# PaperVision® Enterprise R84
Home Page Quick Reference Guide

PaperVision Enterprise gives you a robust feature set wrapped in an easy-to-use, responsive user interface. In R84, some of the most frequently accessed features have new names and are found in different locations. For example, you can access Projects, Worksteps Waiting/Owned, E-Forms, Destruction Lists, Favorites and Recent Documents from the home screen. Use this handy quick reference to help find what you need.
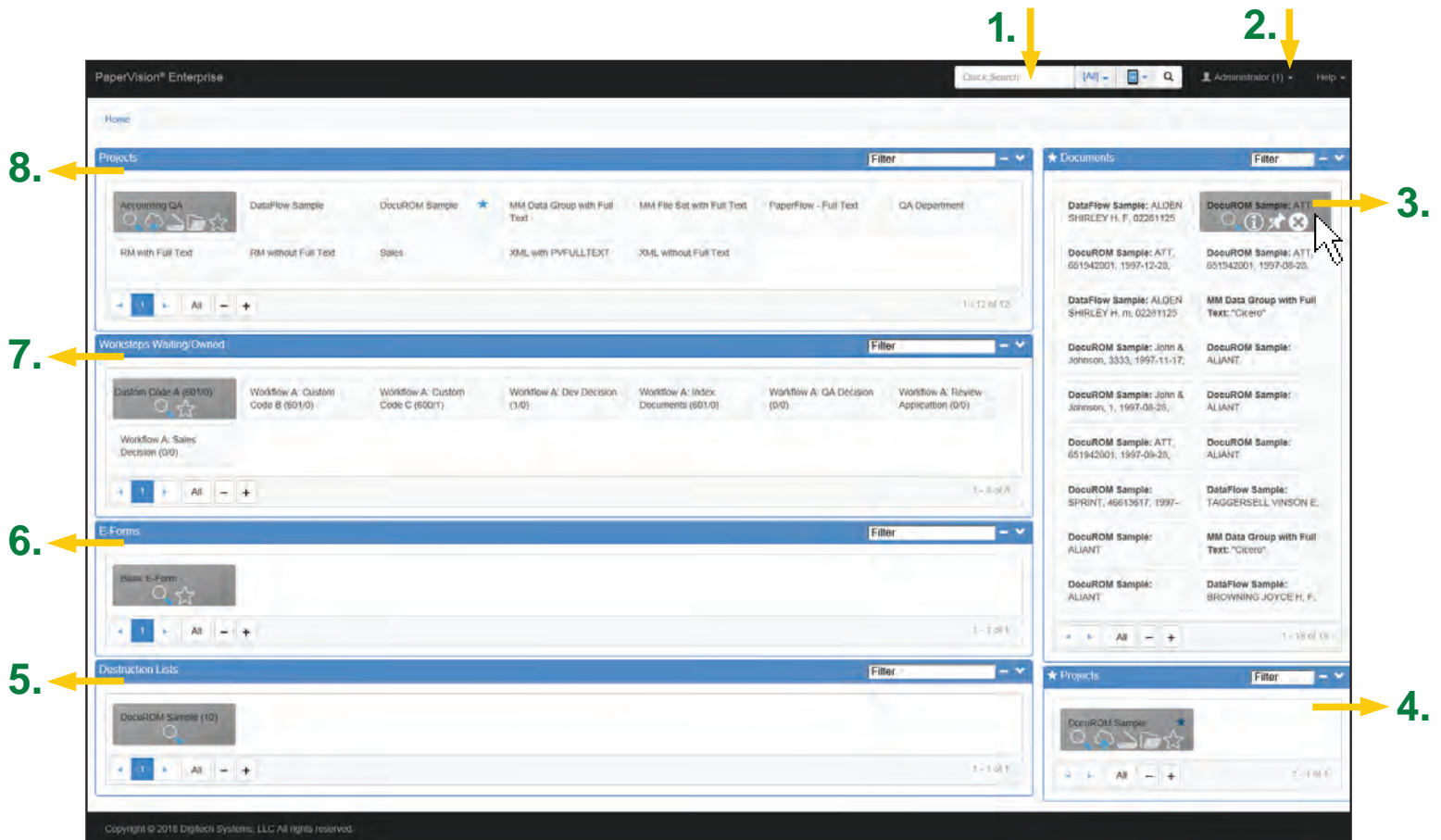
1. Utilize the **Quick Search** toolbar to perform index field or full-text searches across all projects or selected projects.
2. The **Menu** has the following options available for use and configuration: User Options, Destruction Lists, E-Forms, Global Search, Migration Jobs, Notifications, Projects, Recycle Bin, Worksteps, Administration, Downloads, and Reset Page Layout.
3. The **Recent Documents** pane displays the last twenty recently viewed documents and all documents you have pinned. Hover over any document to view icon options: Search, Details, Pin, and Remove.
4. The **Favorites** pane displays any projects, E-Forms, and Worksteps that you have designated as a favorite. Hover over any item in this pane to view icon options: View, Upload, Scan, Folders, and Favorites.
5. The **Destruction List** pane is comprised of documents (including recycled documents) that met the destruction criteria defined by your administrator, but require user review before their destruction. Hover over any item in this pane to view the icon option: View.
6. The **E-Form** pane displays all the E-Forms your administrator has assigned you permission to access. Hover over any item in this pane to view icon options: View and Favorites.
7. The **Worksteps Waiting/Owned** pane displays the worksteps within workflow definitions, to which you are assigned. Hover over any item in this pane to view icon options: View and Favorites.
8. The **Projects** pane displays only the projects to which you have been assigned access. Hover over any item in this pane to view icon options: View, Upload, Scan, Folders, and Favorites.
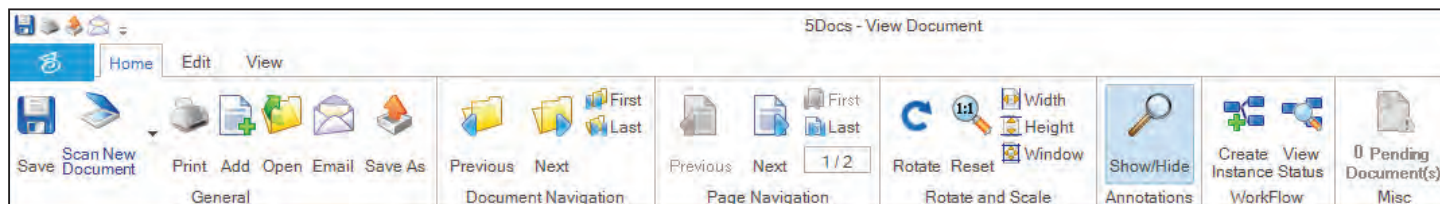
PaperVision® Enterprise R84
## PaperVision Assistant Quick Reference Guide

The PaperVision Assistant (formally known as the PaperVision Web Assistant) is now available after you install the PaperVision Client. It has been re-engineered to improve your ability to work with documents and workflows. You can scroll to navigate documents; see the document image and related full-text on dual tabs; view document thumbnails; choose to index now or later when adding new documents; and dock, resize and move windows to customize your user experience.

Home Tab

- Export is now called **Save As**
- Directly access **PaperVision® Enterprise WorkFlow** to create an instance or view status

Edit Tab
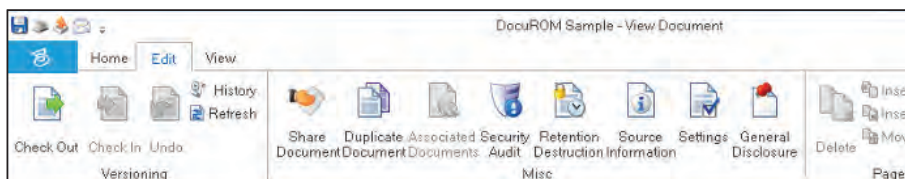
- Document Grant is now called **Share Document**
- New **Duplicate Document** button
- View Associated Documents, Check Out/In/Undo, Revision History, Security Audit, Source Information, and Settings
- Click **Settings** to change General, Display, Hot Keys, Printing, WorkFlow, Scanning, and Annotations options

View Tab
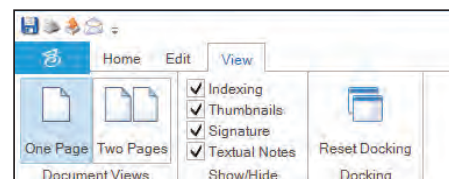
- Movable window panes allow users to **customize their workspace**

There are two document viewers available: the PaperVision Viewer and the browser-based viewer. The following table provides a summary of the key features of each viewer so you can determine which viewer best meets your needs.

Please note, for the web client, the browser-based viewer is now the default. To use the PaperVision Viewer, you must download and install the PaperVision Client.

Feature	PaperVision Viewer	Browser-based Viewer
Requires installing the PaperVision Client	✓	
Requires installation on each client	✓	
Supported on Microsft® Windows® operating systems	✓	✓
Supported on OSX and mobile operating systems (iOS and Android)		✓
Supports scanning	✓	
Supports the PaperVision® Enterprise WorkFlow Client	✓	
Supports batch operations (print, email, save, scan) from document lists	✓	
Perform administrative tasks on WorkFlow, E-Form, and integration definitions; and Message Capture and PaperVision® Enterprise Report Management File Sets	✓	
View annotations Note: Due to a security risk in many browsers, if your administrator selected the **Force Annotations On** option and the document contains a graphical annotation, the document will not appear in the Browser-based Viewer.	✓	✓
Add and edit annotations	✓	
Save and convert files to other formats	✓	