PaperVision® Enterprise

User Guide

Version 85.0

DIGITECH
SYSTEMS

CONTENTS

CHAPTER 7 Worksteps Waiting/Owned

CHAPTER 8 Global Searches

CHAPTER 1

Introduction

Welcome

Welcome to PaperVision Enterprise. This powerful product provides:

- A way to effectively and securely manage, retrieve, and store information.
- Robust searching features for document retrieval.
- The ability to print and save documents, and send them via email.
- Document security features.
- Version control for documents.
- Multiple options for document viewing.
- Flexibility in architecture and integration options.
- Many other options not listed here.

See "Key Product Features" below for more information about product features and their benefits. You can also see "Get Product Support" on page 16 for resources where you can learn more about our products.

Before you begin working in PaperVision Enterprise, reviewing the content under "Terms You Should Know" on page 14 will help you use the product and its documentation more effectively. When you are ready to begin, go to "Log In" on page 18 for step-by-step instructions.

Key Product Features

As the amount of recorded information increases, businesses struggle to manage content. Digitech Systems enables businesses of any size to more effectively and securely manage, retrieve, and store information of any kind, including electronic files, paper documents, images, print streams, and email.

Through our Enterprise Content Management (ECM) systems, PaperVision Enterprise and ImageSilo®, Digitech Systems enables businesses to reduce document-management costs, enhance information security and compliance with regulations, and improve process efficiency. With software and services that deliver any document, anywhere, anytime, organizations create a sustainable competitive advantage.

We take pride in offering software that is easy to use, feature rich, and exceptionally flexible in architecture and integration options. All Digitech Systems' products easily scale to meet the needs of very large organizations and single desktop installations. Integration with Microsoft® Office products is included, and additional integrations are available for virtually any Windows® application.

You can store information on premises and access it internally with PaperVision Enterprise, or you can outsource your ECM system and access information anywhere, anytime over the Internet with ImageSilo, the on-demand system from Digitech Systems. Alternatively, ImageSilo and PaperVision Enterprise can work together seamlessly as a hybrid system to meet a variety of business needs.

ImageSilo offers 24/7 online data access without requiring additional investments in hardware, software, or IT personnel. This massive on-demand service securely delivers data to any Internet-accessible computer, anywhere in the world, at any time. ImageSilo is powered by PaperVision Enterprise, so it inherits all the same security, collaboration, efficiency, and reporting tools. As an outsourced ECM system, ImageSilo automatically scales to meet growing data-storage needs, and

provides extensive physical and electronic safeguards to protect the system from interruption. Digitech Systems' engineers maintain, monitor, and manage all the software, servers, and storage. Multiple redundant systems mitigate the potential for hardware failures affecting information availability.

PaperVision Enterprise lets your organization securely protect and access information of any kind, and supports the storage of more than 250 file types in their native formats.(See "Supported File Types in the PaperVision Viewer" on page 112 for a list of supported file formats.) Extensive security configurations, optional encryption, audit tracking, powerful version controls, and reporting keep administrators informed of system activity and assure that information is safely protected. Intelligent search options let you locate documents by index value, and keyword or phrase in full-text documents. Architectural flexibility allows the system to scale to meet the demands of any size business. You can design a system that fits your environment and needs.

See "Get Product Support" on page 16 for resources where you can learn more about our products.

System Requirements

The following table shows the minimum system requirements for PaperVision Enterprise.

Component	Requirement
Internet Browser	Internet Explorer® 11 (PaperVision Viewer and Browser-Based Viewer) Mozilla Firefox® latest version (PaperVisionViewer and Browser-Based Viewer) Google Chrome™ latest version (PaperVision Viewer and Browser-Based Viewer) Safari® on iPad devices and Macs latest version (Browser-Based Viewer)
Screen Resolution	SVGA Monitor (1024 x 768 or higher recommended)

Terms You Should Know

This content contains definitions for terms that are used throughout the documentation and online help. Knowing this terminology will help you use the product and its documentation more effectively.

- See "Entity" below for a definition of this term.
- See "Entity ID" below for a definition of this term.
- See "Project" below for a definition of this term.
- See "Data Group" on the facing page for a definition of this term.
- See "Index Values" on the facing page for a definition of this term.
- See "Detail Sets" on the facing page for a definition of this term.
- See "Documents" on the facing page for a definition of this term.

Entity

An entity is a body such as a company, corporation, or organization. Each entity is autonomous and administers its own projects, users, groups, workflows, security policies, and so on. An entity never shares elements with other entities, and you cannot switch between entities after you log in. A system administrator can limit access to specific projects, functionality, and documents within an entity. Depending on your configuration, you might be required to log in to your entity from the same computer or network each time.

In general, most users (including those at large enterprise installations) use only a single entity. Only a few special circumstances require more than one entity. For example, in a hosting environment where an application service provider (ASP) is hosting data for multiple companies and each company wants to administrate itself and its users. Digitech Systems' ImageSilo is a good example of an ASP that hosts multiple entities. You might also see more than one entity in a large enterprise consisting of different departments that require the ability to administrate themselves separately from other departments without involving a central IT organization.

Entity ID

An entity ID is a unique number that identifies each entity. Each entity is autonomous. You cannot change your entity ID after you log in and you cannot work across entities.

Project

A project is a logical grouping of documents based on a common indexing schema. For example, ABC Company has three projects: Human Resources, Accounts Receivable, and Sales.

- The Human Resources project contains employee records and health insurance information.
- The Accounts Receivable project contains billing, purchase order, and invoice information.
- The Sales project contains prospect and client information.

Each of these projects is a separate logical grouping within the ABC Company entity. Projects support up to 200 named index fields. Project names must be unique within an entity, but an administrator can create an unlimited number of projects.

Data Group

A data group is a set of documents and their index values. A data group can contain one document or thousands of documents, and those documents can be grouped into one or many projects. A data group holds information for only a single entity, but it can contain an unlimited number of projects. Typically, a data group contains only documents for one project, as this makes organization easier.

Index Values

Document index fields contain values that let you identify key elements of documents within a project during the capture process. You then use these index field values to search for and retrieve documents in PaperVision Enterprise. When you enter an index value to perform a search for a document, the application compares the value you entered against your database tables and retrieves documents that meet your specific criteria.

> **NOTE**
>
> When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

Detail Sets

Detail sets (also referred to as "duplicate documents") define a collection of index values that allow multiple sets of field data to reference a single document. If documents with detail sets appear in a search results screen in PaperVision Enterprise, they display with a down arrow that allows you to expand all documents contained in the detail set. Detail sets can be created in PaperFlow™, PaperVision Capture, PaperVision Message Manager, and PaperVision Enterprise Report Management.

The example below shows a search results screen with expanded detail sets to show the documents' related Company Name, and Check Date. The Invoice Number and Document ID detail sets vary across documents.

Company Name ↑	Invoice Number	Check Date	@Document ID	@Document Creation Date	@Status
Amazon Warehouse	**737545**	**1994/07/05**	**6**	**2017-12-18 14:00:16**	
Amazon Warehouse	374773	1994/07/05	7	2017-12-18 14:00:16	
Amazon Warehouse	743723	1994/07/05	8	2017-12-18 14:00:16	
Amazon Warehouse	823745	1994/07/05	9	2017-12-18 14:00:16	
Digitech Systems LLC.	**123456**	**1997/07/26**	**1**	**2017-12-18 14:00:16**	
Digitech Systems LLC.	654321	1997/07/26	2	2017-12-18 14:00:16	
Microsoft Inc.	**235673**	**1975/04/04**	**3**	**2017-12-18 14:00:16**	
Microsoft Inc.	384745	1975/04/04	4	2017-12-18 14:00:16	
Microsoft Inc.	893753	1975/04/04	5	2017-12-18 14:00:16	

Documents

Documents contain the individual pages or images for a given set of index values. If document grouping is enabled, documents are grouped per page results. By default, 100 documents appear per page of search results in PaperVision Enterprise.

Get Product Support

Digitech Systems takes great pride in providing software that is simple to use, feature-rich, and flexible in architecture and integration capabilities. If you experience any difficulty, please contact us toll free at (877) 374-3569 or direct at (402) 484-7777 to experience our legendary customer service. Additionally, you may contact us at support@digitechsystems.com. Our technical support staff is available to serve you between the hours of 8:00 AM and 6:00 PM Central Time.

Digitech Systems' product features and enhancements are driven by you, our customer. If you have an idea for a future product feature or enhancement, please send an e-mail to dev@digitechsystems.com.

In addition to our legendary technical support staff, we also offer the following resources to help you answer questions and resolve issues.

- **MyDSI** - MyDSI is an interactive tool for all Digitech Systems customers. Log in to MyDSI at http://mydsi.digitechsystems.com to download product updates, license purchased software, view support contract renewals, and check the status of your software support cases and requests.

- **User Forums** - Log in to the User Forums at http://forums.digitechsystems.com to exchange answers and ideas with other users in our moderated community.

- **Knowledge Base** - Log in to search our extensive Knowledge Base at http://k-b.digitechsystems.com for articles on all Digitech Systems products.

- **Documentation** - For documentation describing the use and features of PaperVision Enterprise, refer to the PaperVision Enterprise product guides. To access the online help and manuals from the PaperVision Enterprise software, click the **Help** menu.

CHAPTER 2

Get Started

Log In

When you log in to PaperVision Enterprise, the system authenticates your access based on the user name and password you provide. If your site uses multiple entities, you will also need to provide the correct entity ID.

Before you can log in to PaperVision Enterprise, you must get the following items from your administrator:

- The URL to access PaperVision
- Your user name and password
- Your entity ID (if required)

To log in

1. Start your web browser.

2. In the Address bar, type the URL provided by your administrator to access PaperVision Enterprise.

   The format of the address is **http://*serverurl*/PVE.aspx**.

3. In the **Welcome to PaperVision Enterprise** dialog box, in the **User Name** box, type your user name.

4. (Optional) On some devices, you have the option to use either a touch screen, or a mouse (or track pad). Click the option that describes how you will interact with the device.

5. In the **Entity ID** box, type your entity ID.

6. In the **User Name** box, type your user name.

7. In the **Password** box, type your password.

8. From the **Language** list, select the appropriate language.

9. (Optional) If you do not remember your password, click **Forgot your password** to open the **Request Password Reset** dialog box. In the **User Name** box, type your user name, and then click **Continue**. If your user name is associated with a valid account, you will receive an email message with instructions and a link to reset your password. The link expires in one hour. Click **Return to the Login Page** to return to the **Welcome to PaperVision Enterprise** dialog box.

10. Click **Login**.

    By clicking **Login**, you acknowledge that you accept the terms of the Digitech Systems acceptable use policy.

    N O T E

    If your session times out and you log in again, the application retains the most recent page you accessed. The amount of time before your session times out depends on the setting the administrator assigned.

Optional Pre-Login Parameters

The following optional parameters are available for you to specify before you log in to the PaperVision Enterprise web application.

To go to a specific project ID when you log in

1. Start your web browser.

2. In the Address bar, type the URL provided by your system administrator, followed by a question mark (**?**), and then **ProjID=** followed by the project ID.

    For example: **http://***serverurl***/PVE.aspx?ProjID=***1*

3. When the **Welcome to PaperVision Enterprise** dialog box appears, log in.

To log in to a specific entity when you log in

1. Start your web browser.

2. In the Address bar, type the URL provided by your system administrator, followed by a question mark (**?**), and then **EntID=** followed by the entity ID.

    For example: **http://***serverurl***/PVE.aspx?EntID=***1*

3. When the **Welcome to PaperVision Enterprise** dialog box appears, log in.

To automatically log in from the Address bar

1. Start your web browser.

2. In the Address bar, type the URL provided by your system administrator, followed by a question mark (**?**), and then **hRemote=true**, and then **&txtEntityID=** followed by the entity ID, and then **&txtUser=** followed by your user name, and then **&txtPassword=** followed by your password. The example below is based on the default login parameters using the System Admin account where the user name and password are both **Admin**.

    For example: **http://***serverurl***/PVE.aspx?hRemote=true&txtEntityID=***1***&txtUser=***admin* **&txtPassword=***ADMIN***&ProjID=1**

T I P

The automatic log in parameters can be used with a form, and then posted to PaperVision Enterprise so you can create your own form that contains these values.

Log Out

We recommend that you log off from PaperVision Enterprise each time you are finished with your session.

To log out

- On the title bar, click the down arrow by your user name, and then click **Logout**. Click **Yes** on the confirmation message.

Main Window Overview

After you have logged in to PaperVision Enterprise you will see the main window. The main window is comprised of the following:

- Menu bar - On the menu bar you can perform global searches (see "Global Search Tasks" on page 154 for more information). Click the down arrow next to your user name to access the following options.

  - **User Options** - Contains settings that define: parameters for search results, the method used to view documents, display settings, and options for electronic signatures. (See "User Options" on page 160 for information about specifying these settings.)

  - **Destruction Lists** - Contains destruction lists and options for working with them. (See "Destruction List Tasks" on page 168 for more information).

  - **E-Forms** - Select this option to maximize and display only the E-Forms pane in the main window.

  - **Global Search** - Contains global search filters and options for working with them. (See "Global Search Tasks" on page 154 for more information.)

  - **Migration Jobs** - Contains migration jobs and options for working with them. (See "Migration Job Tasks" on page 172 for more information.)

  - **Notifications** - Contains system messages and options for working with them. (See "Notifications" on page 163 for more information.)

  - **Projects** - Select this option to maximize and display only the Projects pane in the main window.

  - **Recycle Bin** - Contains all recycled documents and options for working with them. (See "Recycle Bin Tasks" on page 178 for more information.)

  - **Worksteps** - Select this option to maximize and display only the Worksteps pane in the main window.

  - **Administration** - Launches the PaperVision Enterprise Administration Console. You must have the proper permissions to open the console. You can return to the PaperVision Enterprise User Console by clicking **Home** on the breadcrumb trail.

  - **Downloads** - Select this option to open the Downloads window. (See "Downloads" on page 164 for more information.)

  - **Reset page Layout** - Select this option to return the main window to its default layout.

- Breadcrumbs - You can navigate back to any previous window by clicking the appropriate breadcrumb.

- Panes - In the default view, the left side contains components to which you have access. The components on the right side display any recently viewed documents, and your favorites.

The following table describes all of the possible components. Some of the listed components may not be available to you either because your site doesn't use that feature, or your administrator has not given you access to it.

Component	Description
Projects	This pane displays all projects to which you have access. See "Available Projects" on page 24 for more information.
Worksteps Waiting/Owned	This pane displays the worksteps within workflow definitions, to which you are assigned See "Worksteps Waiting/Owned Overview" on page 146 for more information.
E-Forms	This pane displays all the E-Forms your administrator has assigned you permission to access. See "Add E-Form Content" on page 158 for more information.
Destruction Lists	This pane displays all destruction lists to which you have access. See "Destruction List Tasks" on page 168 for more information.
Recent Documents	This pane displays all pinned documents, and the last 20 documents that you have viewed.
Favorites	This pane displays any projects, E-Forms, and Worksteps that you have designated as a favorite.

To configure a pane on the main window

After you have logged in to PaperVision Enterprise, select a pane and then do any of the following:

- To expand or collapse the pane, click the component name, or click **Minimize**, or **Maximize**.
- To filter the items in the pane, in the **Filter** box, type your criteria. Click the **X** to remove your filter.
- To remove or add a component from view, click the down arrow, and then select the components you want displayed.
- To scroll through the items in the pane, click **Go to the previous page**, or **Go to the next page**.
- To display all the items in a pane, click **All**.
- To change the number of items displayed in the pane, click **Display Less**, or **Display More**.
- To specify the panes that are displayed on the main window, click the down arrow next to the **Filter** box, and select the panes you want displayed.

You can rest the pointer on each item in a pane to display the following options. Not all of these options are available for each item.

- **Search** - Opens the **Search** dialog box for the project. See "Search for Documents" on page 33 for more information.
- **Upload** - Opens the **Upload Documents** dialog box for the project. See "Upload Documents" on page 47 for more information.
- **Scan** - Opens the **Scan New Document** window. See "Scan Documents" on page 73 for more information.
- **Folders** - Opens the **Folders** window for the project. See "Folder Tasks" on page 26 for more information.
- **Favorite** - Adds the item to the **Favorites** pane. Click Favorite again to remove the item from the Favorites pane.
- **View** - Opens the item in the appropriate viewer.
- **Pin** - Pins a document to the **Recent Documents** pane. This document will always display above the recently viewed documents.
- **Details** - Opens a window that displays information on the document. Click **Close** to close the window.
- **Remove** - Removes the document from the **Documents** pane.

Select a Document Viewer

There are two document viewers available: the PaperVision Viewer and the Browser-Based Viewer. In general, the PaperVision Viewer requires more set up, but offers more functionality and administrative options. The Browser-Based Viewer requires very little set up and still offers much of the functionality available in the PaperVision Viewer. If you are restricted from installing software, use the Browser-Based Viewer as the PaperVision Viewer requires the installation of the PaperVision Assistant. The following table provides a summary of the key features of each viewer so you can determine which viewer best meets your needs. It's easy to select the viewer you want to use and change it as needed. See "To specify document viewing options" on page 161 for instructions.

Feature	PaperVision Viewer	Browser-Based Viewer
Requires installing the PaperVision Assistant. See "Install the PaperVision Assistant" on page 182 for instructions.	✔	
Requires installation on each client	✔	
Supported on Windows operating systems	✔	✔
Supported on OSX and mobile operating systems (iOS and Android)		✔
Supports scanning	✔	
Supports the 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 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	✔	

Available Projects

Projects organize documents into logical groupings based on a common indexing scheme. Only an administrator can create and delete projects, and assign permission to access them. Only the projects to which you have been assigned access appear in your list of available projects.

To access projects

1. After you have logged in to PaperVision Enterprise, all of the projects to which you have access appear in the **Projects** pane.

2. You can rest the pointer on any project and access the following options.

   * Click **Search** to search for a document. See "Search for Documents" on page 33 for more information.

   * Click **Upload** to add a document to a project. See "Upload Documents" on page 47 for more information.

   * Click **Scan** to scan a document. See "Scan Documents" on page 48 for more information.

   * Click **Folders** to open the folder view. See "Folder Tasks" on page 26 for more information.

   * Click **Favorites** to add the project to the favorites pane.

3. Click the project in which you want to work.

   * If no previous search exists, the **Search** pane opens

   * If a previous search exists, a document list appears on the right pane. See "Document Lists" on page 42 for more information on working with document lists.

CHAPTER 3

Folders

Folder Tasks

On the **Folders** pane, you can create folders to organize documents for quick access. The folders results pane on the right displays the contents of any folder you select. Documents exist simply as shortcuts in the folders. As you place a document into a folder, a shortcut for that document is created to reference it in that specific folder. You can place one document in multiple folders, which creates multiple shortcuts (to that specific document) in each folder. On the folders results pane, you can perform the same functions and view the standard information available for all document lists. (See "Document Lists" on page 42 for references to the common tasks you can perform and an overview of the displayed information.) The functionality available to you depends on whether your administrator has assigned you permission to perform the task.

N O T E

All folder operations are specific to the project in which you are working. For example, you cannot copy and paste a folder into another project. Folders are project specific.

To create a new folder

1. After you have logged in to PaperVision Enterprise, do one of the following:

   * Rest the pointer on the project in which you want to create a new folder, and then click **Folders**.

   * Open a document list (see "Document Lists" on page 42 if you need help opening a document list), and then, on the toolbar, click **Show**.

2. A list of existing folder appears on the left pane. You can only view one level of folders at a time. If you want to create a folder at a different level, do one of the following:

   * If you want to create a folder in a higher level, on the toolbar, click **Up**.

   * If you want to create a subfolder of an existing folder, double-click the folder on the left pane.

3. On the toolbar, click **Menu**, and then click **Create**.

4. In the **Create Folder** dialog box, type the folder name, and then click **Save**.

To edit an existing folder

1. After you have logged in to PaperVision Enterprise, do one of the following:

   * Rest the pointer on the project in which you want to edit a folder, and then click **Folders**.

   * Open a document list (see "Document Lists" on page 42 if you need help opening a document list), and then, on the toolbar, click **Show**.

2. A list of existing folders appears on the left pane. You can only view one level of folders at a time. If you want to edit a folder at a different level, do one of the following:

   * If you want to edit a folder in a higher level, on the toolbar, click **Up**.

   * If you want to edit a subfolder of an existing folder, double-click the folder on the left pane.

3. Click the folder you want to edit, and then on the toolbar, click **Menu**. You have the following options.

    *   To move the folder and its contents to another location, click **Move** to open the **Choose Folder** dialog box. You have the following options.

        -   To move the folder you selected, select the destination folder, and then click **OK**.

        -   To copy the folder you selected, select the destination folder, and then click **OK**.

        -   To create a new destination folder, click **New Folder**, type the name of the new folder, and then click **Save**.

    *   To remove the folder and its contents, click **Delete**.

    *   To rename a folder, click **Rename**, type the new name of the folder, and then click **Save**.

    *   To update the **Folders** pane and the document list with any recent changes, click **Refresh**.

To copy document shortcuts from a document list and then paste them into a folder

> **N O T E**
>
> You can paste document shortcuts that are copied from a document list only into folders that are in the same project.

1. After you have logged in to PaperVision Enterprise, do one of the following:

    *   Rest the pointer on the project in which you want to create a new folder, and then click **Folders**.

    *   Open a document list (see "Document Lists" on page 42 if you need help opening a document list), and then, on the toolbar, click **Show**.

2. Select the document(s) for which you want to create shortcuts. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Move** to open the **Choose Folder** dialog box. Do one of the following:

    *   Select the destination folder, and then click **OK**.

> **T I P**
>
> You can double-click a folder to view any sub-folders.

    *   To create a new destination folder, click **New Folder**, type the name of the new folder, and then click **Save**.

To delete documents and document shortcuts

1. After you have logged in to PaperVision Enterprise, do one of the following:

    *   Rest the pointer on the project in which you want to delete document shortcuts, and then click **Folders**.

    *   Open a document list (see "Document Lists" on page 42 if you need help opening a document list), and then, on the toolbar, click **Show**.

2. On the **Folder** pane, select the folder containing the document shortcut you want to delete.

3. On the right pane, select the document shortcut you want to delete.

4. On the toolbar, click **Recycle** to open the **Recycle Document** dialog box. Do one of the following:

    *   To delete the document shortcut from the folder, select Delete shortcut from folder.

    *   To recycle the document, select **Recycle Document**. (See "Recycle Bin Tasks" on page 178 for information on recycling documents.)

5. Click **OK**.

CHAPTER 4

Documents

Search Pane Overview

With the comprehensive search capabilities in PaperVision Enterprise, you can perform searches ranging from detailed criteria for specific index values, to broad document searches in a single project. (See "Global Search Tasks" on page 154 for information on performing searches across multiple projects.) You enter the criteria for searches on the **Search** pane.

To open the Search pane

1. After you have logged in to PaperVision Enterprise, if necessary, expand the **Projects** pane, and then do one of the following:

   - Rest the pointer on the project in which you want to search, and then click **Search**, to open the **Search** pane.

   - Double-click the project.

     - If no previous search exists, the **Search** pane opens.

     - If a previous search exists, a document list appears on the right pane. Click **Search Criteria** to open the **Search** pane.

2. (Optional) You can click the down arrow next to the Search breadcrumb and choose the following options:

   - **Upload** - See "Upload Documents" on page 47 for more information.

   - **Scan** - See "Scan Documents" on page 48 for more information.

   - **Folders** - See "Folder Tasks" on page 26 for more information.

3. (Optional)To hide the fields that are displayed in the **Search** pane, click **Show/Hide**, and then select the fields you want to hide. You can click the field again to display it in the **Search** pane.

The **Search** pane contains the following areas.

- **Index Fields** - Specify these settings to perform an index-field search. (See "Index Field Searches" on page 33 for more information.)

- **System Fields** - Specify these settings to perform a system field search. (See "System Field Searches" on page 35 for more information.)

- **Options** - Specify these settings to define the type of search, how the search results are sorted, and whether to include recycled documents. (See "Project Search Options" on page 37 for more information.)

- **Full-Text** - Specify these settings to perform either a Boolean, or a natural language full-text search. (See "Full-Text Searches" on page 37 for more information.) Full-Text Options (**Stemming**, **Phonic**, **Fuzzy Searching**, and **Synonym Searching**) are available only when you select **Show Full Text Options** in the **Search** settings under **User Options**. (See "User Options" on page 160 for more information.)

Search for Documents

You can search for index-fields, system fields, full-text, or any combination by setting the properties on the **Search** pane. Searches are not case-sensitive, and include only documents to which you have security access.

> **N O T E**
>
> The way search results appear depends on the sort order specified in the **Options** area, and the **Search** settings under **User Options** where you can specify the maximum number of results per query and how documents are grouped. (See "User Options" on page 160 for more information.)

To search for documents

1. Open the **Search** pane. (See "Search Pane Overview" on page 30 if you need instructions.)

2. Specify the search properties:

   - To search index fields, specify the properties in the **Index Fields** area. (See "Index Field Searches" below for more information.)

   - To search system fields, specify the properties in the **System Fields** area. (See "System Field Searches" on page 35 for more information.)

   - To specify the search type, how search results are sorted, and whether to include recycled documents, specify the properties in the **Options** area. (See "Project Search Options" on page 37 for more information.)

   - To search full-text, specify the properties in the **Full-Text** area. (See "Full-Text Searches" on page 37 for more information.)

3. (Optional) Click **Clear Criteria** to remove all your search criteria.

4. Click **Search** to initiate the document search.

   The system will complete the document search, sort all of the search results based on your sort criteria, and then present those results in a document list based on your user settings. (See "Document Lists" on page 42 for more information about tasks you can perform from a document list.)

Index Field Searches

On the **Search** pane, the **Index Field** area displays all the index fields in the project that your administrator has granted you permission to view. Using the search options, you can configure each index you want to search. Numeric, date, and currency index fields display two boxes where you can type beginning and ending search values. This will return any document that has an index value within the specified range. Typing a single value in a box, instead of a range, will return all documents with that index value.

To set index field search criteria

1. Open the **Search** pane. (See "Search Pane Overview" on page 30 if you need instructions.)

2. In the **Index Field** area, configure each index field that you want to search. In addition to typing the values for which you want to search, you can use the options in the table below to further refine your search criteria.

3. (Optional) If predefined values exist for the project, click the down arrow in the box, and select the index value from the list on which you want to search.

4. (Optional) Click **Clear Criteria** to remove all your search criteria.

5. See "Search for Documents" on the previous page for instructions on completing a document search.

To search for	Type	Example
Any number of unknown characters in an index value	*	**T*** returns any document where the selected index value begins with T ***T*** returns any document where the selected index value contains a T ***T** returns any document where the selected index value ends with T
A single unknown character in an index value	_	**S_N** returns SON, but will not return SOON **_*** returns any non-blank value
Multiple values within a single index field by using "and" and "or"	**&** = and **^** = or	***A*&*Z*** returns all documents where the selected index value contains an A and a Z **A*^Z*** returns all documents where the selected index value begins with A or Z
Values in an index field that contain an ampersand	**&&**	**Johnson && Johnson** returns all documents where the selected index value is Johnson & Johnson. (Predefined index values containing an ampersand will appear in the list with two ampersands (**&&**)).
Documents of a specific age based on the current date and time.	**[CURRENTDATETIME]+** or **-** the following: number of years **Y** number of months **M** number of days **D** number of hours **H** number of minutes **N** number of seconds **S**	**[CURRENTDATETIME]** = Current Date/Time **[CURRENTDATETIME+1Y]** = Current Date/Time plus 1 year **[CURRENTDATETIME-12M]** = Current Date/Time minus 12 months **[CURRENTDATETIME+2D]** = Current Date/Time plus 2 days **[CURRENTDATETIME-96H]** = Current Date/Time minus 96 hours **[CURRENTDATETIME+900N]** = Current Date/Time plus 900 minutes **[CURRENTDATETIME+120S]** = Current Date/Time plus 120 seconds

To search for	Type	Example
A range of dates	Beginning and ending dates in the format specified for the index value.	**01/01/1995**, and **12/31/1999** returns all documents where the selected index value is between January 1, 1995, and December 31, 1999. Typing a single value instead of a range will return all documents with that index value.
A range of numbers or currency values.	Beginning and ending values.	**100**, and **1000** returns all documents where the selected index value is between 100, and 1000. Typing a single value instead of a range, will return all documents with that index value.

System Field Searches

On the **Search** pane, the **System Field** area displays all the system fields in the project that your administrator has granted you permission to search and view. Using the search options, you can configure each index you want to search.

N O T E
You cannot perform a search on the following system fields:

- **@Data Group Name**
- **@Original Data Group Name**
- **@Checked Out By Full Name**
- **@Checked Out By User Name**
- **@Recycled By**

When you select a system field from those listed above, you cannot configure it in the search pane, but it is displayed in the search results.

Numeric, date, and currency index fields display two boxes where you can type beginning and ending search values. This will return any document that has an index value within the specified range. Typing a single value in a box, instead of a range, will return all documents with that index value.

To set index field search criteria

1. Open the **Search** pane. (See "Search Pane Overview" on page 30 if you need instructions.)

2. In the **System Fields** area, configure each system field that you want to search.

3. (Optional) Click **Clear Criteria** to remove all your search criteria.

4. See "Search for Documents" on page 33 for instructions on completing a document search.

System Field	Definition
@Document Creation Date	Date and time of the latest version of the document
@Document ID	Unique system-assigned ID applied to each document

System Field	Definition
@Duplicate ID	System-assigned ID applied to duplicate documents
@Full-Text Index	Specifies the full-text database number (0 indicates that no full-text data exists)
@Hash Type	Specifies how the system will parse the data in the FILESET column to display pages.
@Object ID	Unique ID assigned to each version of a document
@Object Type	Specifies the type of file
@Pages	Number of pages in a document
@Secure List	List of document security level IDs
@Data Group ID	System-assigned ID applied to a data group
@Data Group Name	Name of the data group assigned when imported (This field is not searchable.)
@Original Data Group Name	Name of the data group assigned in its source location (This field is not searchable.)
@Source Document ID	Original document ID in the data group from which the document was imported
@Checked Out By Full Name	Full name of the user who currently has the document checked out (This field is not searchable.)
@Checked Out By User ID	User ID of the user who currently has the document checked out
@Checked Out By User Name	User name of the user who currently has the document checked out (This field is not searchable.)
@Checkout Time	Date and time the document was checked out
@Version Creator	User name of the operator who created the version of the document
@Version Number	Version number of the document
@Version Time	Date and time the version of the document was created
@Recycled By	User name of the user that recycled the document (This field is not searchable.)
@Recycled By User ID	User ID of the user that recycled the document
@Recycled Time	Date and time the document was sent to the recycle bin
@Lock Time	Date and Time the retention lock expires

System Field	Definition
@Destruction List ID	ID of the destruction list on which the document appears
@Destruction Time	Destruction date and time applied to the document

Project Search Options

On the **Search** pane, in the **Options** area, you can specify:

- The type of search to perform using your index field search criteria.

- How the search results are sorted by selecting the index value upon which to sort.

- Whether the document list is arranged in ascending or descending order.

- Whether to include recycled documents in the search (if you have permission to view the Recycle Bin for the project).

To set project search options

1. Open the **Search** pane. (See "Search Pane Overview" on page 30 if you need instructions.)

2. In the **Options** area, set the following options:

   - **Search Type** - From the **Search Type** list, select one of the following:

     - For your search to return any document that meets at least one of your index field search criteria, select **Or**.

     - For your search to return any document that meets all of your index field search criteria, select **And**.

   - **Sort By** - From the **Sort By** list, select the index field or system field by which to sort your search results. Select **[+]** to arrange the results in ascending order, or **[-]** to arrange the results in descending order. For example, to sort the search results in ascending order by company name, select **COMPANY NAME [+]**.

   - **Include Recycled Documents** - Select this option to include recycled documents in your search.

Full-Text Searches

You can perform full-text searches on projects containing documents with full-text data. Anytime a full-text-supported document is added to a project, PaperVision Enterprise populates the full-text database. (See "Supported File Formats for Full-Text Extraction" on page 60 for a list of supported file types for full text extraction.)

You can combine full-text searches with document index field searches and system field searches on documents with full-text data, by specifying the properties in both the **Index Field**, **System Field**, and the **Full-Text Search Criteria** areas. The full-text search is performed first, and then the document index field and system field search is performed on those results. You can change the order of those operations by selecting the **Query After Indices** option.

Your search results are displayed in a document list. (See "Document Lists" on page 42 for more information about tasks you can perform from a document list.) In addition to the standard information available in a document list, full-text search results also include:

- **Hits** - The total number of full-text matches in a document.

- **Score** - The total number of hits in a document divided by the largest number of hits of any document in the project. This value is displayed as a percentage. The document with the most hits has a score of 100%.

- **Title** - The first 512 characters of the full-text data in the document.

> **E X A M P L E**
>
> If a search returns four documents with hits of 115, 77, 50, and 5, the documents will have the following scores:
>
> - Document 1: 115 hits divided by 115 hits = 100%
>
> - Document 2: 77 hits divided by 115 hits = 67%
>
> - Documents 3: 50 hits divided by 115 hits = 43%
>
> - Document 4: 5 hits divided 115 hits = 4%

Click the arrow in the first column to display or hide full-text information in the document list. This arrow only appears when full-text information is available.

Boolean Full-Text Searches

A Boolean search request consists of a group of words or phrases that are linked by search operators that precisely indicate the relationship between the words or phrases. Boolean searches treat two or more words that occur together as a phrase. The table following the procedure describes the valid search operators and shows examples of how to use them.

To set Boolean full-text search properties

1. Open the **Search** pane. (See "Search Pane Overview" on page 30 if you need instructions.)

2. In the **Full-Text** area, in the **Criteria** box, type the search criteria. (See the table following this procedure for information on using Boolean search operators.)

3. Select **Boolean Search**.

4. (Optional) Select **Query After Indices** to perform a full-text search on the results of an index field search. (See "Index Field Searches" on page 33 if you need help building an index field search.)

5. Select from the following options.

   - **Stemming** - Select this option to expand a search to include grammatical variations of the words in your search criteria. For example, a stemming search for "fish" would also find "fishing." A search for "applied" would also find "applying," "applies," and "apply." Selecting this option performs a stemming search for all of the words in your query. To apply a stemming search to specific words, type a tilde (**~**) at the end of the desired words in your criteria (for example, **fish~**).

- **Phonic** - Select this option to expand a search to include words that sounds like the words in your search criteria and begin with the same letter. For example, a phonic search for "Smith" will also find "Smithe" and "Smythe." Selecting this option performs a phonic search for all of the words in your query. To apply a phonic search to specific words, type a number sign (**#**) in front of the desired words in your search criteria (for example, **#Smith**).

- **Fuzzy Searching** - Select this option to expand a search to include misspelled versions of the words in your search criteria. For example, a fuzzy search for "apple" will find "appple." Fuzzy searching will locate text that may contain typographical errors or text that was created from optical character recognition (OCR). The fuzziness values range from 1 to 10. A search for "alphabet" with a fuzziness value of 1 would find "alphaqet." A fuzziness value of 3 would find "alphaqet," "alpkaqet," and "allkaget."

  Selecting this option and typing a fuzziness value performs a fuzzy search for all of the words in your search criteria. To apply a fuzzy search to specific words, type the percent sign (**%**) in the search criteria as shown in the examples below:

  - **ba%nana** - specifies that the word must begin with "ba" and have at most one difference between it and "banana"

  - **b%%anana** - specifies that the word must begin with "b" and have at most two differences between it and "banana"

- **Synonym Searching** - Select this option to expand a search to include synonyms or related concepts of the words in your search criteria. For example, a synonym search for the word "fast" would also find "quick." Selecting this option performs a synonym search for all of the words in your query. To apply a synonym search to specific words, type an ampersand (**&**) at the end of the desired words in your criteria (for example, **improve&**). You do not need to select **Synonym Searching** when you use the ampersand (**&**), but you must select at least one of the following synonym libraries to perform synonym searching for either all of the words in your query, or for specific words:

  - **WordNet Synonyms** - Select this option to use the WordNet thesaurus developed at Princeton University.

  - **WordNet Related Words** - Select this option to use the WordNet's extensive lexical and semantic network of the English language to include links between words other than synonym relationships, including antonyms, hypernyms, hyponyms, meronyms, and holonyms.

  - **User Synonyms** - Select this option to use the server's user-defined synonyms.

6. (Optional) Click **Clear Criteria** to remove all your search criteria.

7. See "Search for Documents" on page 33 for instructions on completing a document search.

The following table describes the valid search operators and examples of how to use them.

Search Operator	Description	Usage Example
AND	Specifies that both words must be present	**apple AND pear** Results in a search for documents that contain both "apple" and "pear"
OR	Specifies that at least one of the words must be present	**apple OR pear** Results in a search for documents that contain either "apple" or "pear"
NOT	Specifies that the word is not present; can be used with the AND and OR operators	**apple AND NOT pear** Results in a search for documents that contain "apple" and not "pear"
w/n	Specifies that words must occur no more than *n* words apart	**apple w/6 pear** Results in a search for documents that contain "apple" within six words of "pear"
*	A wildcard character that matches any number of letters	***apple AND pea*** Results in a search for documents that contain any word that ends with "apple" and any word the begins with "pea"
?	A wildcard character that matches any single letter	**apple AND pe?r** Results in a search for documents that contain "apple" and any word that begins with "pe" and ends with "r" and contains one letter in between.

Natural Language Full-Text Searches

Natural-language searches use "term weighting," which evaluates the frequency and density of a word's occurrences in documents. The system searches for words in phrases individually (not as a full phrase) and ranks the search results based on this term weighting.

> **E X A M P L E**
>
> Perform a search for the following text: "Get me Sam's memo on the 2015 takeover of CorpX." The system locates all documents that contain words that match the following individual search terms: "Sam," "memo," "2015", "takeover," and "CorpX." The system then weighs the terms. If the term 2015 exists in 3,000 files and the term Sam exists in only two files, the files that also contain the term Sam receive a higher relevancy ranking than those that do not contain Sam. In a natural-language search, words such as "get," "me," "on," "the," "and," "of," and "or" are considered "noise" and are ignored.

To set natural language full-text search properties

1. Open the **Search** pane. (See "Search Pane Overview" on page 30 if you need instructions.)

2. In the **Full-Text** area, type the search criteria in the **Criteria** box.

3. Select **Natural Language**.

4. (Optional) Select **Query After Indices** to perform a full-text search on the results of an index field search. (See "Index Field Searches" on page 33 if you need help building an index field search.)

5. Select from the following options.

   - **Stemming** - Select this option to expand a search to include grammatical variations of the words in your search criteria. For example, a stemming search for "fish" would also find "fishing." A search for "applied" would also find "applying," "applies," and "apply." You can perform a stemming search for all of the words in your query by selecting this option, or for specific words by placing a tilde (**~**) at the end of the desired words in your criteria (for example, **fish~**).

   - **Phonic** - Select this option to expand a search to include words that sounds like the words in your search criteria and begin with the same letter. For example, a phonic search for "Smith" will also find "Smithe" and "Smythe." You can perform a phonic search for all of the words in your query by selecting this option, or for specific words by placing a number sign (**#**) in front of the desired words in your search criteria (for example, **#Smith**).

   - **Fuzzy Searching** - Select this option to expand a search to include misspelled versions of the words in your search criteria. For example, a fuzzy search for "apple" will find "appple." Fuzzy searching will locate text that may contain typographical errors or text that was created from optical character recognition (OCR). The fuzziness values range from 1 to 10. A search for "alphabet" with a fuzziness value of 1 would find "alphaqet." A fuzziness value of 3 would find "alphaqet," "alpkaqet," and "allkaget."

You can perform a fuzzy search for all of the words in your search criteria by selecting this option and typing a fuzziness value; or for specific words by placing the percent sign (**%**) in the search criteria as shown in the examples below:

- **ba%nana** - specifies that the word must begin with "ba" and have at most one difference between it and "banana"

- **b%%anana** - specifies that the word must begin with "b" and have at most two differences between it and "banana"

- **Synonym Searching** - Select this option to expand a search to include synonyms or related concepts of the words in your search criteria. For example, a synonym search for the word "fast" would also find "quick." You can perform a synonym search for all of the words in your query by selecting this option, or for specific words by placing an ampersand (**&**) at the end of the desired words in your criteria (for example, **improve&**). You do not need to select **Synonym Searching** when you use the ampersand (**&**), but you must select one or more synonym libraries.

  You must select at least one of the following options to perform synonym searching for either all of the words in your query or certain words:

  - **WordNet Synonyms** - Select this option to use the WordNet thesaurus developed at Princeton University.

  - **WordNet Related Words** - Select this option to use the WordNet's extensive lexical and semantic network of the English language to include links between words other than synonym relationships, including antonyms, hypernyms, hyponyms, meronyms, and holonyms.

  - **User Synonyms** - Select this option to use the server's user-defined synonyms.

6. (Optional) Click **Clear Criteria** to remove all your search criteria.

7. See "Search for Documents" on page 33 for instructions on completing a document search.

Document Lists

Working in document lists lets you select multiple documents, and then perform the same task on all of them. For example, if an index value, such as an address or zip code changes, you can select all documents affected by the change, and then modify the index value only once for the correction to be made for all of the documents.

Document lists appear:

- When documents that have matching criteria are found during a project-level search. (See "Search for Documents" on page 33 for more information.)

- When documents that have matching criteria are found during a global search. (See "Global Search Tasks" on page 154 for more information.)

- In **Destruction Lists**. (See "Destruction List Tasks" on page 168 for more information.)

- In the **Recycle Bin**. (See "Recycle Bin Tasks" on page 178 for more information.)

- In folders on the **Folders** tab. (See "Folder Tasks" on page 26 for more information.)

The sections listed below describe tasks that are common to all document lists. See the content for the location where the document list appears (referenced in the previous list) for functionality that is specific to that location. For example, if you are working with a document list that appears in a destruction list, see the "Destruction List Tasks" on page 168 section for functionality that is not covered in the sections referenced in the following list. The functionality available to you depends on whether your administrator has assigned you permission to perform the task. The following sections describe the tasks that you can perform from all document lists.

- See "View Documents" on page 46 for instructions to perform this task.
- See "Group, Sort, and Filter Document Lists" on page 45 for instructions to perform this task.
- See "Document List Options" on page 45 for instructions to perform this task.
- See "Upload Documents" on page 47 for instructions to perform this task.
- See "Scan Documents" on page 48 for instructions to perform this task.
- See "Folder Tasks" on page 26 for instructions to perform this task.
- See "Save Documents" on page 50 for instructions to perform this task.
- See "Email Documents" on page 51 for instructions to perform this task.
- See "Print Documents" on page 53 for instructions to perform this task.
- See "Add Documents to a List" on page 54 for instructions to perform this task.
- See "Export Document List Items" on page 54 for instructions to perform this task.
- See "Print Document List" on page 55 for instructions to perform this task.
- See "Edit Document Index Values" on page 55 for instructions to perform this task.
- See "Delete Documents" on page 56 for instructions to perform this task.
- See "Apply or Remove Document Security" on page 56 for instructions to perform this task.
- See "Apply or Remove Document Retention Locks" on page 57 for instructions to perform this task.
- See "Apply or Remove Document Destruction Dates" on page 58 for instructions to perform this task.
- See "Rebuild Full-Text Data" on page 59 for instructions to perform this task.

Document List Overview

Document lists appear on the right pane, and display the following information.

- The number of documents that appear per page in a document list is determined by the **Max. Results Per Query** setting under **User Options**. (See "To specify search options" on page 161 for instructions to modify this setting.)

- The order and grouping of documents is determined by the **Document Grouping** setting under **User Options**. (See "To specify search options" on page 161 for instructions to modify this setting.) No document grouping is applied during full-text search results.

- Index fields display as column headers in document lists. Click the header to sort the column in ascending or descending order.

- After a document is placed in the Recycle Bin, it displays with red text when it appears in any document list.

- Documents that contain detail sets (also referred to as "duplicate documents") appear with a plus sign.

- The **Status** column displays various symbols to indicate when a document is checked out, has security applied (for administrators only), and has a destruction or retention date applied. Rest the pointer on the symbol for additional information.

- The total number of search results are displayed on the lower-right portion of the pane.

Group, Sort, and Filter Document Lists

If you have a large number of list items, it may be helpful to group, sort, or filter them. These operations are performed independently by page, on your query results.

To group list items

1. On the document list, select the column heading you want to use to group documents, and then drag it to the row above the grid.

    The documents are now grouped by each entry in that column heading. For example, to group all the documents by the **Name** index field, , drag the **Name** column heading to the **Group by** row above the grid. The grid will then contain all the documents grouped by name.

2. (Optional) You can drag additional column headings to the row above the grid to divide the list into groups and subgroups.

    For example, if you grouped documents by Name, you could drag an index field (Date) to the row above the grid. The result would include all the documents grouped by Name. Each of those groups would have subgroups based on the Date index field.

To filter list items

1. On the document list, select the column heading you want to use to filter the search results, and then click the filter button to open the filter dialog box.

2. Do any of the following:

    *   To filter the list based on specific index values, select the values you want to include in the filtered list.

    *   To filter the list based on a condition, type the value you want to use in the box, click the down arrow, and then select the appropriate operator.

        For example, to filter all rows where the value in the selected column is greater than 15, type **15** in the box, and then select **Is greater than** from the list. Optionally, if you want the filter to be case sensitive, click **Match case**.

    *   To filter by more than one condition, type the value you want to use for the first condition in the first box, click the down arrow, and then select the appropriate operator. In the second box, type the value you want to use for the second condition, click the down arrow, and then select the appropriate operator.

To sort list items

1. On the document list, click a column heading to sort the results in ascending order.

2. (Optional) Click the column heading again to reverse the sort order.

Document List Options

When viewing document lists, you can select to group or expand documents by detail sets, select all documents in the list, remove all detail set grouping, perform in-line editing on index values, and refresh the document list.

To expand documents

1. Open a document list. (See "Document Lists" on page 42 if you need help.) Documents that are grouped by detail sets, are displayed with a right arrow in the left column.

2. Do one of the following to expand documents.

  * To expand all documents grouped by detail sets, on the toolbar, click **Expand**.

  * To expand a single detail set, on the left column, click the right arrow of the detail set you want to expand.

3. Do one of the following to collapse documents.

  * To collapse all documents and group them by detail set, on the toolbar, click **Collapse**.

  * To collapse a single detail set, on the left column, click the down arrow of the detail set you want to collapse.

To select all documents

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the toolbar, click **Select**.

3. (Optional) to deselect all documents, on the toolbar click **Deselect**.

To remove or apply detail set grouping for documents

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. Do one of the following:

  * To remove detail set grouping, on the toolbar, click **Single**.

    All documents are listed individually, and the left column showing detail sets is removed.

  * To apply detail set grouping, on the toolbar, click **Detail**.

    The left column displays a right arrow next to documents grouped by detail set.

To perform in-line editing on documents

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. Select the document in the document list that you want to edit.

3. Press Enter, and update the index values that you want to change.

4. After you have made your changes, press Enter again, and then click **OK**.

To refresh the document list

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the toolbar, click **Refresh**.

View Documents

If your administrator has assigned you permission to do so, you can view documents that appear in a document list. There are two document viewers available for your use. (See "Select a Document Viewer" on page 23 for information about each viewer.) When you view a document from a document list, it opens in the viewer you have selected in your system settings. (See "To specify document viewing options" on page 161 for instructions to specify the document viewer.) See "PaperVision Viewer Overview" on page 62 or "Browser-Based Viewer Overview" on page 118 for information about the operations you can perform after opening the document viewer you selected.

To view a document list item

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, double-click the document you want to view.

N O T E

For full-text documents, if your administrator has specified that annotations are "forced on" and the document contains an annotation, then the full-text is hidden behind the annotation and you cannot view the obscured text on the **Full-Text** tab.

Upload Documents

If your administrator has assigned you permission to do so, you can add documents, from the:

- **Search** pane for projects.
- Document lists for project and global searches.
- **Folders** tab.
- Browser-Based Viewer. (See "Upload Documents" on page 120 for instructions to add documents from the Browser-Based Viewer, as the following procedure is not applicable from that location.)
- PaperVision Viewer. (See "Add Documents" on page 77 for instructions to add documents from the PaperVision Viewer, as the following procedure is not applicable from that location.)

Documents are added to the project that is selected when you click the **Upload** command, and the index fields that appear are those that have been defined for documents in the selected project.

To add a document to a project

1. On the toolbar, click **Upload** to open the **Upload Documents** pane.
2. In the **Document Index Fields** area, type or select the document index values.

   If you previously had a document selected, the index values displayed are from that document. You can use or overwrite these values.

3. (Optional) If you want to add the document into a folder, do the following:
   1. Next to the **Folder** box, click **Browse**.
   2. In the **Choose Folder** dialog box, select a folder and then do one of the following:
      - Click **OK** to add the document to the folder you selected.
      - (Optional) To create a new folder, select the appropriate parent folder, click **New Folder**, and then type the name of the new folder.
4. In the **Files** area, click **Select File**.
5. In the **Choose File to Upload** dialog box, select the file, and then click **Open**.
6. (Optional) If you want to add multiple documents using the same index values, click **Additional Files**, and then repeat the previous two steps to select another document.
7. When you are finished selecting files, click **Save**.

Scan Documents

If your administrator has assigned you permission to do so, you can scan and upload single-page or multiple-page documents directly from a TWAIN-enabled scanning device into PaperVision Enterprise from the:

- **Search** pane for projects.
- Document lists for project and global searches.
- **Folders** tab.
- PaperVision Viewer.
- WorkFlow Viewer.

Using a direct connection to the scanner, any PaperVision Enterprise machine can serve as a scan station. The scan feature lets you add, move, or delete pages within a document and maintain version control of those documents. When new documents are scanned, they are temporarily stored on the local computer where they were scanned. After documents are indexed, they are automatically uploaded. Documents are added to the project currently selected. If applicable, any document-level security definitions are applied.

To scan documents from a document list, you must:

- Select the PaperVision Viewer as your document viewer. (See "To specify document viewing options" on page 161 if you need instructions.)

> **N O T E**
>
> If you have the Browser-Based Viewer selected as your document viewer, the **Scan** option is not available.

- Select a TWAIN-enabled scanning device. (See "Select Scanner and Set Scanner Properties" on page 75 for instructions to select a scanner and set scanner properties.)
- Specify how documents are handled during scanning. (See "Specify Scanning Settings" on page 106 for instructions to specify scanning settings.)

> **I M P O R T A N T**
>
> To scan documents into PaperVision, the scanner must be connected directly to the computer hosting the PaperVision Assistant. Do not use wireless or other network connections.

To scan documents

1. Place the pages you want to scan in the scanner.
2. On the toolbar, click **Scan** to open the PaperVision Viewer.

NOTE

Documents are added to the project that is selected when you click the **Scan** command, and the index fields that appear are those that have been defined for documents in the selected project.

---

3. On the **Home** tab, in the **General** group, click **Scan New Document**.

4. (Optional) If the **Select Source** dialog box appears, click the scanner you want to use, and then click **Select**.

   The pages are scanned and placed in the **Pending Document(s) View**. See "Manage Pending Documents" on page 88 for instructions to add index values and upload documents.

TIP

If the pages did not scan correctly, in the **General** group, click **Remove From Pending**, and then click **Yes** in the confirmation message to delete the document from the **Pending Document(s) View**.

---

5. (Optional) If your system has been configured to do so, a message appears asking if you want to add pages to the scanned document. To do so, add pages to the scanner, and then click **Yes**. When you are finished scanning pages, click **No** to this message.

6. (Optional) If your system has been configured to do so, the **Indexing Editor** appears where you can do one of the following:

   - To index the document later, click **Cancel**. When you are ready to add index values for the document(s), see "Manage Pending Documents" on page 88 for instructions.

   - To index the document now, in the boxes for the index values, type or select a new index value, or if your system is configured to so, index values from the previously selected document appear which you can use or overwrite.

7. (Optional) If you want to add the document into a folder, do the following:

   1. Next to the **Add to Folder** box, click the ellipsis button.

   2. In the **Selected Folder** dialog box, do one of the following:
      - Click the folder to which you want to add the document.
      - To create a new folder, select the appropriate parent folder, click **Create Folder**, type the name for the new folder, and then click **OK**.

   3. Click **OK**.

8. On the **Indexing Editor**, click **OK**.

   If you indexed and saved the document, it is uploaded automatically.

   If you still need to index the document, see "Manage Pending Documents" on page 88 for instructions.

Save Documents

If your administrator has assigned you permission to do so, you can save documents that appear in a document list. If a document is an image-based or PDF format, you can convert it to a format you specify when you save it. If the document is not an image-based or PDF format, it will be saved in its original format. Only image-based documents can be converted. For example, if the image is a TIF, it can be converted to a PDF when saved. Microsoft Word documents, however, will remain as Word documents. (See "Document Types" on page 59 for information about imaged-based and non-image based document formats.)

> **N O T E**
>
> To save documents from a document list, you must select the PaperVision Viewer as your document viewer. (See "To specify document viewing options" on page 161 if you need instructions.)

To save documents

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) you want to save. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Save**.

> **N O T E**
>
> If the project has **Enhanced Auditing** enabled, when you click **Save As**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

4. In the **Output Directory** box, type the path, or click the ellipsis button to open the **Browse For Folder** dialog box to locate, and then select the location where you want the document(s) saved. You can create a new folder by clicking **Make New Folder**, and then typing the name of the folder.

5. After you have selected or created a folder for the document(s), click **OK**.

6. In the **File Name** list, do one of the following:

   - To use the system date and time for the file name, select **Date/Time**.

   - To specify a file name, select **User Specified**, and then type the name in the box.

   - To use an index value for the file name, select the index you want to use.

> **N O T E**
>
> Only image-based documents can be converted to a different format. For example, if the image is a TIF, it can be converted to a PDF when saved. Microsoft Word documents, however, will remain as Word documents.

7. In the **Format** list, select the format for the document(s).

8. In the **Page Range** list, do one of the following:

    - To save the entire document, select **All Pages**.

    - To save specific pages, click **Page Range**, and then type the page numbers. You can specify individual pages and page ranges (for example, 1-5, 8, 11-13).

9. If you are saving a COLD document, in the **Format** list select one of the following options:

    - To save the document text, select **Text**.

    - To save the overlay images, select **Overlay**.

10. If the document has annotations, do one of the following:

    - To save the annotations, select **Include Annotation**.

    - To exclude the annotations, clear **Include Annotation**.

> **N O T E**
>
> If your administrator set user permissions so that annotations are "forced on," you cannot clear the **Include Annotation** check box, and the **Overlay** setting is forced on for COLD documents.

11. Click **OK** to save the selected document(s).

Email Documents

If your administrator has assigned you permission to do so, you can send documents by email from document lists using any MAPI-compliant email application. If the document is an image-based or PDF format, you can convert it to a format you specify when you send it. If the document is not an image-based or PDF format, it will be sent in its original format. Only image-based documents can be converted. For example, if the image is a TIF, it can be converted to a PDF when sent. Microsoft Word documents, however, will remain as Word documents. (See "Document Types" on page 59 for information about imaged-based and non-image based document formats.)

To send documents by email, you must have an email address associated with your user account. Contact your administrator if you need one added. When you send a document via email, the document files and index values are included in the email message.

> **N O T E**
>
> To send documents by email from a document list, you must select the PaperVision Viewer as your document viewer. (See "To specify document viewing options" on page 161 if you need instructions.)

To send documents using a MAPI-compliant email application

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) you want to send. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Email**.

N O T E

If the project has **Enhanced Auditing** enabled, when you click **Email**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

4. In the **File Name** list, do one of the following:

   - To use the system date and time for the file name, select **Date/Time**.

   - To specify a file name, select **User Specified**, and then type the name in the box that appears.

   - To use an index value for the file name, select the index you want to use.

5. In the **Format** list, select the format for the document(s).

N O T E

Only image-based documents can be converted to a different format. For example, if the image is a TIF, it can be converted to a PDF when saved. Microsoft Word documents, however, will remain as Word documents.

6. In the **Page Range** list, do one of the following:

   - To send the entire document, select **All Pages**.

   - To send specific pages, click **Page Range**, and then type the page numbers. You can specify individual pages and page ranges (for example, 1-5, 8, 11-13).

7. If you are sending a COLD document, in the **Format** list select one of the following options:

   - To save the document text, select **Text**.

   - To save the overlay images, select **Overlay**.

8. If the document has annotations, do one of the following:

   - To send the annotations, select **Include Annotation**.

   - To exclude the annotations, clear **Include Annotation**.

N O T E

If your administrator set user permissions so that annotations are "forced on," you cannot clear the **Include Annotation** check box, and the **Overlay** setting is forced on for COLD documents.

9. Click **OK**.

10. When the **Batch Email** dialog box appears, click **Finish**.

11. When your email application appears, type the email address for the recipient, the subject of the email, the message text, and then send the email.

Print Documents

If your administrator has assigned you permission to do so, you can print documents that appear in a document list.

> **NOTE**
>
> To print documents from a document list, you must select the PaperVision Viewer as your document viewer. (See "To specify document viewing options" on page 161 if you need instructions.)

> **NOTE**
>
> The options under the **Printer Properties** link vary depending on the type of printer. If you need information about printer properties, see your printer documentation. Only the print options that are specific to PaperVision Enterprise are documented in the following procedure.

To print documents

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) you want to print. (Hold down the Ctrl key to select multiple documents, or, on the toolbar, click **Select** to select all documents.)

3. On the toolbar, click **Print**.

> **NOTE**
>
> If the project has **Enhanced Auditing** enabled, when you click **Print**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

4. In the **Print** dialog box, specify the print options.

5. If you are printing a COLD document, in the **Overlay** list select one of the following options:

   - To print the document as text, select **Text**.

   - To print the document text with the overlay image, select **Overlay**.

6. If the document has annotations, do one of the following:

   - To print the annotations, select **Include Annotation**.

   - To exclude the annotations, clear **Include Annotation**.

> **NOTE**
>
> If your administrator set user permissions so that annotations are "forced on," you cannot clear the **Include Annotation** check box, and the **Overlay** setting is forced on for COLD documents.

7. After you specify the print options, click **Print**.

Add Documents to a List

You can add documents to a user-defined list that can then be migrated for other uses. You can add documents from various projects and data groups in your repository to a list, and then save them and any existing or modified document index fields into a new data group. An administrator can then save this new data group to any location, including external media.

For example, you might need to supply an attorney with documents that apply to a specific case. You can add only the applicable documents to a list, and then submit them for migration. After they are migrated, your administrator can then burn them onto a CD or DVD so that the attorney can access the information. The original documents are not altered, nor are they removed from PaperVision.

Before documents can be migrated, they must be added to a list as described in the following procedure. (See for information about the document migration process and the tasks you can perform for migration jobs.)

To add documents to a list

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) you want to add to a list. (Hold down the Ctrl key to select multiple documents, or, on the toolbar, click **Select** to select all documents.)

3. On the toolbar, click **List**, and then do one of the following:

   * To create a new list, click **New List**, type a name for the list, click **Save**, and then select the list.

   * To use an existing list, click the list.

4. Click **OK** to confirm adding the document(s) to the list.

5. When you are ready to submit the list for migration, see for information about the document migration process and the tasks you can perform for migration jobs.

To delete a list

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the toolbar, click **List**, and then select the list that you want to delete.

3. Click **Delete List**, and then click **OK**.

Export Document List Items

From a document list, you can select documents, and then export the displayed information into a Microsoft Excel file.

> **NOTE**
>
> Only the information displayed on the document list is exported. The content of referenced documents is not exported.

To export document list items

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the documents for which you want to export the displayed information. (Hold down the Ctrl key to select multiple documents, or , on the toolbar, click **Select** to include all documents)

3. On the toolbar, click **Results**, and then click **Save**.

4. When prompted, do one of the following:

   • Click **Open** to view the XML file contents on a new tab in the browser.(See the documentation for your specific browser for instructions to print, save, etc.)

   • Click one of the **Save** options. If you select **Save As**, you can specify a location and file name for the export file, and then click **Save**.

Print Document List

If your administrator has assigned you permission to do so, you can print the entire document list in a print-friendly format.

> **N O T E**
>
> Only the information displayed on the document list is printed. The content of referenced documents is not printed.

To print a document list

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the toolbar, click **Results**, and then click **Print**.

3. Click **Print** to print the document list. The document list appears in a print-friendly format on a new tab, and the **Print** dialog box opens.

4. In the **Print** dialog box, specify the print options, and then click **Print**

Edit Document Index Values

If your administrator has assigned you permission to do so, you can alter index values for documents that appear in a document list. The options available for altering index values depend on how your administrator has configured the project. You can either type a new index value, select a value from a list, or both. When you change the index values for a document, the server updates the values immediately when you click **Save**.

> **N O T E**
>
> When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

To alter document index values

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) for which you want to change the index values. (Hold down the Ctrl key to select multiple documents, or, on the toolbar, click **Select** to select all documents.)

> ⚠ **I M P O R T A N T**
>
> If you selected multiple documents, be aware that the changes you make are applied to all of the selected documents. Use care to leave the values you are not changing as they are. For example, to change the date for all of the selected documents but nothing else, ensure that you modify only the date field and not any other index fields.

3. On the toolbar, click **Edit** to open the**Edit** dialog box.

4. In the box for the index field(s) you want to modify, type or select the new index value.

5. Click **Update**.

Delete Documents

If your administrator has assigned you permission to do so, you can delete documents that appear in a document list. How document deletion is handled depends on how your administrator has configured the Recycle Bin settings for the project. When you delete a document, it is either moved to the Recycle Bin or it is deleted along with all of its associated versions and annotations. Furthermore, depending on how the administrator configured the data group for the documents, physical files might also be deleted from their source media. Contact your administrator to learn how document deletion is configured.

To delete documents

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) you want to delete. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Recycle**.

4. Click **Yes** to confirm the deletion.

Apply or Remove Document Security

Your administrator can assign or deny permissions to specific projects and functionality within them. In addition, your administrator can define document security levels that you can apply if you have permission to do so. Security applied at the document-level provides for more precise settings. For example, access to documents can be restricted to certain people based on date ranges or invoice amount ranges.

If document security is applied to a document and you do not have access to it, that document will not appear in your document lists. If you have access to a secured document (or are logged in as an administrator), the **Status** column in the document list displays a padlock symbol for secured documents.

To apply document security

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the documents for which you want to apply security. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Secure** to open the **Apply Document Security Levels** dialog box.

4. In the **Document Security** area, select the check boxes that correspond to the security level(s) you want to apply.

5. Click **Save**.

To remove document security

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the documents for which you want to remove security. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Secure** to open the **Apply Document Security Levels** dialog box.

4. In the **Document Security** area, clear the check boxes that correspond to the security level(s) you want to remove.

5. Click **Save**.

Apply or Remove Document Retention Locks

Applying a retention lock to a document prevents it from being deleted before the specified lock date and time. Depending on how your administrator has configured the Recycle Bin settings for your project, a document with a retention lock can be moved to the Recycle Bin, but it cannot be emptied from the Recycle Bin before the specified lock date and time. If your administrator has assigned you permission to do so, you can apply and remove document retention lock dates. For the documents that have a retention lock applied, the **Status** column in the document list displays a symbol of a document with a padlock on it.

> **N O T E**
>
> If you do not have permission to remove retention locks, you cannot apply a new lock date that is later than the current lock date.

To apply or edit a document retention lock

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the documents for which you want to apply or edit a document retention lock. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Retention** to open the **Records Retention** dialog box.

4. If necessary, expand **Retention**.

5. Click **Lock Date/Time** box, and then select date and time up to which the document must be retained. Click **Close**.

6. (Optional) In the **Comments** box, you can type comments that can be viewed until the document is destroyed.

7. Click **Apply**.

8. In the confirmation message, click **yes** to confirm the retention lock date and time.

To remove a document retention lock

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the documents for which you want to remove the document retention lock. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Retention** to open the **Records Retention** dialog box.

4. Select **Remove**, and then click **Yes**.

Apply or Remove Document Destruction Dates

If your administrator has assigned you permission to do so, you can apply and remove document destruction dates. For the documents that have a destruction date applied, the **Status** column in the document list displays a note symbol. When you rest the pointer on the symbol, it displays the scheduled destruction date, any related comments that were entered, and the user name for the person who applied the destruction date. Depending on how your administrator has configured the Recycle Bin settings for your project, a document with a destruction date that has been reached will either be deleted or moved to the Recycle Bin during the destruction process. If a document is in a destruction list and you apply a destruction date to it, it is automatically and immediately removed from all destruction lists. (See "Destruction List Tasks" on page 168 for information about how destruction lists are used.)

> **N O T E**
>
> For document destruction to automatically happen, your administrator must have configured a Records Retention Policy Set at the project level. If this has not occurred, documents will not be deleted even if their specified destruction date has passed.

To apply or edit a document destruction date

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) for which you want to apply or edit a document destruction date. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Retention** to open the **Records Retention** dialog box.

4. If necessary, expand **Destruction**.

5. In the **Destruction Date/Time** box, and then select date and time up to which the document must be retained. Click **Close**.

6. (Optional) In the **Comments** box, you can type comments that can be viewed until the document is destroyed.

7. Click **Apply**.

8. In the confirmation message, click **Yes** to confirm the destruction date and time.

To remove a document destruction date

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) for which you want to remove the document destruction date. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Retention** to open the **Records Retention** dialog box.

4. Select **Remove**, and then click **Yes**.

Rebuild Full-Text Data

You can submit individual documents to have their full-text indexes rebuilt. This feature is useful if the full-text data for a document has become corrupt or has changed.

To rebuild full-text data

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, select the document(s) for which you want to rebuild full-text data. (Hold down the Ctrl key to select multiple documents.)

3. On the toolbar, click **Rebuild**, and then click **OK**.

Document Types

PaperVision Enterprise makes a distinction between image-based, and non-image-based documents. These document types are handled differently in the PaperVision Viewer during check out, editing, and adding signatures and annotations. Image-based documents are those that support scanning and include the following formats:

- JPG

- PNG

- GIF

- BMP

- TIFF and PDF formats are treated as image-based documents when they are loaded into Paper-Vision from a PaperFlow or PVE XML data group generated by PaperFlow or PaperVision Capture using single-page images.

- TIFFs are treated as image-based documents when they are added to PaperVision using the scan feature.

After you check out an image-based document, you can insert, move, and delete pages in the PaperVision Viewer. You can also graphically add signatures and annotations to image-based documents.

PaperVision Enterprise categorizes all other documents as non-image-based documents. TIFF and PDF formats are treated as non-image-based documents when:

- They are loaded into PaperVision from a PaperFlow or PVE XML data group generated by Paper-Flow or PaperVision Capture using multiple-page images or full-text.

- They are added using the Add New Document feature.

Some documents that you might typically think of as image-based, such as CAD or Visio drawings, are treated as non-image-based documents in PaperVision because their file formats do not support scanning in the PaperVision Viewer. When you check out non-image-based documents, they are saved to a location you specify, and then you can edit them in the native application for that file type. Signatures are associated with the document, but do not appear graphically. Annotations are not supported for non-image based documents.

Enhanced Auditing

If your administrator has enabled **Enhanced Auditing** for a project, when you select the **Print**, **Open**, **Email**, **Save As**, **Check Out**, or **Share Document** commands, the **Enhanced Auditing** dialog box appears, and displays the method used to open it. You must specify the values in the **Enhanced Auditing** dialog box before the command you selected will run. If you are using the PaperVision Viewer, you can also manually open the **Enhanced Auditing** dialog box to make a general disclosure that was not initiated by a document command. See "To make a general disclosure " on page 108 for instructions.

To specify the values in the Enhanced Auditing dialog box

> **N O T E**
>
> The options available for specifying the **Recipient** and **Reason** values depend on how your administrator has configured the enhanced auditing options for the project. You can either type a new value, or select a value from the list.

1. In the **Recipient** box, type or select the name of the document recipient.

2. In the **Reason** box, type or select the reason for disclosing the document.

3. In the **Notes** box, type any notes you want to include in the Security Access Report. (See "Security Audit Options" on page 97 for information about this report and how to access it.)

4. Click **OK** to save the values you specified.

Supported File Formats for Full-Text Extraction

All file formats are supported for full-text extraction with the following exceptions: E-Forms, .exe files, and image files (except PDF formats). If a document is not supported for full-text extraction, you can still upload the document and locate it by searching for index field values. However, full-text information cannot be extracted.

CHAPTER 5
PaperVision Viewer

PaperVision Viewer Overview

Before you can open documents in the PaperVision Viewer, you must select the PaperVision Viewer as your document display method. (See "To specify document viewing options" on page 161 for instructions.) If you need help determining which document viewer to use, see "Select a Document Viewer" on page 23 for more information about each viewer.

Use the following procedure to open the PaperVision Viewer.

To open the PaperVision Viewer

1. After you have logged in to PaperVision Enterprise, open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, double-click a document to open the PaperVision Viewer.

The operations listed below are available in the PaperVision Viewer. Accessibility to specific operations is controlled by your administrator, and the available operations may vary depending on the type of document you opened.

- See "Customize the Workspace" on the facing page to access instructions to set options that customize the workspace.

- See "Modify Index Values" on page 68 for instructions to perform this task.

- See "Full-Text Options" on page 68 for instructions to perform tasks for full-text documents.

- See "Thumbnail Options" on page 69 for instructions to perform tasks on the **Thumbnails** pane.

- See "Textual Notes Options" on page 71 for instructions to perform tasks on the **Textual Notes** pane.

- See "Document Signature Options" on page 72 for instructions to perform tasks on the **Signatures** pane.

- See "Scan Documents" on page 73 for instructions to perform this task.

- See "Select Scanner and Set Scanner Properties" on page 75 for instructions to perform these tasks.

- See "Print Documents" on page 76 for instructions to perform this task.

- See "Add Documents" on page 77 for instructions to perform this task.

- See "Open Documents in Native Applications" on page 78 for instructions to perform this task.

- See "Email Documents" on page 79 for instructions to perform this task.

- See "Save Documents As" on page 81 for instructions to perform this task.

- See "Navigate Documents and Pages" on page 83 for instructions to perform these tasks.

- See "View and Edit Annotations" on page 84 for instructions to perform these tasks.

- See "Workflow Options" on page 88 for instructions to perform these tasks.

- See "Manage Pending Documents" on page 88 for instructions to perform tasks in the **Pending Documents View**.

- See "Version Control Options" on page 91 for instructions to perform tasks for version control.

- See "Share Documents" on page 95 for instructions to perform this task.

- See "View Associated Documents" on page 97 for instructions to perform this task.

- See "Security Audit Options" on page 97 for instructions to perform tasks for security audits.

- See "Apply or Remove Document Retention Locks" on page 99 for instructions to perform these tasks.

- See "Apply or Remove Document Destruction Dates" on page 100 for instructions to perform these tasks.

- See "View Source File Information" on page 101 for instructions to perform this task.

- See "Settings Overview" on page 101 to access instructions to specify various settings for the PaperVision Viewer.

- See "General Disclosure" on page 108 for instructions to perform this task.

- See "Additional PaperVision Viewer Options" on page 110 for instructions to perform these tasks.

- See "PaperVision Viewer Keyboard Shortcuts" on page 111 for more information on available keyboard shortcuts.

- See "Delete, Insert, Scan, and Move Pages" on page 109 for instructions to perform these tasks.

- See "Supported File Types in the PaperVision Viewer" on page 112 for a listing of these file types.

Customize the Workspace

One of the benefits of the PaperVision Viewer is that it is flexible and easy to customize to meet your needs. Following are some of the ways you can customize the workspace.

- You can specify which panes appear, and their location and size. (See "Set Pane Options" below for instructions.)

- You can specify the number of pages displayed on the **Document** tab. (See "Set Document View" on page 65 for instructions.)

- You can set the rotation and scale for documents. (See "Rotation and Scale Options" on page 65 for instructions.)

- You can hide and show the ribbon. (See "Minimize and Maximize the Ribbon" on page 66 for instructions.)

- You customize the Quick Access Toolbar. (See "Customize the Quick Access Toolbar" on page 66 for instructions.)

Set Pane Options

The PaperVision Viewer contains multiple panes that are easy to customize to meet your needs. The **Document** and **Full-Text** panes are the primary panes on the workspace. They remain stationary, and the functionality described in the following procedures is not available for them.

Pane settings are stored in the `DocviewerDocking.xml` file at the following location on your local computer:

```
C:\Users\username\AppData\Local\Digitech
Systems\PaperVision\DocumentViewer\
```

You can copy the `DocviewerDocking.xml` file, so you do not have to specify settings on each computer.

To specify which panes appear

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **View** tab.

3. In the **Show/Hide** group, select the check boxes for the panes you want to appear. Clear the check boxes for the panes you want to hide.

To remove and apply Auto Hide

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the tab, for the pane you want to set.

3. On the upper-right corner of the pane, click the pin to remove and apply Auto Hide.

   When Auto Hide is removed, the pane remains open and the pin appears in the following position:

   When Auto Hide is applied, the pane is hidden (or "pinned" to the edge of the PaperVision Viewer window), and a tab appears that displays the title of the pane. When you point to the title, the pane temporarily displays until you click another area. The tab for the pane appears on the side nearest to its original location. For example, if the **Indexes** pane was anchored on the left side, it now appears as a tab on the left side. When Auto Hide is applied, the pin appears in the following position:
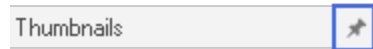
To float panes

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the tab for the pane you want to float, and then click the title bar.

3. Drag the pane until it detaches from the workspace.

To dock floating panes

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the title bar on the pane you want to dock, and then drag the pane until you see the following symbols:

   The portion of the square that has color indicates where the pane will be docked.

3. Do one of the following:

- To dock the pane on the left edge of the workspace, drag it to the symbol.

- To dock the pane on the right edge of the workspace, drag it to the symbol.

- To dock the pane on the upper edge of the workspace, drag it to the symbol.

- To dock the pane on the lower edge of the workspace, drag it to the symbol.

To size panes

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the tab for the pane you want to size, and then rest the pointer on a border of the pane.

3. When the pointer becomes a double-headed arrow, drag the border to size the pane.

To reset panes to their default settings

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **View** tab.

3. In the **Docking** group, click **Reset Docking** to clear docking settings.

Set Document View

You can set the number of pages that display on the **Document** tab in the PaperVision Viewer.

To set the document view

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **View** tab.

3. In the **Document Views** group, do one of the following:

- To display one page at a time on the **Document** tab, click **One Page**.

- To display two pages at a time side-by-side on the **Document** tab, click **Two Pages**.

Rotation and Scale Options

Options to adjust how you view items include applying:

- Rotation

- Scaling (that specifies how items are sized to appear on the window)

- Zoom (that increases the size of a selected area)

You can also reset the view to the default values.

> **NOTE**
>
> The view you set applies until you reset it. For example, if you rotate an item 90 degrees, the rest of the items appear rotated by 90 degrees until you reset the rotation.

To set document view options

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Rotate and Scale** group, click one of the following options:

   * **Rotate** - Rotates the view 90 degrees clockwise each time you click.

   * **Width** - Sizes the item to the width of the window.

   * **Height** - Sizes the item to the height of the window.

   * **Window** - Sizes the item so that all of it appears within the window.

   * **Reset** - Sets the view back to the default settings.

To zoom the view

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Do one of the following:

   * Click the left mouse button and drag the pointer around the region you want to magnify.

   * If you are using an iPad or Android device, pinch the area you want to magnify.

Minimize and Maximize the Ribbon

The ribbon is the rectangular area that appears across the top of the PaperVision Viewer. The ribbon is composed of tabs, each of which represent a subset of functionality. The tabs contain related commands that are organized, grouped, and labeled. You can hide the ribbon when you want to maximize the workspace, and then show it when you need to access commands.

To minimize and maximize the ribbon

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Do one of the following:

   * On the upper-right corner of the pane, do one of the following:

     - To minimize the ribbon, click the ⌃ symbol.

     - To maximize the ribbon, click the ⌄ symbol.

   * On the Quick Access Toolbar, click the down arrow, and then do one of the following:

     - To hide the ribbon, click **Minimize the Ribbon**.

     - To show the ribbon, click **Maximize the Ribbon**.

Customize the Quick Access Toolbar

You can select the icons to display on the Quick Access Toolbar and whether the toolbar appear above or below the ribbon in the PaperVision Viewer. The Quick Access Toolbar is a collection of icons that provides shortcuts to commonly used commands so you can access functions without having to switch between tabs. For example, if you are working on the **Edit** tab and want to print a document without having to go to the **Home** tab, you can add the print icon to the Quick Access Toolbar.

To customize the Quick Access Toolbar

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the Quick Access Toolbar, click the down arrow.

3. On the menu, you can do the following:

   - To add a command, select it.

   - To remove a command, clear the check box.

   - To display the toolbar below the ribbon, click **Show Below the Ribbon**.

   - To display the toolbar above the ribbon, click **Show Above the Ribbon**.

   - To hide the ribbon, click **Minimize the Ribbon**.

   - To show the ribbon, click **Maximize the Ribbon**.

   - To add more commands, click **More Commands**, and then complete the following procedure:

   1. In the **Choose commands from** list, select the ribbon from which you want to select a command.

   2. In the box under the selected ribbon, click the command you want to add. (To select multiple commands, hold down the Ctrl key.)

   3. Click **Add** to move the command(s) to the **Customize Quick Access Toolbar** area.

   4. For commands in the **Customize Quick Access Toolbar** area, you can do the following:

To	Do this
Remove commands	Click the command, and then click **Remove**. (To select multiple commands, hold down the Ctrl key.)
Reorder commands	Select the command you want to move, and then click the up arrow or down arrow. Commands appear on the Quick Access Toolbar in the order that they appear in the list.
Reset commands to the original default setting	Click **Reset**.

Modify Index Values

If your administrator has assigned you permission to do so, you can modify index values for documents in the PaperVision Viewer. The options available for modifying index values depend on how your administrator has configured the project. You can either type a new index value, select a value from a list, or both.

> **N O T E**
>
> When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

To modify index values

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. If you do not see the **Indexes** pane, on the left side of the PaperVision Viewer, click the **Indexing** tab.

3. On the **Indexes** pane, in the box for the index field(s) you want to modify, type or select the new index value.

4. On the **Home** ribbon, click **Save**.

Full-Text Options

If you performed a full-text search on a project, you can view and search the full-text data, and view the full-text search results for each document. The full-text search results provide a summary of each full-text hit in the document. (See "Full-Text Searches" on page 37 if you need help performing a full-text search.)

To view full-text data

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Full-Text** tab to display the full-text data.

To search the full-text data

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Full-Text** tab to display the full-text data.

3. On the lower-left portion of the **Full-Text** tab, type your search criteria in the **Type text to find** box.

> **T I P**
>
> If the **Type text to find** box is hidden, click **Find** to show it.

4. (Optional) Click the down arrow and choose from the following options to refine your search.

   * **Match whole word only** - Select this option for the search results to include only matches where your entry appears as a word by itself, and not as part of a word.

   * **Match case** - Select this option for your search to be case sensitive.

> **N O T E**
> The **Match diacritic**, **kashida**, and **alef hamza** options are not functional.

---

5. Click **Find Next** to find the next search result, or click **Find Previous** to find the previous search result.
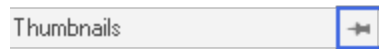
To view the full-text search results

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Misc** group, click **FT Results** to open the **Full-Text Results** window.

   For each full-text hit in the document, the following information appears:

   * **Page** - The page on which the hit occurred.
   * **Word/Phrase** - The search word or phrase.
   * **Context** - The text before and after the hit.

3. To view the page on which a hit occurred, double-click the hit from the list.

Thumbnail Options

The **Thumbnails** pane displays thumbnail images of the pages in a document. Thumbnails images are available only for image-based documents. For non-image-based documents, the **Thumbnails** pane displays a symbol that is based on the file extension. For example, when viewing a text document the

Thumbnails pane displays the following symbol . (See "Document Types" on page 59 for a definition of image- and non-image-based documents.) After you check out an image-based document, on the **Thumbnails** pane you can cut, copy, paste, delete, and move pages. (See "To check out a document" on page 92 if you need instructions.)

To view thumbnails

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. If you do not see the **Thumbnails** pane, on the right side of the PaperVision Viewer, click the **Thumbnails** tab.

3. For image-based documents, the following icons can appear on the thumbnails.

This Symbol	Indicates That
	There is a textual note associated with the page. You can view the note by clicking the **Textual Notes** tab. (See "Textual Notes Options" on the facing page for more information.)
	There is an annotation on the page. (See "View and Edit Annotations" on page 84 for more information.)
	This page was moved to the clipboard.
	This page was copied to the clipboard.
	This page was inserted after the document was checked out. It is not saved until the document is checked back in. (See "Version Control Options" on page 91 for instructions to check a document out and in.)

To cut and paste pages

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. If you do not see the **Thumbnails** pane, on the right side of the PaperVision Viewer, click the **Thumbnails** tab.

3. Select the page you want to move to the clipboard. (To select multiple pages, hold down the Ctrl key.)

4. Right-click the selected page, and then click **Cut**.

    The selected page is placed on the clipboard and the scissor symbol appears on the thumbnail.

5. (Optional) To clear the clipboard, right click a page, and then click **Clear Copy/Cut**.

6. On the **Thumbnails** pane, go to the page where you want to paste the page you cut.

7. Right-click the page, point to **Paste**, and then click either **Before** or **After** to paste the page before or after the current page.

To copy and paste pages

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. If you do not see the **Thumbnails** pane, on the right side of the PaperVision Viewer, click the **Thumbnails** tab.

3. Select the page you want to copy to the clipboard. (To select multiple pages, hold down the Ctrl key.)

4. Right-click the selected page, and then click **Copy**.

    The selected page is copied to the clipboard and the copied symbol appears on the thumbnail.

5. (Optional) To clear the clipboard, right click a page, and then click **Clear Copy/Cut**.

6. On the **Thumbnails** pane, go to the page where you want to paste the page you copied.

7. Right-click the page, point to **Paste**, and then click either **Before** or **After** to paste the page before or after the current page.

To delete pages

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. If you do not see the **Thumbnails** pane, on the right side of the PaperVision Viewer, click the **Thumbnails** tab.

3. Select the page you want to delete. (To select multiple pages, hold down the Ctrl key.)

4. Right-click the selected page, and then click **Delete**.

5. Click **Yes** to confirm the deletion.

To move pages

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. If you do not see the **Thumbnails** pane, on the right side of the PaperVision Viewer, click the **Thumbnails** tab.

3. Select the page you want to move. (To select multiple pages, hold down the Ctrl key.)

4. Drag the page to where you want it.

Textual Notes Options

You can add textual notes to documents to indicate their progress or share other information. Textual notes do not have full-text search capabilities. When a textual note exists, the page appears with this

symbol on the **Thumbnails** pane.

N O T E

After a textual note is created, it cannot be modified or deleted.

To add a textual note to a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the right side of the PaperVision Viewer, click the **Textual Notes** tab.

3. On the **Textual Notes** pane, click **New Note**.

4. Type the note in the box, and then click **Add**.

   The note displays the name of the user who added it, the date and time when it was added, and the note text.

To view textual notes

💡 **T I P**

When a textual note exists, the page appears with this symbol 📝 on the **Thumbnails** pane.

---

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the right side of the PaperVision Viewer, click the **Textual Notes** tab.

3. On the **Textual Notes** pane, do one of the following:

   - To view notes in a text format, click ▤ .

   - To view notes in a graphic format, click ⊞ .

To print textual notes

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the right side of the PaperVision Viewer, click the **Textual Notes** tab.

3. On the **Textual Notes** pane, click **Print**.

4. In the **Print** dialog box, specify the print options, and then click **Print**.

Document Signature Options

Whether you can view and/or add document signatures depends on if your administrator has assigned you permission to do so. You can add a signature to a document for approval or to ensure that the document has not been changed. When you add a signature to an image-based document, the signature appears on the document and the **Signatures** pane. When you add a signature to a non-image-based document, the signature appears only on the **Signatures** pane. (See "Document Types" on page 59 for a definition of image-based and non-image-based documents.)

The system performs non-repudiation that absolutely ensures that neither the record of the signature (that is, the database entry for the signature) nor the document itself was altered. A signature that has passed the non-repudiation validation appears with a green check next to it. If either the signature entry in the database or the document itself is modified, the non-repudiation check will fail and a red box appears next to the signature in place of the green check mark. This validation is an important requirement for admissibility of legal documents signed electronically.

Document signatures are deleted when:

- A document is checked in for non-image-based documents. (Signatures will persist on image-based documents, unless your administrator has modified the default security policy.)

- The project or document that contains the signatures is deleted.

- A data group is purged.

- A document is rolled back to a previous version.

To add a signature to a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the lower-left corner of the PaperVision Viewer, click the **Signatures** tab.

3. On the **Signatures** pane, click **Add Signature**.

4. In the **Signature** box, type the signature for the document.

5. (Optional) In the **Signature Authorization Code** box, type an authorization code.

> 📜 **N O T E**
>
> If your system is configured so that an authorization code is not required, the **Signature Authorization Code** box is unavailable. If an authorization code is required, you must type it before you proceed.

---

6. Click **Sign**.

7. In the confirmation message, click **Yes**.

8. If this is an image-based document, when you see the signature, place the pointer where you want to add the signature, and then click the mouse button to place the signature on the document.

To view a document signature

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the lower-left corner of the PaperVision Viewer, click the **Signatures** tab.

3. (Optional) To view additional information about a signature, double-click it to open the **Signature Information** dialog box.

To print a document signature

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the lower-left corner of the PaperVision Viewer, click the **Signatures** tab.

3. Double-click the signature to print.

4. In the **Signature Information** dialog box, click **Print**.

5. Specify the print options, and then click **Print**.

Scan Documents

If your administrator has assigned you permission to do so, from the PaperVision Viewer, you can scan documents into projects and pages into image-based documents. Using a direct connection to the scanner, any PaperVision Enterprise machine can serve as a scan station. The scan feature lets you add or move pages within a document and maintain version control of those documents. When new documents are scanned, they are temporarily stored on the local computer where they were scanned. After documents are indexed, they are automatically uploaded. Documents are added to the project currently selected. If applicable, any document-level security definitions are applied.

To scan documents, you must:

- Select the PaperVision Viewer as your document viewer. (See "To specify document viewing options" on page 161 if you need instructions.)

- Select a TWAIN-enabled scanning device. (See "Select Scanner and Set Scanner Properties" on the facing page for instructions to select a scanner and set scanner properties.)

- Specify how documents are handled during scanning. (See "Specify Scanning Settings" on page 106 for instructions to specify scanning settings.)

I M P O R T A N T

To scan documents into PaperVision, the scanner must be connected directly to the computer hosting the PaperVision Assistant. Do not use wireless or other network connections.

N O T E

The following procedure describes how to scan documents into projects. To scan pages into image-based documents, see "To scan pages into an image-based document" on page 110 for instructions.

To scan documents

1. Place the pages you want to scan in the scanner.

2. On the **Home** tab, in the **General** group, click **Scan New Document**.

N O T E

Documents are added to the project that is selected when you click the **Scan New Document** command, and the index fields that appear are those that have been defined for documents in the selected project.

---

3. (Optional) If the **Select Source** dialog box appears, click the scanner you want to use, and then click **Select**.

   The pages are scanned and placed in the **Pending Document(s) View**. See "Manage Pending Documents" on page 88 for instructions to add index values and upload documents.

T I P

If the pages did not scan correctly, in the **General** group, click **Remove From Pending**, and then click **Yes** in the confirmation message to delete the document from the **Pending Document(s) View**.

---

4. (Optional) If your system has been configured to do so, a message appears asking if you want to add pages to the scanned document. To do so, add pages to the scanner, and then click **Yes**. When you are finished scanning pages, click **No** to this message.

5. (Optional) If your system has been configured to do so, the **Indexing Editor** appears where you can do one of the following:

   - To index the document later, click **Cancel**. When you are ready to add index values for the document(s), see "Manage Pending Documents" on page 88 for instructions.

   - To index the document now, in the boxes for the index values, type or select a new index value, or if your system is configured to do so, index values from the previously selected document appear which you can use or overwrite.

6. (Optional) If you want to add the document into a folder, do the following:

   1. Next to the **Add to Folder** box, click the ellipsis button.

   2. In the **Selected Folder** dialog box, do one of the following:

      - Click the folder to which you want to add the document.

      - To create a new folder, select the appropriate parent folder, click **Create Folder**, type the name for the new folder, and then click **OK**.

   3. Click **OK**.

7. On the **Indexing Editor**, click **OK**.

8. See "Manage Pending Documents" on page 88 for instructions to upload documents.

Select Scanner and Set Scanner Properties

In addition to the scanner properties described here, you can specify how documents are handled during scanning. See "Specify Scanning Settings" on page 106 for instructions. See "Scan Documents" on page 73 for instructions to scan documents from the PaperVision Viewer.

To select a scanner

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click the down arrow next to **Scan New Doc**.

3. Click **Select Scanner** to open the **Select Source** dialog box.

4. In the **Sources** box, click the scanner you want to use, and then click **Select**.

To set scanner properties

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click the down arrow next to **Scan New Doc**.

3. Click **Scanner Properties** to open the **Select Source** dialog box.

4. In the **Sources** box, click the scanner for which you want to set the properties, and then click **Select**.

   The properties that appear are specific to your scanner. Click **Help** on the **Properties** dialog box or see the product documentation for your scanner for information about the properties.

5. After you set the scanner properties, click **OK** to save the specified settings.

Print Documents

If your administrator has assigned you permission to do so, from the PaperVision Viewer, you can print documents.

NOTE

The options under the **Printer Properties** link vary depending on the type of printer. If you need information about printer properties, see your printer documentation. Only the print options that are specific to PaperVision Enterprise are documented in the following procedure.

To print a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click **Print**.

NOTE

If the project has **Enhanced Auditing** enabled, when you click **Print**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

---

3. In the **Print** dialog box, specify the print options.

4. If you are printing a COLD document, in the **Overlay** list select one of the following options:

   - To print the document as text, select **Text**.
   - To print the document text with the overlay image, select **Overlay**.

5. If the document has annotations, do one of the following:

   - To print the annotations, select **Include Annotation**.
   - To exclude the annotations, clear **Include Annotation**.

NOTE

If your administrator set user permissions so that annotations are "forced on," you cannot clear the **Include Annotation** check box, and the **Overlay** setting is forced on for COLD documents.

---

6. After you specify the print options, click **Print**.

Add Documents

If your administrator has assigned you permission to do so, from the PaperVision Viewer, you can add documents to projects. Documents are added to the project that was selected when you clicked the **Add** command, and the index fields that appear are those that have been defined for documents in the selected project.

To add a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click **Add**.

3. In the **Add Document(s)** dialog box, do one of the following:

   - To import documents from a directory, click **Add files**, select the file(s), and then click **Open**.

   - To drag documents from a directory, select the file(s), and then drag them into the dialog box.

4. Do one of the following:

   - To add index values for the document(s), click **Index Now**.

     The **Add Document(s)** dialog box appears with index values for the currently-displayed document.

   - To index the document(s) later, click **Index Later** to place the documents in the **Pending Document(s)** area. When you are ready to add index values for the document(s), see "Manage Pending Documents" on page 88 for instructions.

5. In the **Value** column, type or select the index values for the selected document.

N O T E

When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

---

6. If you are adding multiple documents, select the next document, and then repeat the previous step for each document.

7. (Optional) If you want to add the document(s) into a folder, do the following:

   1. Next to the **Add to Folder** box, click the ellipsis button.

   2. In the **Selected Folder** dialog box, do one of the following:

      - Click the folder to which you want to add the document.

      - To create a new folder, select the appropriate parent folder, click **Create Folder**, type the name for the new folder, and then click **OK**.

   3. Click **OK**.

8. Click **Save**.

Open Documents in Native Applications

If your administrator has assigned you permission to do so, you can open documents in their native applications. To do so, the native application must be installed.

The ability to open the file you are viewing in its native application is determined by your operating system. If you attempt to open an unsupported file type on an iPad or Android device, the native application must be installed on the device. Otherwise, the document may not open outside the PaperVision Viewer. When documents with annotations are viewed in their native applications, the annotations are not applied to the document.

If your administrator has given you permission to access document versioning and this document is an external document, you have the option to check out the document before opening it. Changes to image-based documents will not affect the retrievable document until your changes have been checked in. You can still access the document (on the same computer) to make additional changes prior to checking it in.

To open a document

> **NOTE**
>
> You must have permissions to document versioning for the check out option to be available.

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click **Open**.

3. In the **Open Document** dialog box, do one of the following:

    * To check out the document from version control before opening it, click **Yes**.(See "Version Control Options" on page 91 for more information about version control and for instructions to check the document back in.)

    * To open the document without checking it out, click **Cancel**.

> **NOTE**
>
> If the project has **Enhanced Auditing** enabled, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

4. If an application has not already been associated with this file, then select one. Otherwise, the document opens in the application associated with the file type in your operating system.

Email Documents

If your administrator has assigned you permission to do so, you can send documents by email using any MAPI-compliant email application or the automation service. (See "Specify General Settings" on page 102 for instructions to change the email method.) If you are using a MAPI-compliant email application and the document is an image-based or PDF format, you can convert it to a format you specify when you send it. If the document is not an image-based or PDF format, it will be sent in its original format. Only image-based documents can be converted. For example, if the image is a TIF, it can be converted to a PDF when sent. Microsoft Word documents, however, will remain as Word documents. (See "Document Types" on page 59 for information about imaged-based and non-image based document formats.) If you are using the automation service to send emails, document conversion is not available.

To send documents by email, you must have an email address associated with your user account. Contact your administrator if you need one added. When you send a document via email, the document files and index values are included in the email message.

To send documents using a MAPI-compliant email application

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click **Email**.

3. On the toolbar, click **Email**.

N O T E

If the project has **Enhanced Auditing** enabled, when you click **Email**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

---

4. In the **File Name** list, do one of the following:

   * To use the system date and time for the file name, select **Date/Time**.

   * To specify a file name, select **User Specified**, and then type the name in the box that appears.

   * To use an index value for the file name, select the index you want to use.

N O T E

Only image-based documents can be converted to a different format. For example, if the image is a TIF, it can be converted to a PDF when saved. Microsoft Word documents, however, will remain as Word documents.

---

5. In the **Format** list, select the format for the document(s).

NOTE

If you email a multi-page PDF and select the same format but with a specific page range and/or include annotations, the file will be converted to an image-based PDF.

---

6. In the **Page Range** list, do one of the following:

   • To send the entire document, select **All Pages**.

   • To send specific pages, click **Page Range**, and then type the page numbers. You can specify individual pages and page ranges (for example, 1-5, 8, 11-13).

7. If you are sending a COLD document, in the **Format** list select one of the following options:

   • To save the document text, select **Text**.

   • To save the overlay images, select **Overlay**.

8. If the document has annotations, do one of the following:

   • To send the annotations, select **Include Annotations**.

   • To exclude the annotations, clear **Include Annotations**.

NOTE

If your administrator set user permissions so that annotations are "forced on," you cannot clear the **Include Annotations** check box, and the **Overlay** setting is forced on for COLD documents.

---

9. Click **OK**.

10. When the **Batch Email** dialog box appears, click **Finish**.

11. When your email application appears, type the email address for the recipient, the subject of the email, the message text, and then send the email.

To send documents using the automation service

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click **Email**.

NOTE

If the project has **Enhanced Auditing** enabled, when you click **Email**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

---

3. In the **Page Range** area, select one of the following options:

   • **All Pages** - Select this option to send all pages of the document.

   • **Current Page** - Select this option to send the currently-displayed page.

   • **Page Range** - Select this option to send a page range, for example, 7-10.

> **N O T E**
>
> When you send documents using the automation service, you can enter only a single page range.

4. In the **To** box, type the email address for the recipient.

5. (Optional) In the **Cc** box, type the email addresses for those to receive a courtesy copy.

6. (Optional) In the **Bcc** box, type the email addresses for those to receive a courtesy copy without other recipients knowing.

7. (Optional) In the **Subject** box, type a subject for the email message.

8. (Optional) In the text box, type a message.

9. Click **Send**.

Save Documents As

If your administrator has assigned you permission to do so, from the PaperVision Viewer you can save documents and specify the directory where you want the document saved and its file name. If a document is an image-based or PDF format, you can convert it to a format you specify when you save it. If the document is not an image-based or PDF format, it will be saved in its original format. Only image-based documents can be converted. For example, if the image is a TIF, it can be converted to a PDF when saved. Microsoft Word documents, however, will remain as Word documents. (See "Document Types" on page 59 for information about imaged-based and non-image based document formats.)

To save documents

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **General** group, click **Save As** to open the **Save As** dialog box.

> **N O T E**
>
> If the project has **Enhanced Auditing** enabled, when you click **Save As**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

3. In the **Output Directory** box, type the path, or click the ellipsis button to open the **Browse For Folder** dialog box where you can browse to, and then select the location where you want the document saved. You can also create a new folder by clicking **Make New Folder**, and then typing the name of the folder.

4. After you have selected a location or created a folder for the document, click **OK**.

5. In the **File Name** list, do one of the following:

   - To use the system date and time for the file name, select **Date/Time**.

   - To specify a file name, select **User Specified**, and then type the name in the box that appears.

   N O T E

   The system will append user-specified file names with the extension for the specified format, even if you type a different extension. For example, if you type **file.doc**, and then save the file as a bitmap, the file name will be **file.doc.bmp**.

   - To use an index value for the file name, select the index you want to use.

   N O T E

   Only image-based documents can be converted to a different format. For example, if the image is a TIF, it can be converted to a PDF when saved. Microsoft Word documents, however, will remain as Word documents.

   ---

6. In the **Format** list, select the format for the saved document.

   N O T E

   If you save a multi-page PDF to the same format but with a specific page range and/or include annotations, the file will be converted to an image-based PDF.

   ---

7. In the **Page Range** list, do one of the following:

   - To save the entire document, select **All Pages**.

   - To save only the current page of the document, select **Current Page**.

   - To save specific pages, click **Page Range**, and then type the page numbers. You can specify individual pages and page ranges (for example, 1-5, 8, 11-13).

8. If you are saving a COLD document, in the **Format** list select one of the following options:

   - To save the document text, select **Text**.

   - To save the overlay images, select **Overlay**.

9. If the document has annotations, do one of the following:

   - To save the annotations, select **Include Annotations**.

   - To exclude the annotations, clear **Include Annotations**.

   N O T E

   If your administrator set user permissions so that annotations are "forced on," you cannot clear the **Include Annotations** check box, and the **Overlay** setting is forced on for COLD documents.

   ---

10. Click **OK** to save the selected document.

Navigate Documents and Pages

Document and page navigation commands help you easily move through document lists. The commands that are available depend on the number of documents in the list and the number of pages comprising each one. In addition, if you enabled the **Document Grouping** option under **System Settings**, multiple documents with the same index values display as if they were a single document and **Item Navigation** commands will be available. (See "To specify search options" on page 161 for instructions to set document grouping options.)

To use document navigation commands

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Document Navigation** group, select from the following commands:

   * To go to the document before the current document in the document list, click **Previous**.

   * To go to the document after the current document in the document list, click **Next**.

   * To go to the document that is first in the document list, click **First**.

   * To go to the document that is last in the document list, click **Last**.

To use page navigation commands

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Page Navigation** group, select from the following commands:

   * To go to the previous page of the current document, click **Previous**.

   * To go to the next page of the current document, click **Next**.

   * To go to the first page of the current document, click **First**.

   * To go to the last page of the current document, click **Last**.

   * To go to a specific page, type the page number in the box, and then press Enter.

Set Rotation and Scale Options

Options to adjust how you view items include applying:

- Rotation

- Scaling (that specifies how items are sized to appear on the window)

- Zoom (that increases the size of a selected area)

You can also reset the view to the default values.

NOTE

The view you set applies until you reset it. For example, if you rotate an item 90 degrees, the rest of the items appear rotated by 90 degrees until you reset the rotation.

To set document view options

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Rotate and Scale** group, click one of the following options:

   - **Rotate** - Rotates the view 90 degrees clockwise each time you click.

   - **Width** - Sizes the item to the width of the window.

   N O T E

   This functionality is not compatible with Grouped Documents.

   - **Height** - Sizes the item to the height of the window.
   - **Window** - Sizes the item so that all of it appears within the window.
   - **Reset** - Sets the view back to the default settings.

To zoom the view

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Do one of the following:

   - Click the left mouse button and drag the pointer around the region you want to magnify.

   - If you are using an iPad or Android device, pinch the area you want to magnify.

View and Edit Annotations

If your administrator has assigned you permission to do so, you can view, create, and modify annotations. You can use annotations to mark up images within a document. For example, you can use annotations to obscure content, highlight important sections, and add custom images. Annotations are simply overlays on images, and can be applied only on image-based documents. (See "Document Types" on page 59 for information about image- and non-image-based documents.) You can specify how annotations are handled when an image-based document is modified. (See "Specify Annotation Settings" on page 107 for instructions.) You can also use textual notes to add information to documents. Textual notes are available for all document types. (See "Textual Notes Options" on page 71 for instructions to add textual notes.)

Administrators can define user permissions so that annotations are "forced on." When this occurs:

- Annotations always appear on documents, and are included when the document is saved, printed, or sent in an email message.

- Users can perform operations on documents to which they have access, but they cannot remove, hide, or move the annotations.

- For full-text documents, full-text is hidden behind the annotation, but users can still perform a full-text search on the document.

- If an annotation fails to appear, the document will not be displayed to ensure that obscured information is not exposed. This method is enforced in PaperVision Enterprise, but there are extenuating circumstances outside of PaperVision Enterprise when a determined user might be able to view an annotated page without the annotation, thereby exposing any information hidden underneath the annotation.

N O T E

Depending on the import settings assigned to an entity by your administrator, annotations might be lost when data groups are reloaded into PaperVision. Contact your administrator for information about how annotations are handled in your system.

To show or hide annotations

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Annotations** group, click **Show/Hide**.

    When you click **Show/Hide**, annotations are turned on or off. When annotations are turned on, the **Show/Hide** icon appears with a blue background.

To open the annotation tools

N O T E

You can open the annotation tools only if your administrator has assigned you permission to create and modify annotations.

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Annotations** group, click **Show/Hide** as needed to ensure that annotations are turned on.

    When annotation are turned on, the **Show/Hide** icon appears with a blue background, and a pin appears on the upper-left corner of the main workspace

3. Click the pin to remove and apply Auto Hide to the annotation tools.

    When Auto Hide is applied, the annotation tools are hidden (or "pinned" to the edge of the workspace). When you point to the pin, the annotation tools temporarily display until you click another area. When Auto Hide is applied, the pin appears in the following position:

    When Auto Hide is removed, the pane remains open and the pin appears in the following position:

The following table describes each annotation tool.

Button and Command Name	Function
Select	Click **Select**, to clear the currently selected annotation tool.
Rectangle Zoom	Zooms in on the area you select. To reset the view, on the **Home** tab, in the **Rotate and Scale** group, click **Reset**.
Create Highlight	Creates marks as if you were using a highlighter pen.
Create Rectangle	Draws a rectangle.
Create Ellipse	Draws an ellipse.
Create Line	Draws straight lines.
Create Polyline	Draws multiple, connected straight lines. 1. Click **Create Polyline**, and then click the point where the polyline starts. 2. Drag to the location of a vertex, and then click to create the vertex. 3. Repeat the previous step to create each additional vertex. 4. Double-click the location where the polyline ends.
Create Freehand	Draws freehand, as if you were using a pen and paper.
Create Polygon	Draws a polygon. 1. Click **Create Polygon**, and then click the point where the polygon starts. 2. Drag to the location of a vertex, and then click to create the vertex. 3. Repeat the previous step to create each additional vertex. 4. Double-click to complete the polygon.

Button and Command Name	Function
ab | **Create Text**	Adds descriptive text. To modify the text, double-click the annotation.
... **Add/Edit Custom Annotations**	Specifies a custom image to place on documents and adds a button for it. (See "To add, edit, or delete a custom annotation" below if you need help.)

To add annotations to documents

1. Open the annotation tools. (See "To open the annotation tools" on page 85 if you need help.)

2. Click the button for the type of annotation you want to create.

    See the table under "To open the annotation tools" on page 85 for a description of each button, and instructions to add annotations with multiple line segments.

3. On the document, drag the annotation to where you want it.

To set annotation options

1. Open the annotation tools. (See "To open the annotation tools" on page 85 if you need help.)

2. Right-click the annotation to open the available options.

N O T E

The options available are specific for each annotation and will vary.

To cut, copy, delete, or paste annotations

1. Open the annotation tools. (See "To open the annotation tools" on page 85 if you need help.)

2. Right-click the annotation, and then select the command you want to use.

To add, edit, or delete a custom annotation

N O T E

Custom annotations created in the PaperVision Viewer are not supported in the Browser-Based Viewer and cannot be viewed.

---

1. Open the annotation tools. (See "To open the annotation tools" on page 85 if you need help.)

2. Click **Add/Edit Custom Annotations**.

3. In the **Custom Annotations** dialog box, do one of the following:

    *   To add a custom annotation, click **Add**.

    *   To edit a custom annotation, select it, and then click **Edit**.

    *   To delete a custom annotation, select it, and then click **Delete**.

4. In the **Annotation Name** box, type the name for the custom annotation.

   This name appears when you rest the mouse on the annotation button.

5. In the **Image Path** box do one of the following:

   - Type the path to the image you want to use.

   - Click the ellipses button, select the image, and then click **Open**.

6. Click **OK** to save your changes.

Workflow Options

See "WorkFlow Options" on page 147 for information on performing tasks in the **WorkFlow** group.

Manage Pending Documents

Documents are placed in the **Pending Document(s) View** when you:

- Use the **Add** command on the **Home** tab, and then click **Index Later**.

- Use the **Scan New Document** command on the **Home** tab.

In the **Pending Document(s) View**, you can navigate through documents and pages, set document view options, add index values to the documents, and upload them to PaperVision Enterprise. The documents in the **Pending Document(s) View** will remain there until you manually upload them to the server, or they are indexed and saved which causes an automatic upload.

N O T E

You must be logged in for the upload process to complete. If you log out before documents are uploaded, they will remain in the **Pending Document(s) View** until you log in again and complete the upload.

To open the Pending Documents View

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Misc** group, click **Pending Document(s)** to open the **Pending Documents View**.

To add index values

1. Open the **Pending Documents View**. (See "To open the Pending Documents View" above if you need help.)

2. Navigate to the document for which you want to add index values. (See "To use document navigation commands" on page 90 if you need help.)

3. On the left side of the PaperVision Viewer, click the **Indexing** tab.

T I P

If you are adding index values to multiple documents, click the pin on the **Indexes** pane to remove Auto Hide so that the pane remains open.

---

4. On the **Indexes** pane, in the **Value** column, type or select the index value for each field.

> 📜 **N O T E**
>
> When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

5. (Optional) If you want to add the document into a folder, do the following:

   1. In the **Add to Folder** area, click the ellipsis button.

   2. In the **Selected Folder** dialog box, do one of the following:

      - Click the folder to which you want to add the document.

      - To create a new folder, select the appropriate parent folder, click **Create Folder**, type the name for the new folder, and then click **OK**.

   3. Click **OK**.

6. Do one of the following:

   • In the **General** group, click **Upload Document** to save your index values and upload the document to the project.

   • In the **Document Navigation** group, click any of the available options, and when prompted, click **Yes** to save your index values and automatically upload the document to the project.

To upload documents

1. Open the **Pending Documents View**. (See "To open the Pending Documents View" on the previous page if you need help.)

2. Navigate to the document that you want to upload. (See "To use document navigation commands" on the next page if you need help.)

3. In the **General** group, click **Upload Files**.

   The document is uploaded to the project from which it was originally added and removed from the **Pending Documents View**.

> 📜 **N O T E**
>
> You must be logged in for the upload process to complete. If you log out before documents are uploaded, they will remain in the **Pending Document(s) View** until you log in again and complete the upload.

To remove a document from the Pending Documents View

1. Open the **Pending Documents View**. (See "To open the Pending Documents View" on the previous page if you need help.)

2. Navigate to the document that you want to remove. (See "To use document navigation commands" on the next page if you need help.)

3. In the **General** group, click **Remove From Pending**.

4. Click **Yes** to confirm the removal of the document.

To use document navigation commands

1. Open the **Pending Documents View**. (See "To open the Pending Documents View" on page 88 if you need help.)

2. In the **Document Navigation** group, select from the following commands:

   - To go to the document before the current document, click **Previous**.
   - To go to the document after the current document, click **Next**.
   - To go to the document that is first in the **Pending Documents View**, click **First**.
   - To go to the document that is last in the **Pending Documents View**, click **Last**.

To use page navigation commands

1. Open the **Pending Documents View**. (See "To open the Pending Documents View" on page 88 if you need help.)

2. In the **Page Navigation** group, select from the following commands:

   - To go to the previous page of the current document, click **Previous**.
   - To go to the next page of the current document, click **Next**.
   - To go to the first page of the current document, click **First**.
   - To go to the last page of the current document, click **Last**.
   - To go to a specific page, type the page number in the box, and then press Enter.

To set document view options

1. Open the **Pending Documents View**. (See "To open the Pending Documents View" on page 88 if you need help.)

2. In the **Zoom/Format** group, click one of the following options:

   - **Rotate** - Rotates the view 90 degrees clockwise each time you click.
   - **Reset** - Sets the view back to the default settings.
   - **Width** - Sizes the item to the width of the window.
   - **Height** - Sizes the item to the height of the window.
   - **Window** - Sizes the item so that all of it appears within the window.

To zoom the view

1. Open the **Pending Documents View**. (See "To open the Pending Documents View" on page 88 if you need help.)

2. Do one of the following:

   - Click the left mouse button and drag the pointer around the region you want to magnify.
   - If you are using an iPad or Android device, pinch the area you want to magnify.

Full-Text Search Results

If you performed a full-text search on a project, you can view the full-text search results for each document. The full-text search results provide a summary of each full-text hit in the document. (See "Full-Text Searches" on page 37 if you need help performing a full-text search.)

To view the full-text search results

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the **Home** tab, in the **Misc** group, click **FT Results** to open the **Full-Text Results** window.

   For each full-text hit in the document, the following information appears:

   - **Page** - The page on which the hit occurred.
   - **Word/Phrase** - The search word or phrase.
   - **Context** - The text before and after the hit.

3. To view the page on which a hit occurred, double-click the hit from the list.

Version Control Options

Version control options are available so you can manage multiple versions of documents. In addition to standard document check-out and check-in operations, you can roll documents back to previous versions and view old versions of documents. The PaperVision Viewer handles image-based and non-image-based documents differently. (See "Document Types" on page 59 for more information.) When you check out image-based-document types, you can delete, insert, scan, and move pages in the PaperVision Viewer. When you check out non-image-based document types, they are saved to a location you specify, and then you can edit them in the native application for that file type. To save your changes to documents, you must check in and apply a version to them.

To view the current check out status of a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. On the lower-right corner of the status bar, this symbol ☑ appears when a document is checked out. Rest the pointer on the symbol to see the date and time the document was checked out and by whom.

> 📜 **N O T E**
>
> If the document is checked out, the **Check Out** command on the **Edit** ribbon is not available.

To refresh the current document

> ⚠ **C A U T I O N**
>
> When working with an image-based document that is checked out, refreshing it will discard any changes made after the document was checked out. To preserve your changes (added, deleted, moved pages), check the document in before you refresh it.

---

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Versioning** group, click **Refresh**.

To check out a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Versioning** group, click **Check Out**.

N O T E

If the project has **Enhanced Auditing** enabled, when you click **Check Out**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for information to set the values in the **Enhanced Auditing** dialog box.

---

3. Do one of the following:

   - If the document is image-based, in the **Check Out Document** message, click **OK**.

   - If the document is non-image-based, complete the following steps:

     1. In the **Check Out Document** dialog box, select the location where you want to save the document.

     2. (Optional) If you want to change the file name, type the new name in the **File Name** box.

     3. Click **Save**.

     4. If an application has not already been associated with this file, then select one. Otherwise, the document opens in the application associated with the file type in your operating system.

To modify an image-based document

- Check out the image-based document you want to modify. (See "To check out a document" above if you need help.)

After the image-based document is checked out, you can delete, insert, scan, and move pages in the PaperVision Viewer. See "Delete, Insert, Scan, and Move Pages" on page 109 for instructions.

To undo a document check out

C A U T I O N

When you undo a document check out, any changes made while the document was checked out are not submitted.

---

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Versioning** group, click **Undo**.

3. In the **Document Undo Checkout** dialog box, click **Yes** to undo the document check out.

To check in a document

> **N O T E**
>
> Your administrator specifies how many versions of a document are kept before the oldest versions are automatically deleted or moved. If a document check in initiates the deletion of a previous version, the oldest version is either automatically deleted or moved to the Recycle Bin.

---

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Versioning** group, click **Check In** to open the **Check In Document** dialog box.

3. Select one of the following:

   * **New Version (Major)** - Select this option to increment the version by a whole number. For example, version 1.002 becomes version 2.000. Selecting this option indicates that substantial changes occurred.

   * **New Revision (Minor)** - Select this option to increment the minor version of the document. For example, version 1.002 becomes version 1.003. Selecting this option indicates that minor changes occurred.

4. Do one of the following:

   * If the **Source File Path** and **Delete Source File after Check In** options are unavailable, then go to step 5.

   * If the **Source File Path** and **Delete Source File after Check In** options are available, then complete the following sub-procedure:

     1. Ensure that the correct path appears in the **Source File Path** box. If you need to change the path, click the ellipses button to select the file that contains the new version or revision, and then click **Open**.

     2. (Optional) To delete the local copy of the document after it is checked in, select **Delete Source File after Check In**.

5. (Optional) In the **Comments** box, type any notes you want to make about the changes.

   The comments you type appear in the **Comments** column when the revision history is viewed for the document.

6. Click **OK**.

To view the revision history of a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Versioning** group, click **History**.

> **N O T E**
>
> Recycled documents appear in red text.

---

3. To view the contents of a specific document version, select it, and then click the **View** link.

To roll back a document to an earlier version

NOTE

When you roll back a document to an earlier version, the system increments the version number, even though the contents of the document are restored to the contents of the earlier version. For example, version 3.000 does not roll back to version 2.000; instead, the system increments the version to 4.000.

---

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)
2. Click the **Edit** tab, in the **Versioning** group, click **History**.

NOTE

Recycled documents appear in red text.

---

3. Select the document version to which you want to roll back, and then click **Roll Back**.
4. In the confirmation message dialog box, click **Yes**.

To restore a document from the Recycle Bin

NOTE

The restore option appears only if your system administrator has specified that deleted documents are moved to the Recycle Bin instead of being immediately deleted, and there are recycled documents available.

---

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)
2. Click the **Edit** tab, in the **Versioning** group, click **History**.

NOTE

Recycled documents appear in red text.

---

3. Select the document version that you want to restore, and then click **Restore**.
4. In the confirmation message dialog box, click **Yes**.

Share Documents

Whether you can share documents depends on if your administrator has assigned you permission to do so. When you share a document, a user outside your network or company can access it through a URL address. For example, instead of faxing or emailing sensitive loan-processing information as an attachment, you can share a document. The shared document opens through an application on the user's computer. When sharing documents:

- Document security is fully protected during transmission.
- You can share multiple documents at the same time.
- You can apply passwords and expiration dates to shared documents.
- Applied annotations do not appear on shared documents.

To share a document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Share Document** to open the **Share Document** dialog box.

N O T E

If the project has **Enhanced Auditing** enabled, when you click **Share Document**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for information to set the values in the **Enhanced Auditing** dialog box.

---

3. In the **Expiration** box, do one of the following.

- Click the calendar to select the date and time that access to the document will expire.
- Type the date and time that access to the document will expire.
- Leave the existing default value that expires access to the document in 24 hours from the current date and time.

4. In the **Password** box, type the password required to view the document.

I M P O R T A N T

If you do not specify a password, any user who obtains the URL can view the document.

---

5. Click **OK**.

6. In the confirmation message, if the information is correct, click **Yes**.

7. Click **Copy to Clipboard** to copy the URL where the shared document can be accessed.

IMPORTANT

This is the only time the URL appears, so make sure you copy it. If you don't have the URL to access the document, your administrator must manually delete the document share or you will have to wait until it expires before you can share the document again.

---

8. After you have pasted the copied URL into a safe location, close the dialog box.

Duplicate Documents

You can create a duplicate of a document and edit the index values of the new document. The two documents are tied together by the @Duplicate ID system field, and appear as a detail set in document searches.

NOTE

When you create a duplicate document, full-text data is not copied from the original document. The duplicate document does not have any full-text data and therefore will not meet any full-text search criteria. However, if the duplicate document is a text-based file (such as a .txt, or .doc file), you can submit it for a full-text rebuild. (See "Rebuild Full-Text Data" on page 59 for more information.)

To create a duplicate document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the Edit tab, in the **Misc** group, click **Duplicate** to open the **Duplicate Docs** dialog box.

3. Do one of the following to populate index fields.

   - In the index field box, type the index value you want to assign to the duplicate document.

   - Select the check box next to any index field to carry over the index value from the original document.

NOTE

When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

---

4. Once you have configured the index values, click **OK** to add the duplicate document to the project.

View Associated Documents

If your administrator configured document associations for the project in which you are searching, you can view documents (across projects) that are associated with the document open in the PaperVision Viewer. Documents are associated by a common index field or value specified by your administrator. When you view associated documents, the following search methods are used.

- When the document association is based on an index field, the index value in the current document is used to search the index field configured in the associated project to find documents with the same index value.

- When the document association is based on an index value (or wildcard), the value specified by your administrator is used to search the index field configured in the associated project to find documents with the same index value.

> **N O T E**
>
> If the document you are currently viewing does not have any associated documents, the **Associated Documents** option is not available.

To view associated documents

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Associated Documents**.

   The associated documents appear in a document list. The project that contains the documents and the number of documents displayed appears at the top of the list. (If you need help using the toolbar options, see the topics under "Document Lists" on page 42 for instructions.)

3. To view a document, double-click it.

4. If your administrator has defined multiple document associations, you can click the **Document Association** list, and then select the one you want to use.

Security Audit Options

If your administrator has assigned you permission to do so, you can perform security audits for documents. Security audits generate a **Security Audit Report** that records the following information each time a document is accessed:

- The user who accessed the document

- The date and time the document was accessed

- The operation performed

- The pages that the performed operation affected

- The source (IP address) from which the document was accessed

- The recipient of the document. (Only available when **Enhanced Auditing** is enabled.)

- The reason the operation was performed on the document. (Only available when **Enhanced Auditing** is enabled.)

- Any related notes. (Only available when **Enhanced Auditing** is enabled.)

To generate a Security Audit Report

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Security Audit** to open the **Security Audit Report**.

3. You can navigate through the report by using the following commands.

    * To go to the first page of the report, on the toolbar, click **First Page**.

    * To go to the previous page of the report, on the toolbar, click **Previous Page**.

    * To go to the next page of the report, on the toolbar, click **Next Page**.

    * To go to the last page of the report, on the toolbar, click **Last Page**.

4. (Optional) To stop generating the report while it is building, on the toolbar, click **Stop Rendering**.

5. (Optional) To regenerate the **Security Audit Report**, on the toolbar, click **Refresh**.

6. (Optional) To size the **Security Audit Report** within the window, on the tool bar, click **Zoom**, and then select a sizing option from the list.

To print a Security Audit Report

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Security Audit** to open the **Security Audit Report**.

3. (Optional) To open a preview of the printed report, on the toolbar, click **Print Layout**. Click **Print Layout** again to return to the **Security Audit Report**.

4. (Optional) To specify the paper size, orientation, and print margins, click **Page Setup** and specify those properties in the **Page Setup** dialog box.

5. On the toolbar, click **Print**.

6. In the **Print** dialog box, specify the print options, and then click **Print**.

To search the Security Audit Report

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Security Audit** to open the **Security Audit Report**.

3. On the toolbar, type your search criteria in the **Find Text in Report** box.

4. On the toolbar, click **Find** to begin the search. The first search result is highlighted in blue.

5. (Optional) Click **Next** to find the next search result.

To export a Security Audit Report

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Security Audit** to open the **Security Audit Report**.

3. On the toolbar, click **Export** and do one of the following:

 - To save the report as a Microsoft Excel spreadsheet, click **Excel** and the **Save As** dialog box opens. Specify a location and file name for the export file, and then click **Save**.

 - To save the report as a PDF file, click **PDF** and the **Save As** dialog box opens. Specify a location and file name for the export file, and then click **Save**.

 - To save the report as a Microsoft Word document, click **Word** and the **Save As** dialog box opens. Specify a location and file name for the export file, and then click **Save**.

Apply or Remove Document Retention Locks

If your administrator has assigned you permission to do so, you can apply and remove document retention locks. Applying a retention lock to a document prevents it from being deleted before the specified lock date and time. Depending on how your administrator has configured the Recycle Bin settings for your project, a document with a retention lock can be moved to the Recycle Bin, but it cannot be emptied from the Recycle Bin before the specified lock date and time. You can also apply and remove retention locks from document lists. (See "Apply or Remove Document Retention Locks" on page 57 for instructions that apply to document lists.)

> **N O T E**
>
> If you do not have permission to remove retention locks, you cannot apply a new lock date that is later than the current lock date.

To apply or edit a document retention lock

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Retention Destruction** to open the **Retention/Destruction** dialog box.

3. In the **Retention** area, in the **Date/Time** box, click the calendar to select the date and time up to which the document must be retained.

4. (Optional) In the **Comments** box, you can type comments that can be viewed until the document is destroyed.

5. Click **Apply**.

6. In the confirmation message, click **Yes** to confirm the retention lock date and time.

7. Close the **Retention/Destruction** dialog box.

To remove a document retention lock

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Retention Destruction** to open the **Retention/Destruction** dialog box.

3. In the **Retention** area, click **Remove**.

4. In the confirmation message, click **Yes** to confirm the removal of the retention lock date and time.

5. Close the **Retention/Destruction** dialog box.

Apply or Remove Document Destruction Dates

If your administrator has assigned you permission to do so, you can apply and remove document destruction dates. Depending on how your administrator has configured the Recycle Bin settings for your project, a document with a destruction date that has been reached will either be deleted or moved to the Recycle Bin during the destruction process. If a document is in a destruction list and you apply a destruction date to it, it is automatically and immediately removed from all destruction lists. (See "Destruction List Tasks" on page 168 for information about how destruction lists are used.) You can also apply and remove destruction dates from document lists. (See "Apply or Remove Document Destruction Dates" on page 58 for instructions that apply to document lists.)

> **N O T E**
>
> For document destruction to automatically happen, you administrator must have configured a Records Retention Policy Set at the project level. If this has not occurred, documents will not be deleted even if their specified destruction date has passed.

To apply or edit a document destruction date

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Retention Destruction** to open the **Retention/Destruction** dialog box.

3. In the **Destruction** area, in the **Date/Time** box, click the calendar to select the date and time when the document is to be destroyed.

4. (Optional) In the **Comments** box, you can type comments that can be viewed until the document is destroyed.

5. Click **Apply**.

6. In the confirmation message, click **Yes** to confirm the destruction date and time.

7. Close the **Retention/Destruction** dialog box.

To remove a document destruction date

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Retention Destruction** to open the **Retention Destruction** dialog box.

3. In the **Destruction** area, click **Remove**.

4. In the confirmation message, click **Yes** to confirm the removal of the destruction date and time.

5. Close the **Retention/Destruction** dialog box.

View Source File Information

For documents you can view the following source information:

- Source Data Group
- File Path from Root (Size)
- Creation Date and Time
- Version Date and Time
- Non-Repudiation Results

  When you open a document, PaperVision Enterprise calculates a SHA256 hash value for the document and compares it to the stored value to verify that the document has not been altered. The non-repudiation validation returns one of the following results.

  - **Verified** - Displays a green check mark. The hash value calculated when you opened the document is the same as the stored value. This confirms that the document has not been altered.
  - **Failed** - Displays a red X. The hash value calculated when you opened the document is different from the stored value. This indicates that the document has been altered.
  - **Skipped** - Your administrator has configured PaperVision Enterprise to skip the non-repudiation process for documents. No new hash value is calculated when you open the document.

To view source file information

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Source Information** to open the **Source File Information** dialog box.

Settings Overview

PaperVision Viewer settings are stored in the `DocviewerSettings.xml` file at the following location on your local computer:

`C:\Users\`*username*`\AppData\Local\Digitech Systems\PaperVision\DocumentViewer\`

You can copy this file so you do not have to specify settings on each computer. When you change a system setting, it takes effect the next time you load a document.

To access settings

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings** to open the **Settings** dialog box.

   For instructions to specify the settings on each tab, see the following sections:

   - See "Specify General Settings" on the next page to specify the settings on the **General** tab.
   - See "Specify Display Settings" on page 103 to specify the settings on the **Display** tab.
   - See "Specify Keyboard Shortcuts (Hot Keys)" on page 105 to specify the settings on the **Hot Keys** tab.

- See "Specify Printing Settings" on page 105 to specify the settings on the **Printing** tab.
- See "Modify WorkFlow Settings" on page 150 to specify the settings on the **WorkFlow** tab.
- See "Specify Scanning Settings" on page 106 to specify the settings on the **Scanning** tab.
- See "Specify Annotation Settings" on page 107 to specify the settings on the **Annotation** tab.

Specify General Settings

You can specify how documents are cached, the method used to send emails, and document sharing options.

To specify general settings

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **General** tab where you can specify the following options:

    - In the **Document Cache** area, you can specify the following options:

        - **Maximum Number of Documents in Cache** - Use this box to specify the maximum number of documents to be cached on the client. The default value is 10.

        - **Maximum Number of Pages Downloaded per Request** - Use this box to specify the maximum number of pages to be cached at one time while viewing and navigating documents. For example, if you set this value to 5, in a 100-page document, pages 1-5 are cached, and then when you navigate to page 6, pages 6-10 are cached. The default value is 1.

            N O T E

            If the number of thumbnails exceeds this value, then the number of documents cached at one time will equal the number of thumbnails.

    - In the **Email** area, you can specify the following options:

        - **Send Emails via MAPI Client** - Select this option for emails to be sent from the PaperVision Viewer using a MAPI (Messaging Application Programming Interface) client. This option is selected by default.

        - **Send Emails via Automation Server** - Select this option for emails to be sent from the PaperVision Viewer using the automation service.

    - In the **Document Sharing** area, you can specify the following options:

        - **Display confirmation prompt for password and expiration date** - Select this option to display a confirmation message with the specified expiration date, time, and password for the document share. The settings must be verified before the share is created. If this option is cleared, the confirmation message does not appear. This option is selected by default.

- **Enable password** - Select this option to allow a password to be specified for documents to be shared. The same password must be entered to view the shared document. If this option is cleared, the **Password** box is unavailable when the document is shared. This option is selected by default.

- **Close dialog when copying to clipboard** - Select this option to automatically close the dialog box after the URL used to access the shared document is copied to the clipboard. When this option is cleared the dialog box with the URL must be closed manually.

- **Default Duration** - Use this box to specify the default number of days that the document share remains available. The person setting up the document share can override this value. The default value is 1.

- In the **External Documents** area, you can specify the following option:

  - **Use Embedded Web Browser Control** - Administrators can specify file types that open in their native applications instead of the PaperVision Viewer. If you have an Internet Explorer plug-in that supports the specified file type, then the document appears in a web browser control in the PaperVision Viewer. Otherwise, a prompt appears, and you can choose to download the file or open it in the native application for that file type. If this option is cleared, you will always receive the prompt to download or open the file for document types specified by your administrator to open in their native applications. This option is selected by default.

4. After you have finished specifying the settings, click **Save**.

Specify Display Settings

On the **Display** tab you can specify:

- Font options and margins for documents in a text format (TXT, RTF, HTM/HTML and COLD/ERM).

- Display setting for presentation and word-processing documents.

- The display resolution for various types of documents.

- The maximum size of displayed images.

To specify display settings

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **Display** tab where you can specify the following options:

   - In the **Text Formats** area, you can specify the following options:

     - **Font Name** - From this list, you can select the font to use for displaying documents that are in a text format. The default value is Courier New.

     - **Font Size** - Use this box to specify the font size. The default value is 11.

     - **Bold** - Select this check box to display the font in bold text.

     - **Italic** - Select this check box to display the font in italics.

     - **Left Margin** - Use this box to specify the size of the left margin (in pixels) when displaying documents. The default value is 5.

- **Right Margin** - Use this box to specify the size of the right margin (in pixels) when displaying documents. The default value is 5.

- **Top Margin** - Use this box to specify the size of the top margin (in pixels) when displaying documents. The default value is 5.

- **Bottom Margin** - Use this box to specify the size of the bottom margin (in pixels) when displaying documents. The default value is 5.

• In the **Word Processing Documents** area, you can specify one of the following options for the **Display Mode**:

- **Fit to Width** - Select this option for documents to display at the width of the window. This value is selected by default.

- **Fit to Height** - Select this option for documents to display at the height of the window.

- **Fit to Max Pages Across** - Select this option for documents to display so that all of the image appears within the window.

• In the **Document Resolution** area, you can specify the following options:

- **Diagram Resolution** - Use this box to specify the DPI resolution for the display of diagrams. The default value is 200.

- **Legacy PDF Annotation Scaling** - Use this box to specify the DPI resolution of PDF documents. If your administrator set user permissions so that annotations are "forced on," this option is unavailable. The default value is 96.

📜 **N O T E**

For PDF documents with annotations, changing the **PDF Resolution** setting affects the size and position of annotations on the document.

- **Spreadsheet Resolution** - Use this box to specify the DPI resolution for the display of spreadsheets. The default value is 200.

- **Word Processing Resolution** - Use this box to specify the DPI resolution for the display of word-processing documents. The default value is 200.

• In the **Presentation Documents** area, you can specify the following options:

- **Landscape Width** and **Height** - Use these boxes to specify the landscape width and height in pixels for the display of presentation documents. The default values are 1100, and 850.

- **Portrait Width** and **Height** - Use these boxes to specify the portrait width and height in pixels for the display of presentation documents. The default values are 850, and 1100.

• In the **Image Display** area, you can specify the following option:

- **Max Image Size** - Use this box to specify the maximum size in megabytes for displayed images. Images that are larger than the size you specified are automatically scaled down. If large images are not displaying properly, decreasing this value may improve the display of the image without degrading its quality. If **Max Image Size** is set to **0**, images are never scaled down. The default value is 5.

- **Scaling Mode** - From the list, select the scaling mode you want to use for all images. Select **Native** to scale images using ImageGear algorithms. Select **WPF** to scale images using Windows Presentation Foundation algorithms. See http://help.ac-cusoft.com/ImageGear-Net/v21.0/Windows/HTML/topic152.html for more information on scaling algorithms. The default setting is **Native**.

4. After you have finished specifying the settings, click **Save**.

Specify Keyboard Shortcuts (Hot Keys)

Keyboard shortcuts consist of one keystroke or multiple keystroke combinations that activate operations in PaperVision Enterprise. The same key combination may perform a different operation depending on your location in PaperVision Enterprise. See "PaperVision Viewer Keyboard Shortcuts" on page 111 for a listing of keyboard shortcuts you can use in various locations. Use the procedure below to access a list of keyboard shortcuts that you can customize.

To customize keyboard shortcuts (hot keys)

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **Hot Keys** tab.

4. Click the key combination for the keyboard shortcut you want to customize.

5. From the **Key** list, select the primary key you want to assign to the command.

6. To create a key combination, select the check box next to key(s) you want to include (**Ctrl**, **Alt**, **Shift**).

7. (Optional) To reset the keyboard shortcut to the original default setting, click **Reset**.

8. To save your settings, click **OK**.

To restore all keyboard shortcuts (hot keys) to the default values

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **Hot Keys** tab.

4. Scroll to the bottom of the right pane, and then click **Restore Default Hot Keys**.

5. Click **OK** to confirm the reset of all hot keys to the default settings.

Specify Printing Settings

You can specify printing settings for the font, placement, and content for document headers and footers. (See "Print Documents" on page 76 for instructions to print documents.)

To specify printing settings

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **Printing** tab where you can specify the following options:

- In the **Font** area, you can specify the following options:

  - **Font Name** - From this list, you can select a different font. The default font is Courier New.

  - **Font Size** - In this box, you can type the font size. The default value is 11.

  - **Bold** - Select this check box to print the font in bold type.

  - **Italic** - Select this check box to print the font in italics.

- In the **Data** area, for each listed location, you can type a custom value (for example, confidential) or specify one of the following options:

  - **None** - Select this value to print nothing on the page at the listed location. This is the default value for each location.

  - **Current Date** - Select this value to print the current date on the page at the at the listed location.

  - **Current Date and Time** - Select this value to print the current date and time on the page at the listed location.

  - **Current Time** - Select this value to print the current time on the page at the listed location.

  - **Index Fields** - Select this value to print the index fields in the document on the page at the listed location.

  - **Page Number** - Select this value to print numbers on the page at the listed location.

4. After you have finished specifying the settings, click **Save**.

Specify Workflow Settings

See "Modify WorkFlow Settings" on page 150 for information on specifying workflow settings.

Specify Scanning Settings

You can specify how documents are handled during scanning.

To specify scanning settings

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **Scanning** tab where you can specify the following options:

- **New Document File Type** - From this list, select one of the following options:

  - **Single-Page TIFF** - Select this option to save each scanned image as an individual image (single-page TIFF) within the document. Selecting this option lets you add, remove, and move pages in scanned documents from the PaperVision Viewer.

  - **Multi-Page PDF** - Select this option to save all pages for the scanned document as a single, multiple-page PDF file. If you select this option, you must use a third-party application (a PDF editor) to add, remove, and move pages in scanned documents.

- **Pre-Populate New Fields** - Select this option to populate document index values with the same values as the document currently being viewed. This option is selected by default.

- **Prompt to Add Pages** - Select this option to receive a prompt to add more pages after the scanner has finished scanning all of its pages. Selecting this option lets you add pages to the document before it is indexed. After scanning and indexing are complete, the document cannot be modified until it is uploaded and then checked out. This option is selected by default.

- **Show Indexing Grid After Scan** - Select this option for the indexing grid to automatically open after a document is scanned to allow for immediate indexing. If this option is cleared, scanned documents are placed in the **Pending Documents** area where they can be indexed later.

4. After you have finished specifying the settings, click **Save**.

Specify Annotation Settings

You can specify how annotations are handled when an image-based document is modified. (See "Document Types" on page 59 for information about image- and non-image-based documents.) See "View and Edit Annotations" on page 84 for instructions to add annotations.

To specify annotation settings

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **Annotation** tab where you can specify the following options to determine what happens to annotations when a modified document is checked in.

   - **Annotations follow Images** - Select this option to keep annotations with the images to which they are applied. For example, you have annotations on specific diagrams within a document. If you placed an annotation on a diagram on page 10, and then inserted five new pages before it, the image that was page 10 is now page 15. Therefore, you must select this option to keep the annotations in the correct location. Otherwise, the new page 10 image will have the annotation that applies to the diagram on the new page 15. When this option is selected, annotations on an image that is deleted are also deleted. This option is selected by default.

   - **Annotations follow Page Numbers** - Select this option to keep annotations with the page number. This option is useful when annotations do not have to remain on a specific image. For example, you have annotations on the first page of the document that apply to the entire document and you want them to always appear on page 1. If you insert a page in front of page 1, the annotations will stay on page 1 regardless of what the image is. When this option is selected, annotations on a deleted page are retained as long as that same page number exists in the document.

NOTE

If you roll back a document to an earlier version, annotations are kept with their page numbers.

---

4. After you have finished specifying the settings, click **Save**.

Specify Signature Settings

On the Signatures tab you can specify authorization codes and fonts for electronic signatures.

To specify signature options

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **Settings**.

3. Click the **Signatures** tab.

4. In the **Signature Authorization Area** area, you can specify the following options.

   * **Authorization Code Required** - Select this option to require the entry of an authorization code to electronically sign a document.

   * **Reset Authorization Code** - In this box, type the code that must be entered to electronically sign a document.

   * **Re-enter Authorization Code** - In this box, re-type the authorization code to verify it.

5. In the **Signature Font** and **Signature Details Font** areas, you can specify the font and font size to use for electronic signatures and signature details.

General Disclosure

If your administrator has enabled **Enhanced Auditing** for a project, the **Enhanced Auditing** dialog box appears when you select **Print**, **Open**, **Email**, **Save As**, **Check Out**, or **Share Document**. You must specify the values in the **Enhanced Auditing** dialog box before the command you selected will run. You can also manually open the **Enhanced Auditing** dialog box to make a general disclosure that was not initiated by a command as described in the following procedure.

To make a general disclosure

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Misc** group, click **General Disclosure** to open the **Enhanced Auditing** dialog box.

> **N O T E**
>
> The options available for specifying the **Recipient** and **Reason** values depend on how your administrator has configured the enhanced auditing options for the project. You can either type a new value, or select a value from the list.

3. In the **Recipient** box, type or select the name of the document recipient.

4. In the **Reason** box, type or select the reason for disclosing the document.

5. In the **Notes** box, type any notes you want to include in the Security Access Report. (See "Security Audit Options" on page 97 for information about this report and how to access it.)

6. Click **OK** to save the values you specified.

Delete, Insert, Scan, and Move Pages

After you check out an image-based document, you can delete, insert, scan, and move pages in the PaperVision Viewer. (See "Document Types" on page 59 for a definition of image- and non-image-based documents.) To save your changes to documents, you must check in and apply a version to them. (See "Version Control Options" on page 91 for instructions.)

> **T I P**
>
> As you work with pages in a document, you might find it helpful to view their thumbnail images. (See "Thumbnail Options" on page 69 for more information.)

To check out an image-based document

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Click the **Edit** tab, in the **Versioning** group, click **Check Out**.

> **N O T E**
>
> If the project has **Enhanced Auditing** enabled, when you click **Check Out**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for information to set the values in the **Enhanced Auditing** dialog box.

3. In the **Check Out Document** message, click **OK**.

To delete pages from an image-based document

1. Check out the image-based document you want to modify. (See "To check out an image-based document" above if you need help.)

2. Click the **Edit** tab, in the **Page** group, click **Delete**.

3. In the **Page Range** box, specify the pages you want to delete. You can specify individual pages and page ranges (for example, 1-5, 8, 11-13).

4. Click **OK**.

To insert pages into an image-based document

1. Check out the image-based document you want to modify. (See "To check out an image-based document" above if you need help.)

2. Navigate to the page in the document where you want to insert a page.

3. Click the **Edit** tab, in the **Page** group, do one of the following:

    • To insert pages before the current page, click **Insert Before**.

    • To insert pages after the current page, click **Insert After**.

4. In the **Select Image File(s) to Import** dialog box, locate and select the items you want to insert. (Hold down the Ctrl key to select multiple items.)

5. Click **Open**.

To scan pages into an image-based document

1. Check out the image-based document you want to modify. (See "To check out an image-based document" on the previous page if you need help.)

2. Navigate to the page in the document where you want to scan pages.

3. Click the **Home** tab.

4. In the **General** group, next to **Scan New Document**, click the down arrow.

5. Do one of the following:

    • To insert pages before the current page, click **Scan Pages Before**.

    • To insert pages after the current page, click **Scan Pages After**.

    The pages are scanned and now appear in the document.

To move pages in an image-based document

1. Check out the image-based document you want to modify. (See "To check out an image-based document" on the previous page if you need help.)

2. Click the **Edit** tab, in the **Page** group, click **Move Pages**.

3. In the **Source Page Range** box, specify the pages you want to move. You can specify individual pages and page ranges (for example, 1-5, 8, 11-13).

4. In the **Destination Page** box, type the page number to which you want the page(s) moved.

5. Click **OK**.

Additional PaperVision Viewer Options

You can improve the image quality of documents rendered as images in the PaperVision Viewer. This is useful when you zoom in on a document and find that the image quality is degraded too much for your purposes. These options are applied immediately to the image so that you can see which options provide the quality you need.

To improve the quality of an image in the PaperVision Viewer

1. Open the PaperVision Viewer. (See "To open the PaperVision Viewer" on page 62 if you need help.)

2. Right-click the document, and then do any of the following:

    • To enhance the quality of an image by adjusting pixel positions and intensity, click **Antialias**. This setting is applied to all images you open in the PaperVision Viewer.

    • To enhance the quality of an image by adding or removing pixels to maintain the original resolution, click **Resample**. This setting is applied to all images you open in the PaperVision Viewer.

    • To enhance the quality of an image by changing the scaling algorithm, click **Scaling**, and then choose one of the following from the list. This setting is applied to all images you open in the PaperVision Viewer. See http://help.accusoft.com/ImageGear-Net/v21.0/Windows/HTML/topic152.html for more information on scaling algorithms.

        - Click **Native** to scale the image using ImageGear algorithms.

        - Click **WPF** to scale the image using Windows Presentation Foundation algorithms.

PaperVision Viewer Keyboard Shortcuts

Keyboard shortcuts consist of one keystroke or multiple keystroke combinations that activate operations in the PaperVision Viewer. You can save time using keyboard shortcuts for repetitive, frequently used functions. The following keyboard shortcuts are available.

Keyboard Shortcut	Function
Ctrl + Home	Displays the first page of the first document on the search results list
Ctrl + End	Displays the first page of the last document on the search results list
Ctrl + Page Up	Displays the first page of the previous document on the search results list
Ctrl + Page Down	Displays the first page of the next document on the search results list
Home	Displays the first page of the current document
End	Displays the last page of the current document
Page Down	Displays the next page of the current document
Page Up	Displays the previous page of the current document
Ctrl + J	Jumps to a specific page of the current document
Ctrl + R	Rotates images 90 degrees
Ctrl + I	Scales image or document to full width
Ctrl + T	Scales images or document to original view (reset page)
Ctrl + H	Scales image or document to full height
Ctrl + W	Scales image to window
Ctrl + Shift + A	Adds new document
Ctrl + Shift + I	Checks in current document
Ctrl + Shift + H	Opens document history
Ctrl + E	Sends document as an email message
Ctrl + Shift + F	Opens Document Source File information
Ctrl + Shift + R	Opens Retention/Destruction information
Ctrl + Alt + A	Opens Security Audit report
Ctrl + Shift + U	Undoes a document check out
Ctrl + O	Opens the current document
Ctrl + D	Opens the Associated Document list
Ctrl + Shift + O	Checks out the current document
Ctrl + Shift + S	Opens the Save As dialog box

Keyboard Shortcut	Function
Ctrl + P	Prints current document
Ctrl + S	Saves document changes
Ctrl + G	Opens Share Document window
Ctrl + Shift + V	Displays annotations
Ctrl + N	Scans new document
Ctrl + Alt + S	Selects new scanner
Ctrl + Alt + P	Displays scanner properties
Ctrl + Shift + W	Creates a new workflow instance
F8	Opens Workflow Status window
Shift + F5	Refreshes workflow instances
Ctrl + Delete	Deletes pending document
Ctrl + Alt + F	Displays full-text results
F5	Refreshes current document
F3	Opens Settings dialog box

Supported File Types in the PaperVision Viewer

The permissions granted by the administrator determine whether you can view documents in the PaperVision Viewer. You can view the following file formats without installing any additional software.

File Extension	Associated Application or File Format
ARC	Compressed Archive Format (Most commonly created as Macintosh Hierarchical File Systems or MS-DOS archives.)
BMP	Standard Windows Bitmap Graphic Format (including OS/2)
BTR	Brooktrout FAX
CAL	CALS Raster Type 1
CAR	Computer Assisted Retrieval Format (used for microfilm-based document and record storage and retrieval)
CGM	Computer Graphics Metafile
CLP	Windows Clipboard
CR2	Canon CR2 Digital Camera RAW Format
CRW	Canon CRW Digital Camera RAW Format

File Extension	Associated Application or File Format
CSV	Comma Separated Values
CUR	Windows Mouse Cursor
CUT	Dr Halo Bitmap Graphic Format
DCM	DICOM (Digital Imaging and Communications in Medicine) Image Format
DCRAW	Digital Camera RAW Format
DCX	Intel Multi-Page FAX
DGN	MicroStation Drawing
DICOM	Digital Imaging and Communications in Medicine
DNG	Adobe Digital Negative Format
DOC	Microsoft Word
DOCM	Microsoft Word (file contains macros)
DOCX	Microsoft Word (Microsoft Office Open XML Format)
DOT	Microsoft Word (template file)
DWF	Autodesk Design Web Format
DWG	Autodesk AutoCAD Drawing Format
DXF	Autodesk AutoCAD Drawing Exchange Format
EML	Microsoft Outlook Express Email
GEM	GEM Paint Raster Format
GIF	Graphic Image Format
GZ	GZip Compressed Archive Format
GZIP	GZip Compressed Archive Format
Hasselblad	Hasselblad Digital Camera RAW Format
HDP	HD Photo Format
HeaderlessRaw	Headerless Digital Camera RAW Format
HPGL	Hewlett-Packard Graphics Language Format
HTM	Hyper Text Markup Language Format
HTML	Hyper Text Markup Language Format
ICA	IBM Image Object Content Architecture
ICO	Windows ICON Format
IFF	Electronic Arts Interchange File Format

File Extension	Associated Application or File Format
Imacon	Imacon Digital Camera RAW Format
IMG	Xerox Raster Format
IMR	IMRS-Raster Image Format
IMT	IMNET Format
JP2	JPEG 2000 File Format
JPEG	JPEG File Interchange Format
JPG	JPEG File Interchange Format
JPX	JPX File Format (JPEG 2000 Extensions)
KDC	Kodak Digital Camera RAW Format
KFX	Kofax Group 4 Image Format
LeicaRaw	Leica/Panasonic Digital Camera RAW Format
LV	Laserdata LaserView Format
MEF	Mamiya Digital Camera RAW Format
MHT	MIME HTML Web Page Archive Format
MHTML	MIME HTML Web Page Archive Format
MJ2	Reserved for Future Use
MODCA	IBM Mixed Object Document Content Architecture Format
MOS	Leaf Digital Camera RAW Format
MRW	Konica-Minolta Digital Camera RAW Image Format
MSG	Microsoft Outlook Message
MSP	Microsoft Paint Format
NCR	NCR Bitonal Image Format
NEF	Nikon Digital Camera RAW Format
ODP	Open Document Presentation Format used by OpenOffice and StarOffice. It is based on the ODF (OpenDocument Format by OASIS)
ODS	Open Document Spreadsheet Format used by OpenOffice, StarOffice. It is based on the ODF (OpenDocument Format by OASIS).
ODT	Open Document Text Format used by OpenOffice and StarOffice. It is based on the ODF (OpenDocument Format by OASIS).
ORF	OyImpus Digital Camera RAW Format
OTS	Open Document Spreadsheet Template Format used by OpenOffice and StarOffice. It is based on the ODF (OpenDocument Format by OASIS).

File Extension	Associated Application or File Format
PBM	Portable Bitmap Format
PCD	Kodak Photo CD
PCX	PC Paintbrush
PDF	Adobe Portable Document Format
PEF	Pentax/Samsung Digital Camera RAW Format
PhaseOne	Phase One Digital Camera RAW Format
PNG	Portable Network Graphic Format
PPT	Microsoft PowerPoint
PPTX	Microsoft PowerPoint (Microsoft Office Open XML Format)
PS	PostScript Language Format
PSB	Adobe Photoshop (Large Document Format)
PSD	Adobe Photoshop
PTOCA	IBM Presentation Text Object Content Architecture
RAF	FujiFilm Digital Camera RAW Format
RAS	Sun Raster Format
RAW	Headerless RAW Format
RTF	Rich Text Format
SCI	SCITEX
SGI	Silicon Graphics Raster Format
SonyRaw	Sony Digital Camera RAW Format
SVG	Scalable Vector Graphics
TAR	Unix Standard Archive Format
TGA	Truevision Targa Graphic Format
TIF	Tagged Image File Format
TIFF	Tagged Image File Format
TXT	Text Format
U3D	Universal 3D File Format
VDX	Microsoft Visio
VSD	Microsoft Visio
VSS	Microsoft Visio
VST	Microsoft Visio

File Extension	Associated Application or File Format
VSX	Microsoft Visio
VTX	Microsoft Visio
VZW	Microsoft Visio
WBMP	Wireless BMP Format
WPG	WordPerfect Graphic Format
XBM	X Windows Bitmap Graphic Format
XLS	Microsoft Excel
XLSB	Microsoft Excel (binary workbook file)
XLSM	Microsoft Excel (file contains macros)
XLSX	Microsoft Excel (Microsoft Office Open XML Format)
XLTX	Microsoft Excel (template file)
XML	Extensible Markup Language Format
XPM	X Windows Pixmap Format
XPS	XML Paper Specification Format
XWD	X Windows Dump Format
ZIP	WinZip

CHAPTER 6

Browser-Based Viewer

Browser-Based Viewer Overview

Before you can open documents in the Browser-Based Viewer, you must select the Browser-Based Viewer as your document display method. (See "To specify document viewing options" on page 161 for instructions.) If you need help determining which document viewer to use, see "Select a Document Viewer" on page 23 for more information about each viewer.

To open the Browser-Based Viewer

1. After you have logged in to PaperVision Enterprise, open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, double-click a document to open the Browser-Based Viewer.

The operations listed below are available in the Browser-Based Viewer. Accessibility to specific operations is controlled by your administrator, and the available operations may vary depending on the type of document you opened.

- See "Print Documents" on the facing page for instructions to perform this task.
- See "Upload Documents" on page 120 for instructions to perform this task.
- See "Open Documents in Native Applications" on page 120 for instructions to perform this task.
- See "Navigate Documents and Pages" on page 121 for instructions to perform these tasks.
- See "Set Document View Options" on page 122 for instructions to set these options.
- See "Version Control Options" on page 123 for instructions to perform tasks for version control.
- See "Alter Document Index Values" on page 126 for instructions to perform this task.
- See "Email Documents" on page 126 for instructions to perform this task.
- See "Duplicate Documents" on page 127 for instructions to perform this task.
- See "Share Documents" on page 128 for instructions to perform this task.
- See "View Associated Documents" on page 129 for instructions to perform this task.
- See "View Source File Information" on page 130 for instructions to perform this task.
- See "Full-Text Options" on page 131 for instructions to perform this task.
- See "Textual Note Options" on page 131 for instructions to perform tasks for textual notes.
- See "Show and Hide Annotations" on page 132 for instructions to perform these tasks.
- See "WorkFlow Options" on page 147 for instructions to perform these tasks.
- See "Document Signature Options" on page 133 for instructions to perform tasks for document signatures.
- See "Document-Rendering Options" on page 134 for instructions to set these options.
- See "Document Font Options" on page 135 for instructions to set these options.
- See "Supported File Types in the Browser-Based Viewer" on page 136 for a listing of these file types.

Print Documents

If your administrator has assigned you permission to do so, from the Browser-Based Viewer, you can print documents. The file type of the document determines what happens when you click the **Print** command:

- Multiple-page images prompt you to specify a page range, are converted to a PDF, and then printed.

- Single-page images, PDFs, Office documents, and E-Forms are converted directly to a PDF, and then open in your default PDF viewer where you can specify print options, and then print them.

- All other file types, open in the Browser-Based Viewer **Print** window, where you can specify print options, and then print the document.

> **N O T E**
>
> You may see different print results when printing with PCL printer drivers as compared to PostScript printer drivers.

To print a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on the previous page if you need help.)

2. On the toolbar, click **Print**.

> **N O T E**
>
> If the project has **Enhanced Auditing** enabled, when you click **Print**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

3. Do one of the following:

   - When prompted, select whether you want to open or save the document, and then print it through the application you use to view PDF documents.

   - In the **Print** dialog box, select one of the following **Page Range** options, and then click **OK**.
     - **All** - Select this option to send all pages of the document.
     - **Current Page** - Select this option to send the currently-displayed page.
     - **Pages** - Select this option to send a page range (for example, 7-10) or specific pages (for example, 1, 8, 12).

     When prompted, select whether you want to open or save the document, and then print it through the application you use to view PDF documents.

   - When the document opens in the application you use to view PDF documents, specify the print options, and then print the document.

   - When the document opens in the Browser-Based Viewer **Print** window, click **Print**, specify the print options, and then print the document.

Upload Documents

If your administrator has assigned you permission to do so, from the Browser-Based Viewer you can add documents to projects.

To upload a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Upload**.

    The **Upload New Document** dialog box appears with index values for the currently-displayed document.

3. In the **Document Index Fields** area, type the required document index values.

4. (Optional) If you want to add the document into a folder, do the following:

    1. Next to the **Folder** box, click **Browse**.

    2. In the **Choose Folder** dialog box, do one of the following:

        - Click the folder to which you want to add the document.

        - To create a new folder, select the appropriate parent folder, click **New Folder**, type the name for the new folder, and then click **Save**.

    3. Click **OK** to place the document in the selected folder.

5. Next to the **File** box, click **Browse**.

6. In the **Choose File to Upload** dialog box, select the file, and then click **Open**.

7. Click **Save**.

    In the **Progress** area, a progress message briefly appears while the document is uploaded.

Open Documents in Native Applications

If your administrator has assigned you permission to do so, you can open documents in native formats. (See "Supported File Types in the Browser-Based Viewer" on page 136 for a complete listing of supported files.)

The ability to open the file that you are viewing in its native application is determined by your operating system. If you attempt to open an unsupported file type on an iPad or Android device, the native application must be installed on the device. Otherwise, the document may not open outside the Browser-Based Viewer. When documents with annotations are viewed in their native applications, the annotations are not applied to the document.

If your administrator has give you permission to access document versioning and this document is an external document, you have the option to check out the document before opening it. Changes to image-based documents will not affect the retrievable document until your changes have been checked in. You can still access the document (on the same computer) to make additional changes prior to checking it in.

To open a document in its native application

> **NOTE**
>
> You must have permissions to document versioning for the check out option to be available.

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Open**.

> **NOTE**
>
> If the project has **Enhanced Auditing** enabled, when you click **Open**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

3. In the **Message from webpage** dialog box, do one of the following:

   * To check out the document from version control before opening it, click **OK**.(See "Version Control Options" on page 123 for more information about version control and for instructions to check the document back in.)

   * To open the document without checking it out, click **Cancel**.

4. In the prompt at the bottom of the window, do one of the following:

   * Click **Open** to open the file in its native application.

   * Click one of the **Save** options to save the file to a location where you can then open it.

Navigate Documents and Pages

Document and page navigation commands help you easily move through document lists. The commands that are available depend on the number of documents in the list and the number of pages comprising each one. In addition, if you enabled the **Document Grouping** option under **System Settings**, multiple documents with the same index values display as if they were a single document and **Item Navigation** commands will be available. (See "To specify search options" on page 161 for instructions to set document grouping options.)

To use document navigation commands

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, select from the following commands:

   * To go to the document before the current document in the document list, click **Previous**.

   * To go to the document after the current document in the document list, click **Next**.

   * To go to the document that is first in the document list, click **First**.

   * To go to the document that is last in the document list, click **Last**.

To use page navigation commands

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, select from the following commands:

   - To go to the previous page of the current document, click **Previous**.

   - To go to the next page of the current document, click **Next**.

   - To go to the first page of the current document, click **First**.

   - To go to the last page of the current document, click **Last**.

   - To go to a specific page, click **Jump**, type a page number, and then click **OK**.

To use item navigation commands

> **N O T E**
>
> Item navigation commands appear only when document grouping is in use.

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, select from the following commands:

   - To go to the previous item in the grouped document, click **Previous**.

   - To go to the next item in the grouped document, click **Next**.

Set Document View Options

Options to adjust how you view items include applying:

- Rotation

- Scaling (that specifies how items are sized to appear on the window)

- Zoom (that increases the size of a selected area)

You can also reset the view to the default values.

> **N O T E**
>
> The view you set applies until you reset it. For example, if you rotate an item 90 degrees, the rest of the items appear rotated by 90 degrees until you reset the rotation.

To set document view options

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click one of the following options:

   - **Rotate** - Rotates the view 90 degrees clockwise each time you click.

   - **Reset** - Sets the view back to the default settings.

   - **Scale to Width** - Sizes the item to the width of the window.

- **Scale to Height** - Sizes the item to the height of the window.
- **Scale to Window** - Sizes the item so that all of it appears within the window.

To zoom the view

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. Do one of the following:

   - Click the left mouse button and drag the pointer around the region you want to magnify.

   - If you are using an iPad or Android device, pinch the area you want to magnify.

Version Control Options

Version control options are available so you can manage multiple versions of documents. In addition to standard document check-out and check-in operations, you can roll documents back to previous versions and view old versions of documents.

To view the current check out status of a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Status**.

N O T E

If the document is not checked out, the **Status** option is not available.

The **Current Status** dialog box displays the date and time the document was checked out and by whom.

To check out a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Check Out**.

N O T E

If the project has **Enhanced Auditing** enabled, when you click **Check Out**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for information to set the values in the **Enhanced Auditing** dialog box.

---

3. In the prompt at the bottom of the window, do one of the following:

   - Click **Open** to open the file in its native application.

   - Click one of the **Save** options to save the file to a location where you can then open and edit it.

To undo a document check out

⚠️ **C A U T I O N**

When you undo a document check out, any changes made while the document was checked out are not submitted.

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Undo**.

3. In the **Message from webpage** dialog box, click **OK** to confirm the undoing of the check out.

To check in a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Check In** to open the **Check In** dialog box.

3. In the **Changes Made** area, select one of the following:

   - **New Version (major)** - Select this option to increment the version by a whole number. For example, version 1.002 becomes version 2.000. Selecting this option indicates that substantial changes occurred.

   - **New Revision (minor)** - Select this option to increment the minor version of the document. For example, version 1.002 becomes version 1.003. Selecting this option indicates that minor changes occurred.

4. Next to the **File Path** box, click **Browse** to open the **Choose File to Upload** dialog box.

5. Locate, and then select the file that contains the new version or revision, and then click **Open**.

6. (Optional) In the **Comments** box, type any notes you want to make about the changes.

   The comments you type appear in the **Comments** column when the revision history is viewed for the document.

7. Click **Save**.

📜 **N O T E**

Your administrator specifies how many versions of a document are kept before the oldest versions are automatically deleted or moved. If a document check in initiates the deletion of a previous version, the oldest version is either automatically deleted or moved to the Recycle Bin.

To view the revision history of a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **History**.

📜 **N O T E**

Recycled documents appear in red text.

3. Select the version you want to view, and then click **View**.

4. In the confirmation message dialog box, click **OK**

To roll back a document to an earlier version

> **N O T E**
>
> When you roll back a document to an earlier version, the system increments the version number, even though the contents of the document are restored to the contents of the earlier version. For example, version 3.000 does not roll back to version 2.000; instead, the system increments the version to 4.000.

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **History**.

> **N O T E**
>
> Recycled documents appear in red text.

3. Select the document version to which you want to roll back, and then click **Roll Back**.

4. In the confirmation message dialog box, click **OK**.

To restore a document from the Recycle Bin

> **N O T E**
>
> The restore option appears only if your system administrator has specified that deleted documents are moved to the Recycle Bin instead of being immediately deleted, and there are recycled documents available

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **History**.

> **N O T E**
>
> Recycled documents appear in red text.

3. Select the document version that you want to restore, and then click **Restore**.

4. In the confirmation message dialog box, click **OK**.

Alter Document Index Values

The options available for altering index values depend on how your administrator has configured the project. You can either type a new index value, select a value from a list, or both.

> **N O T E**
>
> When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

To alter document index values

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **Edit** to open the **Edit Index Values** dialog box.

3. In the box for the index field(s) you want to modify, type or select the new index value.

   Only the index values specific to the currently-displayed document will change.

4. Click **Save**.

Email Documents

If your administrator has assigned you permission to do so, you can send documents by email. To do so, you must have an email address associated with your user account. Contact your administrator if you need one added. The document files and index values are included in the email message. If the document is an image-based format, it is converted to a PDF when you send it. If the document is not an image-based, it will be sent in its original format. For example, if the image is a TIF, it is converted to a PDF when sent. Microsoft Word documents, however, will remain as Word documents. (See "Document Types" on page 59 for information about imaged-based and non-image based document formats.)

> **N O T E**
>
> When sending a grouped document by email, only the document currently displayed in the Browser-Based Viewer is included in the email.
>
> When sending documents by email from the Browser-Based Viewer, annotations are not included.

To email a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **Email** to open the **Email** dialog box.

> **N O T E**
>
> If the project has **Enhanced Auditing** enabled, when you click **Email**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for instructions to set the values in the **Enhanced Auditing** dialog box.

3. In the **Page Range** area, select one of the following options:

   * **All** - Select this option to send all pages of the document.

   * **Current Page** - Select this option to send the currently-displayed page.

   * **Pages** - Select this option to send a page range, for example, 7-10.

> **N O T E**
>
> When you send documents using the Browser Based Viewer, only a single page range is supported.
>
> **Pages** settings are ignored for Object Type 2 PDF files. Regardless of your settings, the entire PDF will be included in the email.

4. In the **To** box, type the email address for the recipient.

5. (Optional) In the **Cc** box, type the email addresses for those to receive a courtesy copy.

6. (Optional) In the **Bc** box, type the email addresses for those to receive a courtesy copy without other recipients knowing.

7. (Optional) In the **Subject** box, type a subject for the email message.

8. (Optional) In the **Message** box, type a message.

9. Click **Email**.

Duplicate Documents

You can create a duplicate of a document and edit the index values of the new document. The two documents are tied together by the @Duplicate ID system field, and appear as a detail set in document searches.

> **N O T E**
>
> When you create a duplicate document, full-text data is not copied from the original document. The duplicate document does not have any full-text data and therefore will not meet any full-text search criteria. However, if the duplicate document is a text-based file (such as a .txt, or .doc file), you can submit it for a full-text rebuild. (See "Rebuild Full-Text Data" on page 59 for more information.)

To create a duplicate document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **Duplicate** to open the **Duplicate Docs** dialog box.

3. Do one of the following to populate index fields.

    *   In the index field box, type the index value you want to assign to the duplicate document.

    *   Select the check box next to any index field to carry over the index value from the original doc-ument.

    > **N O T E**
    >
    > When index field values are saved in PaperVision Enterprise, the following characters are automatically removed from them: **% ^ & * | <**

4. After you have configured the index values, click **Duplicate** to add the duplicate document to the project.

Share Documents

Whether you can share documents depends on if your administrator has assigned you permission to do so. When you share a document, a user outside your network or company can access it through a URL address. For example, instead of faxing or emailing sensitive loan-processing information as an attachment, you can share a document. The shared document opens through an application on the user's computer. When sharing documents:

*   Document security is fully protected during transmission.

*   You can share multiple documents at the same time.

*   You can apply passwords and expiration dates to shared documents.

*   Applied annotations do not appear on shared documents.

> **N O T E**
>
> A PaperVision Enterprise license is consumed only during the active viewing of a shared document through the provided URL. A license is not consumed for the duration of time while the document is shared.

To share a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **Share** to open the **Share Document** dialog box.

N O T E

If the project has **Enhanced Auditing** enabled, when you click **Share**, the **Enhanced Auditing** dialog box appears. You must specify the values in this dialog box before you can continue with this procedure. See "Enhanced Auditing" on page 60 for information to set the values in the **Enhanced Auditing** dialog box.

3. In the **Expiration** box, do one of the following.

   • Type the date and time that access to the document will expire.

   • Leave the existing default value that expires access to the document in 24 hours from the current date and time.

4. In the **Password** box, type the password required to view the document.

I M P O R T A N T

If you do not specify a password, any user who obtains the URL can view the document.

5. Click **Save**.

6. In the confirmation message, if the information is correct, click **OK**.

7. In the **Share Document** dialog box, click **Copy to Clipboard** to copy the URL where the shared document can be accessed.

I M P O R T A N T

This is the only time the URL appears, so make sure you copy it. If you don't have the URL to access the document, your administrator must manually delete the document share or you will have to wait until it expires before you can share the document again.

8. After you have pasted the copied URL into a safe location, click **Close**.

View Associated Documents

If your administrator configured document associations for the project in which you are searching, you can view documents (across projects) that are associated with the document open in the Browser Based Viewer. Documents are associated by a common index field or value specified by your administrator. When you view associated documents, the following search methods are used.

■ When the document association is based on an index field, the index value in the current document is used to search the index field configured in the associated project to find documents with the same index value.

- When the document association is based on an index value (or wildcard), the value specified by your administrator is used to search the index field configured in the associated project to find documents with the same index value.

> **N O T E**
>
> If the document you are currently viewing does not have any associated documents, the **Associated** option is not available.

To view associated documents

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **Associated**.

    The associated documents appear in a document list. The project that contains the documents and the number of documents displayed appears at the top of the list. (If you need help using the toolbar options, see the topics under "Document Lists" on page 42 for instructions.)

3. To view a document, double-click it.

4. If your administrator has defined multiple document associations, you can click the **Document Association** list, and then select the one you want to use.

View Source File Information

For documents you can view the following source file information:

- Source Data Group
- File Path from Root (Size)
- Creation Date and Time
- Version Date and Time
- Non-Repudiation Results

    When you open a document, PaperVision Enterprise calculates a SHA256 hash value for the document and compares it to the stored value to verify that the document has not been altered. The non-repudiation validation returns one of the following results.

    - **Verified** - Displays a green check mark. The hash value calculated when you opened the document is the same as the stored value. This confirms that the document has not been altered.

    - **Failed** - Displays a red X. The hash value calculated when you opened the document is different from the stored value. This indicates that the document has been altered.

    - **Skipped** - Your administrator has configured PaperVision Enterprise to skip the non-repudiation process for documents. No new hash value is calculated when you open the document.

To view source file information

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **Info** to open the **Source File Information** dialog box.

Full-Text Options

If you performed a full-text search on a project you can view the full-text data, and the full-text search results for each document. The full-text search results provide a summary of each full-text hit in the document. (See "Full-Text Searches" on page 37 if you need help performing a full-text search.)

To view the full text data for a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **Full Text** to view only the full-text data for the document.

3. To return to the regular view of the document, click the **Full Text** option again.

To view the full-text search results for a document

> **NOTE**
>
> This feature is available only when you run a full-text search before opening the Browser-Based Viewer. (See "Full-Text Searches" on page 37 if you need help.)

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Manage**, and then click **FT Results** to open the **Full Text Search Results** dialog box.

3. The **Full Text Search Results** dialog box lists each full-text hit in the document with the following information.

   - **Page** - The page on which the hit occurred.
   - **Word/Phrase** - The search word or phrase.
   - **Context** - The text before and after the hit.

4. To view the page on which a hit occurred, select the hit from the list, and then click **View**.

Textual Note Options

You can add textual notes to documents to indicate their progress or share other information. Textual notes do not have full-text search capabilities.

> **NOTE**
>
> After a textual note is created, it cannot be modified or deleted. When a textual note exists, the **Notes** icon displays with a red push pin on it.

To add a textual note to a document

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Annotate**, and then click **Notes** to open the **Textual Note** dialog box.

3. In the **Textual Note** box, type the note, and then click **Add**.

   The lower box displays a heading with your user name and the date and time you added the note, followed by the note.

4. Click **Save**.

To view a textual note

💡 T I P

When a textual note exists, the **Notes** icon displays with a red push pin on it.

---

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Annotate**, and then click **Notes** to open the **Textual Note** dialog box.

To print a textual note

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, (if necessary) click **Annotate**, and then click **Notes** to open the **Textual Note** dialog box.

3. Click **Print**.

4. In the **Print** dialog box, specify the print parameters, and then click **Print**.

Show and Hide Annotations

Whether you can show and hide document annotations depends on if your administrator has assigned you permission to do so.

📜 N O T E

To add and edit annotations you must be using the PaperVision Viewer and have permission assigned by your administrator. See "To specify document viewing options" on page 161 for instructions to switch to the PaperVision Viewer, and "View and Edit Annotations" on page 84 for instructions for annotation tasks in the PaperVision Viewer.

To show and hide annotations

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, do one of the following:

    *   To show annotations, (if necessary) click **Annotate**, and then click **Show**.

    🗒 **N O T E**

    Custom annotations created in the PaperVision Viewer are not supported in the
    Browser-Based Viewer and cannot be viewed.

    ---

    *   To hide annotations, click **Hide**.

Workflow Options

Document Signature Options

Whether you can view and/or apply document signatures depends on if you administrator has assigned you permission to do so. You can add a signature to a document for approval or to ensure that the document has not been changed. When you apply a signature to a document, validation occurs on all files within it. Because the system must calculate SHA256 hashes for every page of the document, for optimal performance use single-file documents for signing. The system performs non-repudiation that absolutely ensures that neither the record of the signature (that is, the database entry for the signature) nor the document itself was altered.

A signature that has passed the non-repudiation validation appears with a green check next to it. If either the signature entry in the database or the document itself is modified, the non-repudiation check will fail and a red box appears next to the signature in place of the green check mark.

Document signatures are deleted when:

*   The project or document that contains the signatures is deleted.
*   A data group is purged.
*   A document is rolled back to a previous version.

To view a document signature

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)
2. On the toolbar, click **Show** to display signature information at the bottom of the window.
3. (Optional) To view additional information about a signature, double-click it to open the **Signature Information** dialog box.

To print signature information

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)
2. On the toolbar, click **Show** to display signature information at the bottom of the window.
3. Double-click the signature to print.
4. In the **Signature Information** dialog box, click **Print**.

To apply a document signature

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Sign** to open the **Sign Document** dialog box.

3. In the **Signature** box, type the signature for the document.

4. (Optional) In the **Signature Authorization Code** box, type an authorization code.

> **N O T E**
>
> If your system is configured so that an authorization code is not required, the **Signature Authorization Code** box is unavailable. If an authorization code is required, you must type it before you proceed.

---

5. Click **Sign**.

6. In the confirmation message, click **OK**.

7. When the pointer becomes a cross, place the pointer where you want to apply the signature, and then click the mouse button to place the signature on the document.

Document-Rendering Options

You can specify how certain types of documents are rendered when they are opened in the Browser-Based Viewer. Generally, you can render documents as images or in their native applications.

The following list summarizes how specific documents are rendered in the Browser-Based Viewer:

- Images are displayed in their native format and are not converted to another format in the Browser-Based Viewer.

- Non-converted documents, such as text, HTML, files of unknown types, and files with missing extensions, are not converted in the Browser-Based Viewer. As a result, these types of files do not support graphical annotations.

- PDF and Postscript documents (such as PS, EPS) are not converted in the Browser-Based Viewer. However, PDF files support existing annotations.

- Multiple-part files, such as ZIP, GZIP, and TAR, are displayed in a tree structure. If you select a file in the container, its contents are displayed if they are supported file types.

- Message documents (EML and MSG) and their attachments, are displayed in a general email layout. When you select an attachment in a supported file format, the page navigation operations are accessible.

> **N O T E**
>
> Document-rendering options are saved based on a per-project, per-browser basis. By default, document-rendering options are set to display documents as PNG images at 200 DPI resolution.

To set rendering options for documents

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Options** to open the **Edit Viewer Options** dialog box.

3. Click the **General Rendering** tab.

4. For each document type (except for PDF documents), you can set the following options:

    * **Render As** - From this list, select **Image** to cause the document type to render as images or select **Native** to cause spreadsheets to open in their native application.

    * **Image Page Resolution** - In this box, you can specify the resolution in dpi (dots per inch) at which the document will display.

5. For presentation documents only, you can set the following additional options:

    * **Page Size** - From this list, you can select **Letter**, **Legal**, **A4**, or **Custom**. If you select custom, type the width and length dimensions in the two boxes to the right. You can select **in** for inches, or **cm** for centimeters as the unit of measure.

    * **Paper Orientation** - Select either **Portrait** (vertical) or **Landscape** (horizontal) orientation.

6. For PDF documents, from the **Render As** list, you can select either **Image** or **SVG (Scalable Vector Graphics)**.

    Documents rendered as scalable vector graphics render more slowly, but more clearly.

Document Font Options

You can set font options for textual documents in the Browser-Based Viewer.

To set font options for textual documents

1. Open the Browser-Based Viewer. (See "To open the Browser-Based Viewer" on page 118 if you need help.)

2. On the toolbar, click **Options** to open the **Edit Viewer Options** dialog box.

3. Click the **Fonts** tab.

4. For each font type, you can set the following options:

    * **Font Name** - From this list, you can select a different font.

    * **Font Size** - In this box, you can type the font size.

    * **Font Bold** - Select this check box to display the font in bold text.

5. For plain text font only, you can select the **Font Italics** check box to display the font in italics.

Supported File Types in the Browser-Based Viewer

The permissions granted by the administrator determine whether you can view documents in the Browser-Based Viewer. You can view the following file formats without installing any additional software.

File Extension	Associated Application or File Format
ARC	Compressed Archive Format (Most commonly created as Macintosh Hierarchical File Systems or MS-DOS archives.)
BMP	Standard Windows Bitmap Graphic Format (including OS/2)
BTR	Brooktrout FAX
CAL	CALS Raster Type 1
CAR	Computer Assisted Retrieval Format (used for microfilm-based document and record storage and retrieval)
CGM	Computer Graphics Metafile
CLP	Windows Clipboard
CR2	Canon CR2 Digital Camera RAW Format
CRW	Canon CRW Digital Camera RAW Format
CSV	Comma Separated Values
CUR	Windows Mouse Cursor
CUT	Dr Halo Bitmap Graphic Format
DCM	Digital Imaging and Communications in Medicine
DCRAW	Digital Camera RAW Format
DCX	Intel Multi-Page FAX
DGN	MicroStation Drawing
DIB	Microsoft Device Independent Bitmap
DICOM	Digital Imaging and Communications in Medicine
DICM	Digital Imaging and Communications in Medicine
DNG	Adobe Digital Negative Format
DOC	Microsoft Word
DOCM	Microsoft Word (file contains macros)
DOCX	Microsoft Word (Microsoft Office Open XML Format)
DOT	Microsoft Word (template file)

File Extension	Associated Application or File Format
DWF	Autodesk Design Web Format
DWG	Autodesk AutoCAD Drawing Format
DXF	Autodesk AutoCAD Drawing Exchange Format
EML	Microsoft Outlook Express Email
EPS	Encapsulated PostScript Format
GEM	GEM Paint Raster Format
GIF	Graphic Image Format
GZ	GZip Compressed Archive Format
GZIP	GZip Compressed Archive Format
Hasselblad	Hasselblad Digital Camera RAW Format
HDP	HD Photo Format
HeaderlessRaw	Headerless Digital Camera RAW Format
HPF	Hewlett-Packard Plot Format
HPGL	Hewlett-Packard Graphics Language Format
HTM	Hyper Text Markup Language Format
HTML	Hyper Text Markup Language Format
ICA	IBM Image Object Content Architecture
ICO	Windows ICON Format
IFF	Electronic Arts Interchange File Format
Imacon	Imacon Digital Camera RAW Format
IMG	Xerox Raster Format
IMR	IMRS-Raster Image Format
IMT	IMNET Format
JP2	JPEG 2000 File Format
JPEG	JPEG File Interchange Format
JPG	JPEG File Interchange Format
JPX	JPX File Format (JPEG 2000 Extensions)
KDC	Kodak Digital Camera RAW Format
KFX	Kofax Group 4 Image Format
LeicaRaw	Leica/Panasonic Digital Camera RAW Format
LV	Laserdata LaserView Format

File Extension	Associated Application or File Format
MEF	Mamiya Digital Camera RAW Format
MHT	MIME HTML Web Page Archive Format
MHTML	MIME HTML Web Page Archive Format
MJ2	Reserved for Future Use
MODCA	IBM Mixed Object Document Content Architecture Format
MOS	Leaf Digital Camera RAW Format
MRW	Konica-Minolta Digital Camera RAW Image Format
MSG	Microsoft Outlook Message
MSP	Microsoft Paint Format
NCR	NCR Bitonal Image Format
NEF	Nikon Digital Camera RAW Format
ODP	Open Document Presentation Format used by OpenOffice and StarOffice. It is based on the ODF (OpenDocument Format by OASIS).
ODS	Open Document Spreadsheet Format used by OpenOffice, StarOffice. It is based on the ODF (OpenDocument Format by OASIS).
ODT	Open Document Text Format used by OpenOffice and StarOffice. It is based on the ODF (OpenDocument Format by OASIS).
ORF	Oylmpus Digital Camera RAW Format
OTS	Open Document Spreadsheet Template Format used by OpenOffice and StarOffice. It is based on the ODF (OpenDocument Format by OASIS).
PAL	Dr Halo Palette Format
PBM	Portable Bitmap Format
PCD	Kodak Photo CD
PCX	PC Paintbrush
PDF	Adobe Portable Document Format
PEF	Pentax/Samsung Digital Camera RAW Format
PhaseOne	Phase One Digital Camera RAW Format
PGM	Portable Graymap Graphic Format
PNG	Portable Network Graphic Format
PNM	PBM Portable Any Map Graphic Format
PPM	Portable Pixelmap Graphic Format
PPT	Microsoft PowerPoint

File Extension	Associated Application or File Format
PPTX	Microsoft PowerPoint (Microsoft Office Open XML Format)
PS	PostScript Language Format
PSB	Adobe Photoshop (Large Document Format)
PSD	Adobe Photoshop
PTO	Hugin-PTX Group Project Format
PTOCA	IBM Presentation Text Object Content Architecture
RAF	FujiFilm Digital Camera RAW Format
RAS	Sun Raster Format
RAW	Headerless RAW Format
RTF	Rich Text Format
SCI	SCITEX
SGI	Silicon Graphics Raster Format
SonyRaw	Sony Digital Camera RAW Format
SVG	Scalable Vector Graphics
TAR	Unix Standard Archive Format
TGA	Truevision Targa Graphic Format
TIF	Tagged Image File Format
TIFF	Tagged Image File Format
TXT	Text Format
U3D	Universal 3D File Format
VDX	Microsoft Visio
VSD	Microsoft Visio
VSS	Microsoft Visio
VST	Microsoft Visio
VSX	Microsoft Visio
VTX	Microsoft Visio
VZW	Microsoft Visio
W2D	Autodesk 2D XML Vector Data
W3D	Adobe Shockwave 3D Scene Export Format
WBMP	Wireless BMP Format
WDP	HD Photo Format

File Extension	Associated Application or File Format
WPG	WordPerfect Graphic Format
XBM	X Windows Bitmap Graphic Format
XHTML	Extensible Hyper Text Markup Language Format
XLS	Microsoft Excel
XLSB	Microsoft Excel (binary workbook file)
XLSM	Microsoft Excel (file contains macros)
XLSX	Microsoft Excel (Microsoft Office Open XML Format)
XLTX	Microsoft Excel (template file)
XML	Extensible Markup Language Format
XPM	X Windows Pixmap Graphic Format
XPS	XML Paper Specification Format
XWD	X Windows Dump Format
ZIP	WinZip

CHAPTER 7

Worksteps Waiting/Owned

Basic WorkFlow Overview

A workflow definition describes a series of activities (worksteps, tasks, pre-conditions, etc.) and the order and conditions under which they run. The WorkFlow engine implements the workflow definition to automate a business process.

To build a workflow definition, administrators include the following elements:

- Defined workflow participants
- Workflow definition, which serves as a template of the activities that must occur in the workflow
- Start workstep, which kicks off the first workflow instance when an associated pre-condition is met
- Worksteps, including the associated tasks, post-conditions, time limits, and workflow participants; worksteps can be automated, which means the system undertakes them, or manual, which means a user or group undertakes them.
- Stop step, which serves as the last step in the workflow instance

All workflow definitions follow the same basic steps.

1. The WorkFlow engine searches for documents that meet the pre-condition criteria. Each match creates a workflow instance.
2. In each instance, the WorkFlow engine routes the document to the first workstep. Automated worksteps are completed by the WorkFlow engine. Manual worksteps are assigned to users or groups who can view them on the **Worksteps Waiting/Owned** tab. Clicking on a workstep opens the document viewer where you can select each workstep instance and associated tasks.
3. As each task is completed, the WorkFlow engine evaluates post-conditions. After at least one post-condition is met, the workflow instance is transitioned to the next workstep.
4. When the last workstep meets a post-condition, the workflow instance transitions to the stop workstep, and the workflow instance is complete.

The following figure illustrates a simple loan-processing workflow.
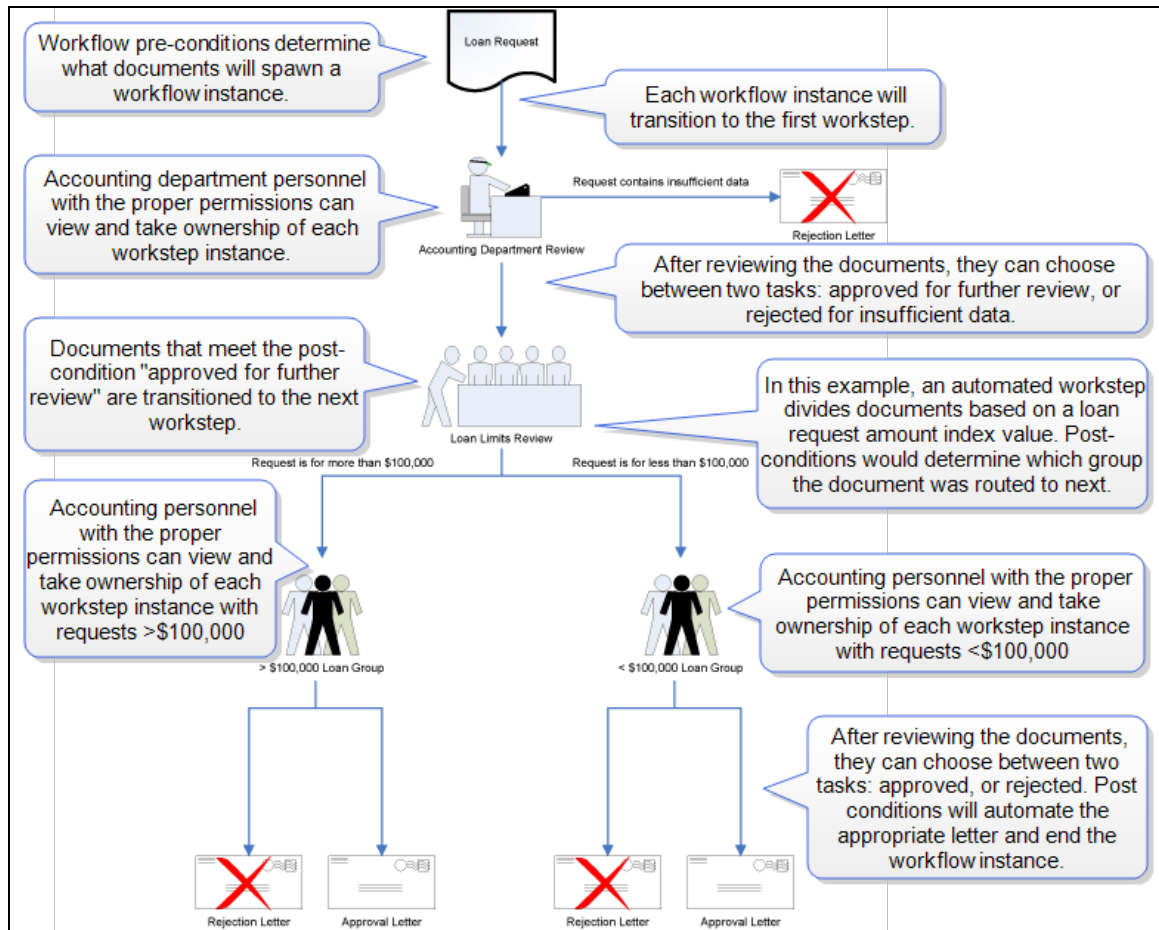
When working with workflows, keep the following in mind:

- A single document can be active in multiple workflow instances at the same time.

- If someone deletes the document from the system, the workflow instance automatically transitions to the stop step, and the application sends the workflow administrator a notice in the log file.

- Documents restored from the Recycle Bin are not reinstated back into workflows.

- A workstep instance can be owned by only one user at a time.

- A workstep instance does not have to be completed all at once.

- Tasks within a workstep instance do not have to be performed in a specific order.

- The system tracks all workflow instances individually for audit reports.

WorkFlow Terms You Should Know

This content contains definitions for terms that are used throughout the documentation and online help when working with workflows and worksteps. Knowing this terminology will help you use the product and its documentation more effectively. These terms adhere to the standard terms and approved synonyms prescribed by the Workflow Management Coalition.

Workflow Definition

A workflow definition describes a series of activities (worksteps, tasks, pre-conditions, etc), and the order and conditions under which they execute, that are controlled by the WorkFlow engine to automate a business process.

Workflow or Workflow Instance

A workflow or workflow instance is a representation of a single enactment of a workflow definition. A workflow instance is the live execution of a workflow definition. When a document is imported into PaperVision that meets the pre-conditions for a workflow definition, the system will spawn a workflow instance of that workflow definition. In other words, you may create a workflow definition for a loan processing application, but the workflow instances are the live representations of loans as they are processed through that workflow.

> **NOTE**
>
> A single document can be active in multiple workflow instances at the same time. If the document is deleted from the system, the workflow instance will be transitioned to the end automatically with a history entry outlining that the document was deleted.

Pre-Conditions

Pre-conditions define a set of rules based on document index criteria that are used to determine if documents should automatically spawn new workflow instances when a document is added to the system (via importing data groups or manually adding a new document). A workflow definition can contain multiple pre-conditions. Once a pre-condition is met for a specific workflow definition and the workflow instance has been instantiated, no additional pre-conditions for that same workflow will be evaluated. However, other workflow definitions' pre-conditions will be evaluated to see if workflow instances should be created for them. If no pre-conditions are defined for a workflow, workflow instances will have to be manually created by administrators or users explicitly granted access to do so.

> **NOTE**
>
> Pre-conditions defined as new versions are not re-evaluated for existing documents (those already residing in the system) when importing with the Full Reload as New Object Version option. Pre-conditions defined as new versions are only re-evaluated during document check-in.

Workstep Definition

A Workstep definition describes an activity that forms one logical step within a process defined by a workflow definition. This activity may be automated by the WorkFlow server (with no user intervention) or may require the user to perform one or a series of tasks. A workstep definition includes one or more tasks that are assigned to a single participant. While worksteps must be performed in the order defined by the workflow definition, tasks within a workstep can be performed in any order.

Workstep or Workstep Instance

A workstep or workstep instance is a representation of a single enactment of a workstep definition within a workflow instance. It is the smallest unit of work scheduled by the WorkFlow engine. Once a workflow instance is created, there is always exactly one active/current workstep instance representing the workstep that the workflow is currently on. The workstep instance may be owned by a single user who is currently working on it or it may be unowned (waiting to be taken ownership of). A workstep instance does not have to be completed all at once. In other words, a user may perform certain tasks on workstep A; complete work on workstep B; then return to complete workstep A at a later time.

Tasks

A task represents an item of work that can be performed during a workstep. Only one user can own a workstep; all tasks to be performed within that workstep must be performed by that one user (more than one user cannot be assigned to the tasks comprising the workstep). Tasks within a workstep do not have to be performed in any specific order. However, the administrator can order the tasks differently for each user.

Tasks can include user operations or automated operations. User tasks are instructions telling the user to do something. Once the user has done that task, the user can mark it as completed. Automated tasks are operations that are carried out by the system for the user. Automated tasks include forcing a document index field to a specific value, executing command-line instructions (to launch separate applications or perform a system operation), and raising events (to allow a third-party application to interact with the workstep). Automated tasks are executed after the previous task in the workstep is executed.

Workstep Participants

A workstep participant indicates whether a group of users will complete the workstep or the server (Automated) will automatically perform every task in the workstep.

Workstep Transition

A workstep transition occurs when a workstep is completed and the flow of the workwlow moves (transitions) to another workstep.

Post Conditions

Post conditions are rules that are evaluated when a workstep instance is activated. After each task is processed, post conditions are used to determine whether the workstep is completed. Post conditions contain two pieces of information, including evaluation rules and the transition workstep. The evaluation rules specify the tasks to be completed and/or any document index criteria that must exist in order for

the rule to be satisfied. If the rule is satisfied, then the workstep is marked as completed and then transitioned to its transition workstep. The transition workstep specifies the next workstep; it can also specify the end of the entire workflow or transition to another workflow entirely.

A workstep definition may contain multiple post-conditions. Each post condition is evaluated in order (i.e. when a workstep contains multiple post conditions, the first post condition that is met will initiate the workstep transition, and the workstep will be completed.

Workstep Owned/Unowned

As workstep instances are created, defined workstep participants can assume ownership of them. Until the worksteps are claimed, they sit in a queue unowned. Once a specific user (or the system) assumes ownership of the workstep instances, that user (or the system) becomes the workstep's owner. When a user (or the system) takes ownership of the workstep instances, no other participants can perform any of the tasks for those particular workstep instances. Ownership of workstep instances can only be revoked by an administrator.

Worksteps Waiting/Owned Overview

If you are assigned to worksteps within a workflow definition, you can click **Worksteps Waiting/Owned** to view a list of your worksteps (the **Worksteps Waiting/Owned** tab is unavailable if there are no workflows defined). Each list item includes the name of the workflow, workstep, and the number of workstep instances that are unowned, and the number that are owned. For example, if you are assigned to the Application Approval workstep in the Loan workflow, and there are nine unowned, and five owned workstep instances, the list will display **Loan:Application Approval (9/5)**. When you select a workstep, the **Workstep Instances** list opens in the PaperVision Viewer. To complete your workstep tasks, you must select the workstep, take ownership of the workstep instance, and then complete the tasks associated with that workstep instance.

If you have a large number of workstep instances assigned to you, it may be helpful to group them. In the **Workstep Instances** list, you can group workstep instances by column headings. You can also filter and sort the **Workstep Instances** list.

To group workstep instances

1. After you have logged in to PaperVision Enterprise, select the **Worksteps Waiting/Owned** pane.

2. Click the workstep for which you want to group workstep instances.

3. On the **Workstep Instances** list, select the column heading to use to group the workstep instances, and then drag it to the row above the grid.

   The workstep instances are now grouped by each entry in that column heading. For example, to group all the owned workstep instances, drag the **Status** column heading to the row above the grid. The grid will then contain a group of all the owned workstep instances and a group of all the unowned workstep instances.

4. (Optional) You can drag additional column headings to the row above the grid to divide workstep instances into groups and subgroups.

   For example, if you grouped the workstep instances into owned and unowned groups, you could drag an index field (Last Name) to the row above the grid. The result would be two groups:

owned, and unowned. Each of those groups would have subgroups based on the Last Name index field.

To filter workstep instances

1. After you have logged in to PaperVision Enterprise, select the **Worksteps Waiting/Owned** pane.

2. Click the workstep for which you want to filter workstep instances.

3. On the **Workstep Instances** list, select the column heading you want to use to filter the workstep instances, and then click the filter button to open the filter dialog box.

4. Do any of the following:

   - To filter the list based on specific index values, select the values you want to include in the filtered list.

   - To filter the list based on a condition, type the value you want to use in the box, click the down arrow, and then select the appropriate operator.

     For example, to filter all rows where the value in the selected column is greater than 15, type **15** in the box, and then select **Is greater than** from the list. Optionally, if you want the filter to be case sensitive, click **Match case**.

   - To filter by more than one condition, type the value you want to use for the first condition in the first box, click the down arrow, and then select the appropriate operator. In the second box, type the value you want to use for the second condition, click the down arrow, and then select the appropriate operator.

To sort workstep instances

1. After you have logged in to PaperVision Enterprise, select the **Worksteps Waiting/Owned** pane.

2. Click the workstep for which you want to sort workstep instances.

3. On the **Workstep Instances** list, click a column heading to sort the results in ascending order.

4. (Optional) Click the column heading again to reverse the sort order.

WorkFlow Options

If your administrator has assigned you permission to do so, you can create a workflow instance, and view the workflow status of a document. The workflow status includes information on each workflow instance with which the document is associated, and a complete history of the document for each instance.

To create a workflow instance

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, double-click the document for which you want to create a workflow instance.

3. On the toolbar, in the **WorkFlow** group, click **Create Instance** to open a list of available workflows.

4. Select the appropriate workflow from the list, and then click **Create**.

5. Click **OK**.

To view the workflow status of a document

1. Open a document list. (See "Document Lists" on page 42 if you need help.)

2. On the document list, double-click the document for which you want to view the workflow status.

3. On the toolbar, in the **WorkFlow** group, click **View Status** to open a workflow status list

4. The workflow status list displays each workflow instance of the document with the following information: Workflow Instance ID, Workflow Name, Workflow Start Time, Workflow End Time, Workstep Instance ID, Workstep Name, Workstep Start time, and Owner. (See "Worksteps Waiting/Owned Overview" on page 146 for information on grouping, sorting, and filtering the list.)

5. Select any associated workflow instance on the list to view a complete history of the document.

Take Ownership of Workstep Instances

The **Workstep Instances** list in the PaperVision Viewer, displays all the owned and unowned workstep instances to which you have been assigned. You must take ownership of a workstep instance to complete any tasks assigned to it. (See "Worksteps Waiting/Owned Overview" on page 146 for information on grouping, sorting, and filtering the **Workstep Instances** list.) Once you take ownership of a workstep instance, only an administrator can change the status to unowned.

To take ownership of a workstep instance

1. After you have logged in to PaperVision Enterprise, select the **Worksteps Waiting/Owned** pane.

2. Click the workstep for which you want to take ownership.

3. In the **Workstep Instances** list, double-click the workstep instance for which you want to take ownership. If a confirmation message appears, click **Yes**.

N O T E

To take ownership of multiple worksteps, while holding the Shift key, select the worksteps in the **Workstep Instance** list, and then double-click your selection. Alternatively, after you have made your selection, press Enter. Click **Yes** on the confirmation message.

---

4. (Optional) If you want to take ownership of a workstep instance in another workstep, click the down arrow next to **Workstep**, select the workstep from the list, and then double-click the workstep. If a confirmation message appears, click **Yes**.

5. (Optional) Click **Refresh** to update the **Workstep Instances** list.

Complete a Workstep Task

The **Tasks** tab in the PaperVision Viewer lists of all the tasks associated with the selected workstep instance. You must take ownership of a workstep instance to complete any of the associated tasks. After you complete a task, the WorkFlow engine evaluates all the post-conditions for that workstep instance. After a post-condition is met, the workstep instance transitions to the next workstep.

To complete a workstep task

1. After you have logged in to PaperVision Enterprise, select the **Worksteps Waiting/Owned** pane.

2. Click the workstep for which you want to complete a task.

3. In the **Workstep instances** list, select the owned workstep for which you want to complete a task. (See "Take Ownership of Workstep Instances" on the previous page for more information.)

4. Click the **Tasks** tab to open the list of the tasks associated with the selected workstep instance.

    Any previously completed tasks display a green check mark.

5. Your administrator provides instructions for completing assigned tasks that can include the following task types:

    *   **User Operation** - This task type requires you to perform a certain function such as approve or deny a request. Click the appropriate task button.

    *   **Launch Application/Shell** - This task type executes a specified command-line program configured by an administrator. Click the task button to launch the application.

    *   **Raise Event** - This task type raises an event with a third-party application. Click the task button to raise the event.

    *   **Alter Index Values** - This task type opens the **Indexing** dialog box. Click the task button, update the appropriate indexes, and then click **OK**.

    *   **Send Email** - This task type sends a preconfigured email message. Click the task button to send the message.

    N O T E

    If you want to include annotations for document attachments included in the email message, you must select **Show Annotations** in the PaperVision Viewer. See "View and Edit Annotations" on page 84 for more information.

    ---

    *   **Force Index Value** - This task type updates an index value that was configured by an administrator. Click the task button to change the index value.

    *   **Sign Document** - This task type opens the **Sign Document** dialog box. Click the task button, type the appropriate information in the dialog box, and then click **Sign**. (See "Document Signature Options" on page 72 for more information on signing documents.)

    *   **Custom Code** - This task type executes custom code that was configured by an administrator. Click the task button to execute the custom code.

    *   **E-Form Validation** - This task requires you to complete an E-Form and then save it before the task is marked complete. Click the task button to place the E-Form in edit mode. You must save the E-Form before you can perform another task.

6. Depending on your assigned WorkFlow settings, after you complete a task, a confirmation message may appear. Click **Yes** to confirm that you have completed the task.

7. Do one of the following:

    *   Repeat this procedure for any remaining tasks.

    *   If the completion of any task meets a post-condition and the workstep transitions, click **OK** to proceed to the next workstep instance. Depending on your WorkFlow settings, the next available workstep instance will open, or you may have to select the next workstep instance.

Modify WorkFlow Settings

If you are assigned the proper permissions, you can change your local WorkFlow settings. Entity settings defined by your administrator will override any changes you make.

When you are working with a WorkFlow, you can customize the workspace using the same options that are available for the PaperVision Viewer. See "Customize the Workspace" on page 63 for instructions. WorkFlow settings are stored on your local computer at the following location:

```
C:\Users\username\AppData\Local\Digitech
Systems\PaperVision\DocumentViewer\
```

The `WorkFlowViewerDocking.xml` file contains the docking settings, and the `DocviewerSettings.xml` file contains the settings described in the following procedure. You can copy these files so you do not have to specify settings on each computer.

To modify the WorkFlow settings

1. After you have logged in to PaperVision Enterprise, select the **Worksteps Waiting/Owned** pane.

2. Click any workstep to open the PaperVision Viewer.

3. In the PaperVision Viewer, click the **Edit** tab, and then click **Settings**.

4. Click the **Workflow** tab where you can specify the following options:

   - **Refresh Period** - Use this box to specify the amount of time, in seconds, the system must remain idle (without the user doing anything in the PaperVision Viewer) before automatically refreshing the **Workstep Instances** list. Type **0** to disable the automatic refresh feature. The default value is 0.

   - **Maximum Number of Instances** - Use this box to specify the maximum number of workstep instances that display in the **Workstep Instances** list. Type **0** to display all worksteps. The default value is 100.

   - **Show Task Description** - Select this check box to display task descriptions. This option is selected by default.

   - **Confirm Ownership** - Select this check box to force a user to click **Yes** in a confirmation message before taking ownership of a selected workstep instance. If this check box is cleared, a user can take ownership of a workstep instance by double-clicking that workstep. This option is selected by default.

   - **Take Next Available Workstep After Transition** - Select this check box for the system to automatically assign ownership of the next available workstep instance to you after you complete the tasks in the current workstep instance and it transitions to the next workstep.

   - **Take Next Available Workstep If Selected is Unavailable** - Select this check box for the system to automatically assign ownership of the next available workstep to you if the one you selected is unavailable. This can occur when you are a member of a group of workflow participants and attempt to take ownership of a workstep instance owned by another participant. Because only one workflow participant can own a workstep instance at a time, the system will deny you access to that workstep instance. If this check box is cleared, the system displays an alert that the workstep is already owned, but it does not automatically assign the next available workstep to you.

■ **Reset Layout for Workstep Instances List** - Select this option, and then click **Yes**, to clear all the sort, filter, and group selections you made in the **Workstep Instances** list when you close the PaperVision Viewer.

5. Click **Save**.

This page was intentionally inserted without content.

CHAPTER 8

Global Searches

Global Search Tasks

Global searches are comprised of customized filters that are applied to the projects you choose. Global searches let you search for documents across multiple projects. If you consistently search using specific criteria, for example, social security number, account number, or company ID, you can add a global search to streamline the search process. All users can define an unlimited number of global searches. Searches are not case-sensitive.

Global searches that are run against certain databases are often added to the database log files which grow over time and might slow down database performance. Because of this possibility, select only the relevant index fields to perform the global search. For example, if you search only for social security numbers across projects, ensure that only the social security index field is selected, and that all unnecessary index fields are cleared for the global search.

> **N O T E**
>
> When searching for full-text data, you must search at the project level. See "Full-Text Searches" on page 37 for more information.

You can also perform quick searches across projects. This type of search uses a predefined filter that is not saved. You have the option of including full-text, and specifying the projects you want to search.

To view global searches

- After you have logged in to PaperVision Enterprise, on the title bar, click the down arrow next to your user name, and then click **Global Search** to open the **Global Search** window.

  The defined global searches appear on the left pane.

To add a global search

1. After you have logged in to PaperVision Enterprise, on the title bar, click the down arrow next to your user name, and then click **Global Search** to open the **Global Search** window.

2. On the toolbar, click **New**.

3. In the **New Global Search Name** box, type a name for the global search.

4. On the **Selected Projects pane**, do any of the following:

   - Double-click the projects you want to include in the search to move them to the **Selected Projects** list.

   - Select the project(s) you want to include in the filter, and then click **Transfer to** to move them to the **Selected Projects** list.

   - (Optional) To move all the projects to the **Selected Projects** list, click **Transfer all to**.

   - (Optional) To remove a project from the **Selected Projects** list, double-click the project, or select the project and then click **Transfer from**.

   - (Optional) To move all projects back to the **Available Projects** list, click **Transfer all from**.

5. On the **Filter Configuration** pane, each project is displayed in a pane containing all index fields for that project. For each project, do the following:

   - Select the indexes and system fields that you want included in the filter.

   - (Optional) Click **Select All** to include all index fields.

- Click the down arrow under **Full Text**, and select one of the following:

  - **None** - Select this option to only include index fields in the search.

  - **Fields and Full-Text** - Select this option if you want a document returned when the search criteria is found in both an index field and full-text.

  - **Fields or Full-Text** - Select this option if you want a document returned when the search criteria is found in either an index field, or full-text.

6. To display system fields in the search results, on the **Displayed System Fields** pane, select the system fields you want included in the search results.

7. When you have finished configuring your global search, click **Save**.

To perform a global search

1. After you have logged in to PaperVision Enterprise, on the title bar, click the down arrow next to the search type box, and then click **Global Search**.

2. Click the down arrow to the left of the search type box, and then select the search you want to run. If no searches are defined, you can add one. (See "To add a global search" on the previous page for instructions.)

3. In the **Global Search** box, type the criteria for which you want to search.

   The value entered is applied to all indexes selected for the global search.

4. Click **Search**. The search results are organized by project. Click any project to display the search results. (See "Document Lists" on page 42 for information about the tasks you can perform from the search results.)

To edit a global search

1. After you have logged in to PaperVision Enterprise, do one of the following to open the **Global Search** window.

   - On the title bar, click the down arrow next to your user name, and then click **Global Search**.

2. On the left pane, select the filter you want to edit.

3. On the right pane, do any of the following:

   - Modify the search parameters for each project on the **Filter Configuration** pane, by selecting the check boxes for the indexes to include, and clearing the check boxes for the indexes to exclude.

   - To add or delete projects from the filter, see "To add a global search" on the previous page for instructions.

   - To delete the filter, on the toolbar, click **Delete**, and then click **Yes**.

4. After you complete your changes, click **Save** .

To delete a global search

1. After you have logged in to PaperVision Enterprise, do one of the following to open the **Global Search** window.

   - On the title bar, click the down arrow next to your user name, and then click **Global Search**.

2. On the left pane, select the search you want to delete.

3. On the toolbar, click **Delete**, and then click **Yes**.

To perform a quick search

1. After you have logged in to PaperVision Enterprise, on the title bar, click the down arrow next to the search type, and select one of the following:

   - To perform a quick search on index fields, select **Quick Search - Index Fields**.

   - To perform a quick search on full-text, click **Quick Search - Full-Text**.

2. Click the down arrow to the left of the search type box, and select the projects you want to search.

3. In the search box, type the criteria for which you want to search.

   The value entered is applied to all indexes or full-text for the projects you selected.

4. Click **Search**. The search results are organized by project. Click any project to display the search results. (See "Document Lists" on page 42 for information about the tasks you can perform from the search results.)

CHAPTER 9

E-Forms

Add E-Form Content

With the E-Forms feature, you can enter information that would usually be entered on a paper form directly into the system. This reduces the time spent transcribing information from paper and increases data accuracy. When you open an E-Form, its version number appears on the lower-right corner of the screen. An E-Form can have many versions, but only the latest published version to which you have access appears under E-Forms on the System tab. The **E-Forms** tab is unavailable if there are no E-Forms defined.

When working with E-Forms, keep in mind the following:

- Your access to E-Forms and their content is determined by the security access set by your administrator.

- Keyboard shortcuts are not available when you are working in an E-Form.

- If custom code is configured, it automatically executes when appropriate.

To add content to an E-Form

1. After you have logged in to PaperVision Enterprise, if necessary, click the **E-Forms** pane, to access the E-Forms to which you have access.

2. Double-click the E-Form you want to open, and then type the required information in the available fields.

3. If you skip a required field, a red validation prompt appears.

4. (Optional) To close all of the validation prompts, on the bottom of the pane, click **Close Validation Prompts**.

5. (Optional) If the E-Form is configured to require a security code, type the displayed security code in the **Type Security Code** box.

6. After you complete the form, on the bottom of the pane, click **Save**.

   The completed E-Form is saved as a document in the project, and the E-Form definition is reset with blank fields.

CHAPTER 10

User Settings

User Settings Overview

The following options are available for your use and configuration. Any settings that the administrator defines for the entity will override any modifications made in the listed items.

- **User Options** - Contains settings that define: parameters for search results, the method used to view documents, display settings, interface settings, and options for electronic signatures. (See "User Options" below for information about specifying these settings.)

- **Destruction Lists** - Contains destruction lists and options for working with them. (See "Destruction List Tasks" on page 168 for more information).

- **E-Forms** - Select this option to maximize and display only the E-Forms pane in the main window.

- **Global Search** - Contains global search filters and options for working with them. (See "Global Search Tasks" on page 154 for more information.)

- **Migration Jobs** - Contains migration jobs and options for working with them. (See "Migration Job Tasks" on page 172 for more information.)

- **Notifications** - Contains system messages and options for working with them. (See "Notifications" on page 163 for more information.)

- **Projects** - Select this option to maximize and display only the Projects pane in the main window.

- **Recycle Bin** - Contains all recycled documents and options for working with them. (See "Recycle Bin Tasks" on page 178 for more information.)

- **Worksteps** - Select this option to maximize and display only the Worksteps pane in the main window.

- **Administration** - Launches the PaperVision Enterprise Administration console. You must have the proper permissions to open the console. You can return to the PaperVision Enterprise User Console by clicking **Home** on the breadcrumb trail.

- **Downloads** - Select this option to open the Downloads window. (See "Downloads" on page 164 for more information.)

User Options

The **User Options** pane contains the following options.

- **Search** - Specify how search results are displayed, including how many results appear per query, whether you want to show the first document and full-text options within your search results, and how documents are grouped.

- **Document Viewing** - Specify what method you want to use to view documents and how windows are opened.

- **Display Settings** - Specify whether the entity ID is displayed.

- **Interface Settings** - Specify whether to enable the touch interface.

- **Signatures** - Specify authorization codes and fonts for electronic signatures.

The following procedures describe the options available in each area.

N O T E

The functionality available to you depends on your security access. You may not have access to all of the described tabs. If you require additional access, contact your administrator. In addition, the administrator can define entity settings that will override any modifications made on the **User Options** pane.

To specify search options

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **User Options**.

2. If necessary, on the left pane, click **General**.

3. In the **Search** area, you can specify the following options.

   - **Max. Results Per Query** - Use this box to specify the maximum number of search results to appear on a search results page. This value cannot exceed the value defined by your administrator.

   - **Show First Document** - Select **Yes** to display the first document that meets the entered search criteria.

   - **Show Full Text Options** - Select **Yes** to display the complete list of full-text search options.

   - **Document Grouping** - Document grouping enables the viewing of multiple documents with the same index values (as if they were a single document). You can select one of the following options:

     - **None** - Select this option to apply no document grouping.

     - **Oldest First** - Select this option to position the oldest documents at the beginning of the grouped document.

     - **Most Recent First** - Select this option to position the newest documents at the beginning of the grouped document.

N O T E

When **Document Grouping** is enabled, the **Scale** options on the viewer tool bar (**Width**, **Height**, and **Window**) are not functional for image-based file types (See "Document Types" on page 59 for more information). For example, if your grouped document contains a Word document, and PNG files, the **Scale** options function only for the Word document.

To specify document viewing options

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **User Options**.

2. If necessary, on the left pane, click **General**.

3. In the **Document Viewing** area, you can specify the following options.

   - **Document Display Method** - You can select the method used for displaying documents. You can select one of the following options:

NOTE

If you are unsure about which viewer to use, see "Select a Document Viewer" on page 23 for more information about each document viewer. Some operations that are available in the PaperVision Viewer are not available in the Browser-Based Viewer.

- **Use Browser-Based Viewer** - Select this option if you are restricted from installing soft-ware, as you will not be able to install the PaperVision Assistant that is required for use with the PaperVision Viewer. This option does not use ActiveX components, and in addi-tion to Internet Explorer, supports Google Chrome, Mozilla Firefox, and Safari (on iPad devices and Macs) and android devices.

- **Use PaperVision Viewer** - If you select this option, you must install the PaperVision Assistant, and you must select this option to perform administrative tasks, WorkFlow functions, and define E-Forms. (See "Install the PaperVision Assistant" on page 182 if you need installation instructions.)

- **Open Window Method** - Select one of the following methods to open the Browser-Based Viewer.

  - **Auto** - Select this option for PaperVision Enterprise to automatically handle how to open the Browser-Based Viewer.

  - **New Window** - Select this option to open the Browser-based Viewer in a new window.

  - **Current Window** - Select this option to open the Browser-based Viewer in the current win-dow.

To specify display options

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **User Options**.

2. If necessary, on the left pane, click **General**.

3. In the **Display Settings** area, you can specify the following options.

   - **Entity ID** - You can specify whether to display the entity ID by selecting one of the following options:

     - **Display Entity ID** - Select this option to display the **Entity ID** box on the login screen and next to the user's name on the title bar of PaperVision Enterprise.

     - **Hide Entity ID** - Select this option to remove the **Entity ID** box on the login screen.

To specify interface options

NOTE

The following options appear only when you are using a touch-enabled device.

---

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **User Options**.

2. If necessary, on the left pane, click **General**.

3. In the **Interface Settings** area, you can specify the following options.

- **Yes** - Select this option if you are using a touch screen device.
- **No** - Select this option if you are not using a touch screen device.
- **Auto** - (Default setting) - Select this option if you want PaperVision Enterprise to automatically detect the type of device you are using.

To specify signature options

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **User Options**.

2. If necessary, on the left pane, click **Signatures**

3. In the **Signature Authorization Area** area, you can specify the following options.

- **Authorization Code Required** - Select this option to require the entry of an authorization code to electronically sign a document.

4. In the **Signature Details Font** areas, you can specify the font and font size to use for electronic signatures and signature details.

Notifications

The **Notifications** pane contains system messages that alert users when certain events occur that may require attention. Many of these notifications are specific to administrators, but some also display to non-administrative users. The system automatically generates notifications for the following events and sends them to the listed users::

- Data group loaded successfully (entity administrators)
- Migration job finished running (entity administrators, if your administrator has enabled migration notifications)
- Data purge failure (entity and global administrators)
- An attempted user login to a "locked" account (entity administrators)
- An attempted user login when all licenses were in use (entity administrators)
- Workstep that remains unprocessed for a long period of time (user group of assigned workstep)

To view notifications

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Notifications**.

2. On the **Notifications** window, you can view notifications.

   The column headings on the **Notifications** pane indicate the following information:

- **Date/Time** - This column shows the date and time that the system generated the notification.
- **Source** - This column shows the activity that initiated the notification. If a user initiates the notification, the user name displays.

To sort notifications

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Notifications**.

2. On the **Notifications** window, click a column heading to sort the notifications in ascending or descending order.

To delete notifications

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Notifications**.

2. Select the notification you want to delete.

3. On the toolbar, click **Delete Selected Notification**.

To export notifications

> **NOTE**
>
> When you select the **Export** option, all listed notifications are exported. You cannot select individual notifications to be exported.

---

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Notifications**.

2. On the toolbar, click **Export Notifications**.

3. In the **Save As** dialog box, select the export location.

4. In the **File Name** box, type the name of the file.

5. Click the down arrow in the **Save as type** box, and then select the file type you want to use.

6. Click **Save**.

To print notifications

> **NOTE**
>
> When you select the **Print** option, all listed notifications are printed. You cannot select individual notifications to be printed.

---

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Notifications**.

2. On the toolbar, click **Print**.

3. In the **Print** dialog box, select the printer options, and then click **Print**.

Downloads

The **Downloads** tab window contains updates for PaperVision Enterprise and files that you can download and install for other Digitech tools and software. You must have appropriate permissions assigned by your administrator to perform the tasks that are available from the **Downloads** window. Additionally, administrative rights in Windows are required to successfully install the PaperVision Assistant.

To download an item

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Downloads**. (See "Log In" on page 18 if you need help.)

2. On the **Downloads** window, choose the application you want to install, and then click **Download**.

3. When prompted, select whether you want to run or save the application.

4. If you saved the application, after the download is complete, run the executable file.

5. On the **InstallShield Wizard** window, click **Next**.

6. Select **I accept the terms in the license agreement**, and then click **Next**.

7. Click **Install** to begin the installation.

8. After you are notified that the software is installed, click **Finish**.

This page was intentionally inserted without content.

CHAPTER 11

Destruction Lists

Destruction List Tasks

A destruction list is comprised of documents (including recycled documents) that met the destruction criteria defined by your administrator but require user review before their destruction. For example, your administrator creates a destruction policy that medical documents older than seven years should be destroyed, but specifies that the documents must be reviewed before they are automatically destroyed. As documents meet the time limit, they are placed in a destruction list where they can be reviewed and their destruction is either confirmed or denied.

If your administrator has assigned you permission to do so, you can view destruction lists and their associated documents on a per project basis (the **Destruction Lists** option is unavailable if there are no destruction lists defined). You can also confirm or deny the destruction of documents on the list.

When you view a destruction list, all of the documents appear in a document list. See "Document Lists" on page 42 for information about the standard tasks you can perform from all document lists. The following procedures describe only those tasks that are unique to destruction lists.

To view a destruction list

1. After you have logged in to PaperVision Enterprise, do one of the following:

   - Click the down arrow next to your user name, and then click **Destruction Lists**.

   - On the main window, if necessary, expand **Destruction Lists**.

2. The **Destruction Lists** window lists all projects that contain destruction lists. Select a project to view the destruction lists in that project in a document list.

3. Double-click the destruction list you want to view.

   The documents in the destruction list appear in a document list. See "Document Lists" on page 42 for information about the standard tasks you can perform from all document lists.

To confirm the destruction of documents

1. After you have logged in to PaperVision Enterprise, do one of the following:

   - Click the down arrow next to your user name, and then click **Destruction Lists**.

   - On the main window, if necessary, click **Destruction Lists**.

2. On the projects pane, double-click the project for which you want to view destruction lists.

3. On the destruction list pane, double-click the document list you want to view.

4. On the document list, select the document(s) for which you want to confirm destruction (hold down the Ctrl key to select multiple items).

5. On the toolbar, click **Review** to open the **Review Destruction List** dialog box.

6. Click **Approve**.

7. In the **Destruction Date/Time**, type the date and time for the destruction of the document(s), or click the box and then select the date and time.

> **N O T E**
>
> If the administrator already specified the destruction date and time, you can only confirm the destruction, and the **Destruction Date/Time** box will not appear.

---

8. (Optional) In the **Comments** box, you can type comments that can be viewed until the document is destroyed.

9. Click **Confirm**.

10. In the confirmation message, click **OK** to confirm the destruction of the document(s), and then click **OK** in the status message.

    The documents are removed from the **Destruction List** and now appear with a note in their **Status** column that displays the scheduled destruction date and the comments that were entered.

To deny the destruction of documents

1. After you have logged in to PaperVision Enterprise, do one of the following:

    *   Click the down arrow next to your user name, and then click **Destruction Lists**.

    *   On the main window, if necessary, click **Destruction Lists**.

2. On the projects pane, select the project for which you want to view destruction lists.

3. On the left pane, double-click the destruction list you want to view.

4. On the document list, select the document(s) for which you want to deny destruction (hold down the Ctrl key to select multiple items).

5. On the toolbar, click **Deny**, and then click **Yes**.

This page was intentionally inserted without content.

CHAPTER 12

Migration Jobs

Migration Job Tasks

The migration feature saves documents that were placed on a user-defined list into a new data group. The original documents are not altered, nor are they removed from PaperVision. When migrating information, the following basic steps are performed:

1. Documents are added to a list for migration. (See "Add Documents to a List" on page 54 for instructions.)

2. Lists are submitted for migration, and then appear on the **Migrations** window.

3. An automated migration operation locates the documents on the list in their original data groups, copies them to a separate location, where they are formatted into an XML data group. This data group can then be saved to any supported media type by an administrator.

4. After a migration job has been processed, the system sends an email message to the entity administrator if your system is configured to do so. (See "Notifications" on page 163 for instructions to view notifications.)

When documents are migrated, the following conditions are applied:

- Users must have appropriate permissions to submit a list for migration.
- Migration jobs do not export document annotations.
- The original documents are not altered, nor are they removed from PaperVision.

To view migration jobs

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Migration Jobs**.

2. The **Migrations** window lists all migration jobs. The column headings indicate the following information:

   - **Submitted Time** - This column shows the date and time when the list was submitted for migration.
   - **Next Run** - This column shows the date and time when the list will be migrated.
   - **User** - This column shows who submitted the list for migration.
   - **Name** - This column shows the assigned name for the migrated list.
   - **Started** - This column shows the date and time when the migration job was started.
   - **Finished** - This column shows the date and time when the migration job was finished.
   - **Docs** - This column shows the number of documents included in the migration job.
   - **MB** - This column shows the size of the migration job in megabytes.
   - **Minutes** - This column shows the amount of time in minutes that it took the migration job to process.
   - **Status** - This column shows the status of the migration job.

To view migration job properties

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Migration Jobs**.

2. Double-click the migration job for which you want to view job properties.

To submit migration jobs

> **N O T E**
>
> Before you can submit a migration job, a list must exist that includes the documents for migration. See "Add Documents to a List" on page 54 for instructions.

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Migration Jobs**.

2. On the toolbar, click **New** to open the **Submit New Migration Job** dialog box.

3. In the **Lists** area, select the list(s) to submit for migration. (Hold down the Ctrl key to select multiple lists.)

4. Click **Submit**.

5. Click **OK** to confirm the submission.

To resubmit migration jobs

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Migration Jobs**.

2. Select the migration job you want to resubmit.

3. On the toolbar, click **Resubmit**.

4. Click **Yes** to confirm the resubmission.

To cancel migration jobs

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Migration Jobs**.

2. Select the migration job you want to cancel.

3. On the right pane, select the migration job(s) you want to cancel. (Hold down the Ctrl key to select multiple migration jobs.)

4. On the toolbar, click **Cancel**.

5. Click **Yes** to confirm the cancellation.

To sort migration jobs

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Migration Jobs**.

2. Click a column heading to sort the migration jobs in ascending or descending order.

This page was intentionally inserted without content.

CHAPTER 13

Pending Queue

Pending Queue Tasks

You can access all pending document without having to open a viewer in a project. This is helpful if you have pending documents in multiple projects. (See "Manage Pending Documents" on page 88 for more information about tasks you can perform on pending documents.)

To access pending documents

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Pending Queue**.

2. In the **Pending Queue** window, all pending documents appear, and you can do any of the following:

   - To open the pending document in the pending document view of the PaperVision Viewer, double-click the pending document.

   - To upload a pending document, select the document(s), and then, on the toolbar, click **Upload Selected Documents**.

   - To upload all pending documents, on the toolbar, click **Upload All Documents**.

CHAPTER 14

Recycle Bin

Recycle Bin Tasks

If your administrator has configured your project to do so, when any document or version of a document is deleted, it is moved to the Recycle Bin for that project. After a document is placed in the Recycle Bin, it displays with red text when it appears in any document list. Your administrator must assign you permissions to view, empty, or restore the contents of the Recycle Bin. The number of documents that appear per page in the Recycle Bin is determined by the **Max. Results Per Query** setting under **User Options**. (See "To specify search options" on page 161 for instructions to modify this setting.)

The procedures in this section describe the functions you can perform on the **Recycle Bin** window. In the Recycle Bin, you can perform the same functions and view the standard information available from all document lists. (See "Document Lists" on page 42 for references to the common tasks you can perform and an overview of the displayed information.)

To open the Recycle Bin

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Recycle Bin**.

2. On the **Recycle Bin** window, the **Projects** pane contains a list of all projects.

3. Select a project to view the recycled documents.

To restore all items from the Recycle Bin

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Recycle Bin**.

2. On the **Projects** pane, select the project for which you want to restore all items from the Recycle Bin.

3. Click **All** to open the **Restore Recycle Bin Items** dialog box.

4. Do one of the following:

   • To restore all items in the Recycle Bin, select **Restore All Recycle Bin items**, and then click **OK**.

   • To restore all items in the Recycle Bin deleted on or before a specified date, select **Restore Recycle Bin items deleted on or before the specified date** and then do one of the following.

      - Type the date and time on or before which the items were deleted, and then click **OK**.

      - Click the button and then select the date and time on or before which the items were deleted, and then click **OK**.

To empty all items from the Recycle Bin

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Recycle Bin**.

2. On the **Projects** pane, select the project for which you want to empty all items from the Recycle Bin.

3. Click **Empty** to open the **Empty Recycle Bin** dialog box.

4. Do one of the following:

   - To empty all items in the Recycle Bin, select **Empty All Recycle Bin Items**, and then click **Save**.

   - To empty all items in the Recycle Bin deleted on or before a specified date, select **Empty Recycle Bin items deleted on or before the specified date** and then do one of the following.

     - Type the date and time on or before which the items were deleted, and then click **OK**.

     - Click the button and then select the date and time on or before which the items were deleted, and then click **OK**.

To delete a document in the Recycle Bin

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Recycle Bin**.

2. On the **Projects** pane, select the project for which you want to delete a document from the Recycle Bin.

3. Select the document(s) you want to delete, and then on the toolbar, click **Delete**.

4. Click **Yes** in the confirmation message.

This page was intentionally inserted without content.

CHAPTER 15

PaperVision Assistant

Install the PaperVision Assistant

The PaperVision Assistant is an application that extends the features and capabilities of the PaperVision Viewer to other browsers such as Mozilla Firefox and Google Chrome. Additionally, if you are using version 75.1 or later of PaperVision Enterprise, the PaperVision Assistant must be installed before you can view any documents using the PaperVision Viewer. The PaperVision Assistant is not required to view documents using the Browser-Based Viewer. The PaperVision Assistant is an integral component of the PaperVision Client. To install the PaperVision Assistant, you must download the PaperVision Client.

N O T E

Administrative rights in Windows are required to successfully install the PaperVision Assistant.

To install the PaperVision Assistant

1. After you have logged in to PaperVision Enterprise, click the down arrow next to your user name, and then click **Downloads**. (See "Log In" on page 18 if you need help.)

2. On the **Downloads** window, select **PaperVision Client**, and then click **Download**.

3. When prompted, select whether you want to run or save the application.

4. If you saved the application, after the download is complete, run the executable file.

5. On the **InstallShield Wizard** window, click **Next**.

6. Select **I accept the terms in the license agreement**, and then click **Next**.

7. Click **Install** to begin the installation.

8. After you are notified that the software is installed, click **Finish**.

APPENDIX A

Search Assistance

Search Process Overview

Document searches are affected by options that administrators set and options specified by users. You can set the following options:

- **Max. Results Per Query** - This setting specifies the maximum number of search results to appear on a search results page. This value cannot exceed the administrator-defined values. (See "To specify search options" on page 161 for instructions.)

- **Document Grouping** - This setting determines whether documents returned from searches are grouped, and if so, in what order. This user-defined value overrides the default behavior set by the administrator. (See "To specify search options" on page 161 for instructions.)

> **N O T E**
>
> When document grouping is selected, up to 100 documents with the same index values appear as if they were a single document.

The system follows the steps below when it searches for documents.

Search Process for Documents (Excluding Full-Text Search Criteria)

1. The index value query is run against the SQL database, the results are limited to the value specified by the **Max. Results Per Query** setting, and then sorted by the Document ID value.

2. Each document returned from that database query is checked to ensure that the requesting user has document-level access to it.

3. After removing documents, if there are fewer than the number specified by the **Max Results Per Query** setting, steps 1 and 2 are repeated for the next group of documents.

4. When the correct number of documents are found (or no more meet the criteria), the final set of documents are sorted based on the user's requested sort order and field.

5. The documents are queued and returned to the client. If document grouping is enabled, document index values are compared to determine if any document groups are created.

Search Process for Documents (Including Full-Text Search Criteria)

1. The full-text search criteria is submitted to the full-text database engine, and it returns, at most, the number of documents specified by the **Max. Full-Text database results per query** setting configured by the administrator. The engine returns the Document ID values (and additional information) of any documents that the full-text engine finds.

2. The submitted index value query (if any) is appended to require that the resulting documents have Document ID values that are in the list of those found by the full-text engine.

3. The submitted index value query is run against the SQL database, and the results are limited to the value specified by the **Max. Results Per Query** setting, and then the results are sorted by the Document ID value.

4. Each document returned from that database query is checked to ensure that the requesting user has document-level access to it.

5. After removing documents, if there are fewer than the number specified by the **Max Results Per Query** setting, steps 3 and 4 are repeated for the next group of documents.

6. When the correct number of documents are found (or no more meet the criteria), the final set of documents are sorted based on the user's requested sort order and field.

7. The documents are queued and returned to the client. Because a full-text search was run, no document grouping is used.

Use the PVESearchURL Feature

The PVESearchURL feature is used to locate information in your database by typing a URL that you create into the address bar on your browser. The URL requires a specific format and predefined parameters.

- See "PVESearchURL Required Parameters" on page 187 for information about the available required parameters.
- See "PVESearchURL Optional Parameters" on page 188 for information about the available optional parameters.

To use the PVESearch URL Feature

1. Open your browser.

2. In the address bar, type **http://*PVEserversite*:*portnumber*/PVESearchURL.aspx?**, and then type the first required parameter, similar to the following:

   ```
   /PVESearchURL.aspx?UserName
   ```

3. After the first parameter, type an equal sign (**=**), and then type the parameter value.

   ```
   /PVESearchURL.aspx?UserName=User1
   ```

4. Type an ampersand (**&**) between each parameter you add.

   ```
   /PVESearchURL.aspx?UserName=User1&Password=pAssw0rd!&ProjID=12
   ```

5. Press Enter when you are ready to run the search.

Usage Examples

The IndexFields, IndexValues and IndexValuesTo parameters are all related to each other. You must supply the values for the IndexValues and IndexValuesTo parameters in the same order as IndexFields. For example, if you have a project with IndexField1, IndexField2 and IndexField3 and you want to search on IndexField1 and IndexField3, your parameters would look like the following:

```
IndexFields=IndexField1Name|IndexField3Name&IndexValues=IndexField1Value|
IndexField3Value
```

The IndexValuesTo parameter is required only when executing a range search. Again, values need to be supplied in a consistent order. For example, to search on all of the index fields above including a range search for IndexField3, you could do the following:

```
IndexFields=IndexField1Name|IndexField2Name|IndexField3Name&IndexValues=IndexField1Value|IndexField2Value|
IndexField3FromValue&IndexValuesTo=||IndexField3ToValue
```

In the previous paragraph, note how IndexValuesTo starts with two pipes, this is to tell the system that the first two IndexFields are not executing a range search. If the pipes were not included, then the system would attempt to run a range search on IndexField1 using IndexField3EndValue as the To value.

E X A M P L E

Here are some examples of what search URLs might look like:

```
/PVESearchURL.aspx?UserName=Test&EntID=4&ProjID=1&IndexFields=Date&IndexValues=01-05-2018&IndexValuesTo=01-06-2018&ResultsType=List
```

```
/PVESearchURL.aspx?UserName=Pub1ic&EntID=4&ProjID=1&IndexFields=Name&IndexValues=John Doe&ResultsType=list
```

```
/PVESearchURL.aspx?UserName=User1&Password=pAsswOrd1&EntID=4&ProjID=1&IndexFields=Name|Date|Amount&IndexValues=John Doe|01-05-2018|100&SortBy=Date&SearchType=And&ResultsType=Docs
```

```
/PVESearchURL.aspx?SessionID=14133234434539852398247329843294972983792834&EntID=4&ProjID=1&IndexFields=Name&IndexValues=John Doe&ResultsType=List
```

PVESearchURL Required Parameters

When using the PVESearchURL feature, you must include the parameters in the following table in your URL.

- See "Use the PVESearchURL Feature" on page 185 for more information about using parameters.
- See "PVESearchURL Optional Parameters" on the next page for information about the available optional parameters.

After each parameter, type an equal sign (**=**) and then type the parameter value. If you use multiple parameters, you must insert an ampersand (**&**) between them.

Parameter	Value	Usage Example
UserName	A valid user name	`UserName=John Smith`
Password	A valid password The Password parameter is optional only when the password for the specified use is set to blank.	`Password=pAs$w0rd1`
EntiID	The ID of the entity to search	`EntiID=2314`
ProjID	The ID of the project to search	`ProjID=12`
IndexFields	A pipe-delimited list of the index fields to search	`IndexFields=Name|Date|Amount`
ResultsType	**List** to display a list of search results, or **Docs** to display specific documents	`ResultsType=List` `ResultsType=Docs`

PVESearchURL Optional Parameters

When using the PVESearchURL feature, the parameters in the following table are optional to include in your URL when the parameter value is either set to the default value or blank.

- See "Use the PVESearchURL Feature" on page 185 for more information about using parameters.

- See "PVESearchURL Required Parameters" on the previous page for information about the available required parameters.

After each parameter, type an equal sign (**=**) and then type the parameter value. If you use multiple parameters, you must insert an ampersand (**&**) between them.

Parameter	Value	Usage Example
IndexValues	A pipe-delimited list of the index values to search	`IndexValues=John Doe|10-05-2016|100`
IndexValuesTo	A pipe-delimited list of the "To" index values in a date range. The default is blank or no range searching. If you use the default and type a date in the **IndexFields** or **IndexValuesTo** parameters, the system searches for that specific date.	`IndexValuesTo=10-06-2016`
SortBy	The name of the index field to sort the results by. The default is the first index field in ascending order. To sort in descending order, add [**-**] to the end of the index field name.	`SortBy=Date[-]`
FTQuery	The full text string for which you are searching.	`FTQuery=John Doe`

Parameter	Value	Usage Example
FTOptions	A tab delimited (**\t**) list of full-text search options which can use the following items: **BOOLEAN** or **NATURAL** specifies to use either a Boolean or Natural Language search. **STEMMING** specifies to use stemming on all words. **PHONIC** specifies to perform a phonic search on all words. **FUZZY=*x*** specifies to perform a fuzzy logic search on all words with a fuzziness setting of *x* (where *x* is between 1 and 10). **SYNONYM** specifies to perform a synonym search on all words. **WNSYNONYM** specifies that any synonym searching uses the WordNet thesaurus of synonyms. **WNRELATED** specifies that any synonym searching uses the WordNet related-words list. **USERSYNONYM** specifies that any synonym searching uses the user-defined thesaurus.	`FTOptions=NATURAL\tPHONIC\tFUZZY=0`
SearchType	Search type values are **And** or **Or**. (The default is **Or**.)	`SearchType=And`
SessionID	A valid session ID. You can use this instead of a user name and password.	`SessionID=1413323443453`
Locale	Used when executing on a translated web site. The **Locale** parameter must use the same country code as the translated strings. The default is **EN-US**.	`Locale=EN-US`

This page was intentionally inserted without content.

APPENDIX B

Digitech Logging Utility

Digitech Logging Utility Overview

For your convenience, the Digitech Logging Utility is provided so that you can easily change some logging aspects without having to manually edit the XML configuration files. You can use the logging utility to modify configuration files for any Digitech Systems' product. The Digitech Logging Utility lets you specify:

- which configuration file to modify,
- the level of detail for the logs,
- where the log information is sent and/or stored,
- and the appearance of the content.

See "Configure the Digitech Logging Utility" below for instructions to configure the Digitech Logging Utility.

Configure the Digitech Logging Utility

For all Digitech Systems software, logging settings are stored in the application's configuration file. If the executable file for your application were named **DigitechApp.exe**, then the name of the corresponding configuration file would be **DigitechApp.exe.config**, and it would be located in the same directory as the executable file. Configuration files are XML files that you can open and edit using any text editor, including Windows Notepad.

To configure the Digitech Logging Utility

1. Click **Start**, and then click **All Programs**.

2. Click the **Digitech Systems** folder, and then click **PaperVision Logging Utility** to open the **Digitech Logging Utility** dialog box.
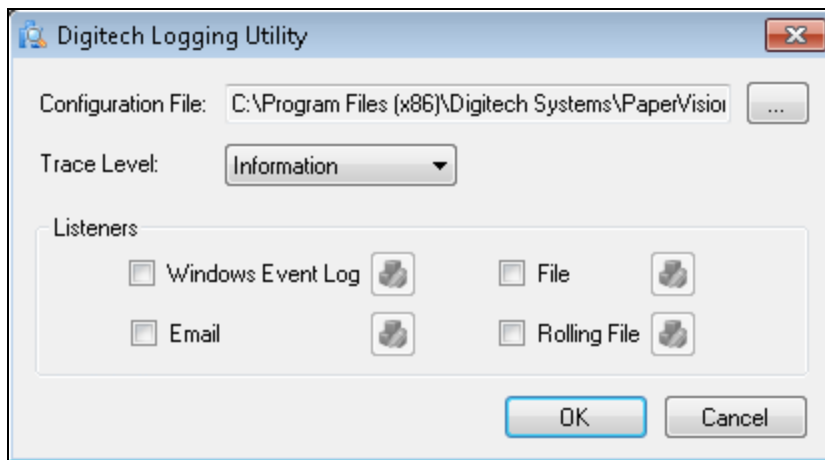
3. Next to the **Configuration File** box, click the ellipsis button � to open the **Select Config File** dialog box.

4. Click the **Look in** list to locate the directory where the configuration files are stored (typically, `Program Files\Digitech Systems\PaperVision Capture`).

5. Click the configuration file for which you want to specify logging properties.

6. Click the **Trace Level** list, and then select one of the following options:

   * **Error** - This option specifies that recoverable errors are logged.

   * **Warning** - This option specifies that non-critical problems are logged.

   * **Information** - This option specifies that informational messages are logged.

   * **Verbose** - This option specifies that debugging trace information is logged.

   * **All** - This option specifies that all possible logging information is included.

N O T E

If you select **Verbose** or **All**, you are requesting the most possible output. These settings can generate a significant amount of output that requires extra processing which could slow application performance.

---

7. Go to "Configure Listeners" below to specify where you want the log information to be sent and/or stored.

Configure Listeners

After you complete the procedure under "To configure the Digitech Logging Utility" on the previous page, you must specify where you want the log information to be sent and/or stored. You do this in the **Listeners** area in the **Digitech Logging Utility** dialog box.

The following procedures describe how to configure each type of listener.

To configure the Windows Event Log Listener

When you select **Windows Event Log**, it specifies that you want the log output to appear in the Windows **Event Viewer**. To access the **Event Viewer**, type **eventvwr** at the command prompt, and then press Enter.

1. If you haven't already done so, complete the procedure under "To configure the Digitech Logging Utility" on the previous page.

2. In the **Listeners** area, select **Windows Event Log**, and then click to open the **Windows Event Log Settings** dialog box.

3. In the **Source Name** box, type the name that you want to appear in the **Source** column of the **Event Viewer**, and then click **OK**.

4. If you are done configuring listeners, click **OK**. Otherwise, go to the instructions for the next listener you want to configure.

To configure the Email Listener

When you select **Email**, it specifies that you want the log output to be sent to an email address.

1. If you haven't already done so, complete the procedure under "To configure the Digitech Logging Utility" on page 192.

2. In the **Listeners** area, select **Email**, and then click to open the **Email Settings** dialog box.

3. In the **SMTP Server** box, type the IP address or server name of the SMTP server.

4. In the **SMTP Port** box, type the applicable port number.

5. In the **To Address** box, type the email address to which the log information will be sent.

6. In the **From Address** box, type the email address from which the log information will be sent.

7. In the **Subject Line Starter (Optional)** box, type the subject you want to appear in the email notifications.

8. Click **OK**.

9. If you are done configuring listeners, click **OK**. Otherwise, go to the instructions for the next listener you want to configure.

To configure the File Listener

When you select **File**, it specifies that you want the log output to go to a file. So that you can easily locate the log file, you can specify the path and file name. The path you specify can contain any environment variable. The variable is resolved when the log is written. (To see a list of all the environment variables configured on your machine, go to a command prompt, type **set**, and then press Enter.)

If you specify a directory with the file name, and that directory does not exist, the logging utility will create it. For example, if you type **C:\temp\logs\dsi.log** for the file name, the logging utility will create the **C:\temp\logs** directory if it does not already exist. When using the **File** option, log entries continue to accumulate in the same file which can cause the file to become very large. If you do not want to manually maintain this file, consider using the **Rolling File** option. (See "To configure the Rolling File Listener" on page 196 for more information.)

1. If you haven't already done so, complete the procedure under "To configure the Digitech Logging Utility" on page 192.

2. In the **Listeners** area, select **File**, and then click to open the **File Settings** dialog box.

3. In the **File Name** box, type the path and/or file name for the log. If you do not include a path, the file you specify will be written to the Digitech installation directory.

4. (Optional) In the **Header** box, type a header that you want to appear at the beginning of each log entry in the file.

5. (Optional) In the **Footer** box, type a footer that you want to appear at the end of each log entry in the file.

6. Click **OK**.

7. If you are done configuring listeners, click **OK**. Otherwise, go to the instructions for the next listener you want to configure.

E X A M P L E

If your entries look like this,
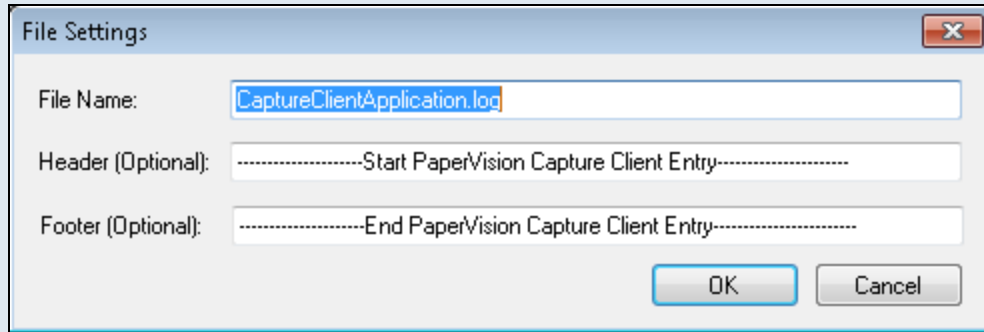
then the log entry would appear similar to the following.

--------------------Start PaperVision Capture Client Entry---------------------
Timestamp: 4/7/2014 5:22:02 PM
Message: Accepting connections…
Category: Operational
EventId: 100
Severity: Information
Machine: BOBR-NOTEBOOK
OS Version: Microsoft Windows NT 6.1.7601 Service Pack 1
Application Domain; CaptureClient.exe
Process Id: 10932
Process Name: C:\dsi\bin\CaptureClient.exe
Win32 Thread Id 5332
Thread Name
--------------------End PaperVision Capture Client Entry----------------------

---

To configure the Rolling File Listener

When you select **Rolling File**, it specifies that you want the log output to go to a file, but to prevent the file from becoming too large, a new file is created based on the current date and time and the time interval that you specify. By default, the contents of a rolling file are abbreviated in comparison to the contents of a regular file.

So that you can easily locate the log file, you can specify the path and file name. The path you specify can contain any environment variable. The variable is resolved when the log is written. (To see a list of all the environment variables configured on your machine, go to a command prompt, type **set**, and then press Enter.) Additionally, if you specify a directory with the file name, and that directory does not exist, the logging utility will create it. For example, if you type **C:\temp\logs\dsi.log** for the file name, the logging utility will create the **C:\temp\logs** directory if it does not already exist.

The **Rolling File** option also supports the use of macros that are expanded when the file is written. Supported macros include: **{machineName}**, **{processID}**, **{timeStamp}**, or **{webSiteID}**.

1. If you haven't already done so, complete the procedure under "To configure the Digitech Logging Utility" on page 192.

2. In the **Listeners** area, select **Rolling File**, and then click to open the **Rolling File Settings** dialog box.

3. In the **File Name** box, type the path and/or file name for the log. If you do not include a path, the file you specify is written to the Digitech installation directory. You can also include macros in this box.
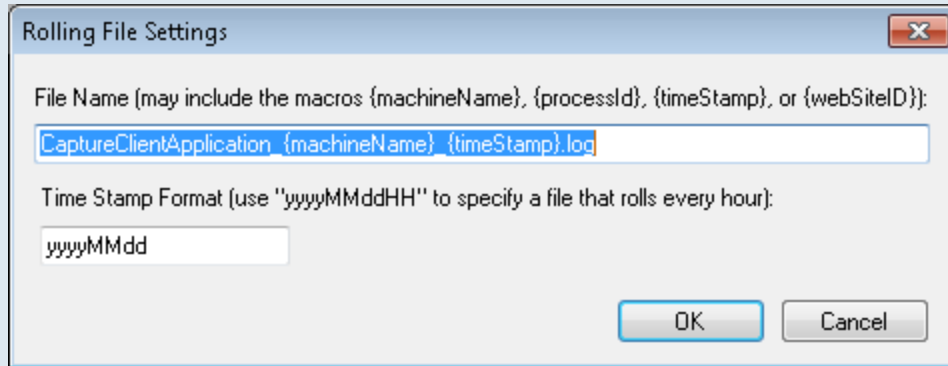

N O T E

To specify a time interval for the creation of a new file, you must include the **{timeStamp}** macro in the **File Name** box.

---

4. In the **Time Stamp Format** box, specify the time interval for the creation of a new file. Use the **yyyyMMddHH format**, where **yyyy** equals the year, **MM** equals the month, **dd** equals the numerical day, and **HH** equals the hour in a 24-hour format. You control the interval by using only the portion of the format you want. For example, to create a new rolling log file on a daily basis, you would type **yyyyMMdd**. To create a new rolling log file on an hourly basis, type **yyyyMMddHH**.

5. Click **OK**.

6. If you are done configuring listeners, click **OK**. Otherwise, go to the instructions for the next listener you want to configure.

E X A M P L E

If your entries looked like this,

The output file would be **CaptureClientApplication_BOBR-NOTEBOOK_20140407.log**. The contents of a rolling file are abbreviated similar to the following sample

2014-04-07 17:31:23 Accepting connections…
2014-04-07 17:31:23 New incoming connection: 127.0.0.1
2014-04-07 17:31:23 Inside TryCheckSystemVersion_7_062413_
2014-04-07 17:31:23 Login user successfully with user name U and entityId 1
2014-04-07 17:31:23 Command from 127.0.0.1 processed successfully
2014-04-07 17:31:23 Client 127.0.0.1 disconnected (gracefully)
2014-04-07 17:31:23 Enabling manual .NET garbage collection every 300 seconds
2014-04-07 17:31:23 New incoming connection: 127.0.0.1
2014-04-07 17:31:23 Command from 127.0.0.1 processed successfully
2014-04-07 17:31:23 Client 127.0.0.1 disconnected (gracefully)
2014-04-07 17:31:23 New incoming connection: 127.0.0.1
2014-04-07 17:31:23 Command from 127.0.0.1 processed successfully
2014-04-07 17:31:23 Client 127.0.0.1 disconnected (gracefully)
2014-04-07 17:31:25 New incoming connection: 127.0.0.1
2014-04-07 17:31:26 Saved User ID 2 preferences
2014-04-07 17:31:26 Command from 127.0.0.1 processed successfully
2014-04-07 17:31:26 Client 127.0.0.1 disconnected (gracefully)
2014-04-07 17:31:26 New incoming connection: 127.0.0.1
2014-04-07 17:31:26 Command from 127.0.0.1 processed successfully
2014-04-07 17:31:26 Client 127.0.0.1 disconnected (gracefully)