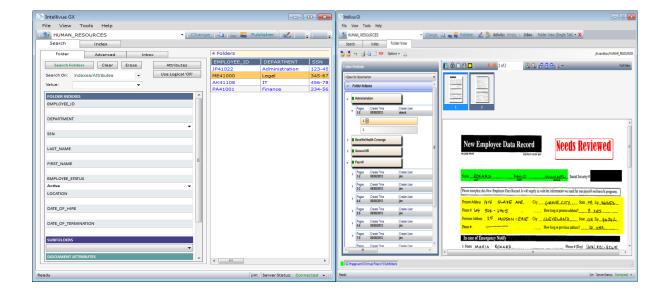
Intellivue™ GX v2.5 End User Manual





Manual Version: 1.1

Revision Date: 08/30/2013

Revised By: James Theodorou

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Version History

Version	Date	Reviser's Name	Brief Description of Change
1.0	03/19/2012	Angela Beck	Original Version
1.1	08/30/2013	James Theodorou	Revision 1

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Section 1 – Login

<u>Section 1 – Login</u>

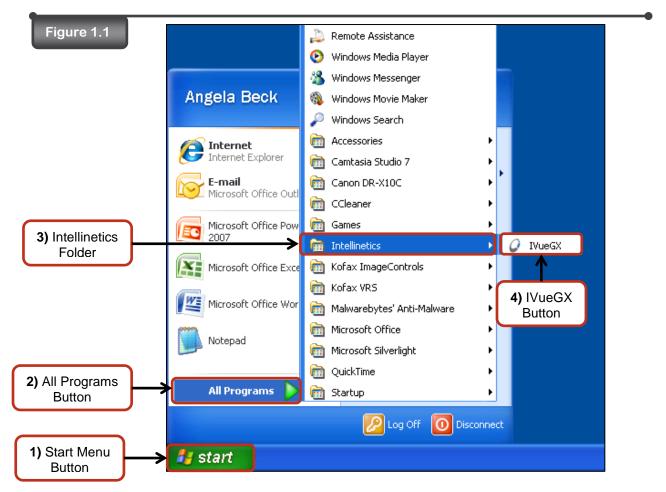
All users must login to the **Intellivue**TM **GX** application using their own individual user credentials, as assigned by the System Administrator (*see Figure 1.2*). To login to **Intellivue**TM **GX**, follow the steps listed below.

Section 1.1 – Windows XP Login

To login to the Intellivue™ GX application on Windows XP, follow the steps listed below.

Steps:

- 1. Click on the **Start Menu** button (see Figure 1.1).
- 2. Click on the All Programs button (see Figure 1.1).
- 3. Click on the **Intellinetics** folder (see Figure 1.1).
- 4. Click on the **IVueGX** button (see Figure 1.1).



- 5. The Intellivue[™] **GX** application will load (see Figure 1.2).
- 6. A Login to Service Provider window will pop up as well (see Figure 1.2).
- 7. Enter your user name in the **User Identification** field (see Figure 1.2).
- 8. Enter your password in the **Password** field (see Figure 1.2).
- 9. Click on the **Login** button (see Figure 1.2).

Figure 1.2		
	🖉 Login to Service Provider 🛛 🔀	
	User Identification	
	abeck	
	Password	
	Login Cancel	

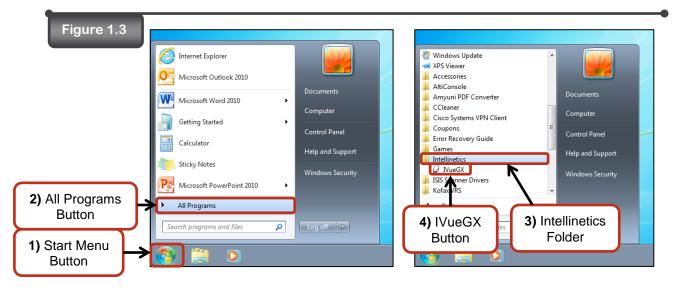
10. You will now be logged in to the Intellivue™ GX application.

Section 1.2 - Windows 7 Login

To login to the Intellivue™ GX application on Windows 7, follow the steps listed below.

Steps:

- 1. Click on the **Start Menu** button (see Figure 1.3).
- 2. Click on the **All Programs** button (see Figure 1.3).
- 3. Click on the Intellinetics folder (see Figure 1.3).
- 4. Click on the **IVueGX** button (see Figure 1.3).



5. To finish the login process, follow steps 5 through 10 from Section 1.1 – Windows XP Login.

Section 2 – Folder Index Search

Section 2 – Folder Index Search

To perform a folder index search, follow the steps listed below.

Steps:

1. Select the application you would like to perform a search in from the application drop down menu located at the top of the Intellivue[™] GX window (see *Figure 2.1*).

Figure 2.1	D Intellivue GX		
	File View Tools Help		
1) Selected			
Application	Folder Advances Inbox		
	Search Folders Application Drop Search On: Down Menu		

 Select the Indexes / Attributes option from the Search On: drop down menu located on the Folder tab (see Figure 2.2).

A) When you first login to the Intellivue™ GX application, the Indexes / Attributes option is automatically selected. Therefore, you will not need to select this option every time you perform a quick folder index search. The only time you will need to select the Indexes / Attributes option is if another option was selected for a different search.

Figure 2.2		D Intellivue GX
		<u>File V</u> iew <u>T</u> ools <u>H</u> elp
		HUMAN_RESOURCES
		Search Index
	Folder Tab	Folder Advanced Inbox
		Search Folders Clear Erase Att
		Search O <u>n</u> : Indexes/Attributes
		Value:
		FOLDER INDEXES
		EMPLOYEE 2) Indexes / Attributes
		Selected

3. Enter the index values you wish to search for into the folder indexes fields (see Figure 2.3). You can also use a Wildcard search.

Symbol	Meaning	Example of Use	Example of Use Results
%	Wildcard	BO%	<u>Bo</u> nnie
			<u>Bo</u> b
		%NN%	Te <u>nn</u> essee
			Pe nn sylvania
		%34	500 34
			AK12 34

The Wildcard can be used to search on Indexes/Attributes, Bookmarks, Notes, Create Date(s), Create User, Virtual File Tiles, and Fulltext.

You can also use symbols from the following list. These symbols can be used only when searching on Indexes/Attributes.

<u>Symbol</u>	Meaning	Example of Use	Example of Use Results
<	Less than	<smith< td=""><td>All results with a value in the field that alphabetically comes <u>before</u> "Smith."</td></smith<>	All results with a value in the field that alphabetically comes <u>before</u> "Smith."
		<03/12/2000	All results with a date in the field that is before March 12, 2000.
>	Greater than	>Smith	All results with a value in the field that alphabetically comes <u>after</u> "Smith."
		>03/12/2000	All results with a date in the field that is <u>after</u> March 12, 2000.
<=	Less than or equal to	<=Smith	"Smith" and all results with a value in the field that alphabetically comes <u>before</u> it.
		<=03/12/2000	Results with a date in the field that is on or <u>before</u> March 12, 2000.
>=	Great than or equal to	>=Smith	"Smith" and all results with a value in the field that alphabetically comes after it.
		>=03/12/2000	Results with a date in the field that is on or <u>after</u> March 12, 2000.
,	This OR That	Smith ; Jones	Results with a value in the field of "Smith" or "Jones".
(underscore)	Wildcard – Match one character	M_T	Results with any one character between the letters M and T, such as "Mat" or "Met".

- Figure 2.3 Ď Intellivue GX <u>File View Tools H</u>elp - Change HUMAN_RESOURCES Search Index Folder Advanced Inbox 4) Search Folders Search Folders Clear Erase Attributes Button Use Logical 'OR' Search On: Indexes/Attributes • Value: Ŧ FOLDER INDEXES EMPLOYEE_ID 3) Index Values DEPARTMENT Entered Into the Finance • Folder Index SSN Fields LAST_NAME ECKARD FIRST_NAME EMPLOYEE_STATUS • LOCATION DATE_OF_HIRE DATE_OF_TERMINATION eady
- 4. Click on the **Search Folders** button located at the top of the page (see Figure 2.3).

5. The search results will appear on the right side of the folder index fields (see Figure 2.4).

Note

a) To change the order of the index columns, simply grab a column header with your mouse and drag it to the desired position.

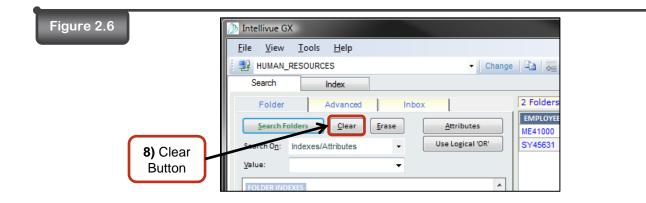
b) To sort columns in ascending or descending order, simply click on the column header itself.

Figure 2.4 Ď Intellivue GX - - -File View Tools Help - Change 📳 👼 🌉 Publisher 🔣 🎼 Activity: Empty 🕞 Inbox HUMAN_RESOURCES Search Index 2 Folders Folder Inbox Advanced EMPLOYEE_ID DEPARTMENT SSN LAST_NAME FIRST_NAME Search Folders Clear Erase Attributes JP41022 Administration 123-45-6789 POWERS JAY Use Logical 'OR' MICHAEL Search On: Indexes/Attributes • ME41000 Administration 345-67-8901 ECKARD Value • FOLDER INDEXES . н EMPLOYEE_ID 5) Search DEPARTMENT Administration Results • Folder Index Fields SSN Þ Ready jim Server Status: Connected 👻 🛒

- 6. Select a folder from the search results list to view (see Figure 2.5).
- 7. The selected folder will appear in the Folder Viewer window (see Figure 2.5).

Figure 2.5	6) Selected Folder	Folder Wewer	
Intellivue GX	Folder	DF Folder Viewer	itt sandbox/HUMAN RESOLIRCES
File View Tools Help			jit sandox/munikw_ktsoukuts
HUMAN_RESOURCES	🔹 Change 🝙 🚒 🌄 Publisher 🗹 🤰 Activity: Expty 🔹 Inbox 👳	Folder Portfolio	📕 🛈 🗌 🖻 🔲 🔯 🕨 🕨 🖿 1 of 4
Search Index		<open bookmarks="" for=""></open>	A
Folder Advanced Inbox	2 Folders	Folder Indexes	ver. 2001 Application for Employment
Search Folders Clear Erase	Attributes	- Administration	Application for Employment
Search On: Indexes/Attributes •	Use Logical OR ME41000 Administration 345-67-8901 ECKARD MICHAEL		Equal screen to programs, review and employment in wallible to all persons. These applicants requiring reasonable accommodation application and/or interview process should assoly a representative of the Homan Rosource Department.
Value:		Pages Create Time Create User 1-2 08/08/2013 abeck	Panisons)) applied for CUStomer Service Representative Due of application 6/1
FOLDER INDEXES	A	1	None Powers Jay Alex Social Services 295-25- Marcon 421 Pineloretok Rd. Hilliard OH 45 =
EMPLOYEE_ID		2	Telephone # (414) le2k-1642, Mobile ResperiOther # (414) \$51-2065 email Address jpowlers @
		Pages Create Time Create User 3-4 08/08/2013 abeck	If you are under 18, and is is required, can you furnish a work premis?
DEPARTMENT		Benefits-Health Coverage	Have you con been employed here before? If yes, give dams and positions Ye Are you fipally eligible for employment in this courses? Xee
Administration	•	Pages Create Time Create User	Date melhide for work. <u>9:1/L_CQ</u> What is your desired shory ranged. <u>5:1/L</u> Type of employment desired XFaUTione Pan-Time "Temperary <u>5:2000</u> Are you do how data menyicement of the pationt. <u>X're</u>
	7) Selected Folder	1-2 08/08/2013 abeck	Here you ever plot "goally" or "no-energian to the parameter of a coince?
LAST_NAME	Ópened in Folder 🔶	Pages Create Time Create User 3-4 08/08/2013 abeck	Anoming "pa" or how quarken does not menticer as assoratic for no employment. Forens such as data of the efforte, environment and source of the vidados establization and possion applied for will brainer ton actions.
		General HR	Employment History
FIRST_NAME	Viewer Window	Pavroll	Saming with your man more employer, surgences or volknere schrides, provide the following information the TVAT is provided to the following information of the schride of
EMPLOYEE_STATUS		Pages Create Time Create User	Customer Sorvice Rep. 4650 Marse Rd Columbus 2
-	• III	1-2 08/09/2013 jim	Division Manager Took customer Scruice calls, Scheduled service
LOCATION		Performance Review	Manager i s (H)
	· · · · · · · · · · · · · · · · · · ·	·	Wat 1999 Keringtra Place Asst. Living 1993 842 -
Ready	jim Server Status: Connected 🔹 🏥	10 Images and 0 Virtual Files in 3 Subfolders	

8. To perform a new search, click on the **Clear** button. All previously entered search criteria will be cleared from the folder index fields. All search results will be cleared as well (see *Figure 2.6*).



Section 3 – Document Attributes Search

Section 3 – Document Attributes Search

To perform a document attributes search, follow the steps listed below.

Steps:

1. Select the application you would like to perform a document attributes search in from the application drop down menu located at the top of the **Intellivue[™] GX** window (see Figure 3.1).

Figure 3.1	D Intellivue GX	
	File View Tools Help	
	: 🛃 🗸 Char	
1) Selected Application	ACCOUNTS_PAYABLE HUMAN_RESOURCES	
Application	Folder Advances Inbox	
	Search Folders Application Drop Attributes	
	Search On: Down Menu Use Logical 'OR'	

 Select the Indexes / Attributes option from the Search On: drop down menu located on the Folder tab (see Figure 3.2).

A) When you first login to the Intellivue™ GX application, the Indexes / Attributes option is automatically selected. Therefore, you will not need to select this option every time you perform a quick document attributes search. The only time you will need to select the Indexes / Attributes option is if another option was selected for a different search.

Figure 3.2	D Intellivue GX
	<u>File View T</u> ools <u>H</u> elp
	HUMAN_RESOURCES
	Search Index
Folder Tab	Folder Advanced Inbox
	Search Folders Clear Erase Att
	Search On: Indexes/Attributes
	Value:
	FOLDER INDEXES
	EMPLOYEE. 2) Indexes / Attributes
	Selected

3. Click on the **Attributes** button (see Figure 3.3).

4. Enter the document attribute values you wish to search for into the document attributes fields (see *Figure 3.3*). You can also use a Wildcard search.

<u>Symbol</u>	Meaning	Example of Use	Example of Use Results
%	Wildcard	BO%	<u>Bo</u> nnie
			<u>Bo</u> b
		%NN%	Te <u>nn</u> essee
			Pe <u>nn</u> sylvania
		%34	500 34
			AK12 34

The Wildcard can be used to search on Indexes/Attributes, Bookmarks, Notes, Create Date(s), Create User, Virtual File Tiles, and Fulltext.

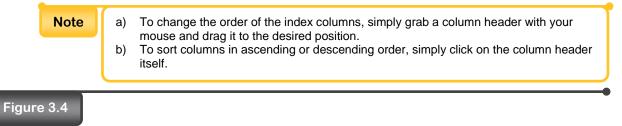
You can also use symbols from the following list. These symbols can be used only when searching on Indexes/Attributes.

<u>Symbol</u>	Meaning	Example of Use	Example of Use Results
<	Less than	<smith< td=""><td>All results with a value in the field that alphabetically comes <u>before</u> "Smith."</td></smith<>	All results with a value in the field that alphabetically comes <u>before</u> "Smith."
		<03/12/2000	All results with a date in the field that is <u>before</u> March 12, 2000.
>	Greater than	>Smith	All results with a value in the field that alphabetically comes <u>after</u> "Smith."
		>03/12/2000	All results with a date in the field that is <u>after</u> March 12, 2000.
<=	Less than or equal to	<=Smith	"Smith" and all results with a value in the field that alphabetically comes <u>before</u> it.
		<=03/12/2000	Results with a date in the field that is on or <u>before</u> March 12, 2000.
>=	Great than or equal to	>=Smith	"Smith" and all results with a value in the field that alphabetically comes after it.
		>=03/12/2000	Results with a date in the field that is on or <u>after</u> March 12, 2000.
,	This OR That	Smith ; Jones	Results with a value in the field of "Smith" or "Jones".
(underscore)	Wildcard – Match one character	M_T	Results with any one character between the letters M and T, such as "Mat" or "Met".

5. Click on the **Search Documents** button located at the top of the page (see Figure 3.3).

Figure 3.3	D Intellivue GX
	File View Tools Help
	HUMAN_RESOURCES Change
	Search Index
	Folder Advanced Inbox
5) Search Documents	Search Documents Clear Erase Attributes 3) Attributes
Button	Search On: Indexes/Attributes Use Logical 'OR' Button
	Value:
	SSN
	LAST_NAME
	FIRST_NAME
	EMPLOYEE_STATUS
	· · · · · · · · · · · · · · · · · · ·
	LOCATION
	DATE_OF_HIRE
	DATE_OF_TERMINATION
	E
	SUBFOLDERS
	DOCUMENT ATTRIBUTES
	Year
4) Document Attributes Values	Document_Type
Entered	Document_Status
Lineled	
	Ready

6. The search results will appear on the right side of the folder index fields and document attributes fields (*see Figure 3.4*).



D Intellivue GX							
<u>F</u> ile <u>V</u> iew <u>T</u> ools <u>H</u> elp							
HUMAN_RESOURCES - Change	je 📳 🗛 🗛 Pub	lisher 🛛 🔏] 🥻	Activity: Empty - In	box Folder View (I	Multiple Tabs) 🔻 🗙		
Search Index							
Folder Advanced Inbox	2 Folders, 2 Docum	ents					
Search Documents Clear Erase Attributes	DATE_OF_HIRE	DEPARTMENT	Document_Status	Document_Type	FIRST_NAME	LAST_NAME	EMPLOYE
	6/16/2000	Administration	Needs Reviewed	Application	JAY	POWERS	Active
Search On: Indexes/Attributes	3/21/2002	Administration	Needs Reviewed	Application	MICHAEL	ECKARD	Active
Value:				1			
LOCATION							
			6)	Search			
DATE_OF_HIRE			Ŕ	lesults			
l							
DATE_OF_TERMINATION			The late				
		der Index					
SUBFOLDERS		and Docur ttributes F					
DOCUMENT ATTRIBUTES		linbules i	leius				
Year							
E							
Document_Type							
Application 👻							
Document_Status							
Needs Reviewed 🗸 🗸							•
Ready					ji	m Server Status: Co	onnected 🔹 🔐

- 7. Select a folder from the search results list to view (see Figure 3.5).
- 8. The selected folder will appear in the **Folder Viewer** window (see Figure 3.5).

Figure 3.5	7) Selected		
2 Intellivue GX	Folder 🗾 📰 🔤	> Folder Viewer	
File View Tools Help		🛅 🍏 🍫 🎯 🖓 📨 POF Options + 723	jtt sandbox/HUMAN_RESOURCE
	Publisher 🖉 🧏 stivity: Empty - Inbox 😜	Folder Portfolio	📘 🗊 🗖 🔝 🕒 🔝 🔸 射 1 of 4 🔤 🔍 🖳 🛃
Search Index		<open bookmarks="" for=""></open>	
Polder Advanced Inbox 2 Polders, 2 Do	TALLS I DOOLITERT TALE I FIRST NAME I LAST NAME	Folder Indexes	ves. 2003 Application for Employment
Search Documents		- Administration	name. Appl entries program, entries and explorates a making and proses. These applicates asymptotectual encounted in terms the application paths are present dual and a spresenties of the Annual Kanasan Department.
yeles:		Pages Create Time Create User 1-2 08/08/2013 abeak	numeround Catherry Section Repairements. margination (c) to 100 non Profit Jay And margination 1985, 35, 9512
LOCATION		•	Allen Add. Backerste, M. Hillyof CH \$1931 Topiner (HT)stackers, Manthuetter (201) \$52-1065 contains, prototic Real, one
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DATE_OF_TERMINATION		Benefits/Health Coverage	Here you wang dad "polon" wat here some "as an base sometand of a sinte". The sometand of a sinter". The sometand of a sinter "The sometand of a sinter "The sometand of a sinter
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	Opened in Folder	Pages Create Time Create User 3.4 08/08/2013 abeek	Total and the second and approximate and the second point in the second se
		General HR	Deliver Manuel? The cathery farmer casts, Scholand terms.
Nar I	Viewer Window	Payroll	Willing Will Brington Block And Long Tellings-same
Document_Type		Pages Create Time Create User	And Keeldard Combineter, BH and Bookensen Rd Colombers 24
Application v		1-2 08/09/2013 jan	State for growth the set of the set
Document_Status Needs Teviewed		· renormance nerver	The set out for the set of a set of a
	"		
Ready	jim Server Status: Connected + ,;;	10 Images and 0 Virtual Piles in 3 Subfolders	

.

9. To perform a new search, click on the **Clear** button. All previously entered search criteria will be cleared from the document attributes fields. All search results will be cleared as well (see *Figure 3.6*).

Figure 3.6	D Intellivue GX
	<u>F</u> ile <u>V</u> iew <u>T</u> ools <u>H</u> elp
	HUMAN_RESOURCES - Change
	Search Index
	Folder Advanced Inbox
	Search Documents Clear
9) Clear	Search On: Indexes/Attributes Use Logical 'OR'
Button	Value:
	FOLDER INDEXES

Section 4 – Additional Folder Tab Searches

Section 4 - Additional Folder Tab Searches

Additional folder tab searches allow you to search for bookmarks, notes, the date a document was indexed, the user who indexed a document, virtual file titles, subfolders, fulltext (contains), and fulltext (freetext). To perform an additional folder tab search, follow the steps listed below.

Steps:

1. Select the application you would like to perform an additional folder tab search in from the application drop down menu located at the top of the **Intellivue[™] GX** window (see Figure 4.1).

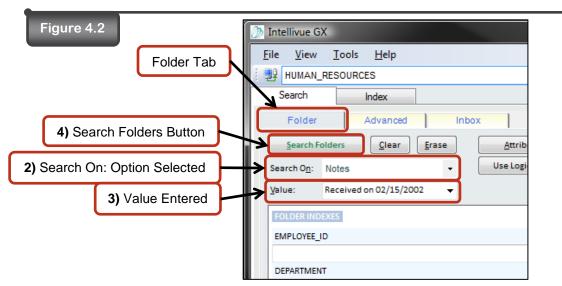


- 2. Select which option you would like to search with from the **Search On:** drop down menu located on the **Folder** tab (*see Figure 4.2*).
 - a. Bookmark searches for a specific bookmark associated with a specific page.
 - b. Notes searches for a specific note associated with a folder or a specific page.
 - c. Create Date(s) searches for documents that were indexed on a specific date.
 - d. Create User searches for documents that were indexed by a specific user.
 - e. Virtual File Titles searches for a specific virtual file tile located in a folder.
 - f. Fulltext (contains) searches for a specific word or phrase, the prefix of a word or phrase, the proximity of a word to another word, or a generational term (inflectional or thesaurus). For more details, refer to section
 - g. Fulltext (freetext) searches for the meaning of a specific word or phrase by breaking the word or phrase down, searching for the inflectional stems of the word or phrase, and searching for synonyms of the word or phrase. For more details, refer to section
- 3. Enter the value you want to search for into the Value: field (see Figure 4.2).

a) You can also enter additional search criteria into the folder index fields and the document attribute fields to narrow your search results down.

4. Click on the **Search Folders** button (see Figure 4.2).

Note



5. The search results will appear on the right side of the folder index fields (see Figure 4.3).

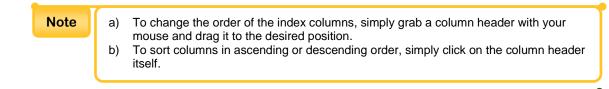


Figure 4.3

Intellivue GX					
File View Tools Help					
HUMAN_RESOURCES • Chang	e 🗈 😽 🌄 Pu	blisher 🛃 🥻	Activity: Emp	ty - Inbox	
Search Index					
Folder Advanced Inbox	3 Folders				
Search Folders Clear Erase Attributes	EMPLOYEE_ID	DEPARTMENT	SSN	LAST_NAME	FIRST_NAME
	JP41022	Administration	123-45-6789	POWERS	JAY
Search On: Notes Use Logical 'OR'	ME41000	Administration	345-67-8901	ECKARD	MICHAEL
Value: Received on 02/15/2002 -	PA41001	Finance	234-56-7890	ASHFORD	PAULETTE
EMPLOYEE_ID DEPARTMENT SSN LAST_NAME	← Fo	der Index Fie	elds	5) Sear Result	
ady				jim Server	Status: Connected 🔻

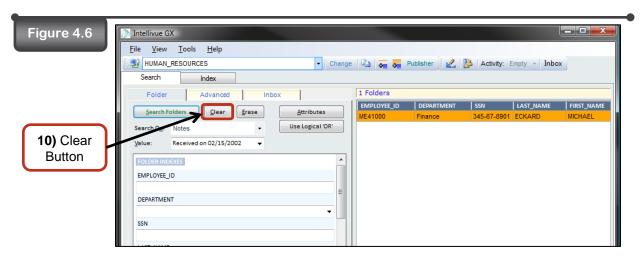
- 6. Select the folder from the search results list that you want to view (see Figure 4.4).
- The additional folder tab search results will appear in the Folder Viewer window in the <Goto Bookmark> drop down list (see Figure 4.4).
- 8. Select a match from the search results list (see Figure 4.4).

Figure 4.4		•
		Folder Viewer Window
Intellive GI	6) Selected	- C Ester Vener
File View Tools Help	Folder	🔁 😅 🖅 🤮 🍇 📧 🚧 Options = 111
HUMAN_RESOURCES . Change (2) (m	- Inbox	P Toler Portolo
Search Index Folder Advanced Index Search-Folders S	Administration 345-67-8901 ECKARD MI	ST_NAME ST_NAME ST_NAME Rom We Stocompany Rom We Stocompany Rom We Stocompany Rom We Stocompany Rom We Rom We Rom We Rom
FEESRE ACCOUNT	8) Match Selected	7) Additional Folder
IIN LAIT_NAME		Tab Search Results Listed
Teady	pre Server Datus	Connected + 2 Images and O Visual Ales in S Subfullers

9. The match will load in the folder view window (see Figure 4.5).

-	(
Figure 4.5	2 Folder Viewer	
	🛅 🚰 🔄 📑 🖻 PDF Options 🕶 ;;;	jtt sandbox/HUMAN_RESOURCES
	Folder Portfolio	📘 🗊 🗖 🔡 🗖 😳 🖒 🕨 1 of 25
	General HR(1)	Page Notes 🕨
	Folder Indexes	(+) 8/9/2013 14:24:6 (jim) Received on 02/15/2002.
	Administration	
	Benefits/Health Coverage	
	General HR	
	Pages Create Time Create User 1-12 08/08/2013 jim	
		▼
	2	
	3	The County's
	4	
	5	representatives and
	6	
	7	9) Match Loaded itted to
	8	
	10	community with prid
	11	
	12	the economic, enviro
	Pages Create Time Create User	• 1 1•, •
		< <u> </u>
	42 Images and 0 Virtual Files in 5 Subfolders	

10. To perform a new search, click on the **Clear** button. All previously entered search criteria will be cleared from the search fields. All search results will be cleared as well (see *Figure 4.6*).



Section 5 – Advanced Search

Section 5 - Advanced Search

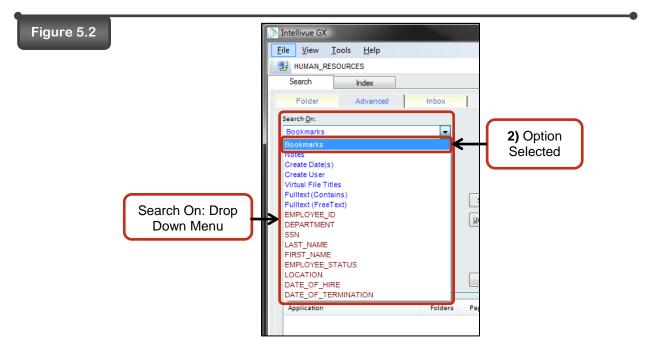
The advanced search allows you to perform detailed searches across multiple applications. You can search for bookmarks, notes, the date a document was indexed, the user who indexed a document, virtual file titles, fulltext (contains), fulltext (freetext), and folder index fields across multiple applications. To perform an advanced search, follow the steps listed below.

Steps:

1. Click on the **Advanced** search tab (see Figure 5.1).

Figure 5.1	D Intellivue GX
	Eile View Iools Help HUMAN_RESOURCES Change Change
	Search On: Indexes/Attributes Yalue: Yalue:
	FOLDER INDEXES EMPLOYEE_ID DEPARTMENT

Select which option you would like to search with from the Search On: drop down menu (see Figure 5.2). For more details on advanced search options, see Appendix E – Advanced Search Options.



3. Select which applications you want to search in or click the **Select All** button to select all of the listed applications (*see Figure 5.3*)

Figure 5.3	D Intellivue GX	
	<u>File V</u> iew <u>T</u> ools <u>H</u> elp	
	HUMAN_RESOURCES	- Change
	Search Index	
	Folder Advanced Inbox	
	Search <u>O</u> n:	
	Bookmarks -	
	Match Scope (Discovery)	
	Check Applications to include in search	
3) Selected	ACCOUNTS_PAYABLE	
Applications		Unselect All

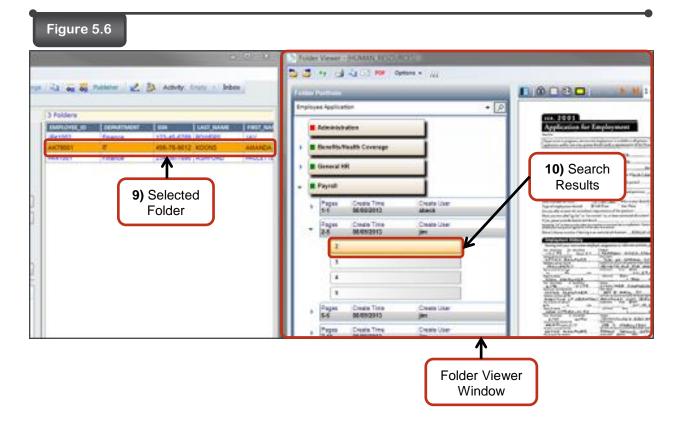
- 4. Enter the information you want to search for into the **Search Value:** field (see Figure 5.4).
- 5. Click on the **Search** Button (*see Figure 5.4*).

Figure 5.4	Intellivue GX File View Iools Help Image: Search Index	•
	Search Index Folder Advanced Inbox Search Qn: Bookmarks Match Scope (Discovery)	
	Check Applications to include in search ACCOUNTS_PAYABLE Sglect All HUMAN_RESOURCES Unselect All	
4) Search Information Entered	Search Value: Employee Application ? Search	5) Search Button

- 6. Search results will appear below the Search Value: field (see Figure 5.5).
- 7. To view the search results for one application, select an application and click on the **List Folders** button (*see figure 5.5*).
- 8. The selected application search results will be listed in the search results area (see Figure 5.5).

Figure 5.5				
DINTERIIVUE GX				
<u>F</u> ile <u>V</u> iew <u>T</u> ools <u>H</u> elp				
HUMAN_RESOURCES	Change 📳 👼 👼 Publisher 🛛 🔏 👺 Activity: Empty 👻 Inbox			
Search Index				
Folder Advanced Inbox	3 Folders			
Search On:	EMPLOYEE_ID DEPARTMENT SSN LAST_NAME FIRST_NAM			
Bookmarks 👻	JP41002 Finance 123-45-6789 POWERS JAY AK78001 IT 456-78-9012 KOONS AMANDA			
Match Scope (Discovery)	PA41001 Finance 234-56-7890 ASHFORD PAULETTE			
· · · · · · · · · · · · · · · · · · ·	•			
Check Applications to include in search ACCOUNTS_PAYABLE Select				
W HUMAN_RESOURCES	All Search Results			
<u>U</u> nselec				
Search Value:				
Employee Application ? Searc				
Application Folders Pages				
ACCOUNTS PAYABLE 0				
HUMAN_RESOURCES 3	7) Selected Application			
	Application			
List Fold	List Folders Button			
6) Search	jsmith Server Status: Connected 🗸 🕫			
Results	Janiti Gever status. Connected • ;;;			

- 9. Select the folder you want to look at from the listed search results (see Figure 5.6).
- 10. The selected folder will appear in the **Folder Viewer** window with the search results (*see Figure 5.6*).



Section 6 – Activity Center

Section 6 - Activity Center

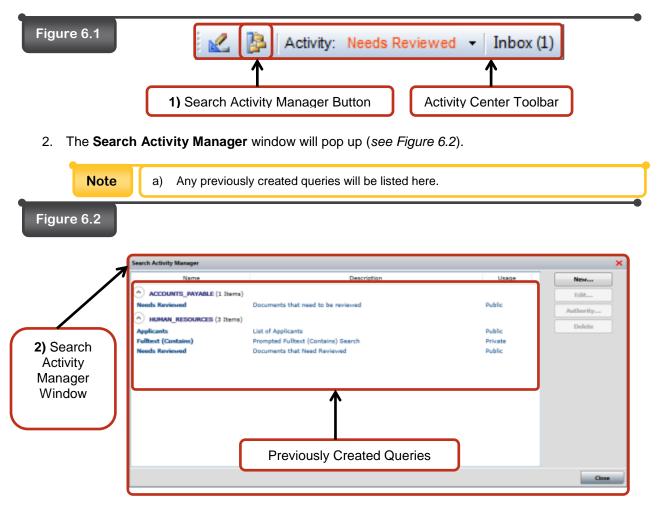
The activity center performs searches of various criteria across multiple fields. Search methods that can be used are equal to (=), not equal to (<>), less than (<), less than or equal to (<=), greater than (>), greater than or equal to (>=), null, not null, in, not in, like, not like, between, not between, function, equal today, and equal user id. For more details on these search methods, see *Appendix D – Activity Center Search Expressions*. Only one application may be searched at a time when using the activity center.

Section 6.1 – Search Activity Manager

The search activity manager contains previously created queries, allows the creation of new queries, the editing of previously created queries, the setting of permissions for previously created queries, and the option to delete previously created queries. To build/edit/delete a query, follow the steps listed below.

Steps:

1. Click on the **Search Activity Manager** button located on the **Activity Center** toolbar (*see Figure* 6.1).



Section 6.1a - New Activity

. . .

To create a new query, follow the steps listed below.

Steps:

- To launch the Search Activity Manager window, follow steps 1 through 2 from Section 6.1 Search Activity Manager.
- 2. To create a new query, click on the New... button (see Figure 6.3).

Search Activity Manager			
Name	Description	Usage	Ne
ACCOUNTS_PAYABLE (1 Iter	ns)		
Needs Reviewed	Documents that need to be reviewed	Public	
A HUMAN_RESOURCES (3 Iter	ns)		Autho
Applicants	List of Applicants	Public	De
Fulltext (Contains)	Prompted Fulltext (Contains) Search	Private	
Needs Reviewed	Documents that Need Reviewed	Public	
		2) New.	. Butt

3. The Search Activity Builder window will pop up (see Figure 6.4).

Figure 6.4	Applications	
3) Search Activity Builder Window		
	Name New Ose logical OR for conditions	
	Even Save Chaine	

4. Select the **Application** you would like to build a new query in from the application drop down menu (see *Figure 6.5*).

gure 6.5	
	Search Activity Builder
4) S App	Applications ACCOUNTS_PAYABLE HUMAN_RESOURCES

- 5. Enter a name for the new query into the **Name** field (*see Figure 6.6*).
- 6. Enter a description for the new query into the **Description** field (see Figure 6.6).
- 7. Set the type of **Usage** applicable to the new query by choosing one of the following options (*see Figure 6.6*):
 - a. Private A privately created query is only visible to the user who created the query.
 Also, a privately created query can only be edited by the user who created the query.
 - b. **Public** A publicly created query is visible to all users. Also, a publicly created query can be edited by all users.

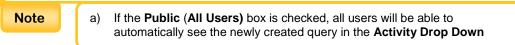
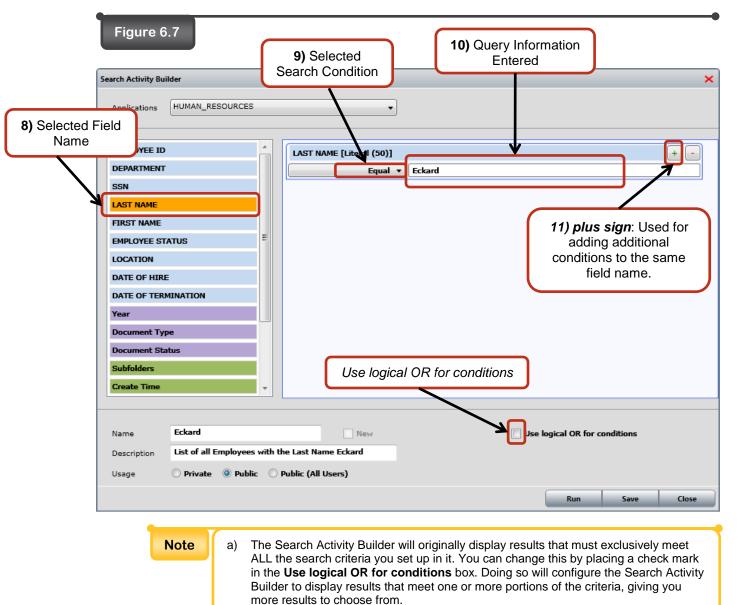


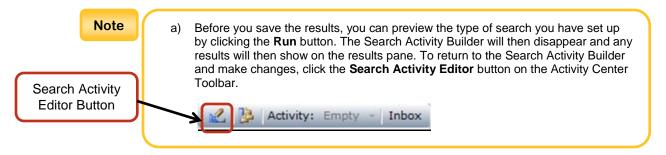
Figure 6.6
Name Eckard New j
Description List of all Employees with the Last Name Eckard
Usage Private Public O Public (All Users)
6) Description Entered into Description Field 7) Public Query Option Selection

- 8. Select the field name you wish to create a query on (see Figure 6.7).
- Select which Search Condition you wish to use to create a query with (see Figure 6.7). For additional information on search conditions, see Appendix D – Activity Center Search Expressions.
- 10. Once you have selected your **Search Condition**, enter your query information into the field provided (*see Figure 6.7*).



11. Repeat steps 9 through 11 until you are finished selecting your fields. If you need to create a query on a different field name, select the field name from the list. If you wish to create a query on the same field name, click on the + (*plus sign*) button (see *Figure 6.7*).

12. Click the **Save** button to retain the setup of your new search activity.



Section 6.1b - Edit Activity

To edit a previously created query, follow the steps listed below.

Steps:

- To launch the Search Activity Manager window, follow steps 1 through 2 from Section 6.1 Search Activity Manager.
- 2. Select a previously created query to edit (see Figure 6.8).
- 3. Click on the **Edit...** button (see Figure 6.8).

Figure 6.8

Name	Description	Usage	New
HUMAN_RESOURCES (2 Iter	is)		Edit
ckard	List of all Employees with the Last Name Eckard	Public	Autopity
	Previously reated Query Selected	:	3) Edit Butto

- 4. The **Search Activity Builder** window will pop up.
- 5. Edit the previously created query as needed, and click on the Save button. The settings will retain and the Search Activity Manager window will close.

Section 6.1c – Authority

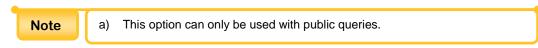
To set permissions on a previously created query, follow the steps listed below.

Steps:

- To launch the Search Activity Manager window, follow steps 1 through 2 from Section 6.1 Search Activity Manager.
- 2. Select a previously created query to which you want to add roles/users (see Figure 6.9).
- 3. Click on the Authority... button (see Figure 6.9).

Search Activity Manager			
Name	Description	Usage	New
HUMAN RESOURCES (2)			Edit
Eckard	List of all Employees with the Last Name Eckard	Public	thority
	2) Previously Created Query Selected		

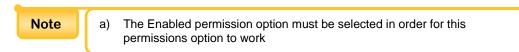
- 4. An **Authority** window will pop up (see Figure 6.10).
- 5. Select the role/user that should have access to the selected query (see Figure 6.10).
- 6. Select the **Permissions** the selected role/user should have when accessing the selected query (*see Figure 6.10*).
 - a. **Enabled** Enables the selected role/user to view the selected public query in the activity center drop down menu.



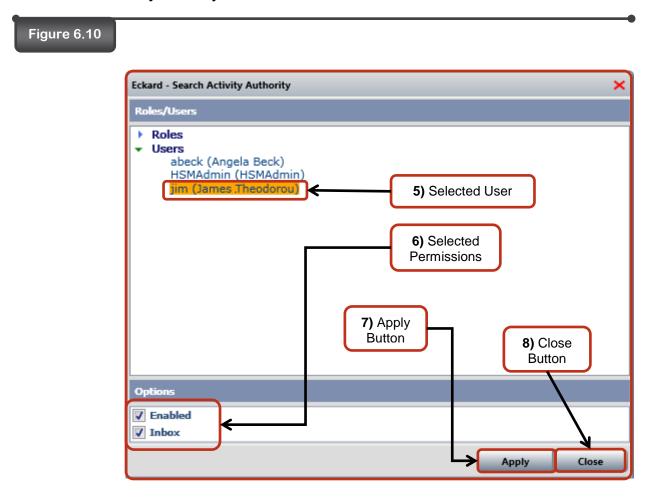
b. **Public Copy** – Allows the selected role/user to copy the selected public query and allows them to customize and edit the selected public query.



Observable – Allows the selected role/user to observe the selected public query in their inbox.



- 7. Click on the **Apply** button (see Figure 6.10).
- 8. When you finish applying permissions, click on the **Close** button (see *Figure 6.10*) to close the **Search Activity Authority** screen.



9. Click the **Close** button on the **Search Activity Manager** window to return to the results pane.

Section 6.1d - Delete

To delete a previously created query, follow the steps listed below.

- To launch the Search Activity Manager window, follow steps 1 through 2 from Section 6.1 Search Manager.
- 2. Select the previously created query you want to delete (see Figure 6.11).
- 3. Click on the **Delete** button (see Figure 6.11).

Search Activity Manager			
Name	Description	Usage	New.
HUMAN RESOURCES (2	Items)		Edit.
Eckard	List of all Employees with the Last Name Eckard	Public	Authori
Needs Reviewed	Documents that need to be reviewed	Public	Delet
	2) Previously Created Query		3) De But

- 4. A **Delete** window will pop up (see Figure 6.12).
- 5. Click on the **Yes** button (see *Figure 6.12*).

Figure 6.12		
	Delete	83
	Are you sure you want to delete this item?	
	Yes No	

- 6. The selected query has now been successfully deleted from the **Search Activity Manager** window (*see Figure 6.13*).
- 7. Click on the **Close** button (*see Figure 6.13*).

ure 6.13			
Search Activity Manager			:
Name	Description	Usage	New
HUMAN_RESOURCES (1 Items)			Edit
Needs Reviewed	Documents that need to be reviewed	Public	Authority
			Delete
	7) Clo Butto	ose	
			Close

Section 6.2 – Activity Drop Down Menu

The activity drop down menu gives a user quick access to run publicly created queries and privately created queries. To run a query from the activity drop down menu, follow the steps listed below.

Steps:

1. Click on the Activity: drop down menu (see Figure 6.14).

Note	a) b) c) d)	Public queries are added to the Activity: drop down menu if the All Users option is checked when a public query is created within the Search Activity Editor window or if the Enabled permission option is checked from the Authority window. Private queries are automatically added to the Activity: drop down menu. In order to see a newly created query in the Activity: drop down menu, you must re- login to the Intellivue ™ GX 2.5 application for it to refresh and show the recently made changes. If multiple queries are listed in the Activity: drop down menu, the public queries will be listed at the top of the list and the private queries will be listed at the bottom of the list, separated by a thin gray line.
------	----------------------	--

2. Select a previously created query (see Figure 6.14).

Figure 6.14	
2) Previously Created Query Selected	Image: style styl

3. Search results for the selected query will be returned in the search results area (see Figure 6.15).

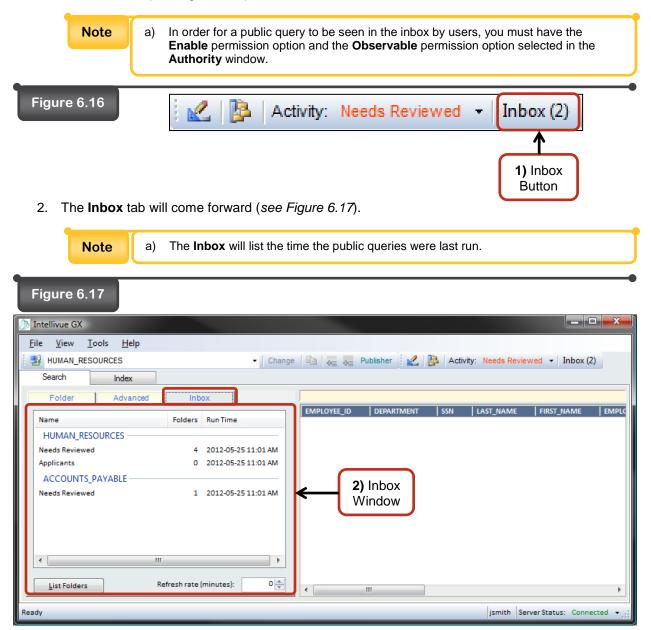
Figure 6.15								
D Intellivue GX								
File View Tools Help								
HUMAN_RESOURCES	- Change	e 🔄 🧓 F	ublisher 🛛 🛃	Activity: I	ickard 👻 Inbo	х		
Search Index								
Folder Advanced Inbox		2 Folders						
Search Folders Clear Erase Attribu	tes	EMPLOYEE_ID ME41000	DEPARTMENT Finance	SSN 345-67-8901	LAST_NAME	FIRST_NAME	EMPLOYEE_STATUS	LOCATION
Search On: Indexes/Attributes - Use Logic	al 'OR'	SY45631	Finance	653-52-1556		JOHN	Active	15
Value:					1			
FOLDER INDEXES	*							
EMPLOYEE_ID				3) 9	elected C			
					arch Res			
DEPARTMENT	-					Julio		
SSN	_							
LAST_NAME	=							
FIRST_NAME								
EMPLOYEE_STATUS	_							
LOCATION	-							
DATE_OF_HIRE								
DATE_OF_TERMINATION								
DOCUMENT ATTRIBUTES								
Year								4
							1	
Ready						js	mith Server Status: Co	onnected 👻 🔐

Section 6.3 – Inbox

When a public query is added to the inbox, the query is run automatically every time you login to the **IntellivueTM GX 2.5** application. When you check the inbox, the search results will be listed for the public query. To view the inbox, follow the steps listed below.

Steps:

1. To view the search results of a public query, click on the **Inbox** button located in the **Activity Center** toolbar(see Figure 6.16).



3. To review the search results of a public query, select a public query (see Figure 6.18).

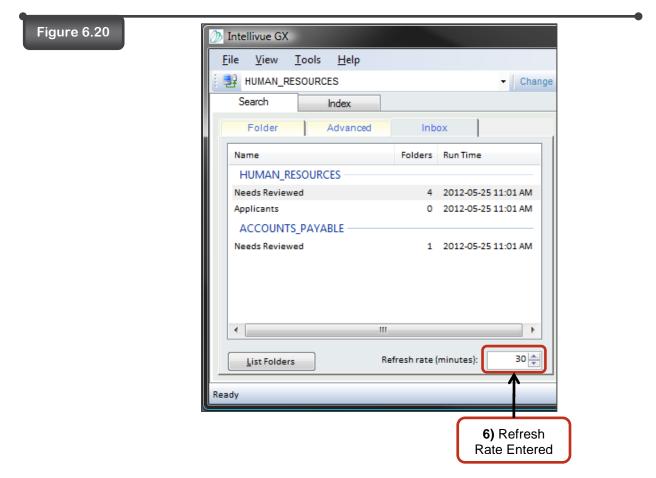
Note a) You can selected	also view the search results of a public query by double-clicking on the query.
Figure 6.18 3) Selected Public Query	Intellivue GX File View HUMAN_RESOURCES Change Search Index Folder Advanced Inbox EMPLOYEE Name Folders HUMAN RESOURCES EMPLOYEE Needs Reviewed 4 2012-05-25 11:01 Accounts_PAYABLE 1 Needs Reviewed 1 2012-05-25 11:01
4) List Folders Button	List Folders Refresh rate (minutes): Image: Comparison of the second se

4. Click on the List Folders button (see Figure 6.18).

5. The search results for the selected public query will appear in search results area (*see Figure 6.19*).

ile <u>V</u> iew <u>T</u> ools <u>H</u> HUMAN_RESOURCES	<u>1</u> eip	- Chang		uhlisher 🕴 🥒 📗	A other A	laada Daviawaa	Inhov (2)	
Search Inde		• Chang	je 🗈 👦 F		Activity.	veeds Reviewed	1 • INDOX (2)	
		1	Currie un					_
Folder Adv	vanced Inb	ox	4 Folders, 4 Do		1.000	1		_
Name	Folders	Run Time	EMPLOYEE_ID	DEPARTMENT Finance	SSN 123-45-6789	LAST_NAME	FIRST_NAME	
HUMAN_RESOURCES			ME41002	Finance	345-67-8901		MICHAEL	
Needs Reviewed	4	2012-05-25 11:01 AM	AK78001	П	456-78-9012		AMANDA	
Applicants	0	2012-05-25 11:01 AM	PA41001	Finance	234-56-7890	ASHFORD	PAULETTE	
ACCOUNTS_PAYABLE	·					1		
Needs Reviewed		2012-05-25 11:01 AM						
				C				
					5) Searc			
					Results			
•	III	Þ						

6. If you want to change the rate at which the inbox refreshes while you are logged in, enter the rate of minutes into the **Refresh rate (minutes):** box (*see Figure 6.20*).

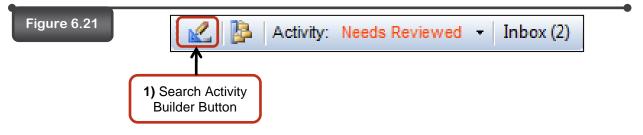


Section 6.4 – Search Activity Builder

The Search Activity Builder allows you to perform a quick detailed query. To perform a quick detailed query, follow the steps listed below.

Steps:

1. Click on the **Search Activity Builder** button located on the **Activity Center** toolbar (see *Figure* 6.21).

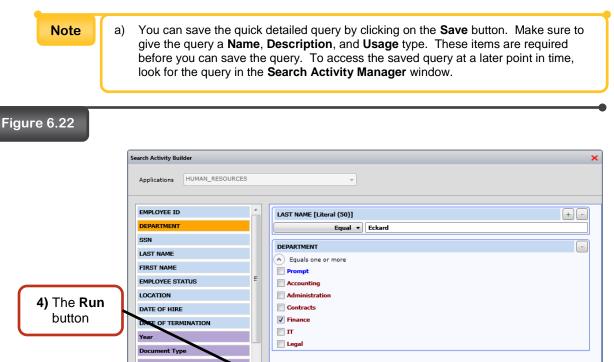


- 2. A Search Activity Builder window will pop up (see Figure 6.22).
- 3. Fill out the Search Activity Builder (see Section 6.1a New Activity.)
- 4. Click on the **Run** button (see *Figure 6.22*).

Name Description

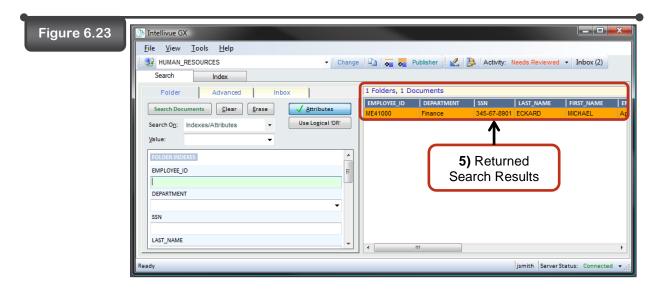
Usage

🔿 Private 💿 Public 💿 Public (All Users)



Use logical OR for condition

5. Search results for the quick detailed query will be returned in the search results area (see Figure 6.23).



Section 7 – Modifying Folder Indexes

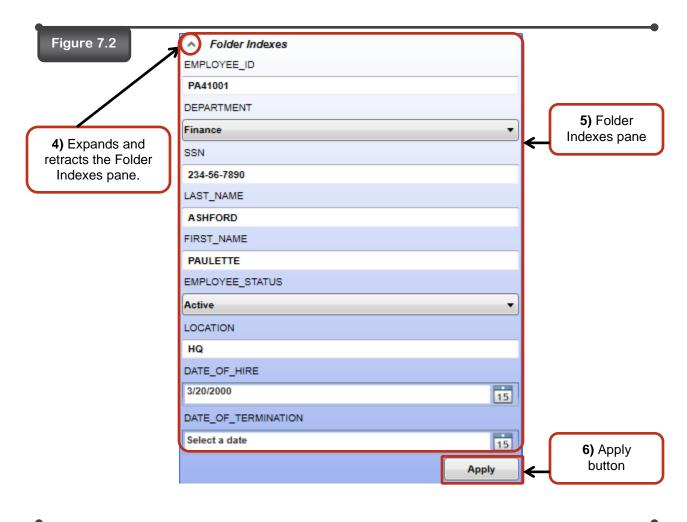
Section 7 – Modifying Folder Indexes

Modifying a folder allows you to update the information entered into the folder index fields for a specific folder. To modify a folder, follow the steps listed below.

- 1. Search for the folder you want to update (see Figure 7.1).
- 2. Select the folder from the search results area (see Figure 7.1).

Search Index Folder Advanced Inbox Search Folders Glear Search Colders Glear Search Colders Glear Search Colders Glear Search Colders Glear PA41001 Finance 234-56-7890 ASHFORD PAULETTE PA41001 Finance 234-56-7890 Sin Use Logical 'OR' Yalue: - Folder to EMPLOYEE_ID Colder to LAST_NAME Ashford First_NAME Ashford First_NAME Paulette EMPLOYEE_STATUS		Eile View Iools Help) 🙀 👼 Publisher 🛛 🔣 📴 Activity: Needs Reviewed 👻 Inbox (2)
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Paulette			

- 3. The selected folder information will appear in the left side of the screen (see Figure 7.2).
- 4. Click the arrow next to Folder Indexes section to reveal its details (see Figure 7.2).
- 5. Make your changes to any or all fields of the Folder Indexes pane (see Figure 7.2).
- 6. Click **Apply** to save the changes (see Figure 7.2).





7. Click the arrow to close the Folder Indexes information (see Figure 7.3).

Section 8 – Modifying Document Attributes

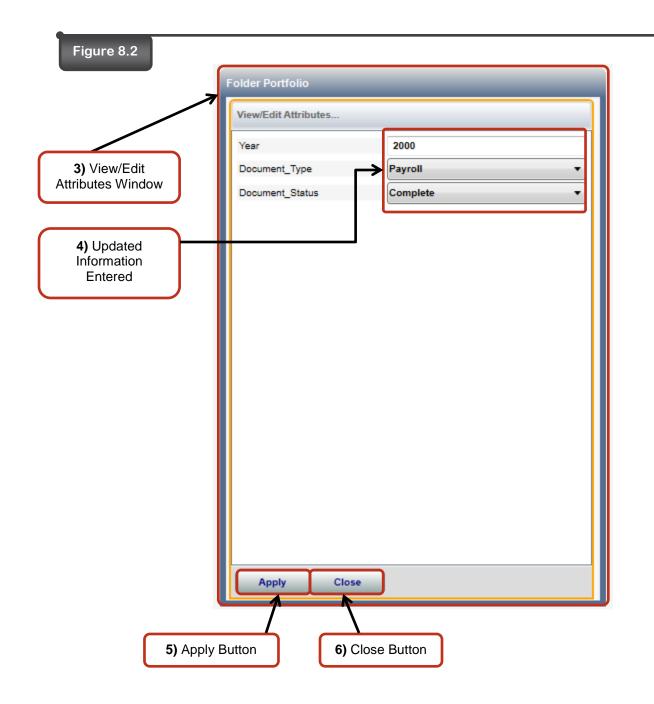
Section 8 – Modifying Document Attributes

Modifying document attributes allows you to update the information entered into the document attributes fields for a specific document/pageset. To modify document attributes, follow the steps listed below.

- 1. Locate and select the document/pageset you want to update (see Figure 8.1).
- 2. Click on the Edit Indexes/Attributes button (see Figure 8.1).

Figure 8.1	
Folder Portfolio <open bookmarks="" for=""> Folder Indexes</open>	
	t Indexes/Attributes Button
Benefits/Health Coverage	Fiease Print
Pages Create Inte Create User 1-9 08/09/2013 jim	Equal acc applicatio
1 ≡	Position() Name
3	Address

- 3. The View/Edit Attributes window will appear (see Figure 8.2).
- 4. Enter the updated information into the document attributes fields (see Figure 8.2).
- 5. Click on the **Apply** button (*see Figure 8.2*). The document attribute fields have now been successfully updated.



6. Click on the **Close** button (see Figure 8.2).

Section 9 – Bookmarks

Section 9 – Bookmarks

Bookmarks are markers used to reference a particular page. Bookmarks can only be used at page level. Only one bookmark maybe assigned per page.

Section 9.1 – Adding a Bookmark

Adding a bookmark allows you to select a specific page and mark it for reference to view at a later point in time. To add a bookmark, follow the steps listed below.

- 1. Select the page you would like to add a bookmark to (see Figure 9.1).
- 2. Click on the **Bookmarks/Notes** button (see Figure 9.1).

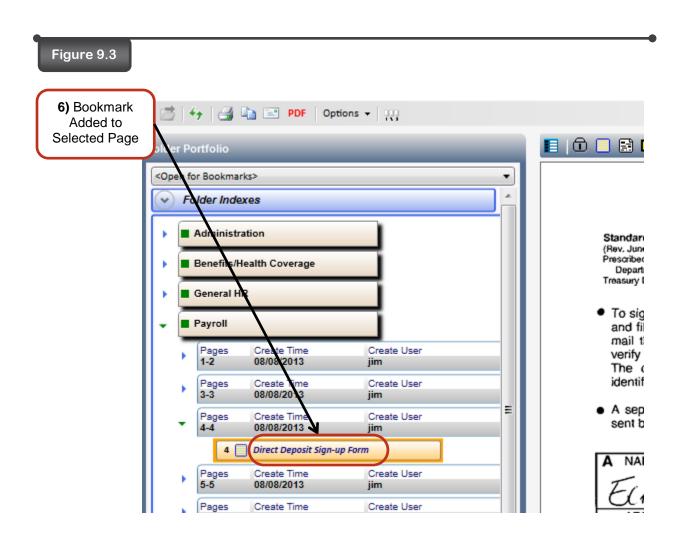
	Portfolio	1	_		
	for Bookma Folder Inde) Bookmarks/Notes Button
	Administr Benefits/H	lealth Coverage			Standard Form 1199A (Ed (Rev. June 1987) Prescribed by Treasury Department Treasury Dept. Cir. 1076
	Payroll Pages	Creste Time 08/08/2013	Create User		 To sign up for Direct and fill in the informa mail this form to the verify the information
•	Pages 3-3 Pages	Create Time 08/08/2013 Create Time	Create User jim Create User	=	The completed form identified below.A separate form must
·	4-4 4 [Pages	08/08/2013	jim Create User		A NAME OF PAYEE

- 3. A Bookmark/Notes window will expand (see Figure 9.2).
- 4. Enter the term you want to give the bookmark into the **Bookmark** field or select a predefined bookmark from the bookmark drop down menu (see *Figure 9.2*).
- 5. Click on the **Apply** button (see Figure 9.2).

Figure 9.2	3) Bookmark/Notes Window
	🔍 🔍 📑 📑 🐂 🂢 🕶 Full View
Page - Bookmark/Notes	×
Notes: [+] 8/9/2013 14:46:16 (jim) Received on 02/15/2002 Enter new notes here	4) Bookmark Term Entered
5) Apply Button	~
Standard Form 1199A (EG) (Rev. June 1987) Prescribed by Treasury Department Treasury Dept. Cir. 1076	DIRECT DEPOSIT SIGN

6. The **Bookmark/Notes** window will automatically close adding the bookmark to the selected page (see Figure 9.3).

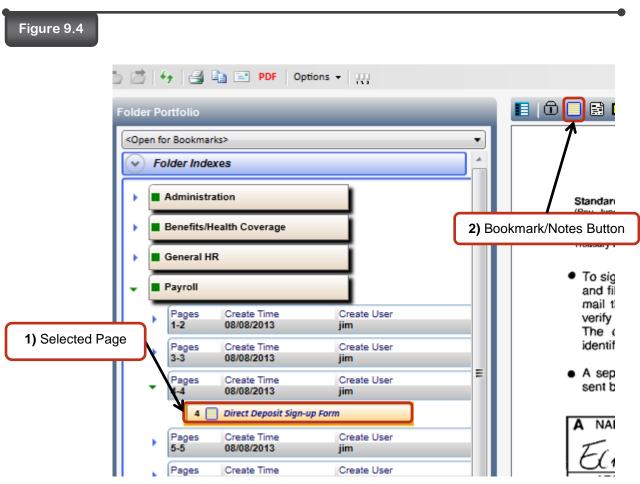




Section 9.2 - Deleting a Bookmark

Deleting a bookmark allows you to delete a bookmark from a specific page. To delete a bookmark, follow the steps listed below.

- 1. Select the page you would like to delete a bookmark from (see Figure 9.4).
- 2. Click on the Bookmark/Notes button (see Figure 9.4)



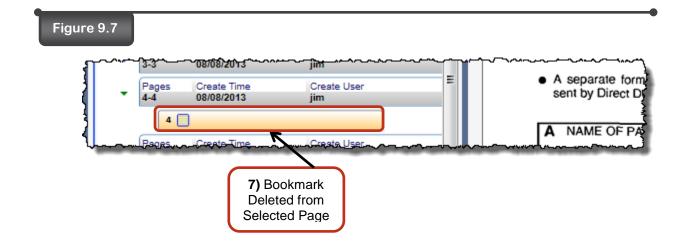
- 3. A **Bookmark/Notes** window will expand (see Figure 9.5).
- 4. Click on the Delete Bookmark/Notes button. Then, click Bookmark (see Figure 9.5).

Figure 9.5			3) Bookmark/Notes Window
	Page - Bookmark/Notes	▶ 4 of 11	4) Delete Bookmark/Notes Button when clicked.
	Bookmark: Direct Deposit Sign-up Form	Bookmark Notes	-
	Notes: [+] 8/9/2013 14:46:16 (jim) Received on 02/15/2002	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

- 5. A **Confirm Delete** window will pop up asking if you are sure you want to delete the selected bookmark (see *Figure 9.6*).
- 6. Click on the **Yes** button (see Figure 9.6).

Figure 9.6	Confirm Delete	
5) Confirm Delete Window	Are you sure you want to delete this bookmark?	
	<u>Y</u> es <mark>№</mark>	6) Yes Button

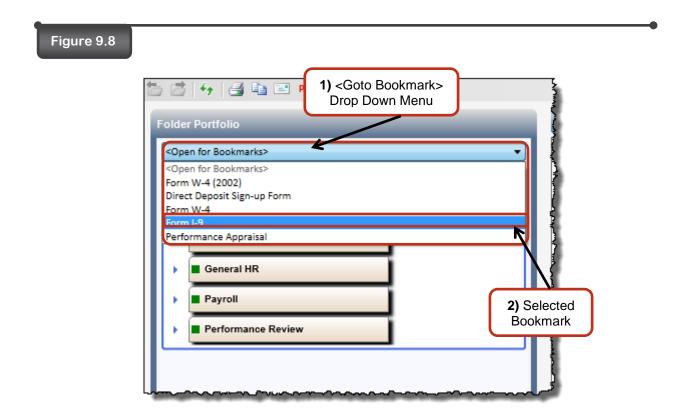
7. The **Bookmark/Notes** window will automatically close deleting the bookmark from the selected page (see *Figure 9.7*).



Section 9.3 - Search for a Bookmark

To search for a bookmark within a selected folder, follow the steps listed below.

- 1. Click on the **<Goto Bookmark>** drop down menu (see Figure 9.8).
- 2. Select the bookmark you want to search for (see Figure 9.8).



3. The selected page containing the selected bookmark will open (see Figure 9.9).

Fiau	re 9.9

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ler Portfolio	📘 💼 🔜 🖾 📕 📢 🔸 👌 🔢 11 of 11
Pages Create Time Create User 12 08/08/2013 jim Pages Create Time Create User 3 Selected Page Containing Selected Bookmark 7-9 08/05/013 jim Pages Create The Create User 10-10 08/08/2013 jim	Errorm 1-9 (Rev. 11-21-91) M Immigration and Naturalization Service Employment Eligibility Verification Press result Employment Eligibility Verification Press result Employment Eligibility Verification CANNOT Sectify Mich document() the ywill accept fram an employment base individual because of a failure explanation and verification. The instructions must be available distribution explores the failure explanation and verification. The instructions must be available distribution explores the failure explanation and verification. The instructions must be available distribution explores the failure e
Pages Create Time Create User 11-11 08/09/2013 jim	Address (River Name and Number, Cay, State, Zg Cubit) Date (Incentristary/sea) Section 2. Employer Review and Verification. To be completed and signed by encloses. A completed and signed the standa one electronic trans. Lab, of examine one advecterier from List and and even final file of the standa store of the time advectory of the file standard and state and the completed and state and the state of the completed and state of the completed and state and the state of the state of the completed and state and the state of the state and the state of the state
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Section 10 – Notes

Section 10 - Notes

Notes allow you to add additional information to a folder or a page. You can add multiple notes to any folder or page. In addition, notes can be deleted. To add/delete notes, follow the steps listed below.

Section 10.1 – Folder Notes

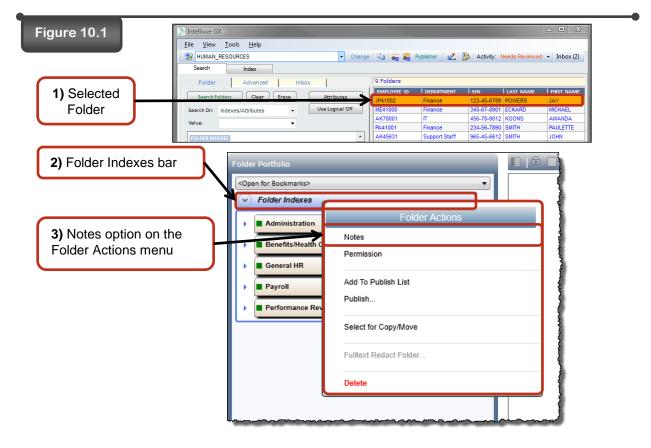
Folder notes allow you to add specific notes to or delete notes from the currently selected folder. To add/delete folder notes, follow the steps listed below.

Section 10.1a – Adding a Folder Note

To add a folder note, follow the steps listed below.

Steps:

- 1. Select the folder you want to add notes to (see Figure 10.1). The folder information appears.
- 2. Right-click on the Folder Indexes bar (see Figure 10.1). The Folder Actions menu appears.
- 3. Click the **Notes** option (see Figure 10.1).



4. The Folder - Bookmark/Notes window will expand (see Figure 10.2)

(

- 5. Enter the information for the note into the provided area (see Figure 10.2).
- 6. Click on the **Apply** button (see Figure 10.2).

Figure 10.2	6) Apply Button	
	Folder - Bookmark/Notes 📦 🖬 🗸	×
	Bookmark:	
	· · · · · · · · · · · · · · · · · · ·	
	Notes:	
Information		^
Entered		
		Ŧ
	Received on 02/01/2011	^
	2	
		~

- A message asking you "Are you sure you want to apply these changes?" will appear on your screen. Click Yes to apply. The Folder - Bookmark/Notes window will automatically close adding the note to the selected folder.
- 8. Click on the **Refresh** button. The newly added folder note will appear above the image viewer (see *Figure 10.3*).

Note a) To have the folder notes appear automatically, click on the **Options** drop down menu, click on the **Show Folder Notes** option.

Figure 10.3 Refresh Button	
🛅 🖆 🕂 PDF Options 🗸 💥	jtt sandbox/HUMAN_RESOURCES
Folder Portfolio	
<open bookmarks="" for=""></open>	Folder Notes 🕨 🗙
Folder Indexes	[+] 8/20/2013 11:6:24 (jim) Received on 02/01/2011
Administration	
Benefits/Health Coverage	
General HR	
Payroll	
Performance Review	
	Newly Added Folder Note

Section 10.1b – Deleting Folder Notes

To delete a folder note, follow the steps listed below.

Steps:

- 1. Select the folder you want to delete notes from (see Figure 10.4).
- 2. Right-click the Folder Indexes bar.
- 3. Click the **Notes** option from the Folder Actions menu that appears (see Figure 10.4).

4) Calestad	Change C
2) Folder Indexes bar	
3) Notes option on the Folder Actions menu	Folder Actions Notes Permission Add To Publish List
Performance Re	Publish Select for Copy/Move
	Fulltext Redact Folder

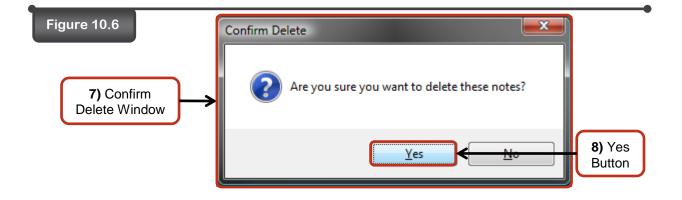
- 4. The Folder Bookmark/Notes window will expand (see Figure 10.5)
- 5. Click the Delete Bookmarks/Notes button (see Figure 10.5).
- 6. Click the **Notes** menu option (see Figure 10.5).

Note

a) The **Notes** button will delete all of the folder notes. You are not able to choose which individual notes can be deleted.

Figure 10.5	5) Delete Bookmark/Notes button	
Folder Portfolio	Folder - Bookmark/Notes Folder - Bookmark/Notes Bookmark: Notes: [+] 8/20/2013 11:6:24 (jim) Received on 02/01/2011 Enter new notes here 6) Click the Notes button	

- 7. A **Confirm Delete** window will pop up asking if you are sure you want to delete all folder notes (see *Figure 10.6*).
- 8. Click on the **Yes** button (*see Figure 10.6*).



9. The **Bookmark/Notes** window will automatically close deleting the notes from the selected folder.

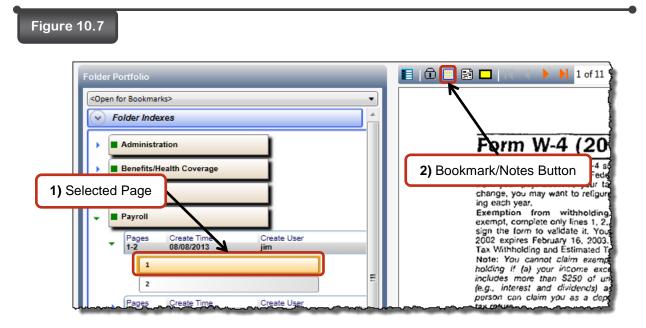
Section 10.2 - Page Notes

Page Notes allow you to add specific notes to or delete notes from the currently selected page. To add/delete a page note, follow the steps listed below.

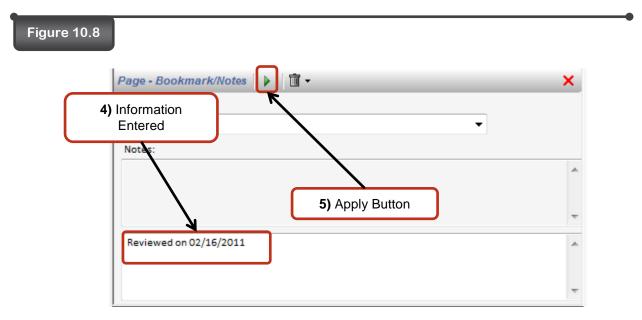
Section 10.2a – Adding a Page Note

To add page notes, follow the steps listed below.

- 1. Select the page you want to add a note to (see Figure 10.7).
- 2. Click on the **Bookmark/Notes** button (see Figure 10.7).



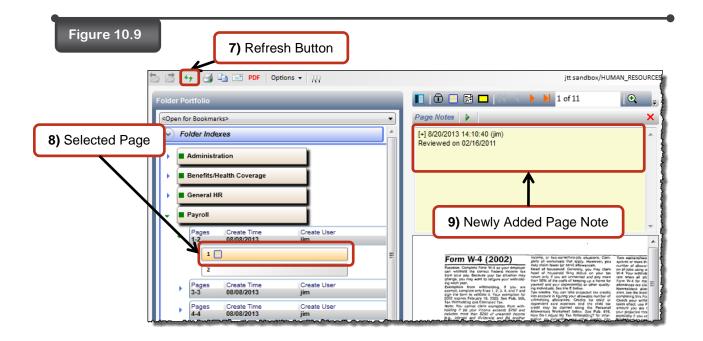
- 3. The Page Bookmark/Notes window will expand (see Figure 10.8).
- 4. Enter the information for the note into the provided area (see Figure 10.8).
- 5. Click on the Apply button (see Figure 10.8).



Note

- A message asking "Are you sure you want to apply these changes?" will appear. Click Yes to continue. The Page - Bookmark/Notes window will automatically close adding the note to the selected page.
- 7. Click on the **Refresh** button (see Figure 10.9).
- 8. The newly added page note will appear above the image viewer (see Figure 10.9).

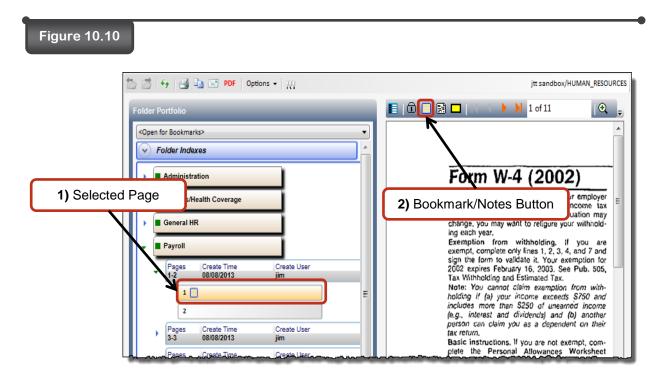
a) To have the page notes appear automatically, click on the **Options** drop down menu, click on the **Show page notes when page item selected** option.
b) A bookmark/note icon will appear on the selected page within the subfolders indicating the selected page contains notes.



Section 10.2b – Deleting Page Notes

To delete page notes, follow the steps listed below.

- 1. Select the page you want to delete notes from (see Figure 10.10).
- 2. Click on the **Bookmark/Notes** button (see Figure 10.10).



- 3. The Page Bookmark Notes window will expand (see Figure 10.11)
- 4. Click on the **Delete Bookmark/Notes** button (see Figure 10.11).
- 5. Click the **Notes** menu option (see Figure 10.11).

Note

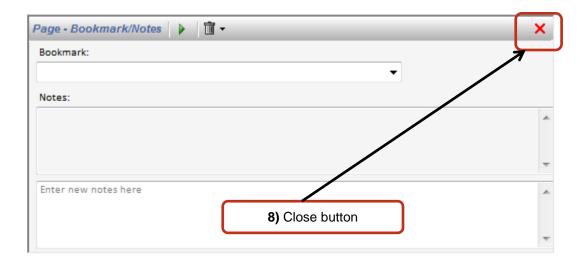
a) The **Delete Notes** button will delete all of the page notes. You are not able to choose which individual notes can be deleted.

gure 10.11	Page - Bookmark/Notes		×
	Bookmark:	Bookmark	
		Notes	•
4) Delete No	tes Button		
	[+] 8/20/2013 14:10:40 (ji		*
5) Click th menu c			-
	Enter new notes here		*
			~

- 6. A **Confirm Delete** window will pop up asking if you are sure you want to delete all page notes (see *Figure 10.12*).
- 7. Click on the **Yes** button (see Figure 10.12).

Figure 10.12		
	Confirm Delete	
6) Confirm Delete Window	Are you sure you want to delete these notes?	
	<u>Y</u> es <u>No</u>	7) Yes Button

8. The **Bookmark/Notes** will remain open for you to add notes and/or bookmarks. To close, click the close button in the upper right corner (*see Figure 10.12*).



Section 11 – Dynamic Annotations

Section 11 – Dynamic Annotations

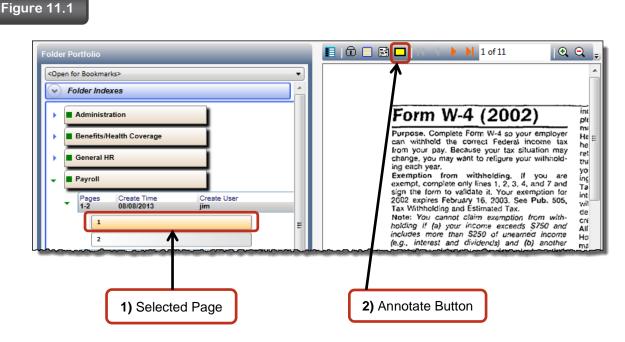
Dynamic Annotations allow you to add highlights, boxes and text boxes to selected areas of a page. To add highlights/boxes/text boxes, follow the steps listed below.

Section 11.1 – Highlight Annotations

Highlight Annotations allows you to highlight certain sections of a page. You can add multiple highlight annotations to a selected page. To add highlight annotations, follow the steps listed below.

Steps:

- 1. Select the page you want to add highlight annotations to (see Figure 11.1).
- 2. Click on the Annotate button (see Figure 11.1).



- 3. The **Annotate** window will expand (see Figure 11.2).
- 4. Place a dot in the **Highlight** option (see Figure 11.2).
- 5. Select the color you want your highlight annotations to be from the **Highlight Color Option** drop down menu (see Figure 11.2).
- 6. Select the area on the selected page you want to highlight.

 a) To highlight a selected area on a page, place your curser at the top left-hand corner of the selected area. Holding down the left button on your mouse, draw a highlight box over the selected area. Once you are done drawling the highlight box, let go of the left button on your mouse.

Note

7. The selected area will now be highlighted (see Figure 11.2).

a) To resize the highlight annotation, select the highlight box and resize it to the desired size.b) To move the highlight annotation, select the highlight box and move it to the desired location.

8. Click on the **Apply** button (*see Figure 11.2*).

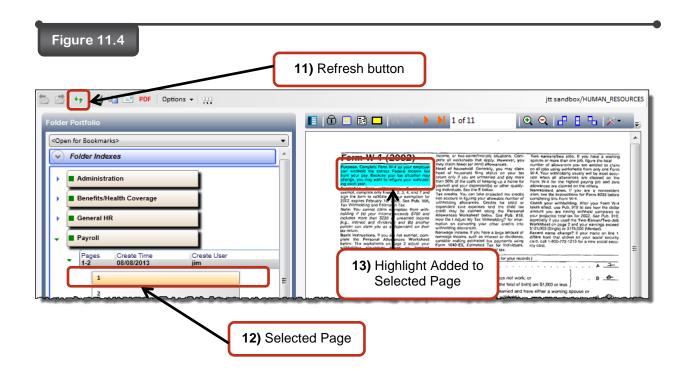
Note

Figure 11.2	8) Apply
Folder Portfolio Copen for Bookmarks> Folder Indexes Folder Indexes	Annotate
Administration Benefits/Health Coverage 3) Annotate	 Highlight Box Text Font Font Fighlight Color Selected
Pages Create Time Create User 1-2 08/08/2013 jim 2 7) Selected Area Highlighted	Form W-4 (2002) Purpose. Complete Form W-4 so your employer can withhold the correct Federal income tax throm your pay. Because your tax situation may change, you may want to religure your withhold ing each year.

- 9. A **Confirm Apply** window will pop up (see Figure 11.3).
- 10. Click on the **Yes** button (see Figure 11.3).



- 11. Click on the **Refresh** button (see Figure 11.4).
- 12. Click on the selected page you added the highlight to (see Figure 11.4).
- 13. The added highlight has now been successfully applied to the selected page (see Figure 11.4).



Section 11.2 – Box Annotations

Box Annotations allow you to apply boxes to certain sections of a page. You can add multiple box annotations to a selected page. To add box annotations, follow the steps listed below.

Steps:

- 1. Select the page you want to add box annotations to (see Figure 11.5).
- 2. Click on the **Annotate** button (see Figure 11.5).

Figure 11.5	2) Annotate	Button
 Adri Ber Ger Pay 	ookmarks> er Indexes ministration nefits/Health Coverage neral HR rroll ages Create Time Create User	■ I of 11 ■ ■ ■ ■ ■ ■ 1 of 11 ■ ■ ■ ■ ■ ■ ■ 1 of 11 ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■
	1) Selected Page	

- 3. The Annotate window will expand (see Figure 11.6).
- 4. Place a dot in the **Box** option (*see Figure 11.6*).
- 5. Select the color you want your box annotations to be from the **Box Color Option** drop down menu (see *Figure 11.6*).
- 6. Select the area on the selected page you want to add a box annotation to.

Note	a) To add a box annotation to a selected area on a page, place your curser at the top left-hand corner of the selected area. Holding down the left button on your mouse, draw a box annotation over the selected area. Once you are done drawling the box annotation, let go of the left button on your mouse.

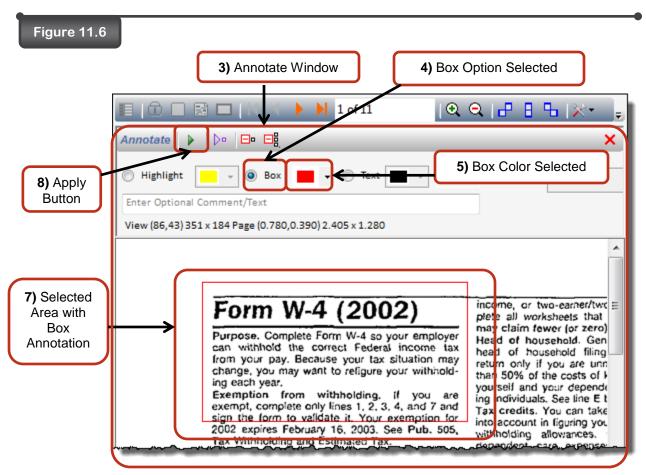
7. The selected area will now have a box annotation around it (see Figure 11.6).

To resize the box annotation, select the box annotation and resize it to the desired a) size. b) To move the box annotation, select the box annotation and move it to the desired

 I o move the box annotation, select the box annotation and move it to the desired location.

Note

8. Click on the **Apply** button (see Figure 11.6).



- 9. A message asking "Are you sure you want to apply these annotations?" will appear. Click **Yes** to proceed.
- 10. Click on the **Refresh** button (see Figure 11.7) and see the page updated with annotations.

Figure 11.7	Refresh Button
Elder Portfolio	📔 🗊 🗔 🔛 🔍 🔇 🕨 🔰 1 of 11
Copen for Bookmarks> Folder Indexes Administration Benefits/Health Coverage General HR Payroll Payroll Pages Create Time Create User 1-2 08/08/2013 jim 1	Form W-4 (2002) Purpose, Complete Form W-4 so your employer can withhold the correct Federal income tax from your pay. Because your tax situation may change, you may want to refigure your withhold- ing each yea. Exemption from withholding, if you are exempt, complete only fines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2002 expires February 16, 2003. See Pub. 505, Tax Withholding and Estimated Tax. Note: You cannot claim exemption from with- holding if Jay your income exceeds \$750 and incluses, more, than, \$250 of unserned, income

Section 11.3 – Text Annotations

Text Annotations allow you to add text boxes to certain sections of a page. You can add multiple text annotations to a selected page. To add text annotations, follow the steps listed below.

Step:

- 1. Select the page you want to add text annotations to (see Figure 11.8).
- 2. Click on the **Annotate** button (see Figure 11.8).

Folder Portfolio	Figure 11.8	2) Annotate Button
	<pre><open bookmarks="" for=""> </open></pre> Folder Indexes Administration Benefits/Health Coverage General HR Payroll Pages Create Time Create User 1-2 08/08/2013 jim	Form W-4 (2002) Purpose. Complete Form W-4 so your employer can withhold the correct Federal income tax from your pay. Because your tax situation may change, you may want to refigure your withhold- ing each year. Exemption from withholding. If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2002 expires February 16, 2003. See Pub. 505, Tax Withholding and Estimated Tax. Note: You cannot claim exemption from with- holding if (a) your income exceeds \$750 and includes more than \$250 of unearned income (e.g., interest and dividends) and (b) another ms

- 3. The Annotate window will expand (see Figure 11.9).
- 4. Place a dot in the **Text** option (see Figure 11.9).
- 5. Select the color you want your text annotations to be from the **Text Color Option** drop down menu (see *Figure 11.9*).
- 6. Select the font you want your text annotations to be from the Font... button (see Figure 11.9).

Figure 11.9	
Annotate	
Highlight Box Enter Optional Comment/Text	Font 6) Font Selector
View (796,18) 606 x 134 Page (7.220,0.1	65) 1.725 × 1.050
Form W-	4 (2002) income, or E
Purpose. Complete can withhold the	Form W-4 so your employer correct Federal income tax head of ho

7. Select the area on the selected page you want to add a text annotation box to.



a)

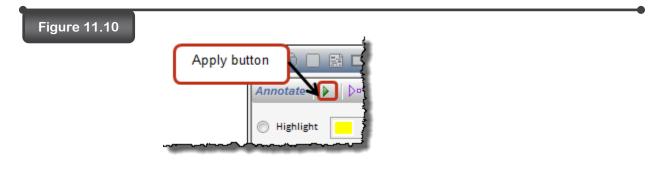
To add a text annotation box to a selected area on a page, place your cursor at the top left-hand corner of the selected area. Holding down the left button on your mouse, draw a text annotation box over the selected area. Once you finish drawing the text annotation, let go of the left button on your mouse.

- 8. The selected area will now contain a text annotation box.
- 9. To add text to the text annotation box, select the text annotation box.
- 10. Enter the text you want to add to the text annotation box into the Enter Optional Comment/Text field.
- 11. The entered text will now be added to the text annotation box.



To resize the text, select the text annotation box and resize the box until the text is at a) the desired size. b) To move the text annotation box, select the box and move it to the desired location.

- 12. Click on the **Apply** button (see Figure 11.10).



- 13. A message asking "Are you sure you want to apply these annotations?" appears.
- 14. Click on the **Yes** button.

- 15. Click on the **Refresh** button (see Figure 11.11).
- 16. Click on the selected page you added the text annotation to (see Figure 11.11).
- 17. The added text annotation has now been successfully applied to the selected page (*see Figure 11.11*).

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<open< th=""><th>for Bookmarks></th><th>•</th><th>. Needs Reviewed</th></open<>	for Bookmarks>	•	. Needs Reviewed
	Administration 15) Refresh General HR Payroll Pages Create Time 1-2 08/08/2013 1	Button	 Form V-4 (2002) Participant Strategies (2004) Participant Strategies (2
•	Pages Create Time 3-3 08/08/2013 Pages Create Time 4-4 08/08/2013	Create User	C Enter "1" for your spouse. But, you may choose to enter "-0" if you are married and have either a working social common more than one (c). (Entering -0" in your below you have to be the set of the short (c). (C)
•	Pages Create Tim 5-5 08/08/2013 Pages Create Time 6-6 08/08/2013	16) Selected page cli	CKEO A blood for do not trial block which is they do do that of "I you have the or mose sight cuber. G I house the or host trial block which is may do done that on host her or mose sight cuber. I house the or host trial block which is may do done that the main adjustments to income and want to reduce your withholding, see the Deductions and Adjustments Worksheet on spage 2. I house more than ever bloc are piob or are martied and you and your sepsuse both works and the combined earnings worksheets I worksheet I worksheet I
•	Pages Create Time 7-9 08/08/2013	Create User jim	that apply. I realisher of the above alluations applies, stop here and enter the number from time H on line 5 of Form W-4 below. Cut here and give Form W-4 to your employer. Keep the top part for your records.
•	Pages Create Time 10-10 08/08/2013	Create User jim Create User	For W-4 Construct to a window and the store of t

Section 11.4 – Stamp Annotations

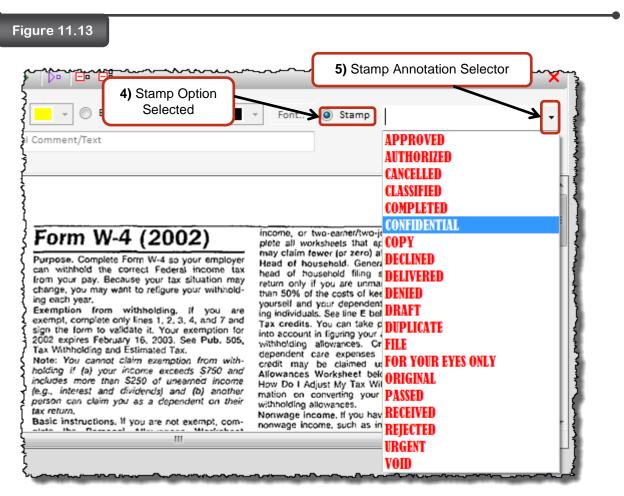
Text Annotations allow you to add text boxes to certain sections of a page. You can add multiple text annotations to a selected page. To add text annotations, follow the steps listed below.

Step:

- 1. Select the page you want to add text annotations to (see Figure 11.12).
- 2. Click on the **Annotate** button (see Figure 11.12).

Figure 11.12	2) Annotate Button
Folder Portfolio	E I I of 11 I of 11

- 3. The Annotate window will expand (see Figure 11.13).
- 4. Place a dot in the **Stamp** option (see Figure 11.13).

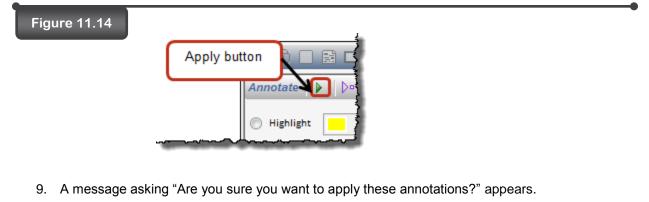


- 5. Click the dropdown to reveal a list of stamp annotations. Select the desired stamp annotation.
- 6. Select the area on the selected page where you want to add the stamp annotation box.

 b) To add a stamp annotation box to a selected area on a page, place your cursor at the top left-hand corner of the selected area. Holding down the left button on your mouse, draw a stamp annotation box over the selected area. Once you finish drawing the stamp annotation, let go of the left button on your mouse.

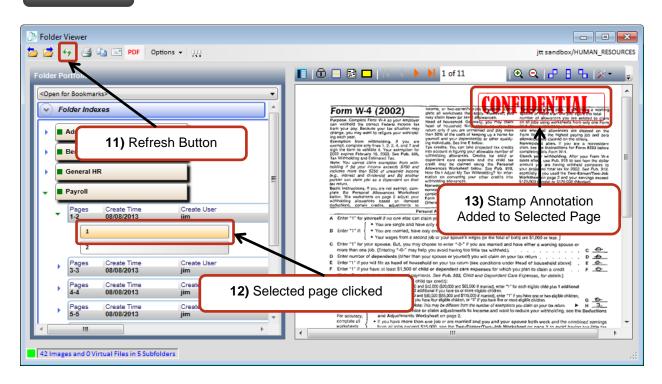
- 7. The selected area will now contain a stamp annotation box with the stamp text you chose. The font size of the text in the stamp adjusts to the size of the selected area.
- 8. Click on the **Apply** button (see Figure 11.14).

Note



- 10. Click on the Yes button.
- 11. Click on the Refresh button (see Figure 11.15).
- 12. Click on the selected page you added the text annotation to (see Figure 11.15).
- 13. The added text annotation has now been successfully applied to the selected page (*see Figure 11.15*).

Figure 11.15



Section 11.5 – Adding Comments

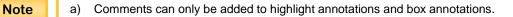
Adding comments allows you to add comments to highlight annotations and box annotations. Only one comment can be added to per annotation. To add comments, follow the steps listed below.

Steps:

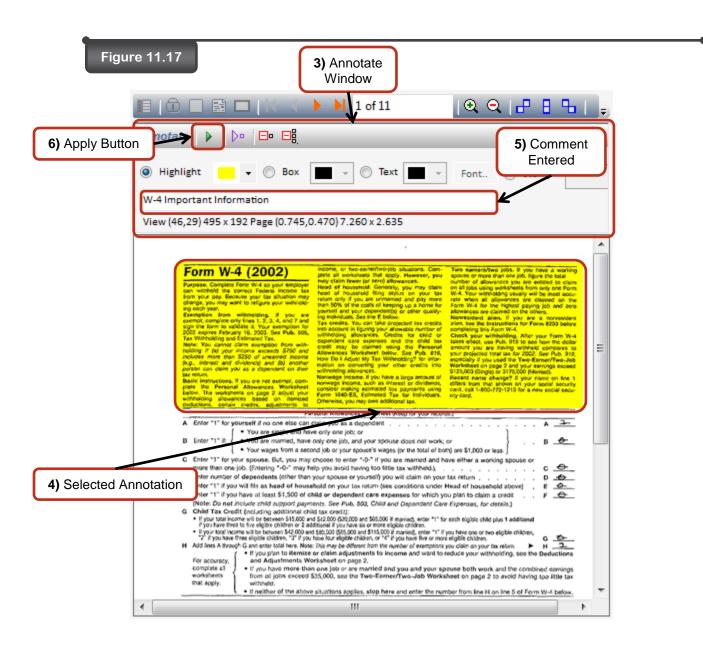
- 1. Select the page that contains the annotation you want to add comments to (see Figure 11.16).
- 2. Click on the Annotate button (see Figure 11.16).

Figure 11.16 2) Anno Copen for Bookmarks> Folder Indexes Administration Benefits/Health Coverage	otate Button
Payroll Pages Create Time Create User 1-2 08/08/2013 iim 1 2	Example you may want to religure your withhold ing each year, Exemption from withholding, if you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2002 expires February 16, 2003. See Pub. 505, with Tax Withholding and Estimated Tax. Note: You cannot claim exemption from with- holding if (a) your income exceeds \$750 and All includes more than \$250 of unearned income (e.g., interest and dividends) and (b) another ms

- 3. The **Annotate** window will expand (see Figure 11.17).
- 4. Select the annotation you want to add a comment to (see Figure 11.17).



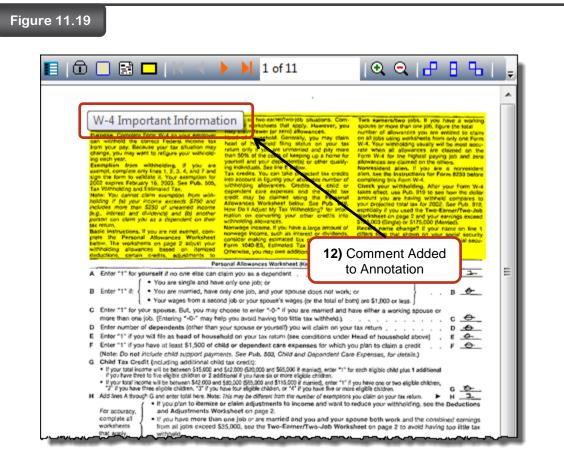
- 5. Enter the comment into the Enter Optional Comment/Text field (see Figure 11.17).
- 6. Click on the **Apply** button (see Figure 11.17).



- 7. A message will ask "Are you sure you want to apply these annotations?" will appear.
- 8. Click on the **Yes** button.
- 9. Click on the **Refresh** button (see Figure 11.18).

Figure 11.18	
🖆 🚰 😝 📑 🖻 PDF 🛛 Options 🗸 👯	2
Folder Portfolio 10) Refresh Button	
Folder Indexes	Form W-4
mentan and a second a se	san withhold the con- som your pay. Because

- 10. Click on the selected page you added the comment to (see Figure 11.19).
- 11. If you place your curser over the annotation, the added comment will now appear (see Figure *11.19*).



Section 11.6 - Deleting Annotations

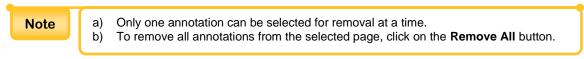
Deleting Annotations allows you to delete highlight annotations, box annotations, text annotations, and stamp annotations from a selected page. To delete annotations, follow the steps listed below.

Steps:

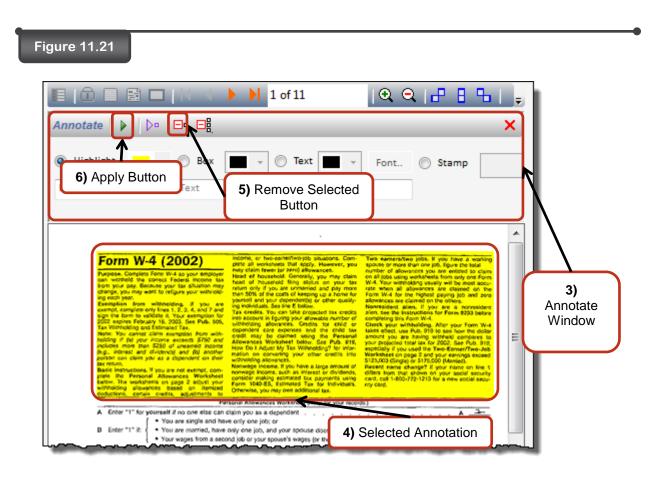
- 1. Select the page that contains the annotation you want to delete (see Figure 11.20).
- 2. Click on the Annotate button (see Figure 11.20).

2) Annotate But	
Copen for Bookmarks> Folder Indexes Administration Benefits/Health Coverage General HR Payroll Pages Create Time Create User 1-2 08/08/2013 iim 1	Form W-4 (2002) Purpose. Complete Form W-4 so your employer can withhold the correct Federal income tax from your pay. Because your tax situation may change, you may want to religure your withhold- ing each year. Exemption from withholding. If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2002 expires February 16, 2003. See Pub. 505, Tax Withholding and Estimated Tax. Note: You cannot claim exemption from with- holding if (a) your informe exceeds S750 and includes more than S250 of uncerned income (e.g., interest and dividends) and (b) another
1) 3. The Annotate window will expand (see Figure 1	Selected Page

- 4. Select the annotation you want to delete (see Figure 11.21).
- 5. Click on the **Remove Selected** button (see Figure 11.21).



6. Click on the **Apply** button (see Figure 11.21).



- 7. A message asking "Are you sure you want to apply these annotations?" appears.
- 8. Click on the **Yes** button.

Folder Indexes

9. Click on the **Refresh** button (see Figure 11.22).

gure 11.22		
Delder Viewer	F Options -	
Folder Portfolio	Refresh Button	

- 10. Click on the selected page you deleted an annotation from.
- 11. The annotation has now been successfully deleted from the page.

Section 12 – Redactions

Section 12 – Redactions

Redacting enables you to black out selected sections of a page from view. Permission Access Levels (PALs) determine the security that controls whether users have access to view the material behind the redaction.

Section 12.1 – Adding Redactions

To add redactions, follow the steps listed below.

Steps:

- 1. Select the page you would like to add redactions to (see Figure 12.1).
- 2. Click on the **Redact** button (*see Figure 12.1*).

Figure 12.1				
D Folder V	iewer	Options 👻 🔛		
Folder Pol	rtfolio Bookmarks>		-	
	Benefits/Health Coverage		^	2) Redact Button
	General HR	1) Selected Page		EMPLOYER
	Pages Create Time 1-2 08/08/2013	jim	Р	ddress <u>IVIU SLAPE</u> AV
•	Pages Create Time 3-3 08/08/2013 3	Create User	2	Personal exemption for yourself, en Il married, personal exemption for t (enter "1" if claimed.)
,	Pages Create Time 4-4 08/08/2013	Create User jim		Add the exemptions which you have

- 3. The Redactor window will expand (see Figure 12.2).
- 4. Select the area on the selected page you wish to redact (see Figure 12.2).

Note	a)	To add a redaction zone to a selected area on a page, place your curser at the top left-hand corner of the selected area you wish to redact. Holding down the left button on your mouse, draw a redaction zone over the selected area. Once you are done
	b) c)	drawling the redaction zone, let go of the left button on your mouse. The Permission Access Level for the currently selected redaction zone is located in the upper left hand corner of the redaction zone. When a new redaction zone is created, the Permission Access Level is automatically set to zero. A selected page can contain multiple redactions.
	0)	

Figure 12.2	3) Redactor Window			
	🔰 3 of 11	Full View		
Redactor 🕨 🗅 🖓 🗔 🕞		×		
Comment: Enter Optional Comment	PAL:			
View (535,81) 423 x 102 Page (8.200,1.2	00) 1.660 × 0.310			
STATE OF OHIO DEPARTMENT OF TAXATION EMPLOYEE'S WITHHOLDING EXEMPTION CERTIFICATE Name <u>MICHAEL DAVID</u> ECKARD Social Security No. Address ILLI SLAPE AVENUE CITY OF U6252 Public School District of Residence <u>Greave City</u> School District No. <u>126</u> 1. Parsonal exemption for yourself, enter "1" if claimed <u>7</u>				
 II married, personal e (enter *1* it claimed.) 		ted Area		
	Reda	acted		

5. Select the redaction zone (see Figure 12.3).

Note

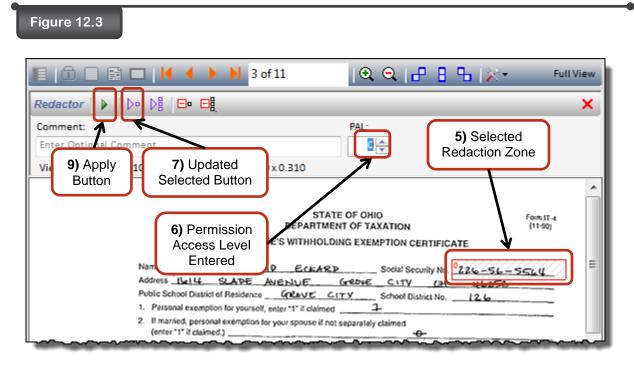
a) To resize the redaction zone, select the redaction zone and resize it to the desired size.

- b) To move the redaction zone, select the redaction zone and move it to the desired location.
- 6. Enter the Permission Access Level you want to give the currently selected redaction zone in the **PAL:** field (*see Figure 12.3*).
- 7. Click on the **Update Selected** button. This option only applies to the currently selected redaction zone (see Figure 12.3).

Note

a) If the currently selected page contains more than one redaction zone and you want all of the redaction zones to have the same Permission Access Level, click on the Update All button. This will make the Permission Access Level for all redaction zones on the currently selected page the same.

- 8. Click on the selected redaction zone again to apply the permission access level.
- 9. Click on the **Apply** button (see Figure 12.3).



- 10. A message asking, "Do you want to apply your changes?" appears.
- 11. Click on the Yes button.
- 12. Click on the **Refresh** button (see Figure 12.4).

D Folder Viewer		
10 10 ft and a la la	PDF Options - 193	1
Folder Portfolio	Refresh	
<open bookmarks="" for=""></open>	Button	· · · · · · · · · · · · · · · · · · ·
Folder Indexes		

13. The newly created redaction zone has now been successfully applied to the selected page.

Note

a)

A redaction icon will appear on the selected page within the subfolders indicating the selected page contains redactions.

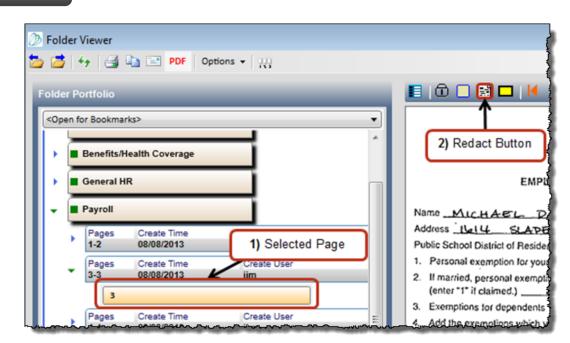
Section 12.2 - Removing Redactions

To remove redactions, follow the steps listed below.

Steps:

- 1. Select the page you want to remove redactions from (see Figure 12.5).
- 2. Click on the Redactor button (see Figure 12.5).

Figure 12.5



- 3. The **Redactor** window will expand (see Figure 12.7).
- 4. Select the redaction zone you wish to remove (see Figure 12.7).
- 5. Click on the **Remove Selected** button (see Figure 12.7).

a) If the currently selected page contains more than one redaction zone and you want to remove all of the redaction zones, click on the **Remove All** button. This will remove all of the redaction zones from the currently selected page.

6. Click on the Apply button (see Figure 12.7).

Note

Figure 12.7 3) Redactor Window Image: Constraint of the second s	View
Redactor 🕨 🗁 🖓 🗖 🛱	×
Comment: PAL: Ent 6) Apply Button 8.200.1.200) 1.660 x 0.310	
5) Remove Selected Button STATE OF OHIO DEPARTMENT OF TAXATION Form IT-4 (11-00)	^
4) Selected Redaction Zone	E
Parsonal exemption for yourself, enter "1" if claimed If married, personal exemption for your spouse if not separately claimed (enter "1" if claimed.)	

- 7. A message asking, "Do you want to apply your changes?" appears.
- 8. Click on the **Yes** button.
- 9. Click on the **Refresh** button (see Figure 12.9).

Figure 12.8

	The second s	
🧯 fg 縄 🖹 P	DF Options - 100	
-		
Ider Portfolio		
Open for Bookmarks>	Refresh Button	

10. The selected redaction zone has now been successfully removed from the selected page.

Section 13 – Permissions

Section 13 – Permissions

Permissions manage all Intellivue[™] GX v2.5 functions utilizing both a 100-level Permission Access system and user rights. Some of the functions controlled by permissions are a user's access to folders, pageset and pages. To add permissions, follow the steps listed below.

Section 13.1 – Adding Folder Permissions

To add folder permissions, follow the steps listed below.

Steps:

- 1. Select the folder you want to add permissions to.
- 2. Right-click the Folder Indexes bar.
- 3. Click the **Permission** option from the **Folder Actions** menu (see Figure 13.1).

Figure 13.1

Folder Portfolio		
<open bookmarks="" for=""></open>	•	Į
Folder Indexes Administration	Folder Actions	
	Notes	5
Benefits/Health General HR	Permission	
Payroll	Add To Publical List	2
Performance R		
	Select for Copy/Move	
Permission Option	Fulltext Redact Folder	
	Delete	}

4. The Folder – Permission Access Level window will expand (see Figure 13.2).

Figure 13.2

	Ŧ
Folder - Permission Access Level	×
Set 0	
]

5. Select the **Set** option (see Figure 13.3).

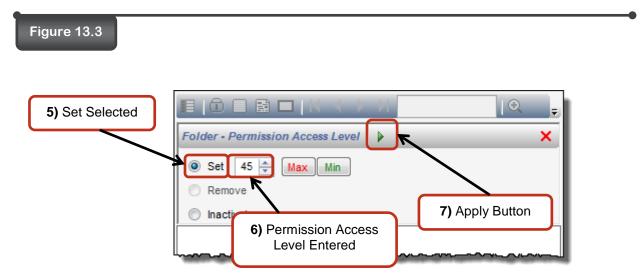
Note

Note

- a) To remove permissions from the selected folder, place a dot in the Set option, enter zero (0) into the Permission Access Level field, click on the Apply button to save the changes.
 - b) To make a selected folder inactive, place a dot in the **Inactive** option and click on the **Apply** button to save the changes.
- 6. Enter the Permission Access Level you want the selected folder to have (see Figure 13.3).

a) If you click on the Max button, the Permission Access Level will automatically be set to zero (0). Zero (0) provides the most security, limiting what users have access to. If you click on the Min button, the Permission Access Level will automatically be set to ninety nine (99). Ninety nine (99) provides the least security, allowing users to have access to anything.

- 7. Click on the **Apply** button (see Figure 13.3).
- 8. A message asks "Are you sure you want to apply this permission?" Click Yes.



9. The folder permissions have now been successfully added to the selected folder.

Section 13.2 – Adding Pageset Permissions

To add pageset permissions, follow the steps listed below.

Steps:

- 1. Select the pageset you want to add permissions to (see Figure 13.4).
- 2. Click on the **Permissions** button (see Figure 13.4)

1) Select Pages	et		2) Permissions Button
Pages	Create Time 08/08/2013	Create User abeck	

- 3. The Pageset Permission Access Level window will expand (see Figure 13.5).
- 4. Place a dot in the **Set** option (see Figure 13.5).

Note

a) To remove permissions from the selected pageset, select the **Set** option, enter zero (0) into the Permission Access Level field, click on the **Apply** button to save the changes.

- b) To make a selected pageset inactive, select the **Inactive** option and click on the **Apply** button to save the changes.
- 5. Enter the Permission Access Level you want the selected pageset to have (see Figure 13.5).

Note a) If you click on the **Max** button, the Permission Access Level will automatically be set to zero (0). Zero (0) provides the most security, limiting what users have access to. If you click on the **Min** button, the Permission Access Level will automatically be set to ninety nine (99). Ninety nine (99) provides the least security, allowing users to have access to anything.

- 6. Click on the **Apply** button (see Figure 13.5).
- 7. A message asks "Are you sure you want to apply this permission?" Click Yes.

Figure 13.5		
		[@
	Pageset - Permission Access Level	×
	Set 45 🚔 Max Min	
4) Set Selected	 Remove Inactivate 	6) Apply Button
	5) Permission Access Level Entered	

8. The pageset permissions have now been successfully added to the selected pageset.

Section 13.3 – Adding Page Permissions

To add page permissions, follow the steps listed below.

Steps:

- 1. Select the page you want to add permissions to (see Figure 13.6).
- 2. Click on the Permissions button (see Figure 13.6)

Figure 13.6 1) Selec	ted Page	2) Permissions Button	
🛅 💆 😽 📑 📑 PDF 🛛 Op	tions - 000		1
Folder Portfolio	_		
<open bookmarks="" for=""></open>		_	
Solder Indexes			Milifary Are you a veneran of the U.S. Armed Forces? Yes Wyes, which branch?
- Administration			Do you have a military obligation, including National Guard If yes, please explain
Pages Create Time 1-2 08/08/2013	Create User abeck		The information requested below is strictly volumtary. Discha adverse treatment. Please theck each eatropy that applies to Veterans of the Vietnam-Era A person who served more than 100 days of active military, in August 5, 1964, Arough May 7, 1975; and
1		ן ו	 A. was discharged er scleased with other than a dishone B. was discharged er released from active dwy because Disabled Vetraan A. person entilled to disability compensation under the 30 percent or more, or
	www.www.		B. A person whose discharge or release from active data

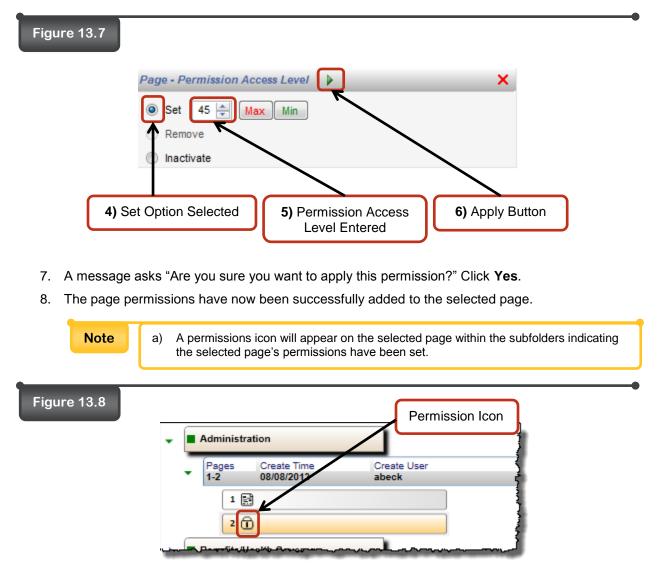
- 3. The Page Permission Access Level window will expand (see Figure 13.7).
- 4. Place a dot in the **Set** option (see Figure 13.7).

Note	a) To remove permissions from a selected page, place a dot in the Remove option and
	click on the Apply button to save the changes.
	b) To make a selected page inactive, place a dot in the Inactive option and click on the Apply button to save the changes.

5. Enter the Permission Access Level you want the selected page to have (see Figure 13.7).

Note a) If you click on the **Max** button, the Permission Access Level will automatically be set to zero (0). Zero (0) provides the most security, limiting what users have access to. If you click on the **Min** button, the Permission Access Level will automatically be set to ninety nine (99). Ninety nine (99) provides the least security, allowing users to have access to anything.

6. Click on the **Apply** button (see Figure 13.7).



Section 14 – Publishing

Section 14 – Publishing

Publishing allows you to select a single page, a single pageset, multiple pagesets, a folder, or multiple folders to be printed, exported, e-mailed, or saved as a PDF. To publish, follow the steps listed below.

Section 14.1 – Publish a Folder

To publish a folder, follow the steps listed below.

Section 14.1a – Publish Multiple Folders

a)

b)

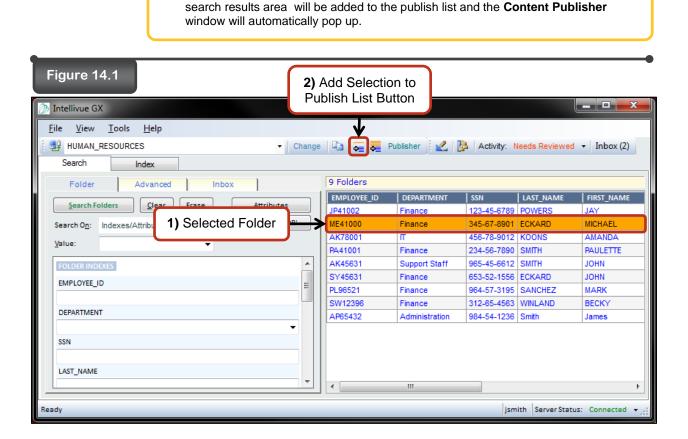
Note

To publish multiple folders, follow the steps listed below.

Steps:

- 1. Select the folder you would like to publish (see Figure 14.1).
- 2. Click on the Add Selection to Publish List button (see Figure 14.1).

Section 14.1a – Publish Multiple Folders.



If you wish to add multiple folders to the publish list, follow steps 1 through 2 from

If you click on the Add All to Publish List button, all of the folders located in the

3. Click on the **Publisher** button (see Figure 14.2).

Figure 14.2	3) Publisher Button						
Intellivue GX							
<u>F</u> ile <u>V</u> iew <u>T</u> ools <u>H</u> elp	V						
🕴 🔁 HUMAN_RESOURCES 🔹 Change 🖾 🤕 🐺 Publisher 🗽 🖉 Activity: Needs Reviewed 🔹 Inbox (2)							
Search							
Folder Advanced Inbox 9 Folders							
	MPLOYEE_ID DEPARTMENT SSN LAST_NAME FIRST_NAME						
Search Folders Clear Erase Attributes	241002 Finance 123-45-6789 POWERS JAY						
Search On: Indexes/Attributes Use Logical 'OR'	E41000 Finance 345-67-8901 ECKARD MICHAEL						
	K78001 IT 456-78-9012 KOONS AMANDA						
Value:	A41001 Finance 234-56-7890 SMITH PAULETTE						

- 4. A Content Publisher window will pop up (see Figure 14.3).
- 5. The publish list will appear under the publishing options (*see Figure 14.3*).
- 6. You will have four publishing options to choose from: **Print**, **E-mail**, **Export**, and **PDF** (see Figure 14.3).

Figure 14.3			6) Publishing
Content Publisher			Options
Print EMail Expo Printer: Samsung SCX-4x26 Series PCL6 Paper Size: Letter 8.50 x 11.00 Resolution: 600 dpi x 600 dpi Select Printer Page Fit		clude Dynamic Annotations	Alternate Permission Access Levels Pageset: 0 Page: 0 Redaction: 0
@ Be:			Included Content Images Virtual Files Image Template Annotations
Application Folder	Subfolder	Page(s) Images File	s Status
HUMAN_RESOURCES ME41000 HUMAN_RESOURCES AK78001 HUMAN_RESOURCES JP41002	•	Pendin Pendin Pendin	Bemove All
	5) Publish List		
Progress	<u>C</u> ancel	Clear list of successfully	y completed items Close
	4) Content Publish	ner Window	

a. To Print a Publish List:

- i. The **Content Publisher** window will automatically be set to the **Print** tab (see Figure 14.4).
- ii. Your default printer will automatically appear in the **Print** tab (see Figure 14.4).



 a) If you want to change to a different printer, click on the Select Printer... button. A Print window will pop up. Select the desired printer and click on the Print button. The new printer will now appear in the Print tab.

iii. If you are publishing multiple folders, you have the option to print all folders as

separate print jobs or print all folders together as a single print job (see Figure 14.4).

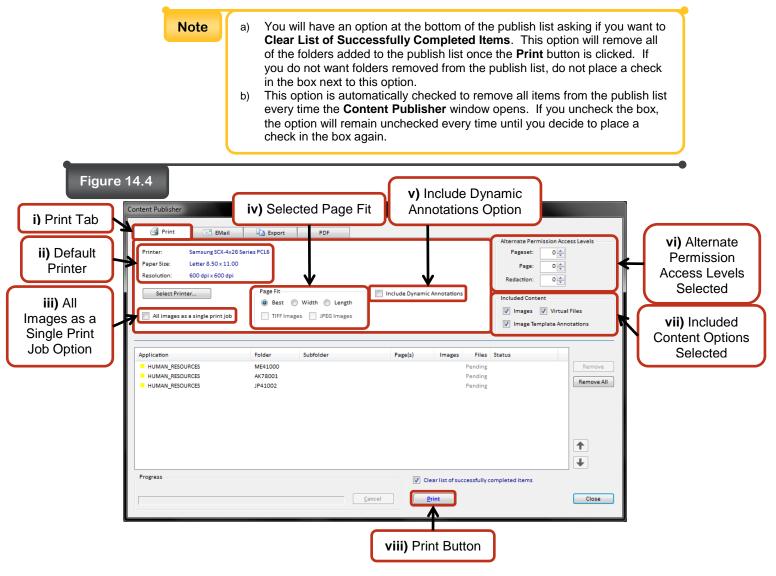


- a) To print all folders into a single print job, place a check in the **All Images as a Single Print Job** box.
 - b) To print all folders as separate print jobs, do not place a check in the All Images as a Single Print Job box.
 - c) If you choose to print all folders together as a single print job, you will not be able to include the content of virtual files.
- iv. Select how you want your pages to be printed from the **Page Fit** options (*see Figure 14.4*).
 - 1. **Best** Finds the best fit for the page(s) to be printed at.
 - 2. Width Prints the page(s) to the original width of the image(s) scanned.
 - 3. Length Prints the page(s) to the original length of the image(s) scanned.
 - 4. **TIFF Images –** Prints all of the TIFF images.
 - 5. **JPEG Images –** Prints all of the JPEG images.
- v. If you want to include dynamic annotations, place a check in the **Include Dynamic Annotations** box (see *Figure 14.4*).
- vi. Select the desired **Alternate Permission Access Levels** for the publish list (see *Figure 14.4*).

Note	a) The Alternate Permission Access Levels allow printing, sending, or exporting of a document at a Permission Access Level lower than the		
	user that is printing, sending, or exporting the document. This feature restricts what users at a lower Permission Access Level can see. It will black out redaction zones and restrict the viewing of some documents, depending on the Permission Access Level of the		
	 documents. b) All Alternate Permission Access Levels are automatically set to 0. Once you change the access levels to a different number, the number will remain in the fields until you change it again 		

- vii. Select which **Included Content** options you would like to print from the publish list (see Figure 14.4).
 - 1. Images This will print all images added to the publish list.
 - 2. Virtual Files This will print all virtual files added to the publish list.

- Image Annotations This will print all image annotations on all of the images that are added to the publish list. This content option can only be used when the images content option is checked.
- viii. Click on the **Print** button (see Figure 14.4).



ix. The publish list will now be printed.

b. To E-mail a Publish List:

- i. Click on the **EMail** tab (see Figure 14.5).
- ii. If you want to put each page into one attachment, place a check in the Each

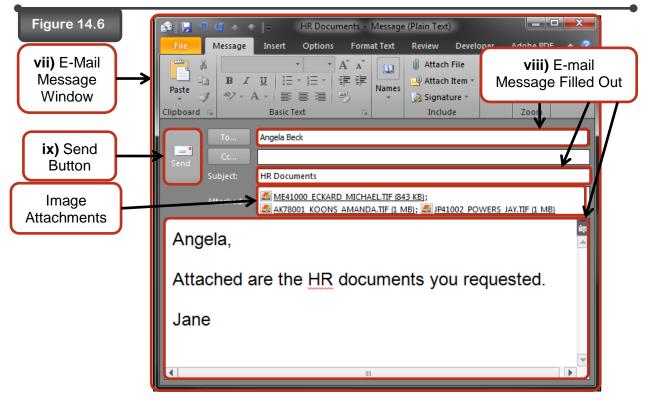
page appended to one attachment box (see Figure 14.5).

Note	 a) If you choose to e-mail each page appended to one attachment, you will not be able to include the content of image template annotations.
	b) If this option is not selected, each page will be its own attachment.

- iii. Select how you want to name the file attachment(s).
 - 1. If you want to add index values to the filename, place a check in the **Filenaming by index value** box (*see Figure 14.5*).
 - a. A list of the applications indexing values will appear.
 - b. Select which index values you want placed within the file name.
 - 2. If you want to manually enter a filename, enter the information into the **Filename:** field (see *Figure 14.5*).
- iv. Select the desired **Alternate Permission Access Levels** for the publish list (see *Figure 14.5*).
- v. Select which **Included Content** you would like to e-mail from the publish list (*see Figure 14.5*).
- vi. Click on the **Send** button (see Figure 14.5).

	re 14.5	i) EMail Tab	_		iv) Alternate Permission Access Levels Selected
ii) Each Page Appended to One File Box Checked	Print Image Page Option Each page app Filenaming by	ended to one file	PDF		Alternate Permission Access Levels Pageset: 0 Page: 0
1) Filenaming by Index Value Box Checked	Filename:	Filename: Field Es ME41000 AK78001	SSN LAST_NAME FRST_NAME b) Index Values Selected	Pe Pe	Redaction: 0 Included Content Images Virtual Files Image Template Annotations Files Status Remove All () Included Content Selected
	Progress		<u>C</u> ancel	Clear list of successfu	lly completed items Close
	<u></u>		vi)	Send Button	

- vii. An e-mail message window will pop up with the image attachments (*see Figure 14.6*).
- viii. Fill out the e-mail message (see Figure 14.6)
- ix. Click on the **Send** button (see Figure 14.6).



x. The publish list will now be e-mailed.

c. To Export a Publish List:

- 1. Click on the **Export** tab (see Figure 14.7).
- 2. If you want to put each page into one file, place a check in the Each page

appended to one file box (see Figure 14.7).

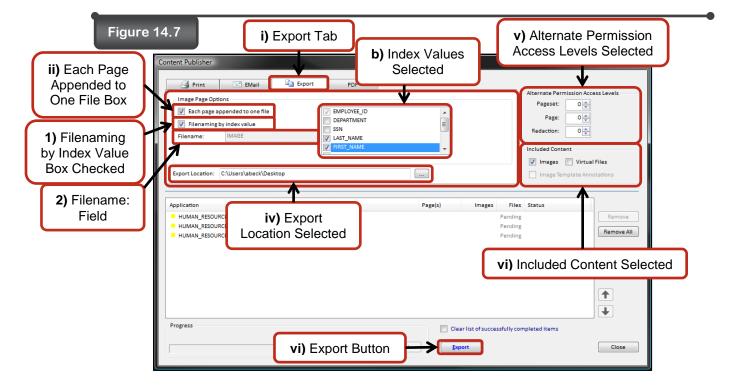


a) If you choose to export each page appended to one file, you will not be able to include the content of image template annotations.b) If this option is not selected, each page will be its own file.

- 3. Select how you want to name the file(s).
 - 1. If you want to add index values to the filename, place a check in the

Filenaming by index value box (see Figure 14.7).

- a. A list of the applications indexing values will appear.
- b. Select which index values you want placed within the file name.
- If you want to manually enter a filename, enter the information into the Filename: field (see Figure 14.7).
- 4. Select an **Export Location:** for the files within the publish list to go to (see Figure 14.7)
- 5. Select the desired **Alternate Permission Access Levels** for the publish list (*see Figure 14.7*).
- 6. Select what **Included Content** you would like to export from the publish list (see *Figure 14.7*).
- 7. Click on the Export button (see Figure 14.7).



8. The publish list will now be exported to the selected folder.

d. To Create a PDF from the Publish List:

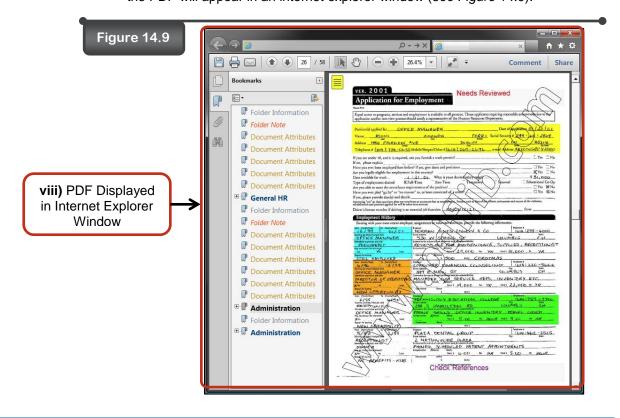
- i. Click on the **PDF** tab (see Figure 14.8).
- ii. Enter the **Document Properties** you wish to give the PDF (see Figure 14.8).
 - 1. Title Gives the PDF a title.
 - 2. **Subject –** Gives the PDF a subject.
- iii. Select the **Output Document Options** you wish to add to the PDF (see Figure

14.8).

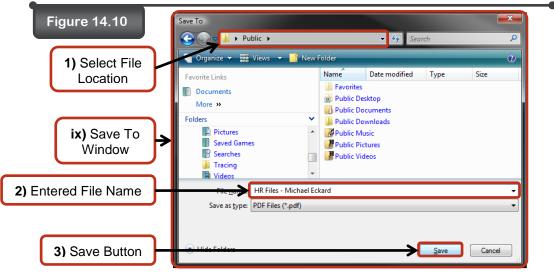
- 1. **Bookmarks –** All bookmarks associated with the selected folder will be added to the PDF.
- Notes All page notes associated with the selected folder will be added to the PDF.
- 3. **Folder Indexes –** All folder indexes associated with the selected folder will be added to the PDF.
- 4. **Folder Notes –** All folder notes associated with the selected folder will be added to the PDF.
- 5. **Document Attributes –** All document attributes associated with the selected folder will be added to the PDF.
- Secured Blank Allows you to block certain pages from being published. When the PDF is created, the pages that are blocked will be printed as blank pages and will say "This Page Intentionally Left Blank."
- 7. **Descending Pageset Date Order –** All pagesets associated with the selected folder will be placed in the PDF in descending date order.
- 8. **Include Dynamic Annotations –** All dynamic annotations associated with the selected folder will be added to the PDF.
- iv. Select the **After Processing Completes** option for how you want to view your PDF (see Figure 14.8).
 - 1. **Open Immediately –** The PDF will open up immediately in an internet explorer window.
 - Save To File The PDF will be saved to a file location of your choosing. If you have several items listed in the publish list and wish to have each item saved as a separate PDF instead of one PDF, place a check in the Create Separate Documents for Each Entry box.
- v. Select the desired **Alternate Permission Access Levels** for the PDF (see *Figure 14.8*).
- vi. Select what Included Content you would like add to the PDF (see Figure 14.8).
- vii. Click on the Create PDF button (see Figure 14.8).

Figure		iii) Selected	Output Document Option	s v) Alternate Permission Access Levels Selected
i) PDF Tab ii) Document Properties Entered iv) After Processing	Content Publisher Print Document Properties Tritie HR Documents Subject Michael Eckard, Amanda Koons, Jay P After Processing Completes Open Immediately Save To File	Expert PDF Output Document Options Ø Bookmarks Notes Ø Folder Indexes Ø Folder Notes		Alternate Permission Access Levels Pageset: 0 @ Page: 0 @ Redaction: 0 @ Included Content Included Content Included Content Included Content Images Virtual Files Image Template Annotations
Completes Option Selected	Application HUMAN_RESOURCES HUMAN_RESOURCES HUMAN_RESOURCES	Folder Subfolder ME41000 AX78001 JP41002	Page(s) Images Fil Pendi Pendi	Benove All
	Progress		Clear list of successfully	completed items Close
			vii) Create PDF Butto	on

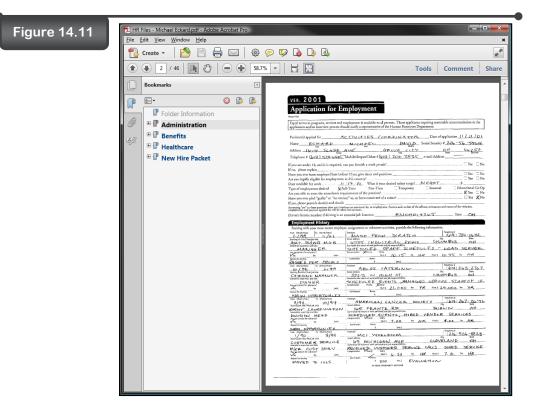
viii. If **Open Immediately** is selected from the **After Processing Completes** options, the PDF will appear in an internet explorer window (see *Figure 14.9*).



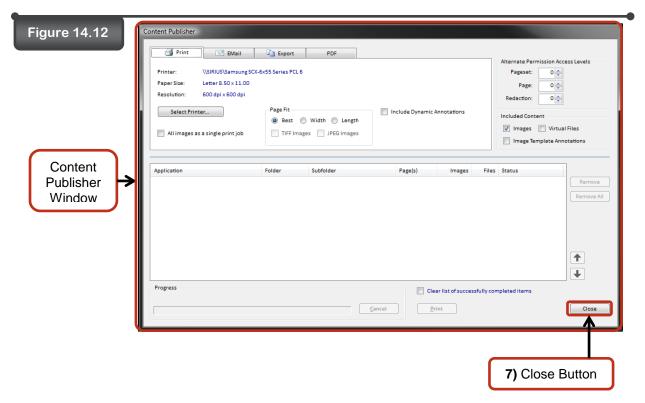
- ix. If **Save To File** is selected from the **After Processing Completes** options, a **Save To** window will pop up (see *Figure 14.10*).
 - 1. Select the file location you want to save the PDF to (see Figure 14.10).
 - 2. Enter the file name you want to give the PDF (see Figure 14.10).
 - 3. Click on the **Save** button (see Figure 14.10).



x. The PDF will now be saved (see Figure 14.11).



7. Once you are done publishing, click on the **Close** button on the **Content Publisher** window (s*ee Figure 14.12*).



Section 14.1b – Publish a Single Folder

To publish a single folder, follow the steps listed below.

Steps:

- 1. Select the folder you would like to publish (see Figure 14.13).
- 2. Right-click the **Folder Indexes** bar (see Figure 14.13).
- 3. Click on the Add to Publish List option from the Folder Actions menu (see Figure 14.13).

Figure 14.13

Folder Portfolio	
<open bookmarks="" for=""></open>	•
3) Add to Publish	Folder Actions
	Notes
Benefits/Health	Permission
General HR	
Payroll	Add To Publish List
Payroli	Publish
Performance Re	
	Select for Copy/Move
	Fulltext Redact Folder
42 Images and 0 Virtual	

a. To Print a Publish List:

- i. Click on the **Print** button (see Figure 14.14).
- ii. A Content Publisher window will pop up (see Figure 14.14).

	Content Publisher				
	Print Printer: VSIRIUS/Samsung SC Paper Size: Letter 8.50 × 11.00 Resolution: 600 dpi x 600 dpi Select Printer All images as a single print job	Printer: \\SIRUSSiamsung SCX-6x5 Saries PCL 6 Paper Size: Letter 8.50 x 11.00 Resolution: 600 dpi x 600 dpi Select Printer Page Fit @ Best @ Width @ Length Include Dynamic Annotations			Access Levels
OContent Publisher Window	Application HUMAN_RESOURCES	Folder Subfolder M641000	Page(s) Images Fi Pend	lles Status	Remove Remove All

iii. Follow step A from Section 14.1a – Publish Multiple Folders to complete the printing of the publish list.

b. To E-mail a Publish List:

i. Click on the E-mail button (see Figure 14.15).

Figure 14.15	늘 🛃 🗲 🛃 🗈 🖃 PDF Options 🗸 🏨	-
	i) E-mail Button	

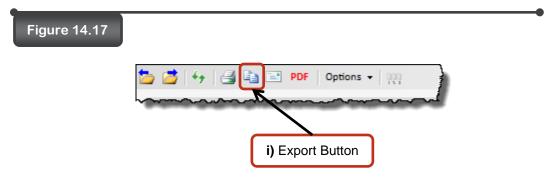
ii. A **Content Publisher** window will pop up (see Figure 14.16).

Figure 14.16	Print EMail Image Page Options P Each page appended to one file P Filenaming by Index value Filename: IMAGE	Export	PDF PDF DEPATMENT SSN LAST_NAME PIRST_NAME	A III V	Alternate Permission A Pagest: 0 Page: 0 Redaction: 0 Included Content Included Content Included Content Included Content	a a Jal Files
Publisher Window	Application HUMAN_RESOURCES	Folder ME41000	Subfolder	Page(s) Imag	es Files Status Pending	Remove All
	Progress		Çanc		ccessfully completed items	Close

iii. Follow step B from Section 14.1a – Publish Multiple Folders to complete the emailing of the publish list.

c. To Export a Publish List:

i. Click on the **Export** button (see Figure 14.17).



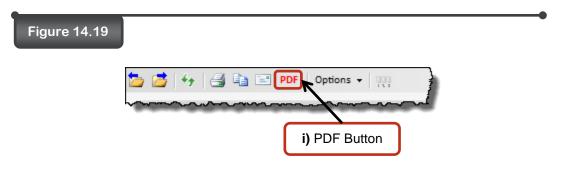
ii. A Content Publisher window will pop up (see Figure 14.18).

	Filenaming by index value Filename: IIMAGE	Image Page Options				
ii) Content Publisher Window	Application HUMAN_RESOURCES	Folder Sut	rfolder Page(s)	Images	Files Status	Remove Remove All

iii. Follow step C from Section 14.1a – Publish Multiple Folders to complete the exporting of the publish list.

d. To Create a PDF from the Publish List:

i. Click on the **PDF** button (see Figure 14.19).



ii. A Content Publisher window will pop up (see Figure 14.20).

ii) Content Publisher Window	Print EMail Document Properties Trite HR Documents Subject Michael Eckard, Amanda Koons, Jay Powers Anter Processing Completes Open Immediately @ Save To File	Deport PDF Deport Options Decomment Options Decomment Options Decomment Options Proces Prolder Indexes Prolder Notes	Document Attributes Secured Blank Descending pageset date o Include Dynamic Annotatio Create separate docume	ns	Alternate Permission Acc Pageset: 0 1 Page: 0 1 Redaction: 0 1 Included Content Included Content Images Virtua Image Template Ann	I Files
		lder Subfolder (41000	Page(s)	Images File Pendin	s Status S	Remove Remove All

 Follow step D from Section 14.1a – Publish Multiple Folders to complete the creation of a PDF from the publish list.

Section 14.2 – Publish a Pageset

To publish a pageset, follow the steps listed below.

Steps:

- 1. Select the pageset you would like to publish (see Figure 14.21).
- 2. Right click on the selected pageset.
- 3. Click on the Add to Publish List button (see Figure 14.21).

a. To Print a Publish List:

i. Click on the **Print** button (see Figure 14.21).



- ii. A Content Publisher window will pop up.
- Follow step A from Section 14.1a Publish Multiple Folders to complete the printing of the publish list.

b. To E-mail a Publish List:

i. Click on the E-mail button (see Figure 14.22).

Figure 14.22	늘 湭 🍕 📑 🖃 PDF Options 🗸 🏨
	www.commence.

ii. A Content Publisher window will pop up (see Figure 14.23).

Figure 14.23	Content Publisher Print EMail Image Page Options Esch page appended to one file Filenamic by index value Filename: IMAGE	2 Export	PDF PDF DEPATINENT SN LAST_NAME FIRST_NAME	A III	Alternate Permission A Pegeset: 0 Pege: 0 Redaction: 0 Included Content V Images Virt Image Template A	ual Files
Publisher Window	Application HUMAN_RESOURCES	Folder ME41000	Subfolder Administration	Pagels) Images 1 thru 2	Files Status Pending	Remove Remove All
	Progress		Çanc		fully completed items	Close

Follow step B from Section 14.1a – Publish Multiple Folders to complete the emailing of the publish list.

c. <u>To Export a Publish List:</u>

i. Click on the **Export** button (See Figure 14.24)



ii. A Content Publisher window will pop up (see Figure 14.25).

Figure 14.25	Content Publisher Image Page Options Image Page Options Image Page Options Image Page Options Filenaming by index value Filename: IMAGE Export Location: C\Users\abeck\Des	Export	PDF EMPLOYEE_ID DEPARTMENT SSN LAST_NAME FIRST_NAME		Page: 0	A Y Y Y tual Files
Publisher Window	Application HUMAN_RESOURCES	Folder ME41000	Subfolder Administration	Page(s) Imag 1 thru 2	ges Files Status Pending	Remove Remove All
	Progress		2	Clear list of su	accessfully completed items	Close

iii. Follow step C from Section 14.1a – Publish Multiple Folders to complete the exporting of the publish list.

d. To Create a PDF from the Publish List:

i. Click on the **PDF** button (see Figure 14.26).

Figure 14.26	늘 📑 👍 📑 🖻 PDF Options 🕶 👯

ii. A Content Publisher window will pop up (see Figure 14.27).

	Print Print Decument Properties Tride HR Documents Subject Michael Eckard, Amada Koons After Processing Completes Open Immediately Save To File		V Notes V Security V Folder Indexes V Desc V Folder Notes V Inclusion		Course of Attributes Course Stank Course St		Interpretation Access Levels
ii) Content Publisher Window	Application HUMAN_RESOURCES	Folder ME41000	Subfolder Administration	Page 1 thr	-	Files Status Pending	Remove All

 Follow step D from Section 14.1a – Publish Multiple Folders to complete the creation of a PDF from the publish list.

Section 14.3 – Publish a Page

To publish a page, follow the steps listed below.

Steps:

- 1. Select the page you would like to publish (see Figure 14.28).
- 2. Right-click on the selected page.
- 3. Click on the Add to Publish List button (see Figure 14.28).

jure 14.28	1-2	08/08/2013	jim	
	2		Page Actio	ns
,	Pages 3-3	Create T 08/08/20	Expand Subfolders	Ctrl+NumPad1
1) Selected Page		Create T	Collapse Subfolders	Ctrl+NumPad2
	4-4	08/08/20	Enlarge View	Ctrl+NumPad3
,	Pages 5-5	Create T 08/08/20	Reduce View	Ctrl+NumPad4
,	Pages 6-6	Create T 08/08/20	Sort	
,	Pages 7-9	Create T 08/08/20	Find	
,	Pages 10-10	Create T 08/08/20	View/Edit Attributes	
2) A dal ta Dubliah	Pages 11-11	Create T 08/09/20		
 Add to Publish List button 		<u>→</u>	Add To Publish List	
	Performance	e Review	Publish	
٠			- Ealast for Geovillous	

- a. To Print a Publish List:
 - i. Click on the **Print** button (see Figure 14.29).



ii. A Content Publisher window will pop up (see Figure 14.30).

Figure 14.30	Print Print Print Printer: VISINUSSamsung SC Paper Size: Letter & 50 × 11.00 Resolution: COO dpi x 600 dpi Select Printer All images as a single print job	Page Fit	PDF Width Cangth Is JPEG Images	Include Dynamic	Annotations	Alternate Permission A Pageset: 0 0 Page: 0 0 Reduction: 0 0 Included Content Included Content Images Virtu	al Files
ii) Content Publisher Window	Application	Folder ME41000	Subfolder Administration	Page(s) 1	Images	Files Status Pending	Remove All
	Progress				ear list of successful	ly completed items	Close

iii. Follow step A from Section 14.1a – Publish Multiple Folders to complete the printing of the publish list.

b. To E-mail a Publish List:

i. Click on the E-mail button (see Figure 14.31).



ii. A Content Publisher window will pop up (see Figure 14.32).

ii) Contont	Print EMail Image Page Options Each page appended to one file Filenaming by Index value Filename: IMAGE	Export	PDF EMPLOYEE_ID DEPARTMENT SN LAST_NAME FIRST_NAME	r III	Alternate Permission A Pageat: 0 Page: 0 Redaction: 0 Included Content Included Content Included Content Included Content	ual Files
ii) Content Publisher Window	Application HUMAN_RESOURCES	Folder ME41000	Subfolder Administration	Page(s) Images 1	Files Status Pending	Remove All
	Progress		Cancel	Clear list of succes	sfully completed items	Close

iii. Follow step B from Section 14.1a – Publish Multiple Folders to complete the emailing of the publish list.

c. To Export a Publish List:

i. Click on the **Export** button (see Figure 14.33).

Figure 14.33	늘 📑 🍫 🛃 🖹 PDF Options 🕶 🏨
	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~

- ii. A Content Publisher window will pop up.
- Follow step C from Section 14.1a Publish Multiple Folders to complete the exporting of the publish list.

## d. To Create a PDF from the Publish List:

i. Click on the **PDF** button (see Figure 14.34).

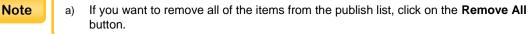
Figure 14.34		•
	늘 🛃 🍫 🛛 🚔 🖹 PDF 🛛 Options 🗸 🔤	

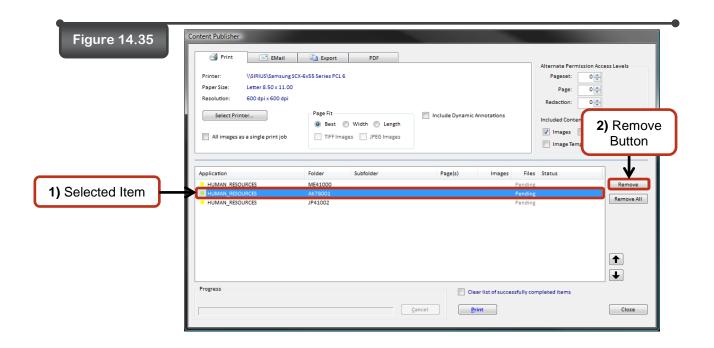
- ii. A **Content Publisher** window will pop up.
- Follow step D from Section 14.1a Publish Multiple Folders to complete the creation of a PDF from the publish list.

## Section 14.4 - Remove an Item from the Publish List

To remove an Item from the publish list, follow the steps listed below.

- 1. Select the item you wish to remove from the publish list (see Figure 14.35).
- 2. Click on the **Remove** button (see Figure 14.35).





# Section 15 – Adding Content

# Section 15 – Adding Content

Adding content allows you to import external files into the currently selected subfolder. To add content, follow the steps listed below.

#### Steps:

- 1. Select the subfolder you would like to add content to (see Figure 15.1).
- 2. Right click on the selected subfolder.
- 3. Click on the Add Content... button (see Figure 15.1).

Figure 15.1	Administration		
•	Benefits/Health C	Subfolder A	ctions
1) Selected	General HR	Expand Subfolders	Ctrl+NumPad1
Subfolder		Collapse Subfolders	Ctrl+NumPad2
	Payroll	Enlarge View	Ctrl+NumPad3
•	Performance Rev	Reduce View	Ctrl+NumPad4
		Sort	
		Find	
Add Content		Expand Pagesets	
Button		Collapse Pagesets	
		Select for Copy/Move	
		Add To Publish List	
	$\mathbf{N}$	Publish	
		Add Content	
	L		

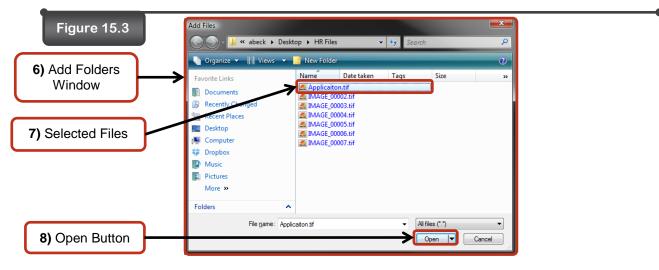
- 4. An Add Content (Administration) window will pop up (see Figure 15.2).
- 5. Click on the **Select Files...** button (see Figure 15.2).

Note

a) You can also add files to the Add Content (Administration) window by selecting the files, dragging them to the area below the Select Files... button, and dropping them into this area.

Figure 15.2			
5) Select Files Button 4) Add Content	Add Content (Administration) Select Files File Access Level	Drag/Drop   Title   Details	ATTRIBUTES
(Administration) Window			
	Storage Option (Images Only)	Delete source files after submit	Default Order     Reset     Apply     Ato Z     Reset with Defaults     Apply All     Ato Z (Required First)

- 6. An **Add Files** window will pop up (see Figure 15.3).
- 7. Select the file(s) you would like to add to the selected folder (see Figure 15.3).
- 8. Click on the **Open** button (see Figure 15.3).



9. The selected file will now appear in the Add Content (Administration) window (see Figure

15.4).

Note	<ul> <li>A Permission Access Level can be given to the selected file so only certain people can view the file.</li> </ul>
	b) A <b>Title</b> can be given to the selected file.
	c) If the selected file contains multiple pages, a Storage Option (Images Only) is available. You can choose to have all pages placed in a single pageset or each image file can be placed in a single pageset.
	d) If you would like to delete the original file, place a check in the <b>Delete source files</b> after submit box.

Figure 15.5

Figure	e 15.4			
		g	) Selected File Added	]
	File	Access Level	Title	Details
•	C:\sample\Invoice_0001.tif		0	
~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		

- 11. To add attributes, select the added file (see Figure 15.5).
- 12. Enter the needed information into the attributes fields (see Figure 15.5).
- 13. Click on the **Apply** button (see Figure 15.5).

	les		Drag/Drop				ATTRIBUTES
File		Access Level	Title	Details	Year		2006
C:\sa	Imple\Invoice_0001.tif	0			Documen	t_Type	Enrollment
	on (Images Only)	Info	rmation E		after submit		Apply button
rage Optio	e files to a single pageset 🔘 Ead	ch image file to a single p	ageset	Submit	AtoZ		Reset with Defaults Apply

- 14. Click on the **Submit** button (see Figure 15.5).
- 15. Click on the **Close** button.
- 16. Click on the **Refresh** button to refresh the folder for the added content to appear.
- 17. The added content will now appear in the selected folder.

Section 16 – Copy/Move

Section 16 - Copy/Move

Copy/Move allows you to copy/move one pageset, one page or several pages to another folder or subfolder. To copy/move, follow the steps listed below.

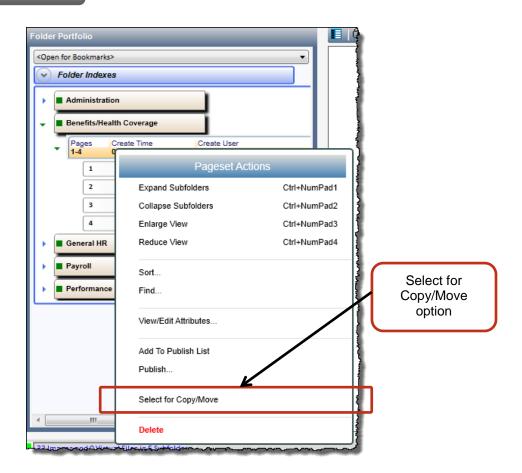
Section 16.1 - Copy/Move a Pageset to a Different Subfolder

To copy/move a pageset to a different subfolder, follow the steps listed below.

Steps:

- 1. Select a subfolder (see Figure 16.1).
- 2. Select the pageset you want to copy/move (see Figure 16.1).
- 3. Right-click on the selected pageset.
- 4. Click on the **Select for Copy/Move** button (see Figure 16.1).

Figure 16.1



5. The neon green border around the selected pageset indicates that it has now been added to the copy/move list (*see Figure 16.2*).

Figure 16.2	مە مىم	<u></u>	൹ഄ൹൷_ ^ഄഄ <u>ຨ</u> ຨ۸ ~~	
		Pages 1-4	Create Time 08/09/2013	Create User jim
	Ĺ		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

- 6. Select the subfolder you want to copy/move the selected pageset to.
- 7. Right-click on the selected subfolder.
- 8. Click on the Copy/Move Selected Items... button.
- 9. An Apply Copy/Move window will.
- 10. Select which Apply Method you want to use.
 - a. **Copy –** Places a copy of the selected pageset/page into the selected subfolder.
 - b. Move Moves the selected pageset/page into the selected subfolder.
- 11. Click on the **OK** button (see Figure 16.3).

Source	
Folder:	EMPLOYEE_ID: AK41108
Subfolder:	Benefits/Health Coverage
Pageset/Pages:	1-4
the selected Include and And Move	v copies of both metadata and content and stores it in d area. e Bookmarks, Notes, Page Permissions, Redactions notations adata, content and page extents to the selected area.

12. Click on the **Refresh** button (see Figure 16.4)



13. The selected pageset has now been successfully copied/moved to the selected subfolder (see *Figure 16.5*).

Figure 16.5	_م •	-	अध्रतीस्तास्त्र General H	₽₽ĠID+∕Oo-∕krogE*^~~		
Pages copied over to the selected subfolder.		•	Pages 1-4 2 3 4	Create Time 08/26/2013	Create User jim	C
	×		Payroll			1
	×	6	Performa	nce Review		
	~	~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

Section 16.2 - Copy/Move a Pageset to a Different Folder

To copy/move a pageset to a different folder, follow the steps listed below.

- 1. Select a folder.
- 2. Select a subfolder.
- 3. Select the pageset you want to copy/move.
- 4. Right-click on the selected pageset.
- 5. Click on the **Select for Copy/Move** button (see Figure 16.6).

Figure 16.6				•
	Folder Portfolio			
	<open bookmarks="" for=""></open>		_	
	Solder Indexes			
	Administration Benefits/Health 0	Coverage		
	Pages Cres	ate Time Create User		
	1-4 0	Pageset Action:	s	
	2	Expand Subfolders	Ctrl+NumPad1	
	3	Collapse Subfolders	Ctrl+NumPad2	
	4	Enlarge View	Ctrl+NumPad3	
	General HR	Reduce View	Ctrl+NumPad4	
	Payroll	Sort		Select for
	Performance	Find		Copy/Move
		View/Edit Attributes		option
		Add To Publish List		
		Publish		
		Select for Copy/Move	1	
	۰ III	Delete		
	221m2~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	ileciaeSubectory	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

- 6. The selected pageset is now added to the copy/move list.
- 7. Select the folder you want to copy/move the selected pageset to.
- 8. Select a subfolder.
- 9. Right-click on the selected subfolder.
- 10. Click on the Copy/Move Selected Items... button.
- 11. An Apply Copy/Move window will (see Figure 16.7).
- 12. Select which Apply Method you want to use (see Figure 16.7).
 - a. Copy Places a copy of the selected pageset/page into the selected subfolder.
 - b. Move Moves the selected pageset/page into the selected subfolder.
- 13. Click on the **OK** button (see Figure 16.7).

Figure 16.7	Apply Copy/Move
	Source
	Folder: EMPLOYEE_ID: 20130814
	Subfolder:
	Pageset/Pages: 1-4
	Apply Method
	© Сору
	Creates new copies of both metadata and content and stores it in the selected area.
	Include Bookmarks, Notes, Page Permissions, Redactions and Annotations
	Move
	Moves metadata, content and page extents to the selected area.
	OK Cancel

- 14. Click on the **Refresh** button.
- 15. The selected pageset has now been successfully copied/moved to the selected folder and selected subfolder.

Section 16.3 - Copy/Move a Page to a Different Subfolder

To copy/move a page to a different subfolder, follow the steps listed below.

- 1. Select a subfolder.
- 2. Select the page(s) you want to copy/move.

		_
Note	 a) To select multiple pages to copy/move, hold down the CTRL button on your keyboard and select the pages you want to copy/move. The selected pages will be highlighted with blue strips. b) You can only select multiple pages within a pageset. You cannot select multiple pages from different pagesets. 	

- 3. Right-click on the selected page(s).
- 4. Click on the **Select for Copy/Move** button (see Figure 16.8).

Figure 16.8			
	Payroll Pages Create Time 1-9 08/09/2013 1 2	Create User jim Page Actions	Feat
	3 4 5 6	Expand Subfolders Collapse Subfolders Enlarge View Reduce View	Ctrl+NumPad1 Ctrl+NumPad2 Ctrl+NumPad3 Ctrl+NumPad4
Сор	7 lect for py/Move ption 15 Pages Create Time 08/09/2013 Create Time 08/09/2013	Sort Find View/Edit Attributes Add To Publish List	
	Pages 08,09/201 Berformance Review	Publish Select for Copy/Move	
	18 Images and 0 Virtual Files in 2 Sub	Delete	

- 5. The selected page(s) is now added to the copy/move list.
- 6. Select the subfolder you want to copy/move the selected page(s) to.
- 7. Right-click on the selected subfolder.
- 8. Click on the **Copy/Move Selected Items...** button.
- 9. An Apply Copy/Move window will (see Figure 16.9).
- 10. Select which **Apply Method** you want to use (see Figure 16.9).
 - c. **Copy –** Places a copy of the selected pageset/page into the selected subfolder.
 - d. Move Moves the selected pageset/page into the selected subfolder.
- 11. Click on the **OK** button (see Figure 16.9).

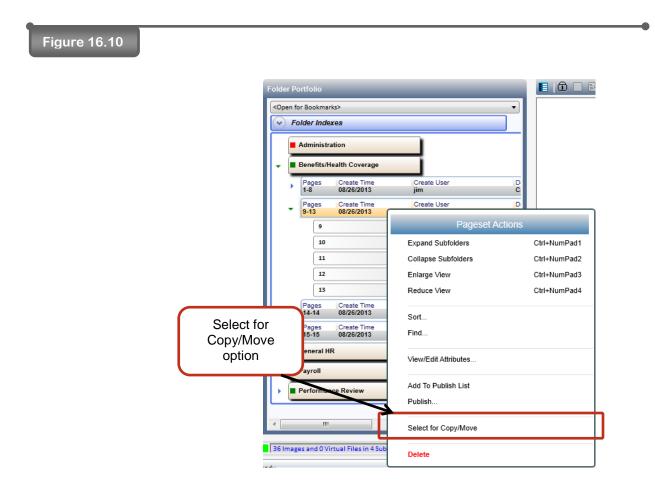
Figure 16.9	
	Apply Copy/Move
	Source Folder: EMPLOYEE_ID: PA41001
	Subfolder: Pageset/Pages: 1
	Apply Method
	Copy Creates new copies of both metadata and content and stores it in the selected area.
	Include Bookmarks, Notes, Page Permissions, Redactions and Annotations
	Move Moves metadata, content and page extents to the selected area.
	OK Cancel

- 12. Click on the **Refresh** button.
- 13. The selected page(s) has now been successfully copied/moved to the selected subfolder.

Section 16.4 - Copy/Move a Page(s) to a Different Folder

To copy/move a page(s) to a different folder, follow the steps listed below.

- 1. Select a folder.
- 2. Select a subfolder.
- 3. Select the page(s) you want to copy/move.
- 4. Right-click on the selected page(s).
- 5. Click on the **Select for Copy/Move** button (see Figure 16.10).



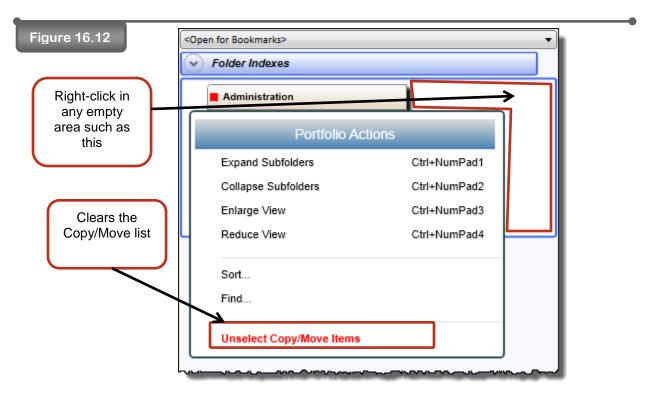
- 6. The selected page(s) are now added to the copy/move list.
- 7. Search for the folder you want to copy/move to, and open it in the Folder Viewer.
- 8. Select the folder you want to copy/move the selected page(s) to.
- 9. Select a subfolder.
- 10. Right-click on the selected subfolder.
- 11. Click on the Copy/Move Selected Items button.
- 12. An Apply Copy/Move window will (see Figure 16.11).
- 13. Select which Apply Method you want to use (see Figure 16.11).
 - a. Copy Places a copy of the selected pageset/page into the selected subfolder.
 - b. Move Moves the selected pageset/page into the selected subfolder.
- 14. Click on the **OK** button (see Figure 16.11).

Figure 16.11	
	Apply Copy/Move
	Source Folder: EMPLOYEE_ID: 20130814 Subfolder:
	Pageset/Pages: 9-13
	Apply Method Copy Creates new copies of both metadata and content and stores it in the selected area. Include Declargedia Materia
	 Include Bookmarks, Notes, Page Permissions, Redactions and Annotations Move Moves metadata, content and page extents to the selected area.
	OK Cancel

- 15. Click on the **Refresh** button.
- 16. The selected page(s) has now been successfully copied/moved to the selected folder and selected subfolder.

Section 16.5 - Clear the Copy/Move List

To clear the copy/move list, right-click in the space surrounding any subfolders, pagesets, or pages (*see Figure 16.12*). From the menu that appears, click the **Unselect Copy/Move Items**.



After clicking the menu option, the Copy/Move List will be successfully cleared.

Section 17 – Deleting

Section 17 – Deleting

Deleting permanently removes a folder, a pageset, or a page from an application.

<u>Section 17.1 – Deleting a Folder</u>

To delete a folder, follow the steps listed below.

- 1. Select the folder you want to delete (see Figure 17.1).
- 2. Right-click the **Folder Indexes** bar.
- 3. Click on the **Delete** button (see Figure 17.1).

Figure 17.1	Folder Portfolio	
	<open bookmarks="" for=""></open>	→
	Folder Ind	Folder Actions
	Administ	Notes
	Benefits/	Permission
		Add To Publish List
Delete	e option erforma	Publish
		Select for Copy/Move
		Fulltext Redact Folder
		Delete

- 4. A message asking, "Are you sure you want to permanently delete this folder?" appears.
- 5. Click **Yes** to proceed. When all folder content has disappeared from view, the folder deletion is complete.

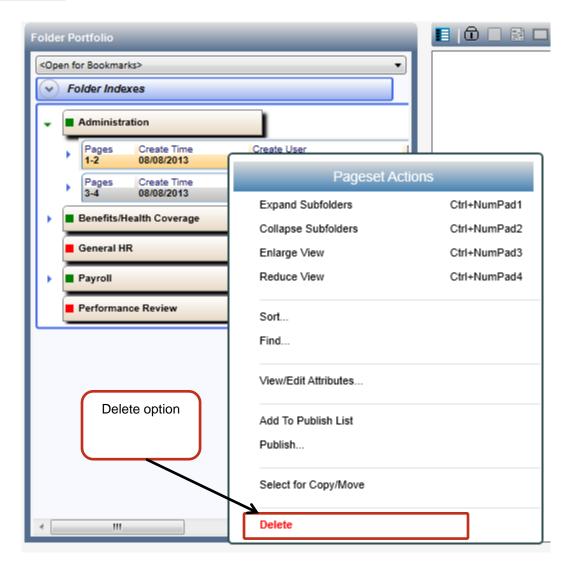
Section 17.2 - Deleting a Pageset

To delete a pageset, follow the steps listed below.

Steps:

- 1. Select the pageset you want to delete.
- 2. Right-click on the selected pageset.
- 3. Click on the **Delete** option (see Figure 17.2).

Figure 17.2



- 4. A message asking "Are you sure you want to permanently delete this content?" Click Yes to proceed.
- 5. The selected pageset has now been successfully deleted.

Section 17.3 - Deleting a Page

To delete a page, follow the steps listed below.

Steps:

- 1. Select the page you want to delete.
- 2. Right-click on the selected page.
- 3. Click on the **Delete** button (see Figure 17.3).

Figure 17.3

en for Bookmarks>			
Administration	1		
	reate Time 8/08/2013	Create User abeck	
1 Ap	plication f	Page Acti	ons
	reate Tim 3/08/2013	Expand Subfolders	Ctrl+NumPad1
Benefits/Healt		Collapse Subfolders	Ctrl+NumPad2
		Enlarge View	Ctrl+NumPad3
General HR		Reduce View	Ctrl+NumPad4
 Payroll Performance R 	leview	Sort	
	_	Find	
		View/Edit Attributes	
Delete option		Add To Publish List	
	J	Publish	
		Select for Copy/Move	

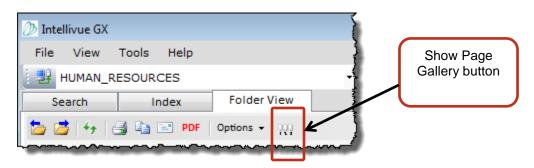
- 4. A message asking "Are you sure you want to permanently delete this content?" Click **Yes** to proceed.
- 5. The selected pageset has now been successfully deleted.

Section 18 – Page Gallery

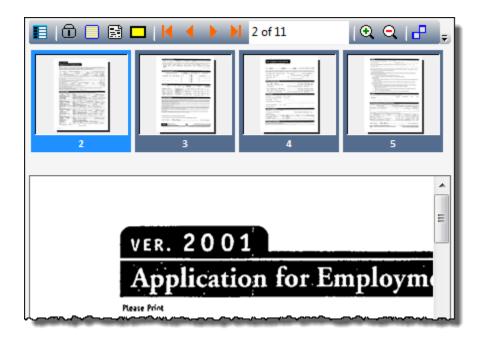
Section 18 – Page Gallery

Page gallery allows you to view the pages within a subfolder as thumbnails.

- 1. Select the first page of any pageset whose thumbnails you wish to see (see Figure 18.1).
- 2. Click on the **Show Page Gallery** button (see Figure 18.1).



- 3. The page gallery will appear about the image viewer (see Figure 18.2).
- 4. Select one of the pages displayed in the page gallery to view in the image viewer (see Figure 18.2).



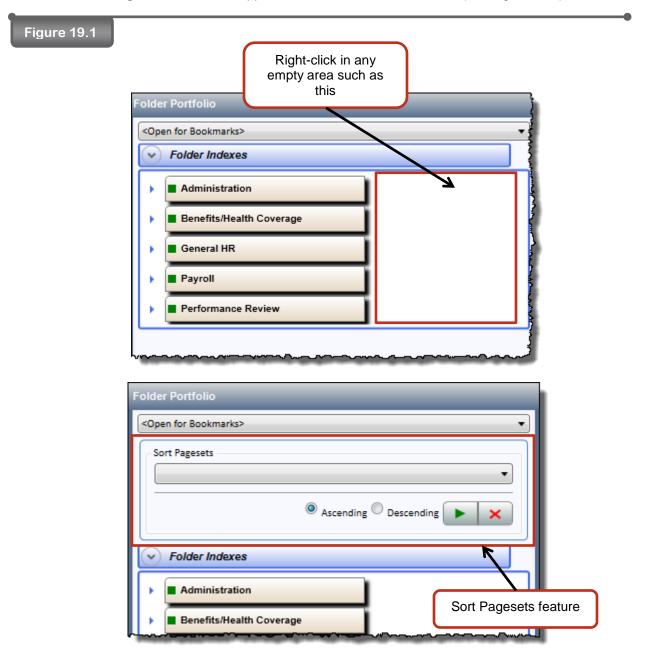
Section 19 – Sort Pagesets

Section 19 - Sort Pagesets

Sort pagesets allows you to sort the order of the pagesets listed within a selected subfolder by date or document attribute. To sort pagesets, follow the steps listed below.

Step:

- 1. Right-click in an empty area (see Figure 19.1).
- 2. From the menu that appears, click the **Sort...** option (see Figure 19.1).
- 3. The **Sort Pagesets** feature will appear above the Folder Indexes bar (see Figure 19.1).



- 4. Select the item you want the pagesets to be sort by (see Figure 19.2).
- 5. Select the order in which you want the pagesets sorted (see Figure 19.2).
- 6. Click on the **Apply** button (see Figure 19.2).

Figure 19.2		4) Selected Item
5) Ascending	Sort Pagesets Document_Status	→
Option Selected		Ascending Descending 6) Apply Button

7. The selected subfolder's pagesets are now sorted in the selected order (see Figure 19.3).

Figure 19.3	- 🔳	General H	IR		
	•	Pages 1-12	Create Time 08/08/2013	Create User jim	Document_Status Not Required
	•	Pages 13-25	Creste Time 08/08/2013	Create User jim	Document_Status Under Review
	- 🔳	Payroll			
7) De secorto O esta d		Pages 1-2	Create Time 08/08/2013	Create User jim	Document_Status Complete
7) Pagesets Sorted by Document_Status in		Pages 3-3	Create Time 08/08/2013	Create User jim	Document_Status Complete
Ascending order		Pages 4-4	Create Time 08/08/2013	Create User	Document_Status Complete
	•	Pages 5-7	Create Time 08/08/2013	Create User jim	Document_Status Complete
	•	Pages 8-8	Create Time 08/08/2013	Create User jim	Document_Status Complete
	•	Pages 9-9	Create Time 08/09/2013	Create User jim	Document_Status Complete
	•	Pages 10-10	Create Time 08/08/2013	Create User jim	Document_Status Needs Reviewed
	•	Pages 11-11	Create Time 08/08/2013	Create User jim	Document_Status Under Review

Section 20 – Save Rotated

Section 20 - Save Rotated

Saved Rotated allows you to rotate a selected page to a new position and save it. To save a rotated page, follow the steps listed below.

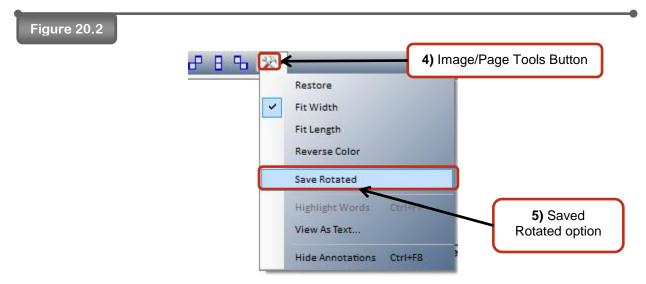
Steps:

Figure 20.1

- 1. Select the page that needs to be rotated.
- 2. Choose one of the three rotation buttons to rotate the selected page (see Figure 20.1).
 - a. Rotate Left Rotates the currently selected page 90 degrees to the left.
 - b. Flip Rotates the currently selected page 180 degrees.
 - c. Rotate Right Rotates the currently selected page 90 degrees to the right.

to the	1011 2012 2014 2015 2015 2015 2015 2015 2015 2015 2015	2) Rotation Button Selected
VER. 2001 Application for Employment terms Equivers to pegnar, revier and conference is multide to all person. These applicants requiring reasonable accorder accounteducion to the application and real accorder process should accord a copression to the Human Resource Dependence.	Publicate(1) applied for $\Delta C T U I \Gamma I \mathcal{E}^{2}$. CCD $\mathcal{E} I M \Delta T \mathcal{E} I \mathcal{E}$ Due of application [1] [1] [0]. Name $\mathcal{E}_{CL} [\mathcal{E} A \mathcal{E} D$ $M I \mathcal{E}^{1} H \frac{1}{2} \mathcal{E}^{1} \mathcal{E}^{1}$ $\mathcal{E}^{1} \mathcal{E}^{2} $	MAN DE FROM SCATCH [[[1]] 134. (25) (25) (25) (25) (25) (25) (25) (25)
VER. 2001 Application for Employment neres Equation softwares trades application and the	Puriner(a) applied for $\Delta C T U \downarrow \Gamma I \in C C C C E E$ Name $E C_1 E C A E E A U E C C C C E E$ Address $-I(L_1 U + S - A E E A U E C - C C E E E)$ Address $-I(L_1 U + S - A E E A U E - C - C - C - E E E E E E E E E E E E$	MANAGE BANKI I MANUNAL MANAGER MANAGER BANKI ALCE MANAGER MANAG

- 3. The selected page must now be saved once it is rotated to its correct position.
- 4. Click on the **Image/Page Tools** button (see Figure 20.2).
- 5. Click on the **Saved Rotated** button (see Figure 20.2).



8. The selected page has now been successfully saved to its new position.

Section 21 – Adding a Folder

Section 21 – Adding a Folder

Adding a folder allows you to create a new empty folder in the currently selected application. To add a folder, follow the steps listed below.

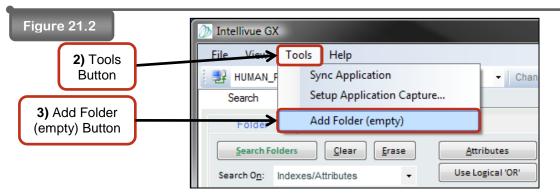
Steps:

(

1. Enter the information you would like to give the new folder into the required folder index fields (see *Figure 21.1*).

Figure 21.1	D Intellivue GX
	<u>File V</u> iew <u>T</u> ools <u>H</u> elp
	HUMAN_RESOURCES 🗸 Change 🐴 5
	Search Index
	Folder Advanced Inbox
	Search Folders Clear Erase Attributes
	Search On: Indexes/Attributes Use Logical 'OR'
	Value:
	FOLDER INDEXES
	EMPLOYEE_ID
	DEPARTMENT
	Accounting
	SSN
	954-65-6541
	LAST_NAME SMITH
1) Entered Information into the	FIRST_NAME
Folder Index Fields	JOHN
Tolder Index Tields	EMPLOYEE_STATUS
	Active 👻
	LOCATION
	54
	DATE_OF_HIRE
	DATE_OF_TERMINATION
	DOCUMENT ATTRIBUTES
	Year
	Document Type
	Ready

- 2. Click on the **Tools** button (see Figure 21.2).
- 3. Select the Add Folder (empty) button (see Figure 21.2).



4. The new folder has been successfully added to the selected application.

Section 22 – Change Data of All Folders

Section 22 – Change Data of All Listed Folders

Change data of all listed folders allows you to search for a group of folders that need their folder index fields or document attribute fields updated at a group level.

Steps:

1. Search for the group of folders that need a updated (see Figure 22.1).

intellivue GX								_ 0
le <u>V</u> iew <u>T</u> ools <u>H</u> elp								
	ange 🝙 🗛 🗛	Publisher	Activity:	Needs Reviewed	 Inbox 			
Search Index								
Folder Advanced Inbox	4 Folders, 4 D	ocuments						
	EMPLOYEE_ID	DEPARTMENT	SSN	LAST_NAME	FIRST_NAME	EMPLOYEE_STATUS	LOCATION	DATE_OF_
Search Documents Clear Erase	JP41002	Finance	123-45-6789		JAY	Active	25	6/16/2000
Search On: Indexes/Attributes Use Logical 'OR'	ME41000	Finance	345-67-8901		MICHAEL	Applicant	23	3/20/2002
Value:	AK78001	IT Finance	456-78-9012		AMANDA	Inactive	5 23	10/24/200
FOLDER INDEXES	PA41001	Finance	234-56-7890	SMITH	PAULETTE	Inactive	23	3/19/2000
EMPLOYEE_ID								
DEPARTMENT								
•								
SSN								
LAST_NAME								
FIRST_NAME								
1001_0000E								
EMPLOYEE_STATUS								
LOCATION								
LOCATION								
LOCATION DATE_OF_HIRE								
DATE_OF_HIRE								
DATE_OF_HIRE DATE_OF_TERMINATION								
DATE_OF_HIRE DATE_OF_TERMINATION DOCUMENT ATTRIBUTES								
DATE_OF_HIRE DATE_OF_TERMINATION								
DATE_OF_HIRE DATE_OF_TERMINATION DOCUMENT ATTRIBUTES Year								
DATE_OF_HIRE DATE_OF_TERMINATION DOCUMENT ATTRIBUTES								
DATE_OF_HIRE DATE_OF_TERMINATION DOCUMENT ATTRIBUTES Year								
DATE_OF_HIRE DATE_OF_TERMINATION DOCUMENT ATTRIBUTES Year Document_Type								
DATE_OF_HIRE DATE_OF_TERMINATION DOCUMENT ATTRIBUTES Year Document_Type Vocument_Status								
DATE_OF_HIRE DATE_OF_TERMINATION DOCUMENT ATTRIBUTES Year Document_Type Cocument_Status Needs Reviewed								

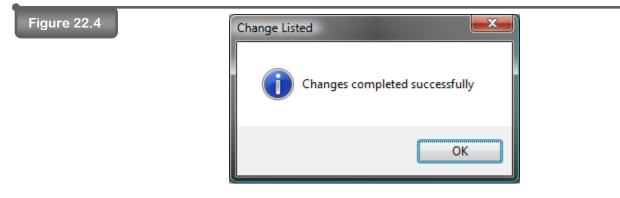
- 2. Enter the information that needs updated (see Figure 22.2).
- 3. Click on the **Change** button (see Figure 22.2).

itellivue GX								_ D _X
e <u>V</u> iew <u>T</u> ools <u>H</u> elp								
	Change 📳 👼 🗛	Publisher	Activity:	Needs Reviewed	* Inhox			
Search Index			pa roundy.		Index			
	4 Folders, 4 D) o que o o to						
Folder Advanced Inbox	EMPLOYEE_ID	DEPARTMENT	SSN	LAST_NAME	FIRST_NAME	EMPLOYEE_STATUS	LOCATION	DATE_OF_
Search Documents Clear Erase Attributes	JP41002	Finance	123-45-6789		JAY	Active	25	6/16/2000
earch On: Indexes/Attributes - Use Logical 'OR	NE41000	Finance	345-67-8901		MICHAEL	Applicant	23	3/20/2002
alue:	AK78001	п	456-78-9012		AMANDA	Inactive	5	10/24/200
	PA41001	Finance	234-56-7890	SMITH	PAULETTE	Inactive	23	3/19/2000
FOLDER INDEXES								
EMPLOYEE_ID								
DEPARTMENT								
-	· .							
SSN								
LAST_NAME								
FIRST_NAME								
EMPLOYEE_STATUS								
•	•							
LOCATION								
DATE_OF_HIRE								
DATE_OF_TERMINATION								
DOCUMENT ATTRIBUTES								
Year								
Document_Type								
	· .							
Document_Status								
	-							
Document_Status								
Document_Status Complete	•							

- 4. A Confirm Change window will pop up (see Figure 22.3).
- 5. Click on the **Confirm** button (see Figure 22.3).

Figure 22.3	C	onfirm Change		•
		Field	Change Value	
		Document_Status	Complete	
		All items in the result list will be changed. to continue with these changes.	This completed action cannot be reversed. Click 'Confirm' Confirm Cancel	

- 6. A Change Lists window will pop up (see Figure 22.4).
- 7. Click on the **OK** button (see Figure 22.4).



8. The group of folders have now been successfully updated.

Section 23 – Export Results List

Section 23 – Export Results List

Export results list allows you to export a list of the search results.

Steps:

- 1. Perform a search (see Figure 23.1).
- 2. The search results will be returned (see Figure 23.1).
- 3. Click on the **Export Result List** button (see Figure 23.1).

gure 23.1	D Intellivue GX								- 0 X
	<u>File V</u> iew <u>T</u> ools <u>H</u> elp								
	HUMAN_RESOURCES - Char	ge 🕒 👵 🗸 I	Publisher	Activity:	Needs Reviewed	✓ Inbox			
	Search Index								
	Folder Advanced Inbox	1 Folders, 18 D	ocuments						
		EMPLOYEE_ID	DEPARTMENT	SSN	LAST_NAME	FIRST_NAME	EMPLOYEE_STATUS	LOCATION	DATE_OF_HI
	Search Documents Clear Erase Attributes	ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
	Search On: Indexes/Attributes - Use Logical 'OR'	ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
	Network Control of Con	ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
	<u>V</u> alue:	ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
	FOLDER INDEXES	ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
		ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
	EMPLOYEE_ID	ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
		ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11
	DEPARTMENT	ME41000	Finance	345-67-8901	ECKARD	MICHAEL	Applicant	23	3/20/2002 11

- 4. A Export Results List will pop up (see Figure 23.2).
 - a. **CSV –** Saves the search results list as a CSV file.
 - b. XML Saves the search results list as an XML file.
- 5. Select the Export Format you want to use (see Figure 23.2).
- 6. Enter the **Export Path:** (see Figure 23.2).
- 7. Click on the **OK** button (see Figure 23.2).

e 23.2	Export Result List
	Export Format CSV Quoted Fields XML Inicude Schema Export Path:
	C:\Users\abeck\Desktop\Michael Eckard.csv

8. The search results list has now been successfully exported.

Figu

Section 24 – Settings and Viewing Options

Section 24 – Settings and Viewing Options

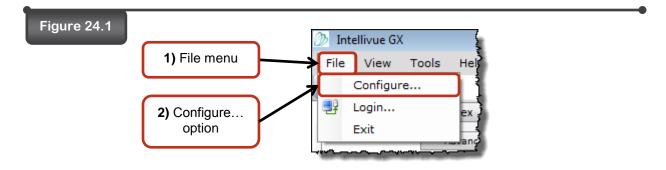
Intellivue[™] GX contains several areas where you can set certain features in the software to function according to the settings you choose. These settings make it possible for you to log in to your specific application and customize the way you view content on your screen.

Section 24.1 Intellivue™ GX Configuration

Before you can use Intellivue[™] GX, you must first enter the Service Provider Site information on the Configuration screen. The Service Provider Site is the location that houses the repository that contains all the information you store and maintain when using Intellivue[™] GX.

Unless your Intellivue[™] GX administrator has made special login setup arrangements, verify that Intellivue[™] GX is configured with the following settings recommended for use. Contact your Intellivue[™] GX administrator if you are not sure of any Configuration information.

- 1. Click the File menu option located in the top left corner (see Figure 24.1).
- 2. Click **Configure...** from the menu (see Figure 24.1).



- 3. Type the address of the internet location where your Service Provider is stored in the **URL** box (see Figure 24.2).
- 4. Type the name of the domain of the Service Provider Site in the **Domain Name** box (see *Figure* 24.2).

Figure 24.2		
	Configuration	
3) URL entered	Service Provider Site URL:	
4) Domain Name entered	https://securehost9.intellinetics.com/hss7/intellivuewebapi Domain Name: Human Resources	
5) Login screen is set to show on startup.	Show Login form on startup	7) Saves or discards your settings.
6) Login screen is set to show on startup.	OK Cancel	

- 5. The checkmark in the **Show Login form on startup** box ensures that a prompt appears each time you log in to Intellivue[™] GX. If your Intellivue[™] GX administrator has set up your login credentials with conditions that do not require the prompt to appear, you can click the box to remove the check mark (see Figure 24.2).
- 6. Unless your Intellivue[™] GX administrator has set up your login credentials differently, make sure the Roaming Profiles checkbox is unchecked (*see Figure 24.2*).
- 7. Click **OK** to save your settings, or **Cancel** to discard any changes. The screen will close (*see Figure 24.2*).

The URL and Domain Name must be entered correctly in order to give you the access to the correct repository. Contact your Intellivue[™] GX administrator if you are not sure of the specific information to enter in these boxes.

Section 24.2 Folder View Tab/Window Selector

The Folder Viewer window presents the contents of a selected folder that has been located using the features on the Search Tab. Use the Folder View tab/window selector to adjust the way that each folder you select appears on the screen (see Figure 24.3).

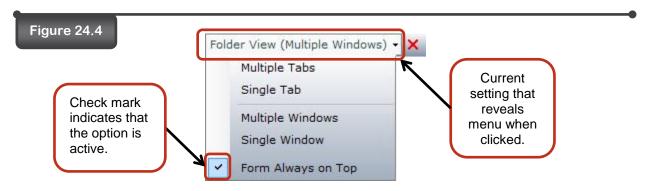
Figure 24.3

Folder View (Single Window) 🔻 🗙

The Folder View tab/window selector is located at the top of the Intellivue[™] GX screen with the rest of the software toolbars. Click the currently selected option to reveal the menu options. Then, choose the option that best fits your viewing preferences of the Folder View tab/window selector.

- Multiple Tabs: A new Folder View tab will open for each selected search result (see Figure 24.4).
- Single Tab: One Folder View tab will open for each selected result (see Figure 24.4).
- **Multiple Windows**: A new Folder View window will open for each selected result (*see Figure 24.4*).
- Single Window: One Folder View tab will open for each selected result (see Figure 24.4).

To keep the Folder View window(s) constantly on the foreground, you can click the **Form Always on Top** option. A check mark located next to the menu option indicates that the option is on. Click the option again to remove the check mark and turn it off (see *Figure 24.4*).



Any Folder View tabs or windows currently open when choosing one of the above four options will close. The new setting will then take effect as soon as you select a new folder index or document attribute from the results pane on the Search tab.

If you use more than one application in Intellivue™ GX, the Folder Viewer options you set apply to only the currently selected application. Therefore, navigating to a different application will show a different Folder Viewer setting until you make the change in the selected application.

To close all Folder View windows and/or tabs, click the K button at any time.

Section 24.3 Application View Options

Note

Each application accessible from within Intellivue[™] GX provides its own set of Search tab settings you can use to show the index/attribute search fields and search pane result columns you wish to see. Additional Options features allow default Settings to take effect as you search and browse through folders and documents.

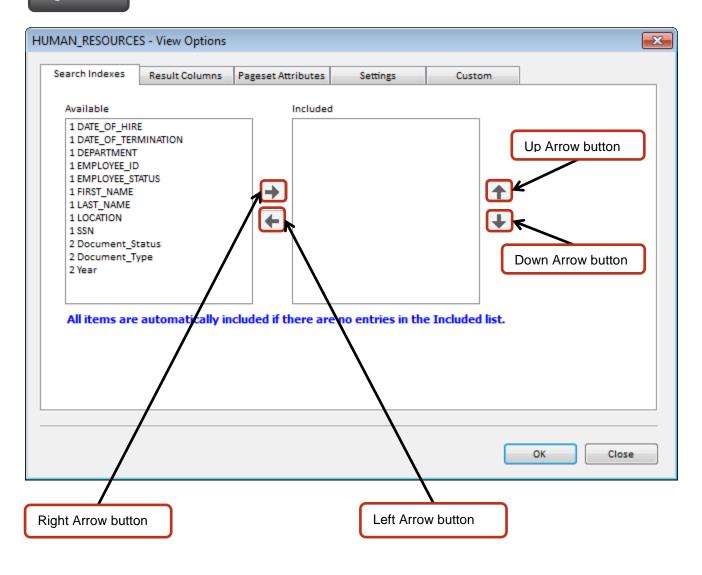
To explore and set your preferences:

- 1. Click the View menu at the top of the screen (see Figure 24.5).
- 2. Click **Options...** (see Figure 24.5).



When the View Options screen appears, make your desired selections from any of the tabs (see *Figure 24.6*). When finished, click the **OK** button to apply your selections.

Figure 24.6



Section 24.3a Search Indexes

The Search Indexes tab defines the order and appearance of the fields that show up under Folder Indexes and Document Attributes on the Search tab (see <u>Section 2 – Folder Index Search</u> and <u>Section 3</u> <u>– Document Attributes Search</u> for further details). If all fields appear in the **Available** list and no fields appear in the **Included** list, Intellivue[™] GX will display all the fields on the Search tab in the order they were originally set up.

To set up all desired fields to appear in a specific order:

- 1. Click to select a field from the list of **Available** fields (see Figure 24.6).
- 2. Click the Right Arrow button arrow. The item will be moved to the Included list (see Figure 24.6).

- 3. Click to select a field from the **Included** list (see Figure 24.6).
- 4. Click the Up and Down Arrow buttons to move the item further up or down the list. This will set

up the order of appearance of the **Included** fields (see Figure 24.6).

If you wish to remove a field from the Included list, click the item from the Available list. Then click the

Left Arrow button to return the item to the Included list (see Figure 24.6).

Section 24.3b Result Columns

Use the Result Columns tab to show or hide columns, and set the order in which you would like them to appear. If all fields appear in the **Available** list and no fields appear in the **Included** list, Intellivue[™] GX will display all possible fields with the exception of the Pageset Createtime in the results pane.

Note The Pageset Createtime represents the time and date that the pageset was created. Regardless of which columns are included to show in the results pane, the Pageset Createtime will only show if you click the specific checkbox for it located beneath the Available and Included lists (*see Figure 24.7*)

From the View Options screen (see *Figure 24.5* and *Figure 24.7*), click the **Result Columns** tab and use the following steps to make your adjustments:

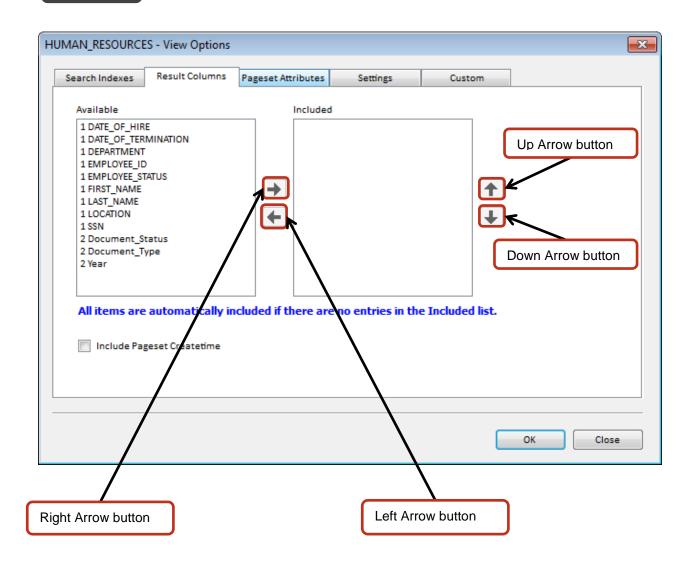
- 1. Click to select a field from the list of **Available** fields (see Figure 24.7).
- 2. Click the Right Arrow button arrow. The item will be moved to the Included list (see Figure 24.7).
- 3. Click to select a field from the **Included** list (see Figure 24.7).
- 4. Click the Up and Down Arrow buttons to move the item further up or down the list. This will set

up the order of appearance of the **Included** fields (see Figure 24.7).

If you wish to remove a field from the Included list, click the item from the Available list. Then click the

Left Arrow button to return the item to the Included list (see Figure 24.7).

Figure 24.7



Section 24.3c Pageset Attributes

After selecting a folder index or document attribute from the search results pane, the Folder View displays all associated pagesets and subfolders contained in the folder. The Pageset Attributes tab determines the order and appearance of the attributes to display on each pageset.

If all fields appear in the **Available** list and no fields appear in the **Included** list, Intellivue[™] GX will display all the fields on the Search tab in the order they were originally set up.

Figure 24.8

HUMAN_RESOURCES - View Option	5			×
Search Indexes Result Columns	Pageset Attributes	Settings	Custom	1
Available	Included			
Document_Status Document_Type	Year		(•	Up Arrow button
				Down Arrow button
				OK Close
			\backslash	
Right Arrow button		Left Arro	ow button	

From the View Options screen (see *Figure 24.5* and *Figure 24.8*), click the **Pageset Attributes** tab and use the following steps to make your adjustments.

To set up all desired fields to appear in a specific order:

- 1. Click to select a field from the list of **Available** fields (see Figure 24.6).
- 2. Click the Right Arrow button arrow. The item will be moved to the Included list (see Figure 24.6).
- 3. Click to select a field from the **Included** list (see Figure 24.6).
- 4. Click the Up and Down Arrow buttons to move the item further up or down the list. This will set

up the order of appearance of the **Included** fields (see Figure 24.6).

If you wish to remove a field from the Included list, click the item from the Available list. Then click the

Left Arrow button to return the item to the Included list (see Figure 24.6).

Section 24.3d Settings

The Settings tab contains a panel of adjustments where you can set various functions in Intellivue[™] GX to perform in certain ways. From the View Options screen (see *Figure 24.5* and *Figure 24.8*), click the **Settings** tab and make any of the following adjustments.

HUMAN_RESOURCES - View Options	
Search Indexes Result Columns Pageset Attributes	Settings Custom
Search Maximum folders to return 0 💭 🔲 Paged A value of '0' sets the default to 256	Forms Minimize folder viewer when main form is minimized Auto open folder on single result
Formatting DateTime Format Default Null Value	Template Sorting
Defaults Redaction zone permission access level 0	
	OK Close

• Search: Set the Maximum folders to return by entering a number between 0 and 256 in the box. The number you enter in the box represents the maximum number of folders set to appear in the search results pane when you perform a search. Entering a 0 will set the search results pane to show a maximum of 256 results.

Placing a check mark in the **Paged** box enables you to continue receiving search results when the total number of results exceeds the maximum folders to return. If you do not place a check mark in the box, the search will complete with only the maximum amount of results showing on the search results pane.

• Formatting: The DateTime Format setting determines the appearance of the date and time on all columns that present a date and/or time. If you set it to Default, the search results pane will show all dates according to your computer date and time settings. If any of the results does not contain a date or time, you can set the Null Value to present either a default set of characters, or an empty box.

For example, if you type "None" in the Null Value field, each result that is missing a date will read "None." If you do not type anything in the field, each result that is missing a date will show an empty space.

- **Defaults**: Set the number of the Redaction zone permission access level box, and the number will show up each time you use the Redact feature on pages in the Folder Viewer.
- Forms: Click any of the boxes to place a check mark next to any settings you wish to enable. If you choose to display a Single Window or Multiple Windows as your viewing preference for the Folder Viewer, you can mark the Minimize folder viewer when main form is minimized option with a check. If there is only one search result, you can have the Folder Viewer open immediately after your search is complete by placing a check mark in the Auto open folder on single result box.
- **Template Sorting**: Perform sort after search.

Section 24.3e Custom

Any settings that have been customized to your specific needs of Intellivue™ GX are found on the Custom tab. If you or your administrator have not set up any custom features, this tab will be blank.

Section 24.4 Folder Viewer Options

The Folder Viewer Options is a set of features that changes how the subfolders, pagesets, and pages display inside the Folder Viewer. All features are located under the Options menu located at the top of the Folder Viewer tab or window (see *Figure 24.10*).

The features of the Options menu are set up in a panel of selections where you can select multiple settings and retain the selections without leaving the Folder Viewer tab or window.

To use the menu, click **Options** to reveal the panel containing the following selections. Then, click each desired selection. Click **Save** to apply the selections, and then **Refresh** to show the changes put into effect (*see Figure 24.10*). Each time the Folder Viewer is opened, the same settings will remain in effect until you make and save any future changes.

Folder Views	Options menu
Folder Portfolio	Deptions Expand folder indexes Expand subfolders Expand pagesets Show folder notes
Check marks indicate selected options. General HR Save button that retains selections.	 Open first page after folder loaded Show page notes when page item selected Enable redaction mode after page displayed Use Native Viewer for Virtual Files Show template annotations on page Save Cancel Page Request

Expand folder indexes

Expand subfolders

Expand pagesets

Show folder notes

Open first page after folder loaded

Show page notes when page item selected

Enable redaction mode after page displayed

Use Native Viewer for Virtual Files

Show template annotations on page

Reveals the Folder Indexes fields.

Reveals the Pagesets of each Subfolder.

Reveals the Pages beneath each Pageset when each Subfolder is expanded.

Loads the Folder Notes when the Folder Viewer is open.

Expands the first Page of the first Pageset of the first Subfolder.

If the selected page contains Page Notes, they will be set to appear in a pane above every selected Page.

Opens the Redactor pane above every selected page, making the page ready for you to make redactions.

Instead of the file contents opening in the page viewer, the file, they will open in a set program installed on your computer.

Reveals the template annotations on Pages where they have been applied.

Section 25 – Linking DirectVUE™ to Intellivue™ GX

Section 25 – Linking DirectVUE™ to Intellivue™ GX

DirectVUE[™] is a tool used to link a data field from an external application to a data field in the **Intellivue™ GX** application. Once configuration is complete, a user will have the ability to execute a search from the external application and images related to the search will be displayed in the **Intellivue™ GX** application results list.

To link DirectVUE[™], follow the steps listed below.

Steps:

- 1. Launch the external application (see Figure 25.1).
- 2. Launch the Intellivue[™] GX application (see Figure 25.1).
- 3. Click on the **Tools** button (*see Figure 25.1*).
- 4. Click on the Setup Application Capture... button (see Figure 25.1).

Figure 25.1	📰 Test Form
	ID Number Date
	Last Name
	First Name
1) External Application	SSN Other
	Sure Care
	Value in a label: 12345
	D Intellivue GX
3) Tools	File View Tools Help
	HUMAN_ Sync Application Change
	Search Setup Application Capture
4) Setup Application Capture Button	Folder Add Folder (empty)
	Search Folders Cross Cro
	Search On: Indexes/Attributes
	Value:
	2) Intellivue™
	GX Application

5. An Application Capture Integration Setup window will pop up (see Figure 25.2).

6. Select the system wide hotkey you want to use from the **System Wide Hot Key Assignment** area (*see Figure 25.2*).

	Target	Source	
	EMPLOYEE_ID		
	DEPARTMENT		
	LAST_NAME		
	FIRST_NAME		
	MIDDLE_INITIAL		
	EMPLOYEE_STATUS		
	LOCATION		
	DATE_OF_HIRE		
5) Application			
oture Integration			
Setup Window	Control Identification		Remove
	Static ID C Location (x,y)		
	Options		
	Pattern Capture All		
	System Wide Hot Key Assignment		
	ALT+ N		
	0		
) Selected System			
Wide Hotkey	s		ок
	Т	ר ר	
	U 🚽 Set	J	Cancel

7. Click on the **Set** button (*see Figure 25.2*).

8. Select the **Target** data field you want to configure to your external application (see Figure 25.3).

Figure 25.3		
	Application Capture Integration Setup	
8) Selected Target Data Field	Target Source EMPLOYEE ID DEPARTMENT LAST_NAME FIRST_NAME MIDDLE_INITIAL EMPLOYEE_STATUS LOCATION DATE_OF_HIRE	
	Control Identification	Remove OK Cancel

- 9. In your external application, locate the data field you would like to link with the **Intellivue™ GX** application (*See Figure 25.4*).
- 10. Place your curser in the selected data field.
- 11. Invoke your selected system wide hotkey, which you setup in the **Application Capture Integration Setup** window, with your keyboard.

Figure 25.4	🖳 Test Form	
9) Selected Data Field	ID Number Date Last Name	
External Application	SSN Other	
	Value in a label: 12345	
		J

- 12. Go back to the **Intellivue™ GX** application. You will see the selected data field from your external application linked successfully with the selected target data field in the **Intellivue™ GX** application (*See Figure 25.5*).
- 13. Select which Control Identification you want to use (See Figure 25.5).
 - a. **Static ID –** the Static ID locates the target data field using programmatic ID's within the target window of the external application.
 - b. Location (x,y) the Location locates the target data field based on its physical position within the target window of the external application.
- 14. Select which **Options** you want to use (See Figure 25.5).
 - Note

a) If you want to use both options, place a check in both the **Pattern** box and the **Capture** All box.

- a. Pattern The pattern option is used as a wildcard search. For example, If there are three different values that appear in one data field in the Intellivue[™] GX application, a user can be in external application's data field (one value) and initiate DirectVUE[™] by using their selected system wide hotkey, and DirectVUE[™] will perform a wildcard (partial matching) search based on that one value.
- b. Capture All The Capture All option allows you to configure multiple fields within DirectVUE[™]. If multiple fields are configured and the Capture All option is enabled, DirectVUE[™] will grab data from all configured fields and insert them into the Intellivue[™] GX application for searching. If the Capture All option is not enabled, DirectVUE[™] will only grab data from the one configured data field and will insert it into the Intellivue[™] GX application for searching.
- 15. Click on the **OK** button (See Figure 25.5).

Figure 25.5	Application Capture Integration Setup	• •
Intellivue™ GX →	Target EMPLOYEE_D DEPARTMENT LAST_NAME FIRST_NAME MDDLE_INITIAL EMPLOYEE_STATUS LOCATION	Source Test Form(WindowsForms10 Windows8 app 0.376734a)(WindowsF 12) Selected Data
13) Selected Control	DATE_OF_HIRE Control Identification Static D Cocation (x,y)	Field Linked Successfully with Selected Target Index
14) Selected Options	Options Pattern Capture All System Wide Hot Key Assignment ALT+ K K N 0 P C Set Set	15) OK Button

DirectVUE[™] is now successfully setup and configured with your external application.