second notice email has been sent the package is available for download.
ThirdNotice	The third notice email has been sent the package is available for download.
Fax Delivery	
FaxQueued	The fax has been composed and queued with the Faxer service for transmission.

Alternate Server	
Merged	This package information was copied from an alternate server.

Definitions

- EDX Package** A ZIP file containing document files and index data about the documents.
- Subscriber** An account in the eX4 system.
- Central Office** The central server that stores and forwards packages.
- Package Processor** A server, which runs at a Subscriber's facility, which communicates packages with other Subscriber's via the Central Office.