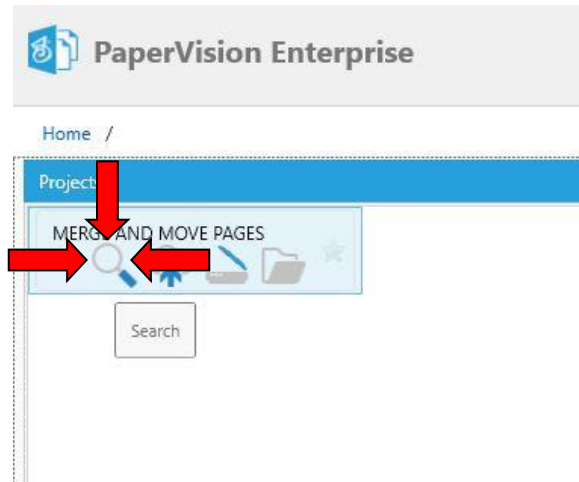




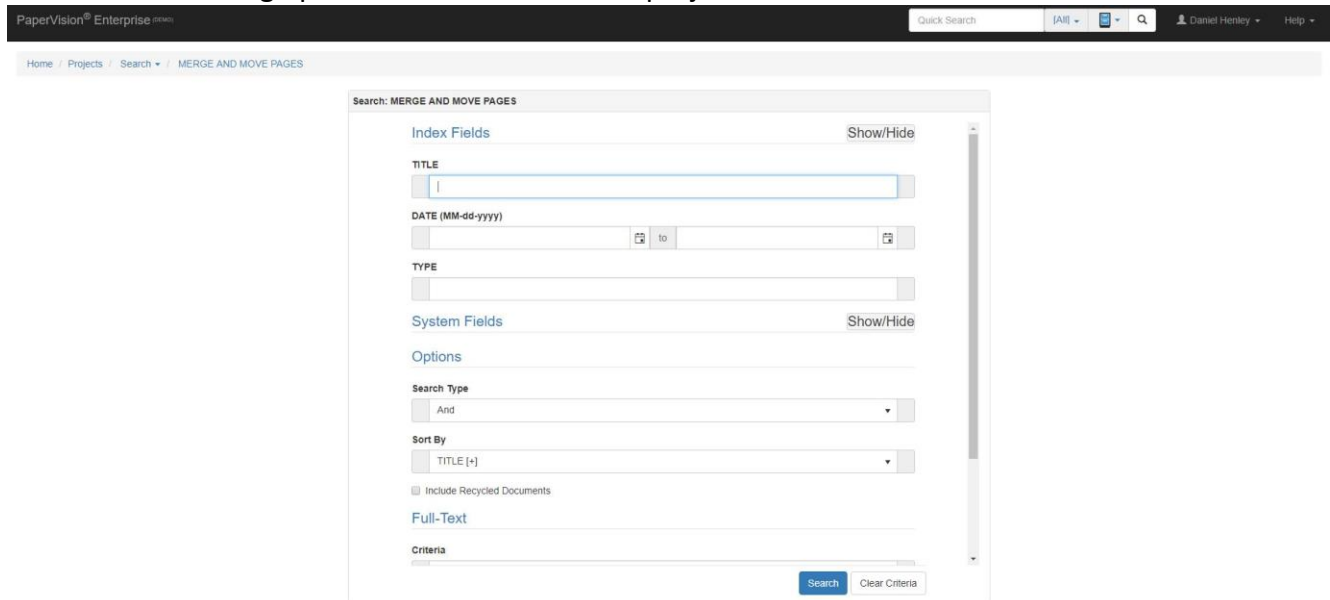
How to Upload Documents Using the PaperVision Website R85

Method 2: Upload a Document to a project straight from the Results Page of the PaperVision Site

1. Please select the project that you wish to upload a document to as seen below by clicking/selecting the “magnifying glass” icon by highlighting over your desired projects box on the Home page.



2. The “Search” screen/tab will appear as below, you will now either put in search criteria to search for a specific document or document type, or simply leave the index fields blank and bring up all the documents in the project if desired.





3. Once you have put in your desired search criteria, or are ready to conduct your search, please click/select the “Search” button as seen below.

The screenshot shows the PaperVision Enterprise search interface. The search criteria are: TITLE: Survey, DATE: (empty), TYPE: (empty), Search Type: And, Sort By: TITLE [+], and Include Recycled Documents: unchecked. The Search button is highlighted with red arrows.

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4. You will now be on the “Results” page/tab of the PaperVision Website, please click/select the “Upload” button near the top above the search results brought up as seen below to begin the process of uploading a document.

The screenshot shows the PaperVision Enterprise results page. The search criteria are: TITLE: Survey, DATE: (empty), TYPE: SURVEY. The Upload button is highlighted with red arrows.

TITLE ↑	DATE	TYPE
Survey		SURVEY



5. The Following “Upload Documents” Screen will appear, as seen below.

This screenshot shows the 'Upload Documents: MERGE AND MOVE PAGES' interface. At the top, there is a navigation bar with 'PaperVision® Enterprise' on the left, a search bar, and user information 'Daniel Henley' on the right. Below the navigation bar, a breadcrumb trail reads 'Home / Projects / Upload / MERGE AND MOVE PAGES'. The main content area is a form titled 'Upload Documents: MERGE AND MOVE PAGES'. It contains several sections: 'Document Index Fields' with input fields for 'TITLE' (containing '|'), 'DATE (MM-dd-yyyy)' (empty), and 'TYPE' (empty); a 'Folder' section with a 'Folder' input field and a 'Browse...' button; and a 'Files' section with a 'Select File...' button. At the bottom of the form are three buttons: 'Save', 'Clear All Fields', and 'Cancel'.

6. You will now index the file as seen below within the “Document Index Fields” section, and then will be ready to proceed to the next step of the process.

This screenshot shows the same 'Upload Documents: MERGE AND MOVE PAGES' interface, but with data entered into the 'Document Index Fields' section. The 'TITLE' field now contains 'Awesome Survey', the 'DATE (MM-dd-yyyy)' field contains '07-26-2018', and the 'TYPE' field contains 'Survey'. The 'Folder' and 'Files' sections are still empty. The 'Save', 'Clear All Fields', and 'Cancel' buttons remain at the bottom.



7. For the next step you will Click/Select the “Select File...” button in the “Files” section of the Upload Documents dialogue box as seen below.

Upload Documents: MERGE AND MOVE PAGES

Document Index Fields

TITLE
Awesome Survey

DATE (MM-dd-yyyy)
07-26-2018

TYPE
SURVEY

Folder

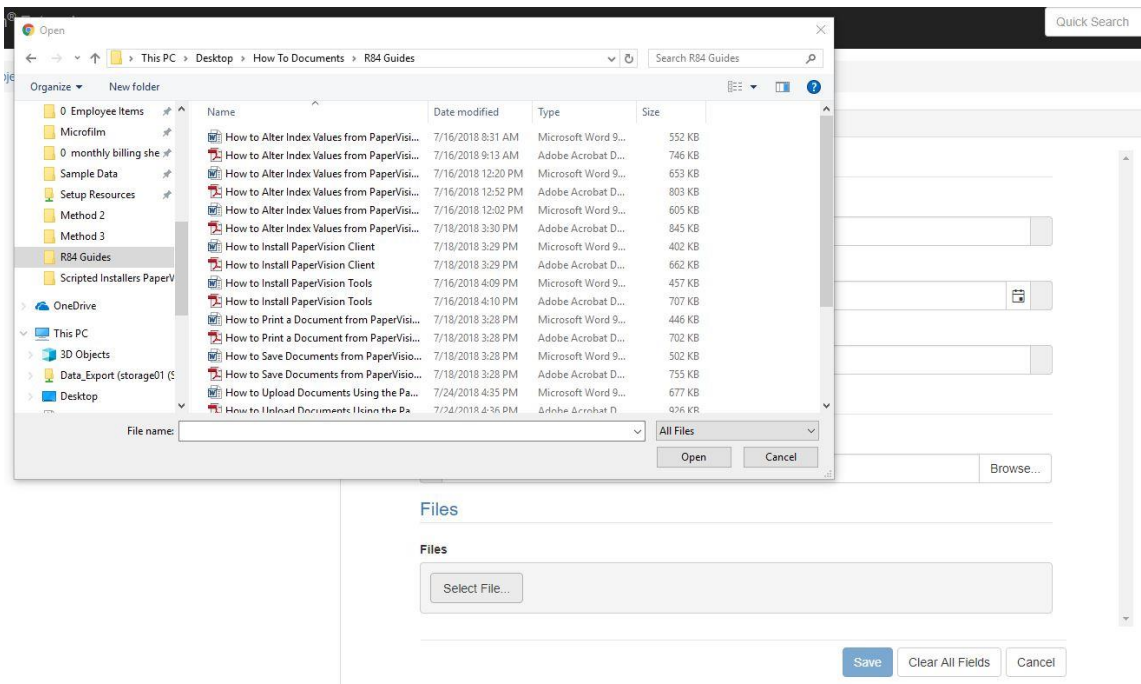
Folder
Browse...

Files

Files
Select File...

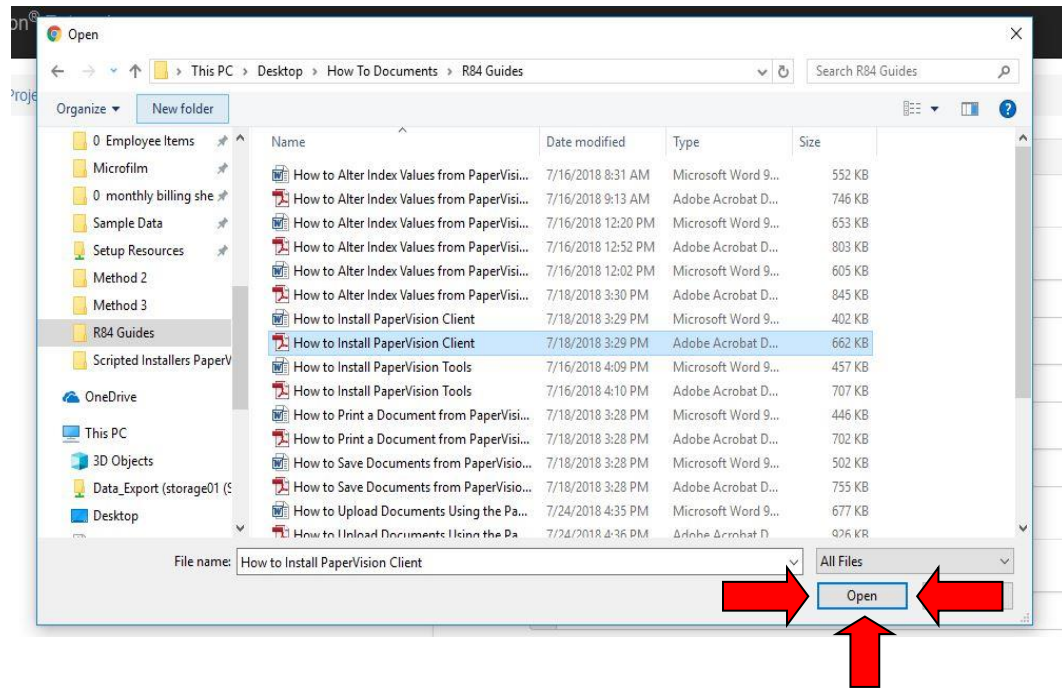
Save Clear All Fields Cancel

8. The “Browse Files” dialogue will appear as below.

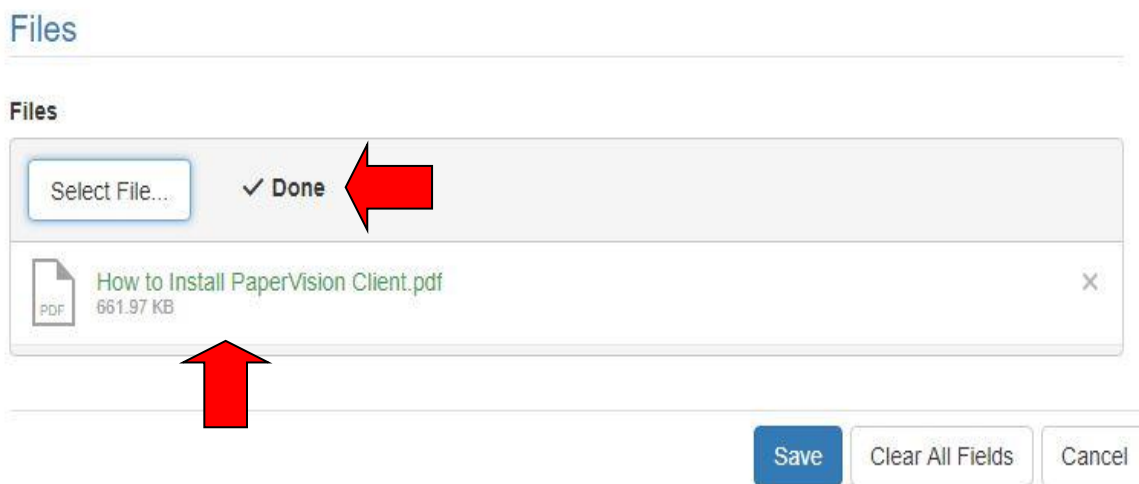




9. You will then select the document that you wish to add to PaperVision and click/select the “Open” button as seen below to complete the selection of the document.



10. The following screen will appear in the “Files” section of the “Upload Documents” screen, there will be a checkmark with “Done” next to it, and it will show your file name and type below, along with the file size as seen below.





11. Now that the file is selected you will now click/select the blue “Save” button at the bottom in order to complete the upload process as seen below.

This screenshot shows the 'Upload Documents: MERGE AND MOVE PAGES' dialog box. It contains several sections: 'Document Index Fields' with input fields for 'TITLE' (Awesome Survey), 'DATE (MM-dd-yyyy)' (07-26-2018), and 'TYPE' (SURVEY); a 'Folder' section with a 'Browse...' button; and a 'Files' section with a 'Select File...' button and a 'Done' button. A file named 'How to Install PaperVision Client.pdf' (651.97 KB) is listed. At the bottom, there are 'Save', 'Clear All Fields', and 'Cancel' buttons. A red crosshair is centered over the 'Save' button.

12. After hitting the “Save” button you will see a progress bar go to 100% at the bottom as the document successfully uploads, and will get a green text message at the top saying “1 document was successfully uploaded to the project”, and you will have completed the process.

This screenshot shows the 'Upload Documents: MERGE AND MOVE PAGES' dialog box after the upload process. A green message at the top reads '1 document was successfully uploaded to the project.' The 'Document Index Fields' section is now empty. The 'Files' section shows a progress bar at 100%. A red arrow points to the 'Save' button at the bottom, and another red arrow points to the green message at the top.