

How to Alter Index Values in PaperVision Web Assistant R85 Version

Note: Altering Index values is a permission not granted to all users/groups in PaperVision. This ability can be utilized if you are uploading or scanning in documents and accidently enter the wrong index value, forget to add an index value. Please be careful when altering index values and ensure the document that you are altering index values for is the correct document, which can be done by opening the document in the PaperVision/Browser based document viewer.

1. To begin please click/select the magnifying glass underneath the project name where the document is located that you wish to correct the index values for as seen below.

rojects					Filter
ACCOUNTS PAYABLE	CASE FILES	CoT Pro OCR Test	DEMO BOARD MEETING MINUTES	EOBS	MEDICAL RECORDS
MERGE AND MOVE PAGES	SPED RECORDS	STUDENT RECORDS	TECHNICAL TEMPLATES	UPLOAD TEST	

2. Search for the document that you wish to alter the index value for, in this example, I have a document within the project with [Blank] index values, so I am going to put [Blank] in the Title index value, and this will bring up the document I wish to alter as seen below. Once you have completed entering the index values to search based on hit the Search button on the bottom right to complete the search process.

Search Project MERGE AND MOVE PAGES	🖗 Upload	ఎ Scan	Dider (
Index Fields						Show/Hide *
TITLE						
[Blank]						
DATE						
Enter from date here				to Enter to date here		
TYPE						
Enter search here						
System Fields						Show/Hide *
						Search: Clear

RMMI - Digital Document Solutions 9164 Marshall Place • Westminster, CO 80031 • (303) 427-0625 www.rmm-i.com SIMPLE. SENSIBLE. SECURE 3. The resulting document brought up by the search that I carried out has no index values filled out, before altering the index values, I will first open the document within my document viewer by double clicking/selecting the document.



4. Now that the document is open within your PaperVision Document Viewer, ensure that your "Indexing" window is visible for the next step of the process, you should see it on the left side by default, if you have hidden it go to the "View" tab as seen below, and ensure the checkbox in the "Show/Hide" section is checked for the <u>"</u>Indexing" window.

Ø	Home E	dit View		
One Pag	e Two Pages	 ✓ Indexin ✓ Thumb ✓ Signati ✓ Textual 	ng nails ure I Notes	Reset Docking
Docu	ment Views	Show/	Hide	Docking
ndexing		*	Docume	nt Full-Text
Name	Value		*	
TITLE				
DATE				

5. The "Indexing" window will now be up on your screen and will appear like the image below, this is what will be utilized to change the index values for the document.

ndexing	*	
Name	Value	
TITLE		
DATE		
TYPE		

6. One will now enter the correct index values for the document, in the example the correct Title will be "Dining Surveys", Date of "07/16/2018", and Type of "SURVEY".

Name	Value
TITLE*	Dining Surveys
DATE*	07/16/2018
TYPE*	SURVEY

7. Once you have entered the correct index values click/select the "Save" button at the top of the Document Viewer window and it will save the alterations made to the index values for the document, alternatively the hotkey combination of "CTRL + S" will also save the updated values.

Save Do	an New cument Print Add ocument (Ctrl+S) eral	Open Email Save A
Indexing	*	Document Full-
Name	Value	*
TITLE*	Dining Surveys	
DATE*	07/16/2018	
TYPE*	SURVEY	

8. After hitting the "Save" button or utilizing the hokey "CTRL + S" you will receive the confirmation as seen below "Success: Index values saved successfully!"

	 	•	
Document Full-Text			
Success: Index values saved successfully!			×

9. After completing the updating of the index values in the Document Viewer, you will not see the values update on the PaperVision website search results, you must go back to your "Search Criteria" by clicking/selecting the "Search : Project Name" hyperlink near the top of the website/PaperVision Client. In my example this is "Search: MERGE AND MOVE PAGES".



10. In my example I had changed/altered the Title index value to "Dining Surveys", I will enter this into the search criteria, and again select/click the "Search" button to bring up the document that was just altered.

In L Bor Sovey Comparison Compar	Index Fields		Show/Hide *
Deem Selement De	TITLE		
System Fields BourMark	Dining Surveys		
System Fields	DATE		
System Fields Douvrise to the second seco	Enter from date here	to Enter to date here	
Sper Fields	TVPE		
System Fields	Enter search here		
System Fields			
	System Fields		Show/Hide *
March (Pare			Suuch Class

11. The search results will show the document that I just altered/changed the index values for within the document viewer now updated on the PaperVision website, this step is not required, but can be utilized as an extra step of verification. You have completed the process of altering/editing a documents index value(s) within the document viewer.

Home	Search	s: MERG	E AND M	OVE PAGE	ES / F	lesults /											5 6	þ
Select	Qpload	Scan	Folders	Save As	Email	Print	List	Edit	Recycle	Secure	Retention	Rebuild	Сору					
Group b	GouphyLl 🙀 着									5								
TITLE			.*				7 DATE						т	ТҮРЕ 7	@Document Creation Date 7	@Document ID 7	@Status	
Dining Si	irveys						07-16	5-2018						SURVEY	2018-07-13 08:59:54	3		