# How to Alter Index Values in PaperVision Web Assistant

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 Project that you wish to correct the documents index value(s) within to bring up the search criteria in order to begin the process.
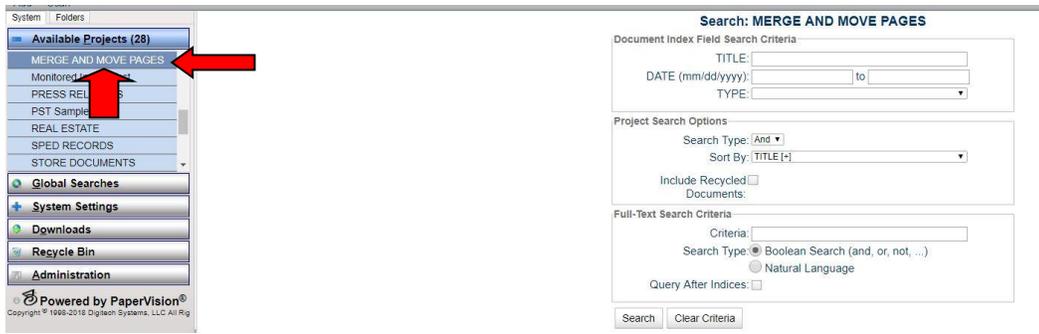
2. Search for the document that you wish to alter the index value for, in this example, I have a document within the project with [Blank] index values, so I am going to put [Blank] in the Title index value, and this will bring up the document I wish to alter as seen below. Once you have completed entering the index values to search based on hit the "Search" button on the bottom right to complete the search process.
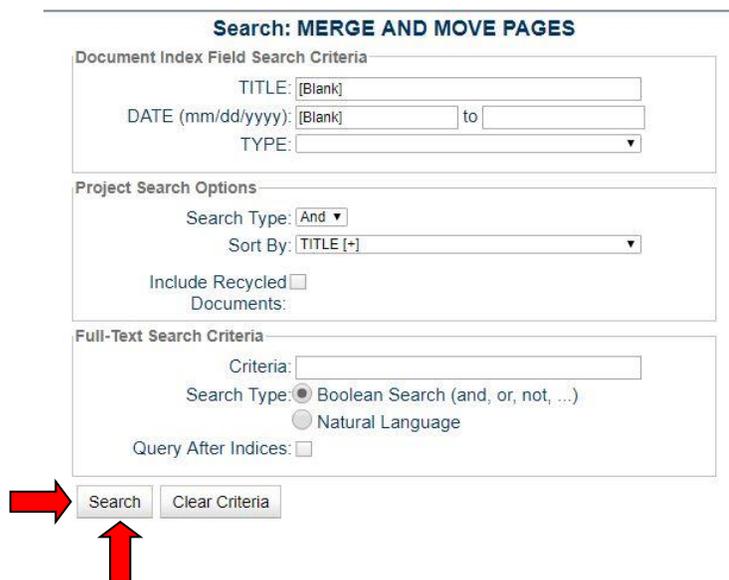
3. The resulting document brought up by the search that I carried out has no index values filled out, before altering the index values, I will first open the document within my document viewer by double clicking/selecting the document.
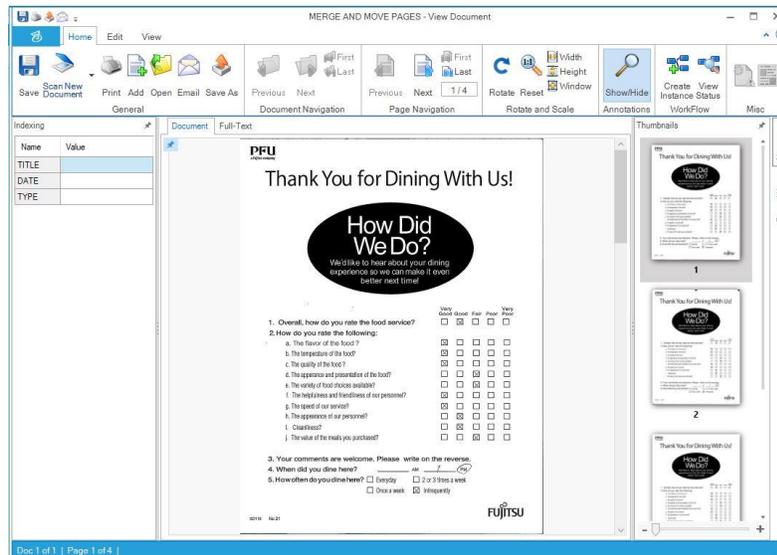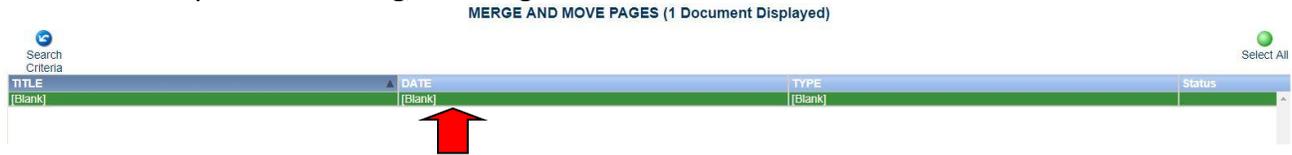
4. Now that the document is open within your PaperVision Document Viewer, ensure that your "Indexing" window is visible for the next step of the process, you should see it on the left side by default, if you have hidden it go to the "View" tab as seen below, and ensure the checkbox in the "Show/Hide" section is checked for the "Indexing" window.
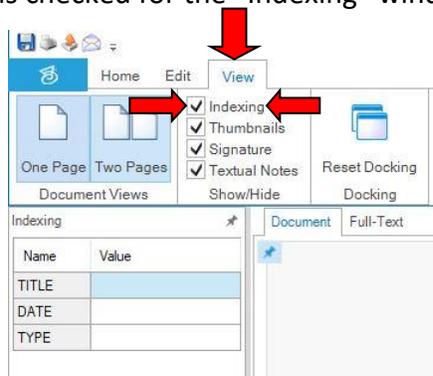

5. The "Indexing" window will now be up on your screen and will appear like the image below, this is what will be utilized to change the index values for the document.
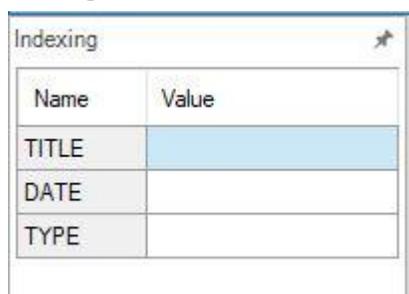
6. One will now enter the correct index values for the document, in the example the correct Title will be "Dining Surveys", Date of "07/16/2018", and Type of "SURVEY".

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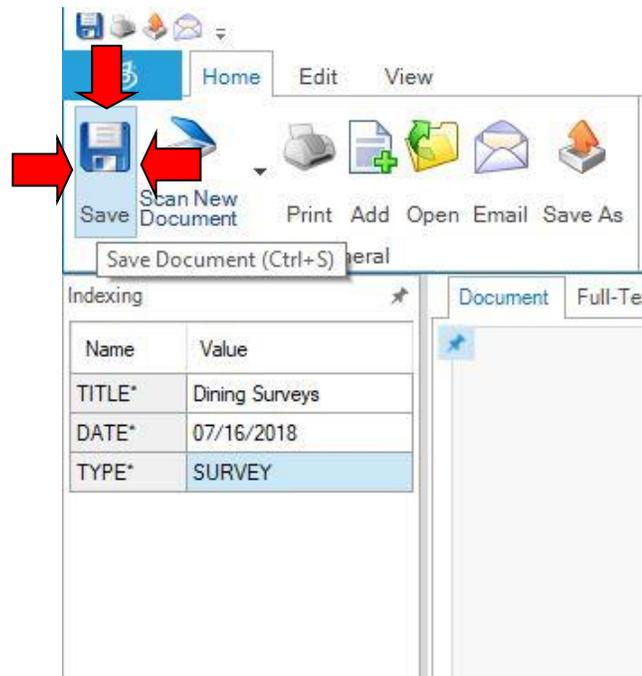
8. After hitting the "Save" button or utilizing the hokey "CTRL + S" you will receive the confirmation as seen below "Success: Index values saved successfully!"

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" utilizing the blue return arrow at the top left of the search results page.

MERGE AND MOVE PAGES (6 Documents Displayed)

Search Criteria

Select All

| TITLE | DATE | TYPE | Status |

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.

Search: MERGE AND MOVE PAGES

Document Index Field Search Criteria
TITLE: Dining Surveys
DATE (mm/dd/yyyy): ___ to ___
TYPE: ___

Project Search Options
Search Type: And
Sort By: TITLE [+]
Include Recycled Documents: ☐

Full-Text Search Criteria
Criteria: ___
Search Type: ● Boolean Search (and, or, not, ...)
○ Natural Language
Query After Indices: ☐

[Search] [Clear Criteria]

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.

MERGE AND MOVE PAGES (1 Document Displayed)

Search Criteria | | | | Select All

TITLE	DATE	TYPE	Status
Dining Surveys	07/16/2018	SURVEY	