brother

BR-Docs Sync Guide

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BR-Docs Sync is a software tool that allows you to synchronize and file your documents between your computer and your BR-Docs online workspace. Thanks to automatic or manual synchronizations, your documents will be saved remotely in order to optimize your work. This way, you can edit them on the train, on the plane, at the office or in the hotel. Moreover, they will be immediately updated on all of your devices (computer, smartphone, tablet, etc.). With BR-Docs Sync, you can also connect your Brother digitization solution to your online BR-Docs workspace and file your digitized hard-copy documents.

For more information, or to view documentation about the topics covered in this document, please refer to Brother's Website, at the following address: http://www.brother.com

Using BR-Docs Sync, each employee who has a BR-Docs account can:

• **Automatically send hard copy documents you have scanned from your BR-Docs digitalization solution.**

The synchronization tool monitors a specific file where the digitalization devices will send digitized hard copy documents. Each time a new file appears, it will be sent in the **Filing** section in BR-Docs.

• **Synchronize documents from your workstation using BR-Docs.**

The synchronization tool updates your online BR-Docs service according to the documents in your workstation, and vice versa. It also compares the files in your workstation with the files in BR-Docs in order to guarantee that you get the most recent version of the file you want to work on.

• **Transfer multiple documents at once.**

The "drag-and-drop" function in BR-Docs Sync lets you send one or more documents with a simple drag and drop movement, from your workstation, into BR-Docs folders tree online.
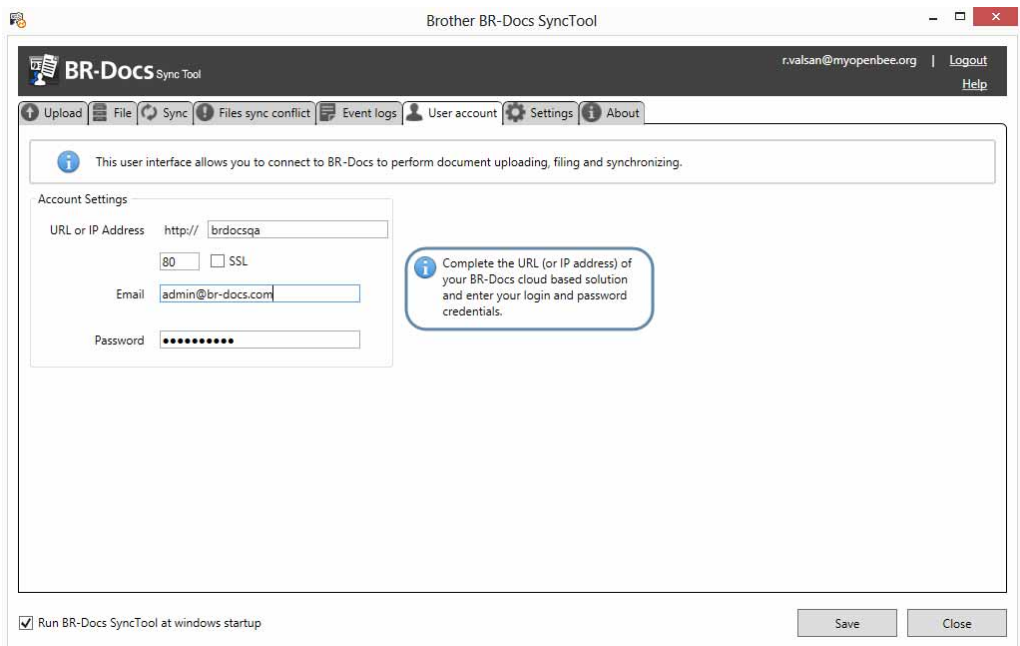
1 Administrator's guide

Logging in to BR-Docs Sync

NOTE

In order to use your BR-Docs Sync, you must be logged in to BR-Docs online.

Logging in to BR-Docs Sync Tool

In order to BR-Docs Sync, access the **User account** tab.

Then fill in the login information, as in the following example:

■ Fill in your URL or your IP address for your BR-Docs online service

■ Fill in your port and check the **SSL** option if you want to use a secured connection

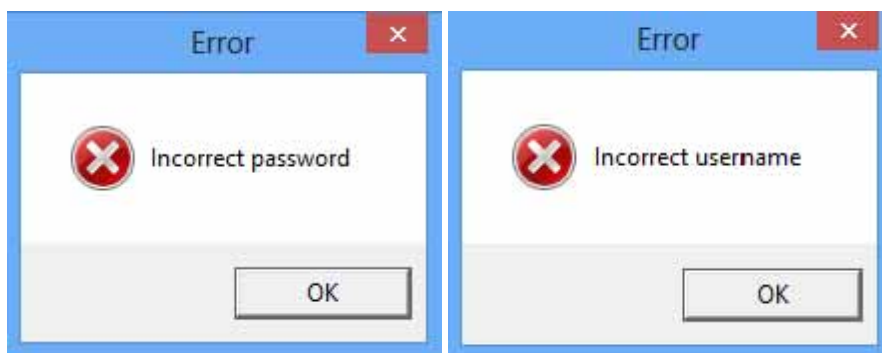■ Fill in your BR-Docs username and password

Once you have filled in the fields, click **Save** in the bottom right in order to log in.
A confirmation window will appear that informs you that your information is correct and that you are now logged in.
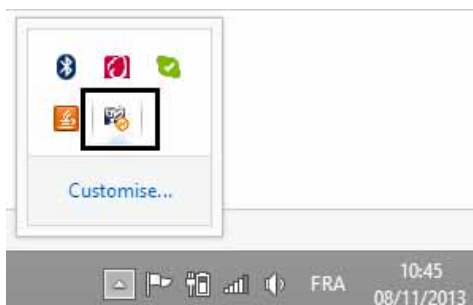

Click **OK**.

If your password or your username is incorrect, one of the following windows will appear:

**NOTE**

If you don't have a BR-Docs username or password yet, contact your system administrator to have an account created for you.

When you are done using BR-Docs Sync or when you click the red X to close the window, connection to the software is not interrupted.
If you want to re-open the software window, click in your task bar and then double-click on the Sync Tool icon, as depicted below:

To log out of the software, right-click on the small BR-Docs Sync icon, then click **Quit**.

Click on the small BR-Docs Sync icon with the right or the left button of the mouse.
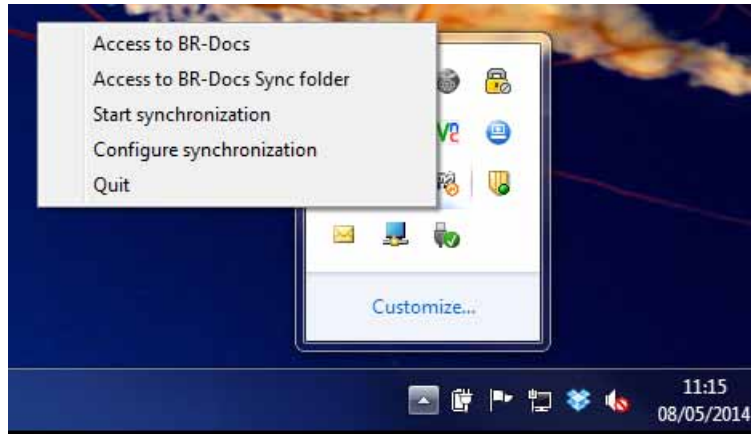
Proxy server and language

Accessing your proxy server and language parameters

If your local network has a proxy server, you can configure it in the **Settings** tab.
In this tab, you can also change the display language for BR-Docs Sync.

The interface offers you two configuration modes for your proxy server:

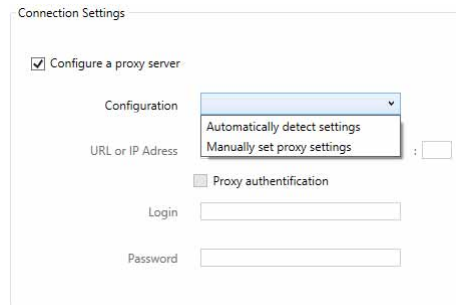■ The **automatic configuration** mode

■ The **manual configuration** mode

Automatic configuration of the proxy server

Choose the **Automatically detect settings** to do an automatic detection of your proxy server's parameters.

NOTE

This option is available only of you have checked the **Configure a proxy server** box.

NOTE

Automatic detection of the proxy server is based on the proxy configuration in Internet Explorer or in the system configuration (Control panel -> Internet options -> Connection -> LAN settings).

If you choose the **automatic configuration**, BR-Docs Sync will search for a configuration set from Internet Explorer/System and will use it.

Manual configuration of the proxy server

Choose the **Manually set proxy setting** to do a manual configuration of your proxy server's parameters.

NOTE

As for the automatic connection, this option is available only if you have checked the **Configure a proxy server** box.

■ Then fill in your URL or IP address, as well as the port your connection uses.

■ Use **Proxy authentication** if your proxy is configured with a username and a password.

■ Now type the login and password required for the proxy connection.

Language selection

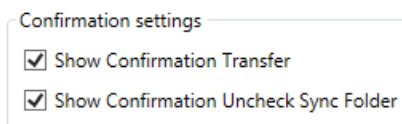You can choose the language in which you want your software to be configured as well.
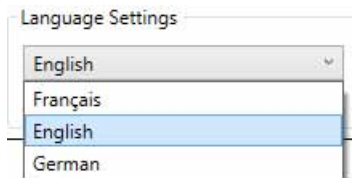
The following window will appear to inform you that you will have to restart BR-Docs Sync in order for the language change to take effect.
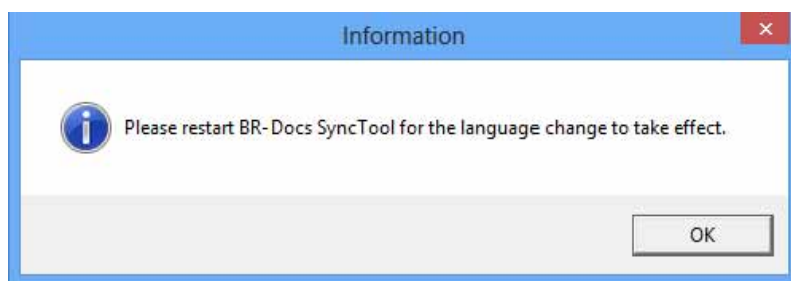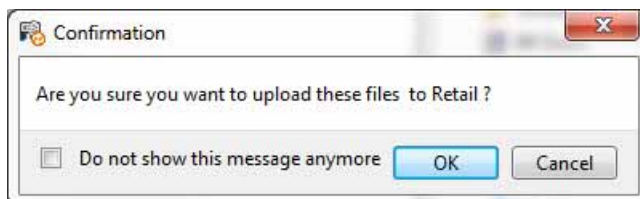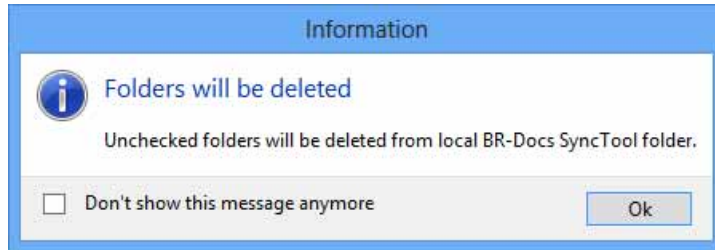
Confirmations configuration

Show Confirmation Transfer: will display the file transfer configuration window in the **File** tab.

Click **OK** to confirm or **Cancel** to cancel.

Show Confirmation Uncheck Sync Folder: will display the following information window that informs you that if you uncheck a folder in the **Sync** tab, it will be deleted when you save the configuration:

Information

Folders will be deleted

Unchecked folders will be deleted from local BR-Docs SyncTool folder.

☐ Don't show this message anymore   Ok

When you have configured all of your parameters, save the configuration with the **Save** button.

A small window will appear to inform you that the details you filled in have been taken into account.

Saving configuration   ✕

Configuration saved successfully.

OK

Click **OK**.

You are now connected to BR-Docs Sync and you can start synchronizing your folders and files into your BR-Docs online.

NOTE

Click **Run BR-Docs at windows startup** if you want to launch the BR-Docs Sync software when starting up your computer. By default, this option is not active.

☑ Run BR-Docs at windows startup

2 Installer guide

The purpose of this chapter is to guide you through installation.

Hardware and software requirements

NOTE

The system requirements for the application to run depends on various factors, including the size of the digitized documents. BR-Docs Sync's speed of execution depends on the power of the workstation on which the software is installed, but also on its memory, on the quality of the network signal and on the server load. The configuration described here will change according to the needs of each type of use. It is only the minimal system requirements BR-Docs Sync needs to run properly.
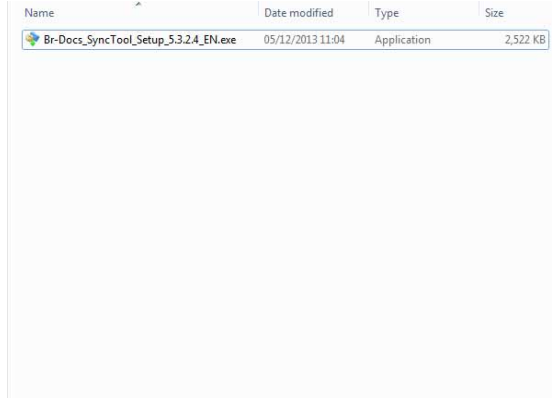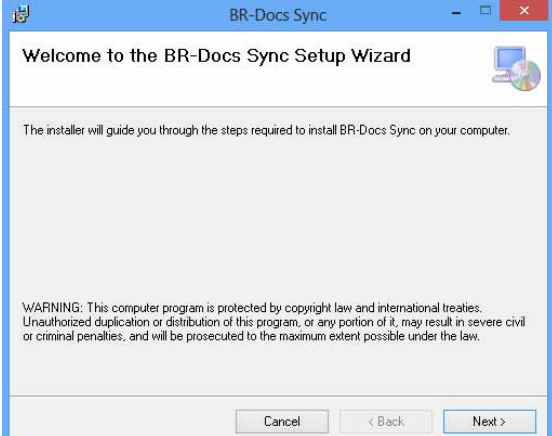
- A computer with an Intel® Core™ 2 Duo processor, or equivalent
- Microsoft® Windows® XP, Vista® or Microsoft® Windows® 7 (32 and 64 bits professional editions), Microsoft® Windows® 2003 Server or 2008 Server (with superior system requirements)
- Microsoft® Internet Explorer® 7, 8, or equivalent
- 2 GB RAM
- 400 MB of free disk space (changes with the volume of the documents to stock)
- A color display (16-bit) resolution of 800 x 600, or more
- A mouse and a keyboard compatible with Microsoft® Windows®
- A scanner compatible with **BR-Docs Sync** and the corresponding driver
- Microsoft® .NET Framework 4

Installing BR-Docs Sync

The BR-Docs Sync Installer will guide you step by step through the software installation process.
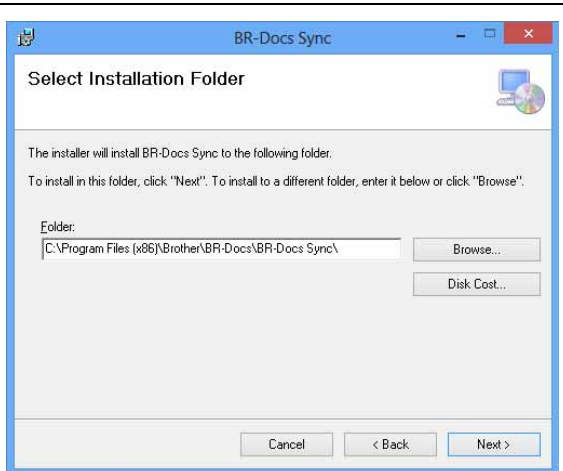
Before installing BR-Docs Sync:

- Close all active applications, especially any anti-virus software.
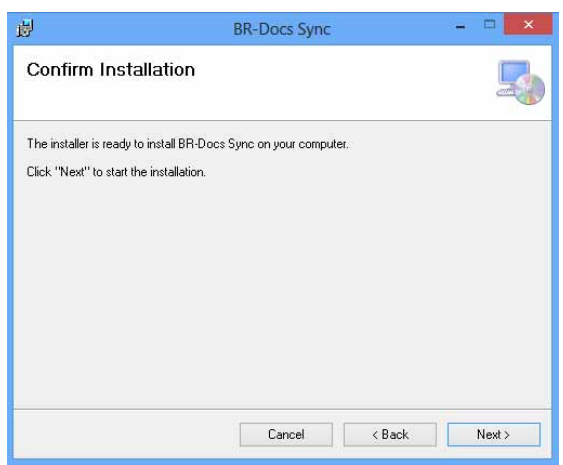- Login as an administrator on you workstation.

Description	Illustration
Double-click **.EXE** file to start the installer.	
The home page displays. Click **Next**.	

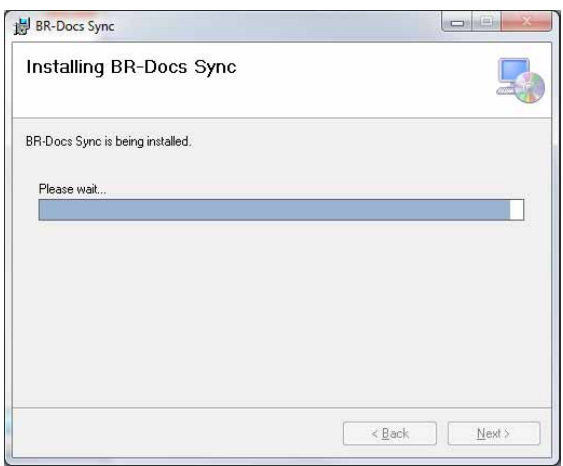|	
Click **Browse...** to select where you want to install the software. Click **Next** when you have chosen a location.	
A confirmation page displays. Click **Next** to start the installation process.	
Wait until the installation is done.	
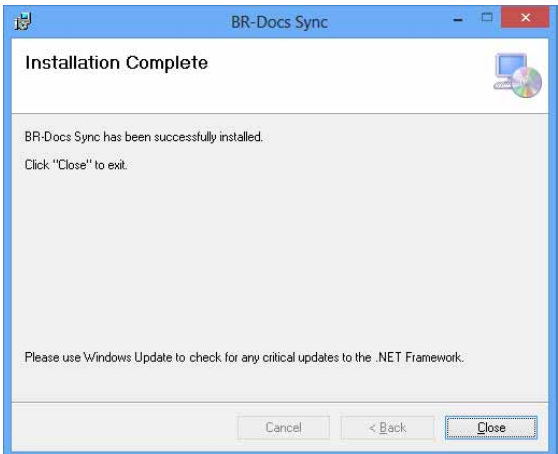
The installation is now finished. Click **Close**.	
A small window will display and ask you to restart your computer. Click **Yes** if you can restart now, or click **No** if you want to restart later.	
A shortcut will be added to your desktop and in your **Start** menu (if you use Windows® 7 and earlier versions), or in your Home menu if you use Windows® 8. Double-click this shortcut to start the software.	
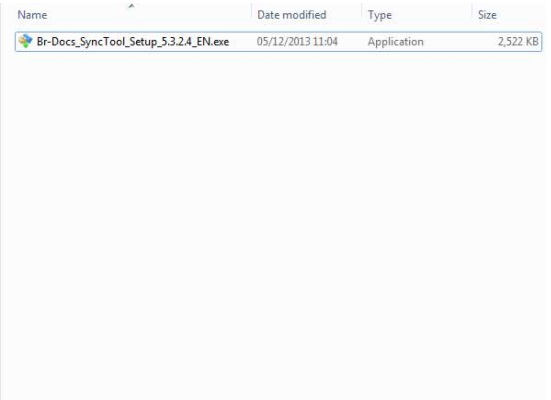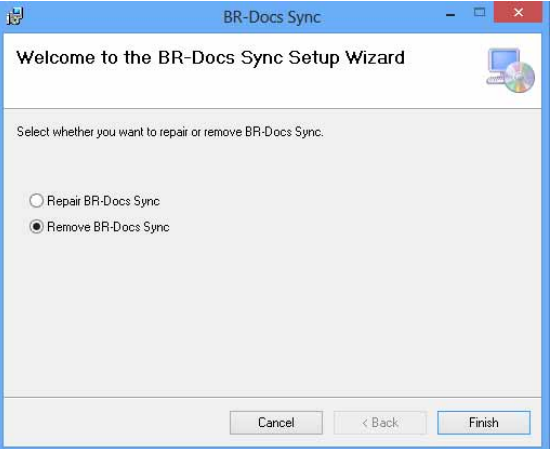
Update procedure

Uninstalling BR-Docs Sync

The uninstalling section of BR-Docs Sync will guide you step by step through the software uninstallation process.

Before uninstalling BR-Docs Sync:

- Close all active applications, especially any anti-virus software.
- Login as an administrator on you workstation.

Description	Illustration
Double-click **.EXE** file to run the uninstallation file.	
The home page displays. Choose **Remove BR-Docs Sync** and then click **Finish**.	

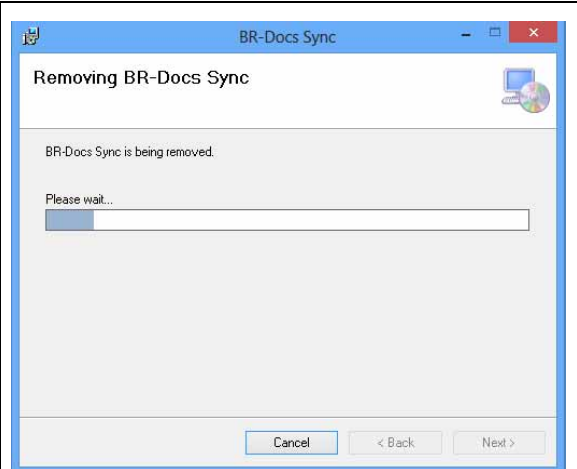|	
Wait until the uninstallation is complete.	
IMPORTANT If this window displays, it means that BR-Docs Sync is still active. Access to SysTray, click on the right button of your mouse on the BR-Docs Sync icon, then click **Quit**. Make sure your Internet browser and the BR-Docs Sync application are closed, then click **Try Again**.	
The installation is now finished. Click **Close**.	
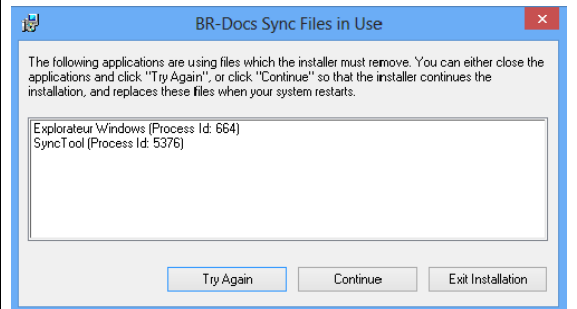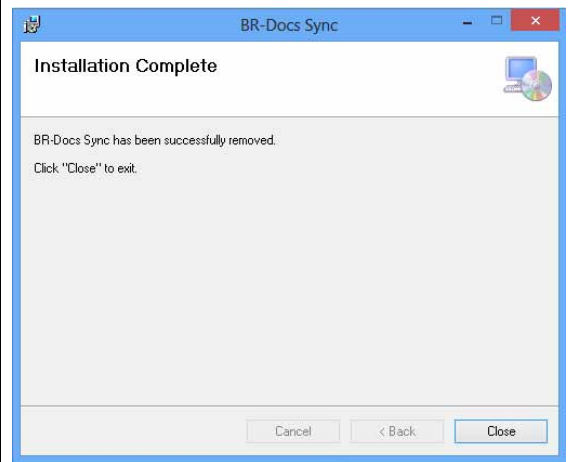
3 **User's guide**

Synchronizing documents

In BR-Docs Sync, you can use the **Sync** tab to configure synchronization of your documents between your workstation and BR-Docs.
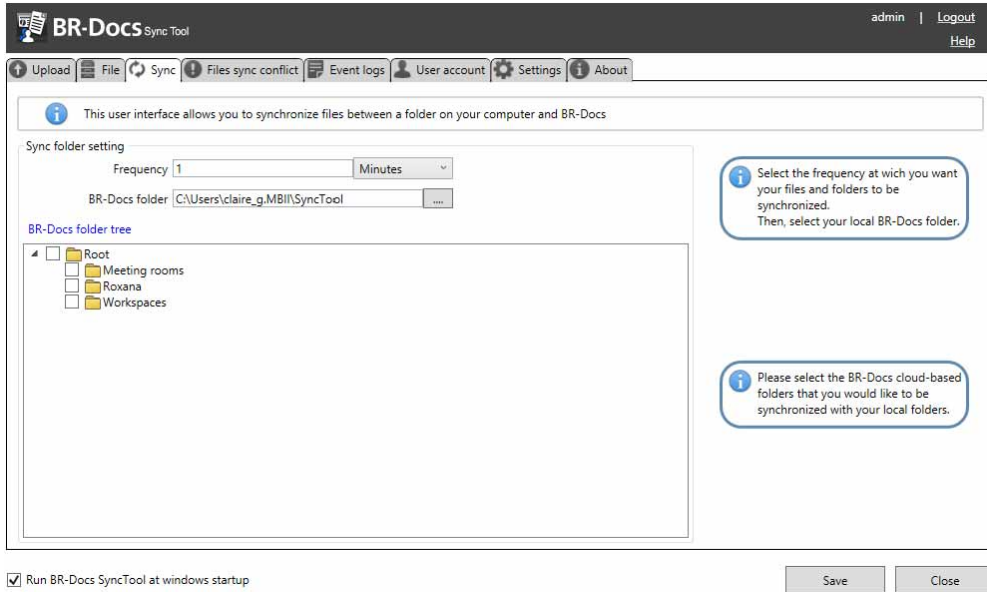
- In **Frequency**, type the synchronization frequency of your choice. You can choose to synchronize your documents in minutes or in hours.

NOTE
If, like in the example, you choose 1 and **Minutes**, your documents will be synchronized every minute.

- Below this option, in **BR-Docs folder** you can select your automatic synchronization folder. All documents in this folder will be automatically sent to BR-Docs, and vice versa.

To select this folder, click the ellipses ....   and select the location you want. The following window opens:
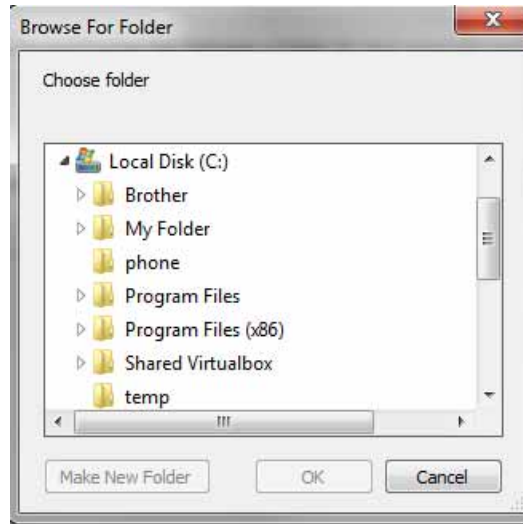
■ Choose the location in your tree, then click **OK**.

NOTE

Only the files that exist in the selected location will be synchronized and automatically transferred in your BR-Docs online.

IMPORTANT

If you delete files in the synchronization folder, these files will be automatically deleted from BR-Docs online at the next synchronization.

You can also start a manual synchronization. To do so, click the BR-Docs Sync icon in the bottom right part of your screen, in the task bar.
Left-click on **Start synchronization**.
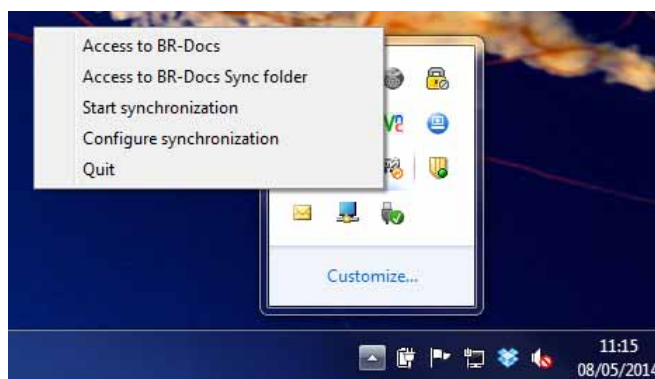
Transferring in BR-Docs Filing section

Using the **Upload** you can transfer one or more documents to the **Filing** section of BR-Docs from your workstation.

This section details the two transfer options you are given.
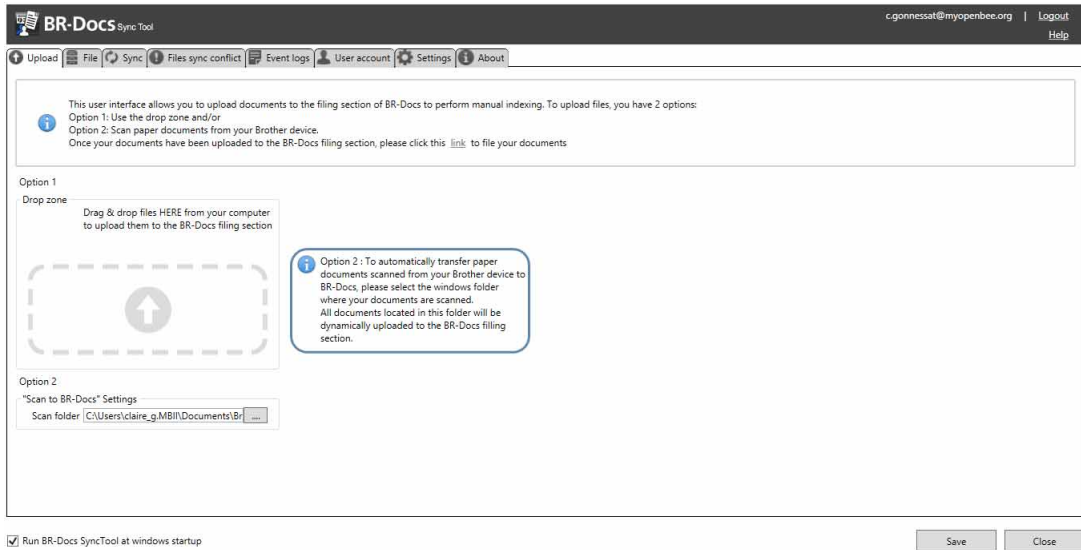
There are two methods you can use to transfer documents from your BR-Docs workspace:

■ Drag and drop your files using the **Drag & drop files** option

■ File your digitized hard copy documents directly from your digitization solution

Option 1: Drag & Drop files
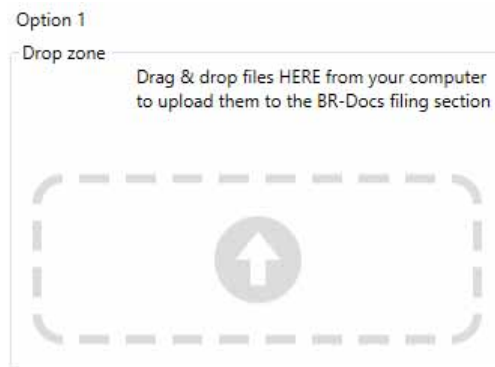
Drag and drop your files in the dotted zone under **Option 1**.
Using this option, you can send as many documents as you want, from your workstation to BR-Docs online **Filing** section.

Option 2: File your digitalized hard copy documents directly from your digitalization solution

Select the destination folder for your digitalized hard copy documents in option 2, **Scan folder**. All the documents in this folder will be automatically sent into the **Filing** section of your BR-Docs online.

Option 2
"Scan to BR-Docs" Settings
Scan folder C:\Users\claire_g.MBII\Documents\Br ....

NOTE

Setting up your digitalization solution

In order for your BR-Docs Sync synchronization tool to transfer your digitized hard copy documents directly into BR-Docs online **Filing** section, your digit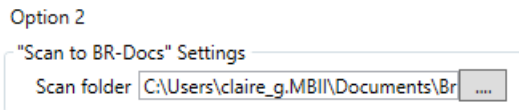ization solution must have been setup so that the digitized hard copy documents are put in the folder selected in option 2 **Scan folder** of BR-Docs Sync.

Once you have selected your scan folder, click the **Save** button to validate the configuration.

NOTE

Congratulations! You can now send hard copy documents from your digitalization solution directly into BR-Docs **Filing** section.
To view your digitalized hard copy document in BR-Docs, click **link** in the following screen.

This user interface allows you to upload documents to the filing section of BR-Docs to perform manual indexing. To upload files, you have 2 options:
Option 1: Use the drop zone and/or
Option 2: Scan paper documents from your Brother device.
Once your documents have been uploaded to the BR-Docs filing section, please click this link to file your documents

Filing your documents

The **File** tab gives you a preview of the folders and documents tree in your BR-Docs online.
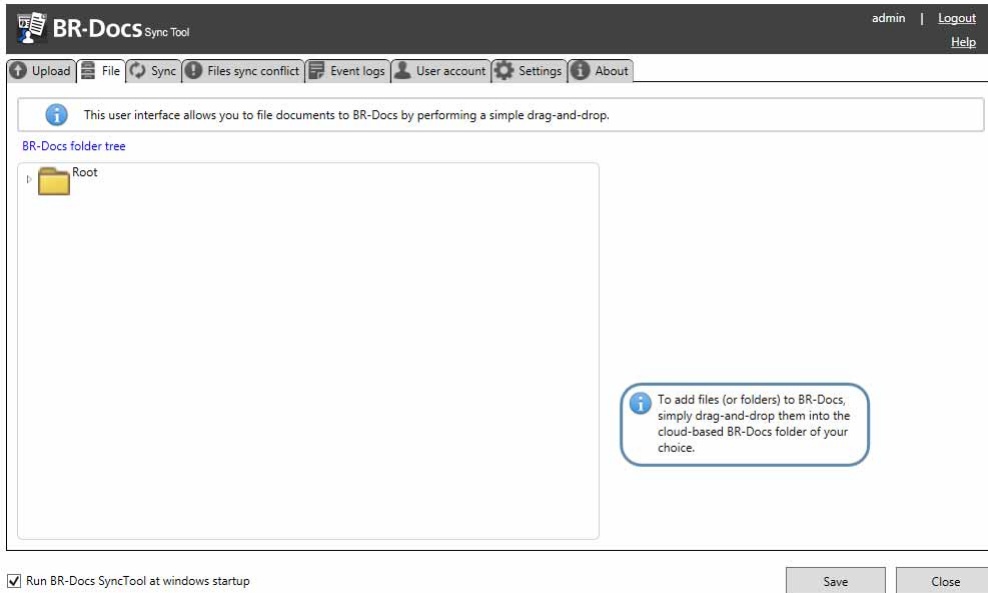
NOTE

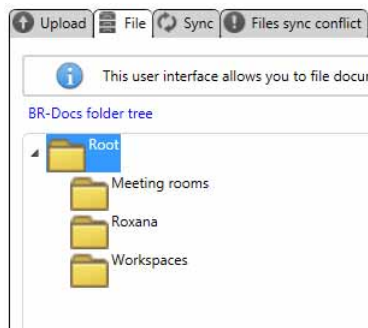When you click the small ▷ icon next to each folder, you can scroll down the tree and see all of the files contained in your folders.

In order to file one or more documents from your computer to a folder in your BR-Docs online, just drag and drop said files into the corresponding folder.
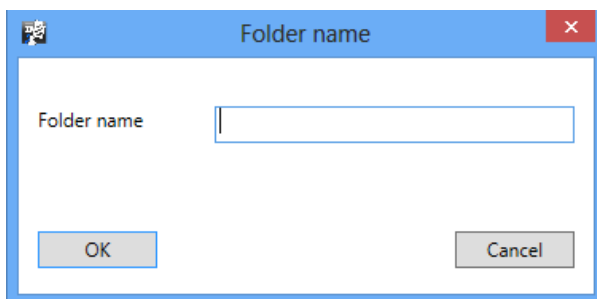
Creating a folder in the tree

You can create a folder inside another folder in the BR-Docs tree.
To do so, right-click on a folder in the tree. A menu that contains the **Add folder** option displays.

Clicking **Add folder** will display the following window:

Type in the name of the folder you want to create:
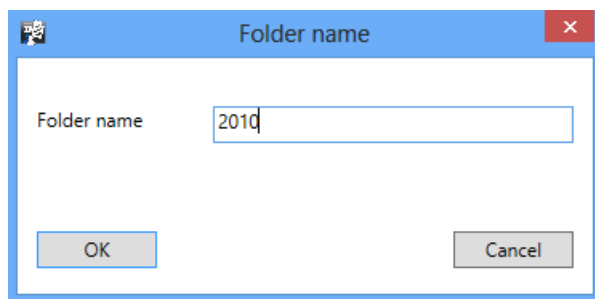
Finally, click **OK**.

The folder is now created and appears in the BR-Docs tree.

Downloading a document from the tree

To download a file, just double-click on the document of your choice. Once the document has been downloaded on your PC, it automatically opens.

Synchronizations and transfers history

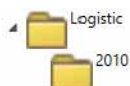The **Event logs** tab gives you information about all the actions that have been performed during your synchronizations and transfers.

■ **Local folder** displays the location of the local folder/your PC.

■ **Target folder** contains the name of the corresponding folder in your BR-Docs online.

■ **File name** contains the name of the file being synchronized.

■ **Status** displays the processing status for your document.

 This means that the transfer/download process for your document is finished.

 The green square indicates that the synchronization of your document was successful.

The red square indicates that a problem occurred during synchronization. It should change to green during the next synchronization.

IMPORTANT

If you have encountered a sending problem, **Status** should display:

There was an error while uploading the file(s). In this case, the files sent from the **File** tab have not been transferred.
They will not be synchronized either during the next synchronization and you will have to send them again from the **File** tab.

During a transfer or download process

Transfer	In progress
	8/11 sent files

If, during a **Transfer**, you click on **In progress**, you can cancel the transfer, providing that you are transferring several documents (the document currently being transferred cannot be cancelled).

You can interrupt the download process in progress for a file.

The following window displays:
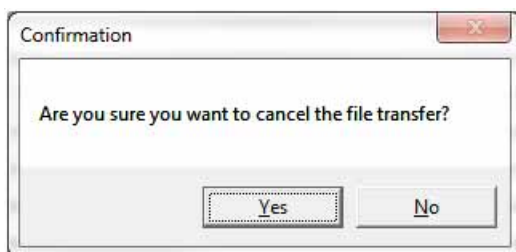
Click **Yes** to validate the cancellation.

Transfer finished

The **File name** column displays the name of the document and the **Status** displays the progress of the transfer:

BC100.docx	Finished

A line is added in the **Event logs**. When the download/transfer process is finished, the **In progress** status will be renamed **Finished**.

When the download process is finished, the document automatically opens, its name is changed into a link in the **Event logs** and the document opens if you click its name.

Document conflicts

The **Files sync conflict** tab displays the synchronization conflicts between your workstation and your BR-Docs online.
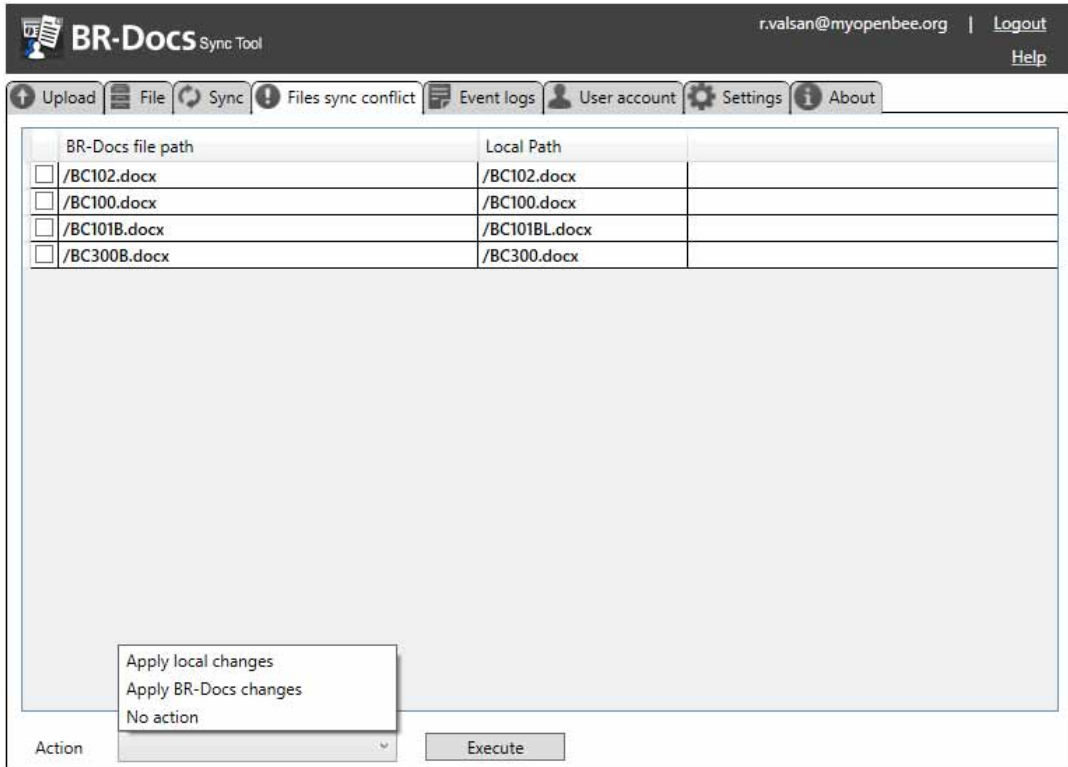
IMPORTANT

Presence of folders in this section means that a problem occurred during synchronization.

A synchronization conflict occurs when a document exists on your workstation and in your BR-Docs online with different saving date (while they are identical, one is more recent than the other). In this situation, BR-Docs Sync offers you two options:

■ You can keep the version present on your workstation and overwrite the online version

■ You can download the BR-Docs online version and replace the one on your workstation

■ The **BR-Docs file path** column displays the access path to the online document that encountered a synchronization problem.

■ The **Local Path** column displays the access path to the document that encountered a synchronization problem on your computer.

■ The **Action** option offers you three choices: **Apply local changes**, **Apply BR-Docs changes**, **No action**. Click **Execute** when you have selected an action.
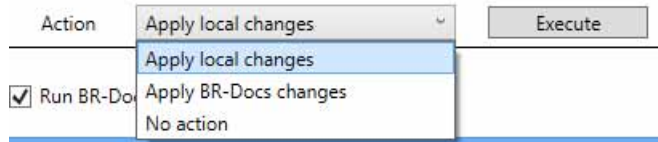
If the document has been deleted on one side and changed on the other, its path will appear as blank in the conflicts table. This indicated that the document no longer exists in the corresponding part.

Conflict situations

In BR-Docs Sync, conflicts arise when a file is changed on the server and the corresponding local file is changed too during 1 synchronization.
To explain the notion of conflict, let's examine the following synchronized folders tree:

- Company
- OpenBee
- MBII

Corresponding file

Definition = a file with the same name and located in the same folder both on the server and locally.

Example - Invoice.docx file

■ The Invoice.docx **file** in the Company/OpenBee folder on the **local computer** is the **corresponding file** to Invoice.docx on the **server**

■ The Invoice.docx **file** in the Company/OpenBee folder on the **server** is the **corresponding file** to Invoice.docx on the **local computer**

Corresponding folder

Definition = a folder with the same name and locale at the same access path locally and on the server. The path to the folder/file depends on the synchronization folder.

Conflict situations

1   File created locally; file created on the server, with the same name and in the same folder as the local file.

2   File re-created (deleted and replaced by another with the same name) locally; corresponding file changed on the server.

3   File re-created (deleted and replaced by another with the same name) locally; corresponding file deleted from the server.

4   File re-created (deleted and replaced by another with the same name) locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.

5   File re-created (deleted and replaced by another with the same name) locally; file deleted, another file with the same name is moved into the corresponding folder on the server.

6   File changed locally; corresponding file re-created (deleted and replaced by another with the same name) on the server.

7   File changed locally; corresponding file changed on the server.

8   File changed locally; corresponding file deleted from the server.

9   File changed locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.

10 File changed locally; file deleted, another file with the same name is moved into the corresponding folder on the server.

11 File deleted locally; corresponding file deleted from the server, another file created with the same name as the old one.

12 File deleted locally; corresponding file changed on the server.

13 File deleted locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.

14 File deleted locally; corresponding file deleted, another file with the same name as the local file moved into the corresponding folder on the server.

15 File renamed locally; corresponding file re-created (deleted and replaced by another with the same name) on the server.

16 File renamed locally; corresponding file changed on the server.

17 File renamed locally; corresponding file deleted from the server.

18 File renamed locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.

19 File renamed locally; corresponding file deleted, another file with the same name as the local file moved into the corresponding folder on the server.

20 File changed locally; corresponding file deleted from the server (file that has the same name as this one).

21 File not changed locally; corresponding file deleted from the server, another file renamed with the same name, but with a different content placed into the corresponding folder on the server.

22 File not changed locally; corresponding file deleted from the server, another file with the same name, but with a different content moved into the corresponding folder on the server.