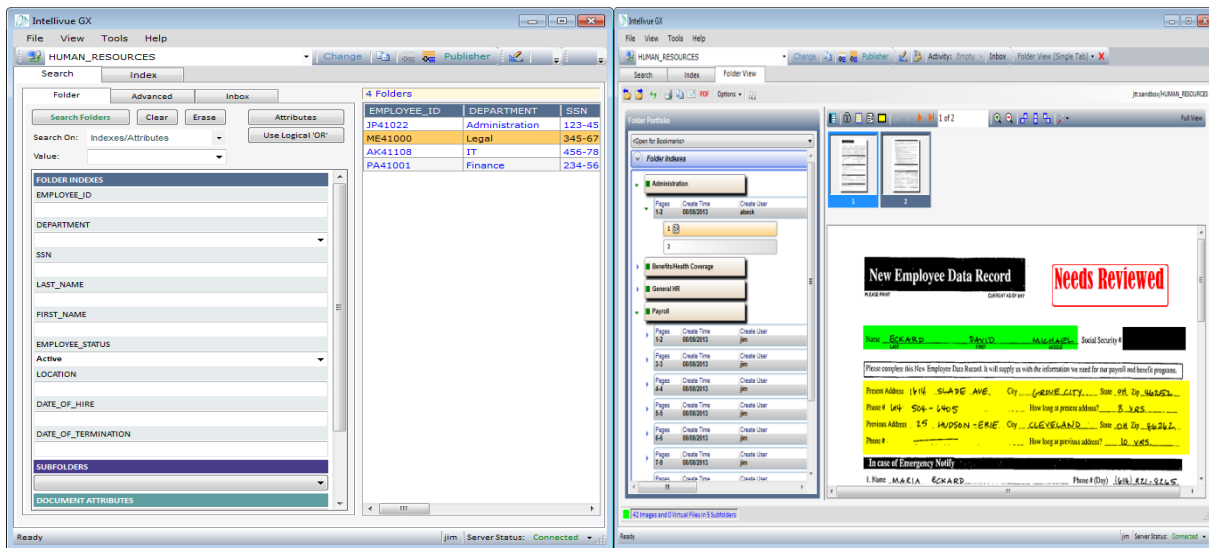


Intellivue™ GX v2.5

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

Table of Contents

Section 1 – Login.....	6
Section 1.1 – Windows XP Login	6
Section 1.2 – Windows 7 Login	8
Section 2 – Folder Index Search	10
Section 3 – Document Attributes Search	16
Section 4 – Additional Folder Tab Searches.....	22
Section 5 – Advanced Search	27
Section 6 - Activity Center.....	32
Section 6.1 – Search Activity Manager	32
Section 6.1a – New Activity.....	33
Section 6.1b – Edit Activity.....	36
Section 6.1c – Authority	37
Section 6.1d – Delete.....	39
Section 6.2 – Activity Drop Down Menu	41
Section 6.3 – Inbox.....	43
Section 6.4 – Search Activity Builder	46
Section 7 – Modifying Folder Indexes	49
Section 8 – Modifying Document Attributes	52
Section 9 – Bookmarks.....	55
Section 9.1 – Adding a Bookmark	55
Section 9.2 – Deleting a Bookmark	57
Section 9.3 – Search for a Bookmark.....	59
Section 10 – Notes	62
Section 10.1 – Folder Notes	62
Section 10.1a – Adding a Folder Note	62
Section 10.1b – Deleting Folder Notes.....	64
Section 10.2 – Page Notes.....	65
Section 10.2a – Adding a Page Note	66
Section 10.2b – Deleting Page Notes	67
Section 11 – Dynamic Annotations.....	71
Section 11.1 – Highlight Annotations	71
Section 11.2 – Box Annotations	74
Section 11.3 – Text Annotations	76

Section 11.4 – Stamp Annotations 79

Section 11.5 – Adding Comments 82

Section 11.6 – Deleting Annotations 85

Section 12 – Redactions 88

Section 12.1 – Adding Redactions 88

Section 12.2 – Removing Redactions 91

Section 13 – Permissions 94

Section 13.1 – Adding Folder Permissions 94

Section 13.2 – Adding Pageset Permissions 96

Section 13.3 – Adding Page Permissions 97

Section 14 – Publishing 100

Section 14.1 – Publish a Folder 100

Section 14.1a – Publish Multiple Folders 100

Section 14.1b – Publish a Single Folder 111

Section 14.2 – Publish a Pageset 115

Section 14.3 – Publish a Page 118

Section 14.4 – Remove an Item from the Publish List 120

Section 15 – Adding Content 123

Section 16 – Copy/Move 127

Section 16.1 – Copy/Move a Pageset to a Different Subfolder 127

Section 16.2 – Copy/Move a Pageset to a Different Folder 129

Section 16.3 – Copy/Move a Page to a Different Subfolder 131

Section 16.4 – Copy/Move a Page(s) to a Different Folder 133

Section 16.5 – Clear the Copy/Move List 135

Section 17 – Deleting 138

Section 17.1 – Deleting a Folder 138

Section 17.2 – Deleting a Pageset 139

Section 17.3 – Deleting a Page 140

Section 18 – Page Gallery 142

Section 19 – Sort Pagesets 144

Section 20 – Save Rotated 147

Section 21 – Adding a Folder 150

Section 22 – Change Data of All Listed Folders 153

Section 23 – Export Results List 157

Section 24 – Settings and Viewing Options 159

Section 24.1 *Intellivue™ GX Configuration* 159

Section 24.2 *Folder View Tab/Window Selector* 160

Section 24.3 *Application View Options* 161

 Section 24.3a *Search Indexes* 163

 Section 24.3b *Result Columns* 164

 Section 24.3c *Pageset Attributes* 165

 Section 24.3d *Settings* 167

 Section 24.3e *Custom* 168

Section 24.4 *Folder Viewer Options* 168

Section 25 – *Linking DirectVUE™ to Intellivue™ GX* 171

Section 1 – Login

Section 1 – Login

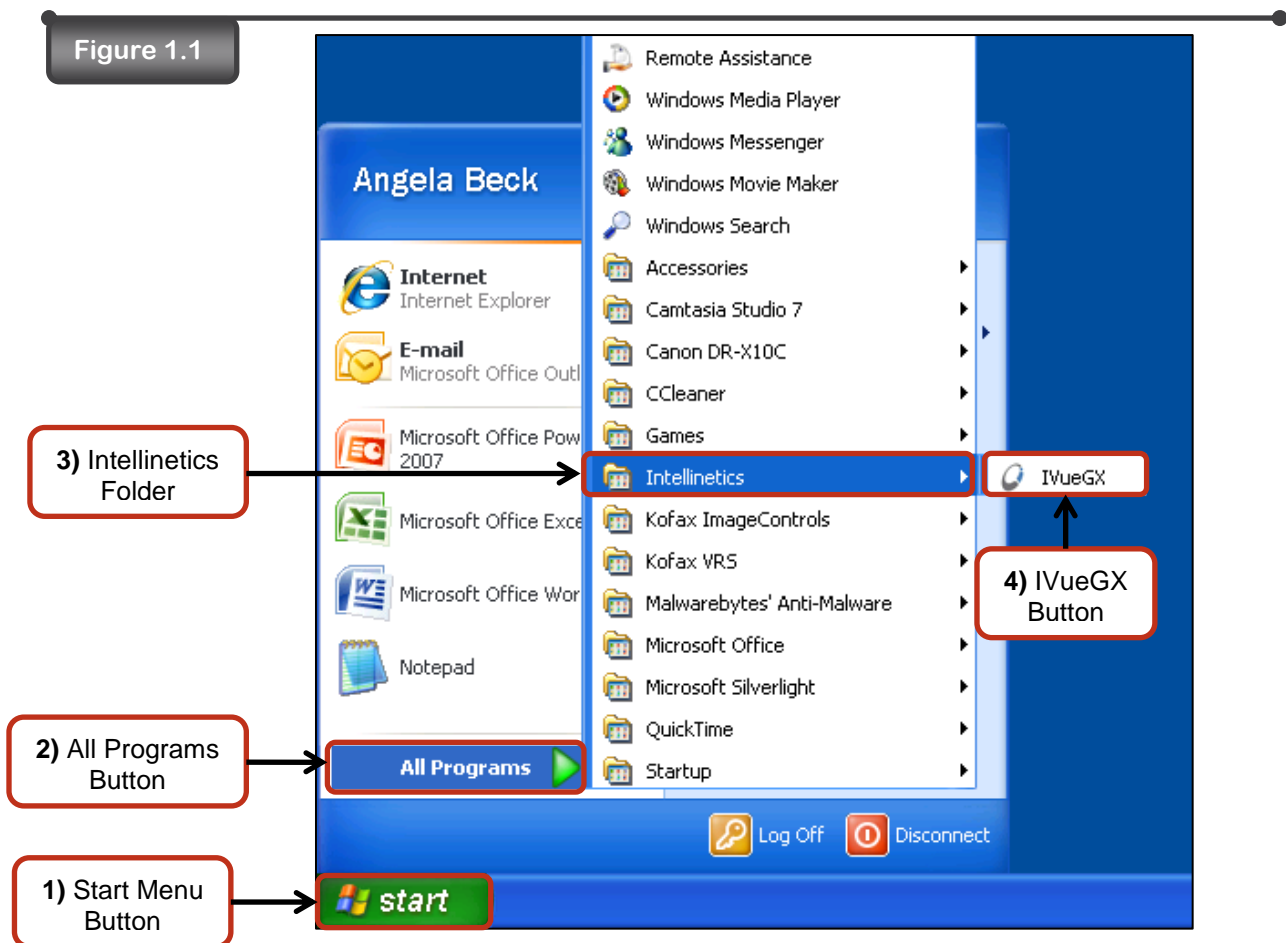
All users must login to the **Intellivue™ GX** application using their own individual user credentials, as assigned by the System Administrator (see *Figure 1.2*). To login to **Intellivue™ GX**, follow the steps listed below.

Section 1.1 – Windows XP Login

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

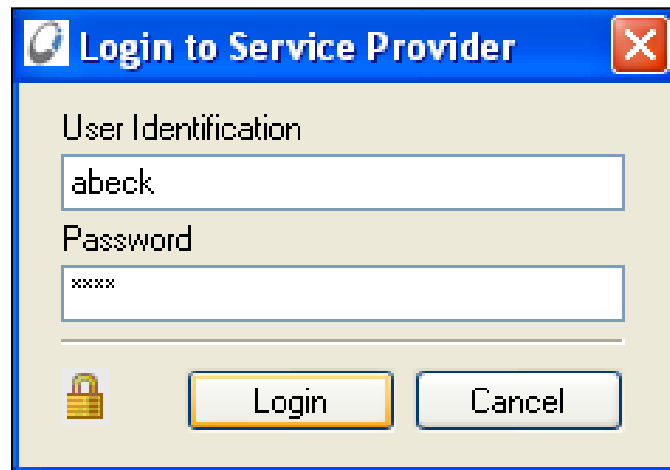
Steps:

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



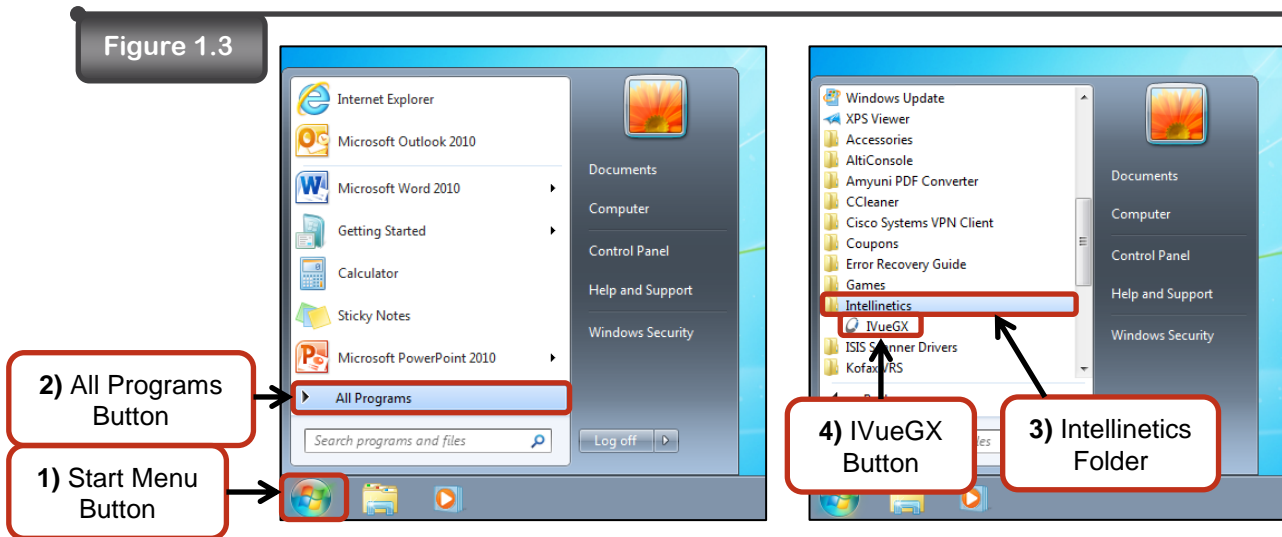
10. You will now be logged in to the **Intellivue™ GX** application.

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

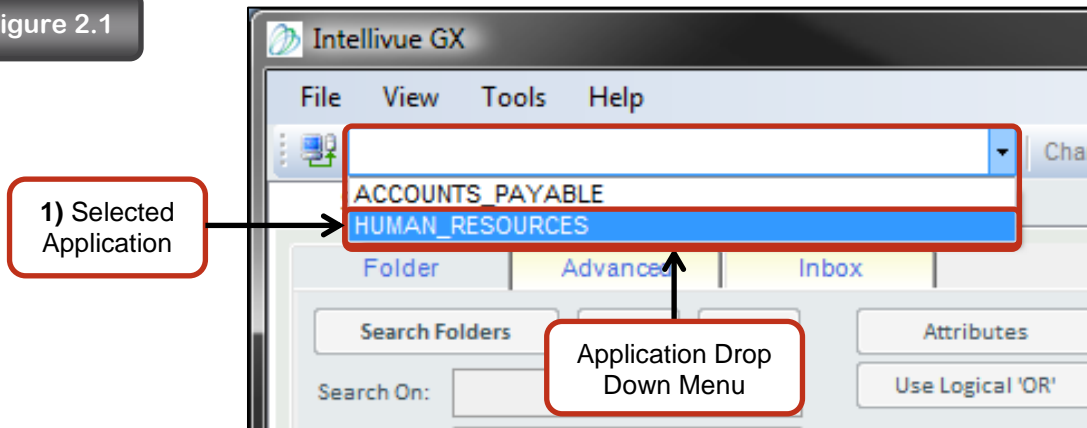
Section 2 – Folder Index Search

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

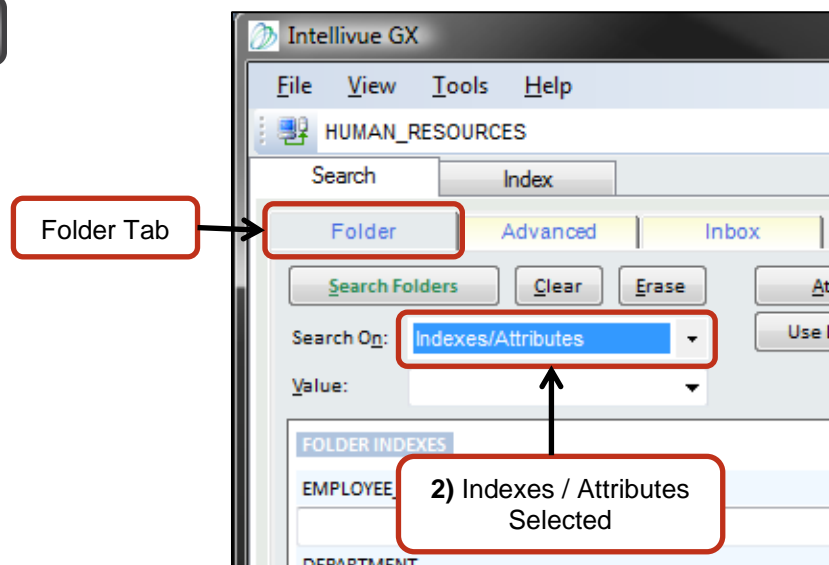


2. Select the **Indexes / Attributes** option from the **Search On:** drop down menu located on the **Folder** tab (see *Figure 2.2*).

Note

- 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



- 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%	B onnie B ob
		%NN%	T en nessee P en nsylvania
		%34	500 34 AK12 34

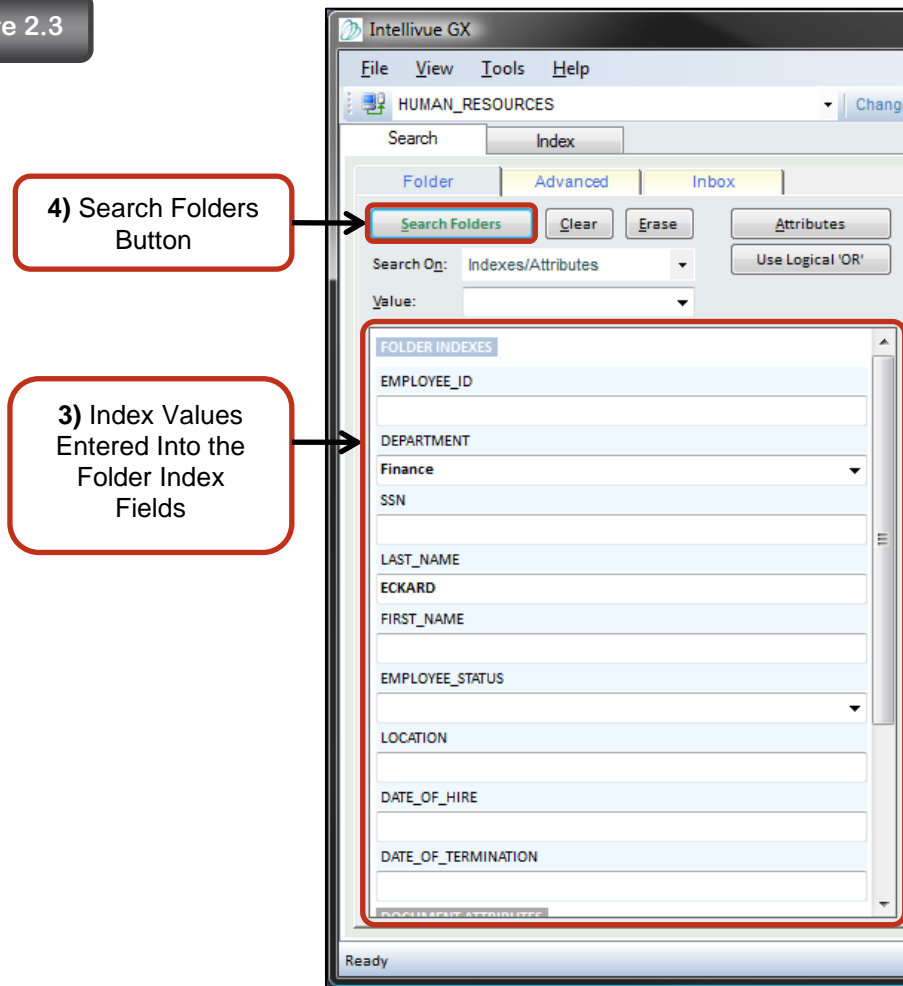
The Wildcard can be used to search on Indexes/Attributes, Bookmarks, Notes, Create Date(s), Create User, Virtual File Tiles, and Fulltext.

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

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

4. Click on the **Search Folders** button located at the top of the page (see *Figure 2.3*).

Figure 2.3

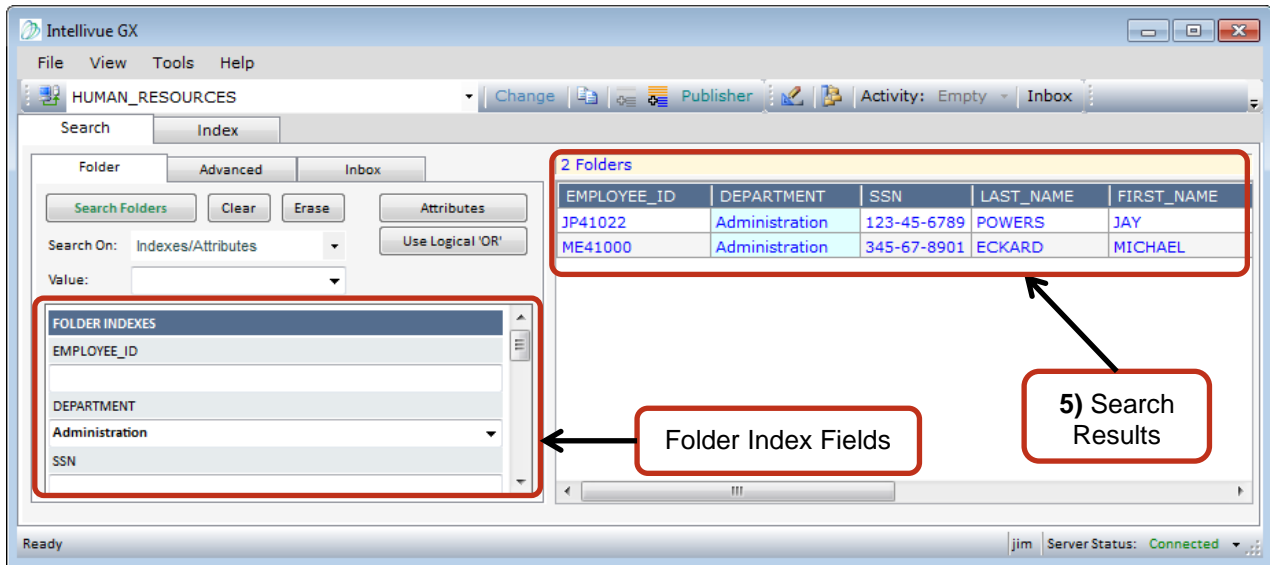


5. The search results will appear on the right side of the folder index fields (see *Figure 2.4*).

Note

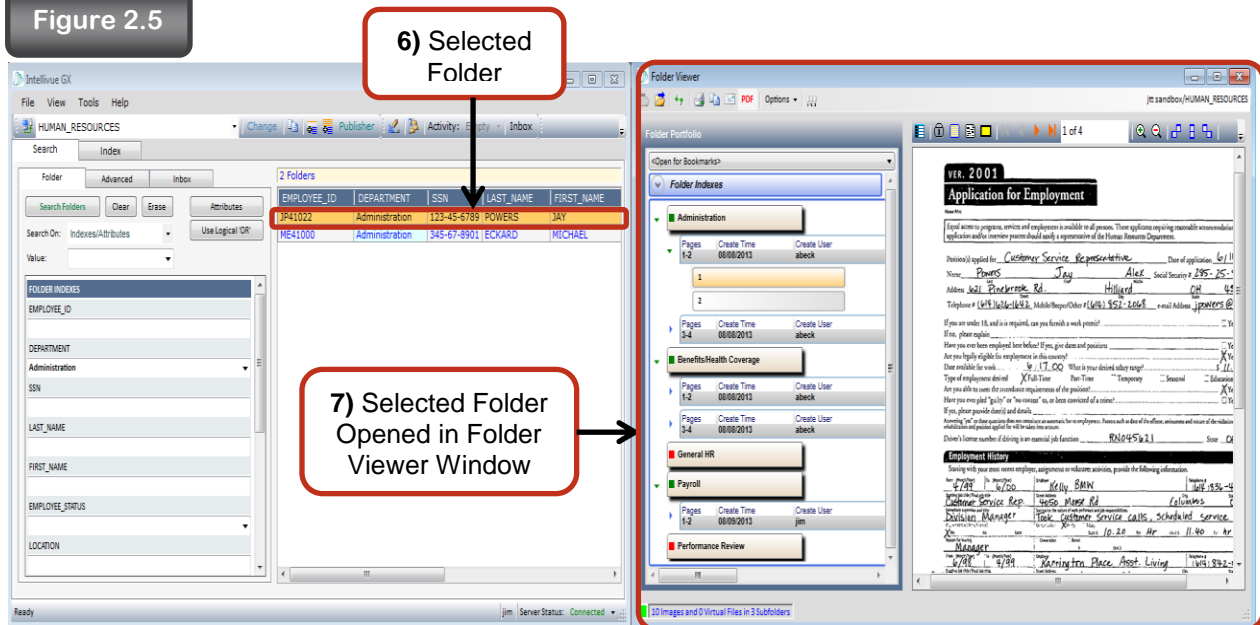
- To change the order of the index columns, simply grab a column header with your mouse and drag it to the desired position.
- To sort columns in ascending or descending order, simply click on the column header itself.

Figure 2.4



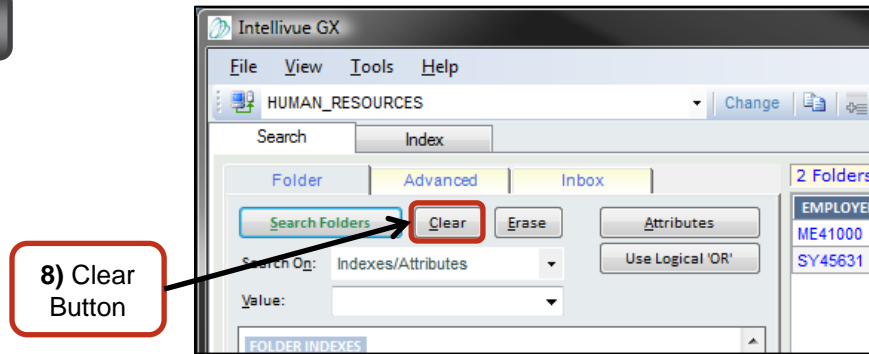
6. Select a folder from the search results list to view (see Figure 2.5).
7. The selected folder will appear in the **Folder Viewer** window (see Figure 2.5).

Figure 2.5



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).

Figure 2.6



Section 3 – Document Attributes Search

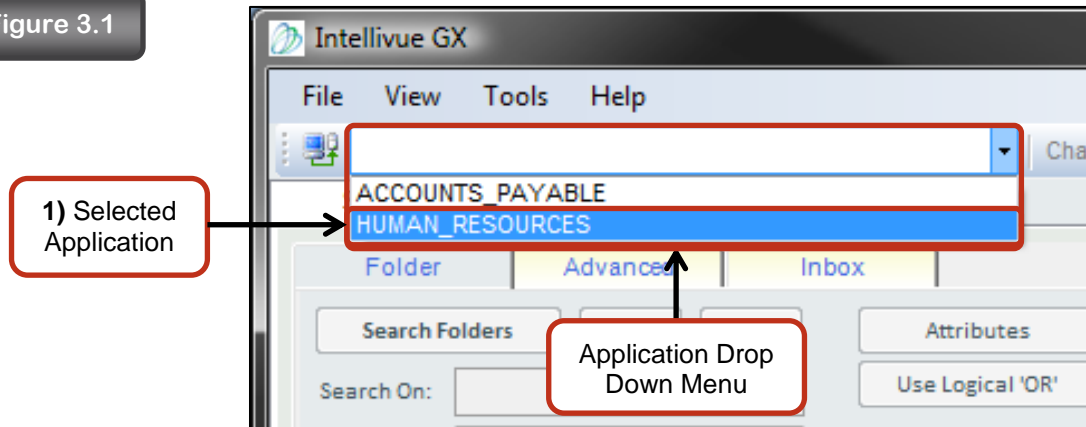
Section 3 – Document Attributes Search

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

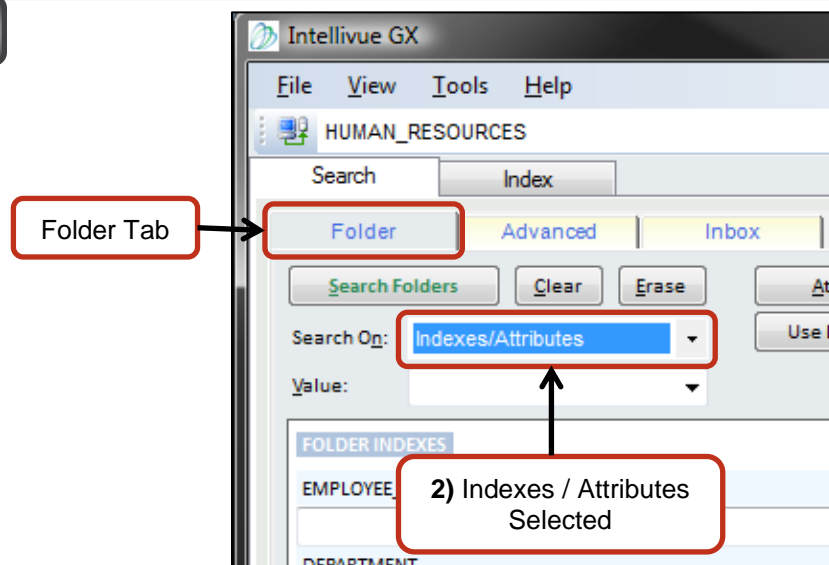


2. Select the **Indexes / Attributes** option from the **Search On:** drop down menu located on the **Folder** tab (see *Figure 3.2*).

Note

- 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



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.

Symbol	Meaning	Example of Use	Example of Use Results
%	Wildcard	BO%	B onnie B ob
		%NN%	T en nessee P en nsylvania
		%34	500 34 AK12 34

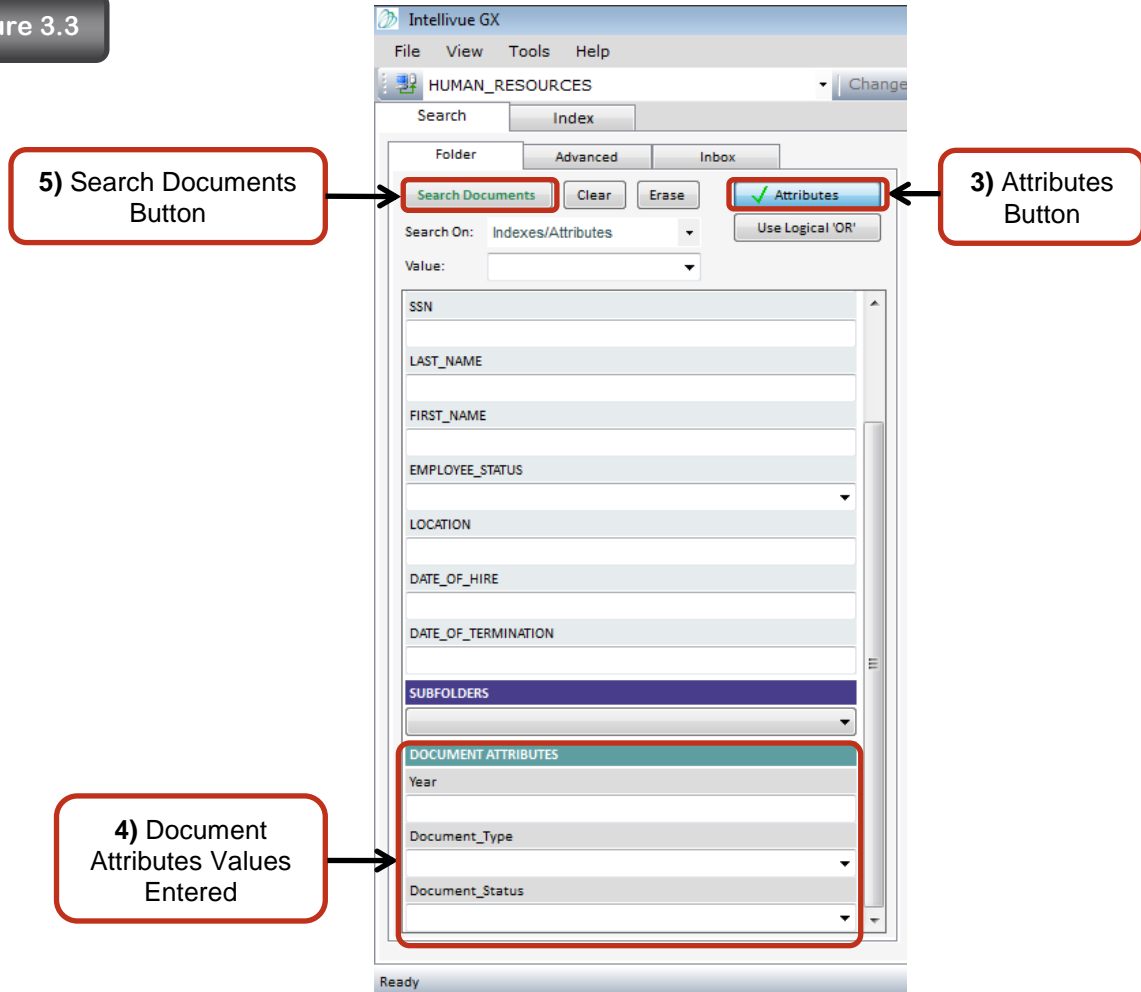
The Wildcard can be used to search on Indexes/Attributes, Bookmarks, Notes, Create Date(s), Create User, Virtual File Tiles, and Fulltext.

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

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

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

Figure 3.3

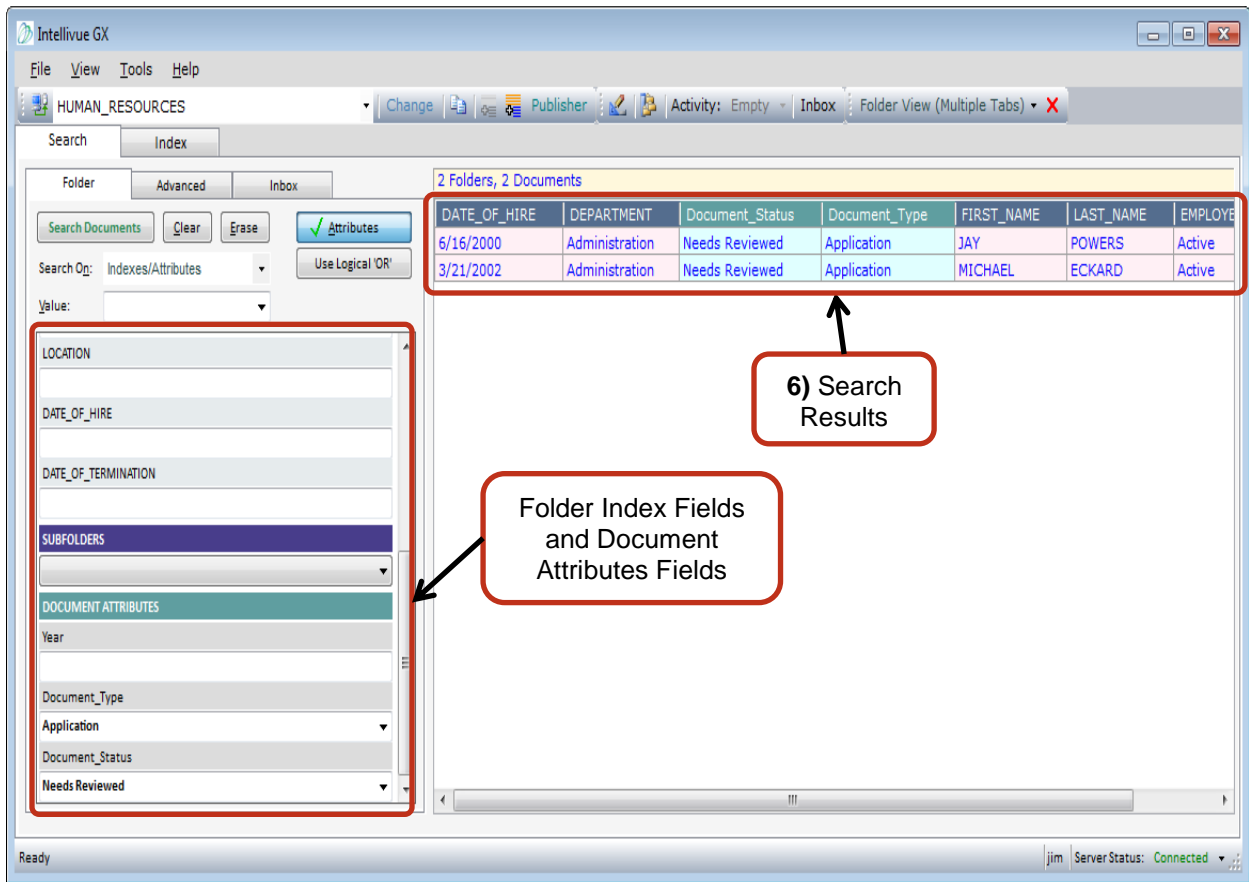


6. The search results will appear on the right side of the folder index fields and document attributes fields (see *Figure 3.4*).

Note

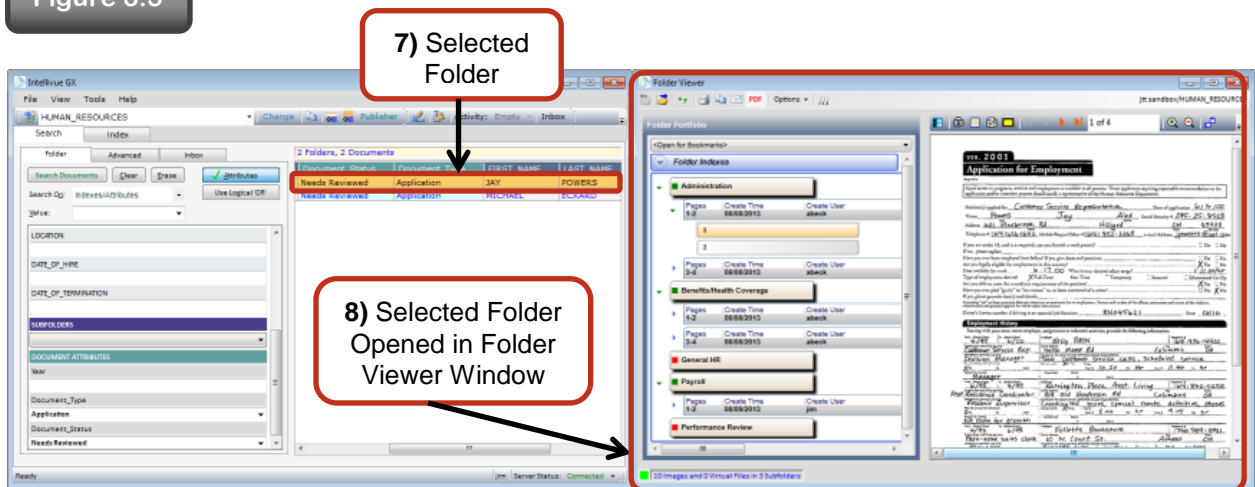
- a) To change the order of the index columns, simply grab a column header with your mouse and drag it to the desired position.
- b) To sort columns in ascending or descending order, simply click on the column header itself.

Figure 3.4



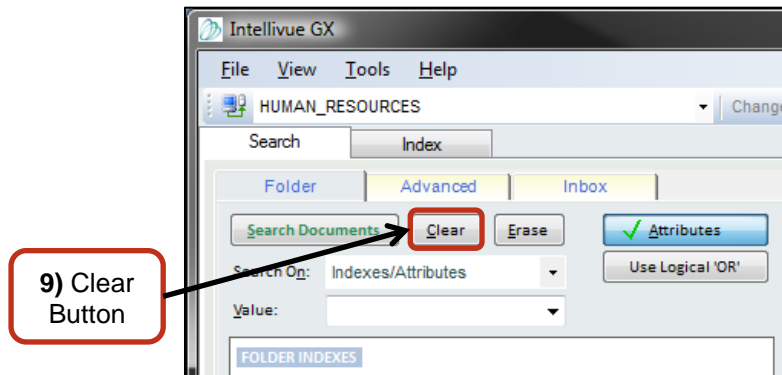
7. Select a folder from the search results list to view (see Figure 3.5).
8. The selected folder will appear in the **Folder Viewer** window (see Figure 3.5).

Figure 3.5



- 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



Section 4 – Additional Folder Tab Searches

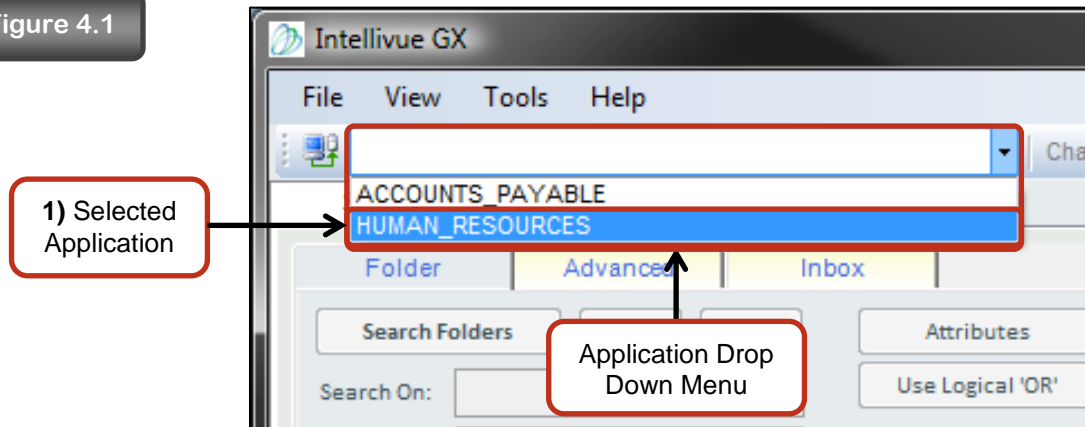
Section 4 – Additional Folder Tab Searches

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*).

Figure 4.1



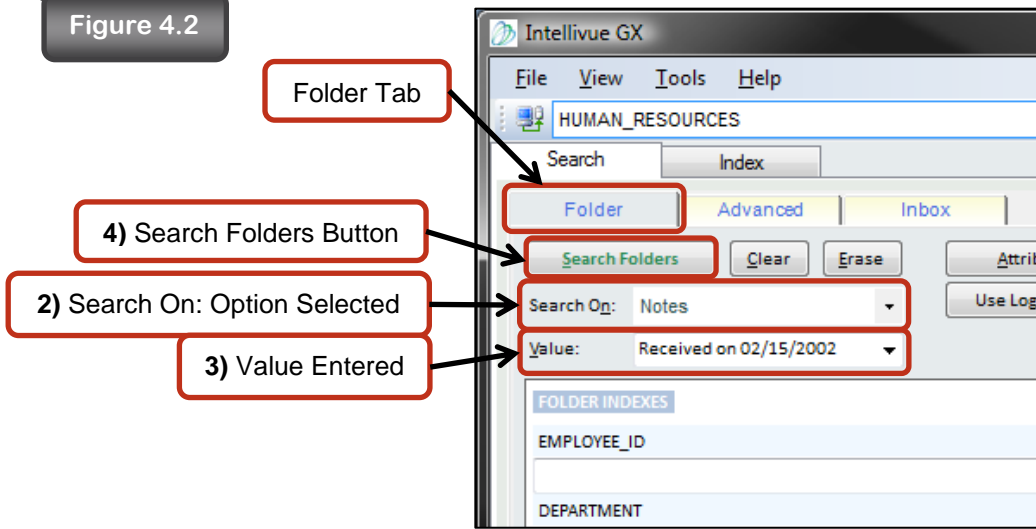
2. Select which option you would like to search with from the **Search On:** drop down menu located on the **Folder** tab (see *Figure 4.2*).
 - a. **Bookmark** – searches for a specific bookmark associated with a specific page.
 - b. **Notes** – searches for a specific note associated with a folder 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*).

Note

- 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*).

Figure 4.2

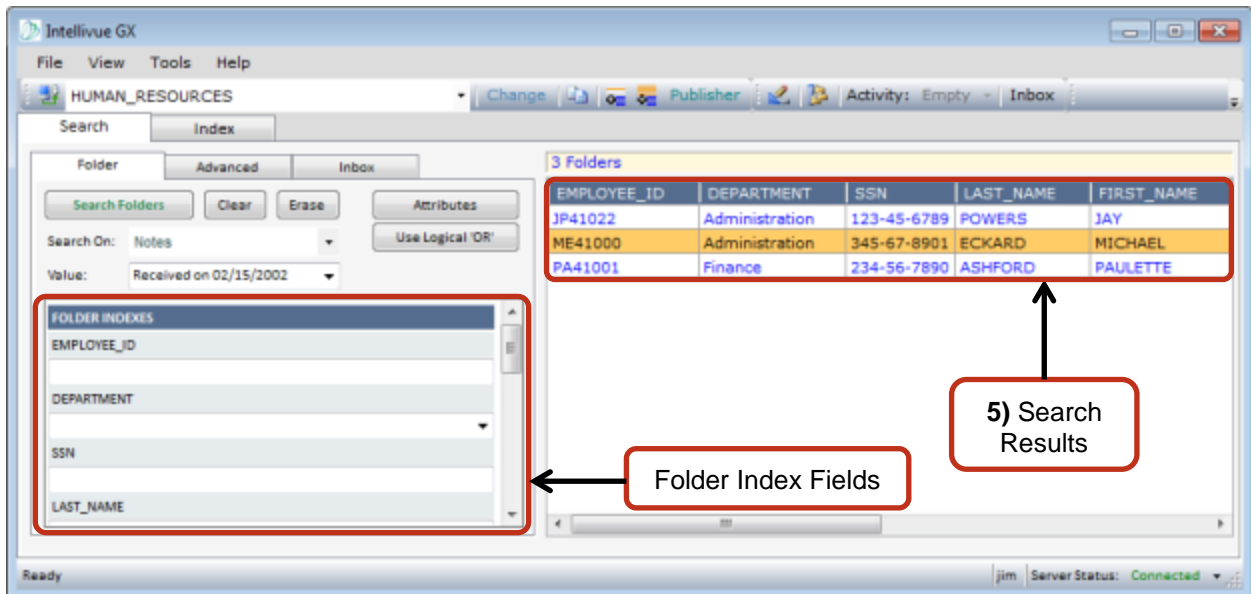


5. The search results will appear on the right side of the folder index fields (see Figure 4.3).

Note

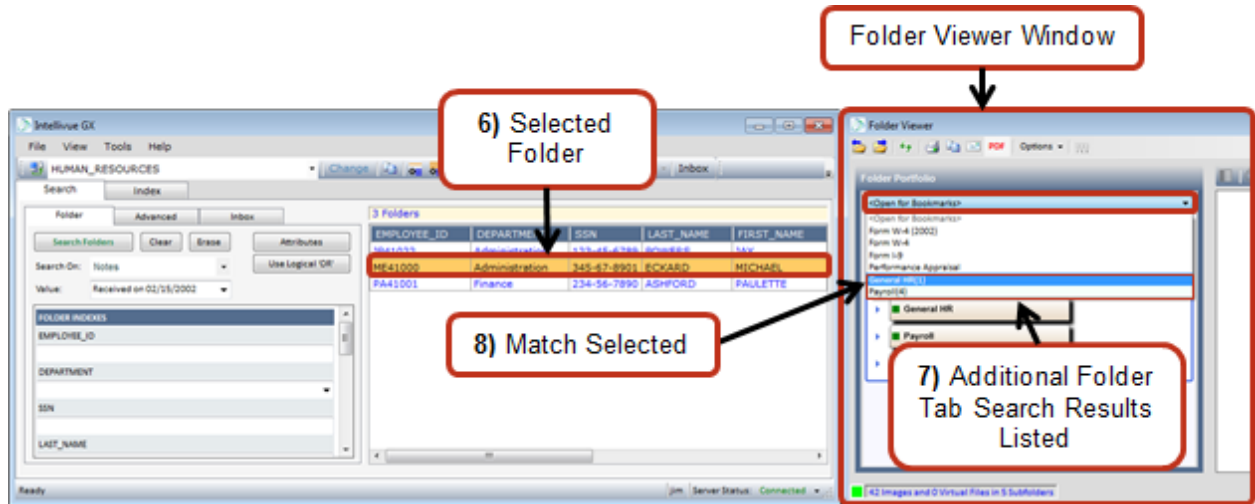
- a) To change the order of the index columns, simply grab a column header with your mouse and drag it to the desired position.
- b) To sort columns in ascending or descending order, simply click on the column header itself.

Figure 4.3



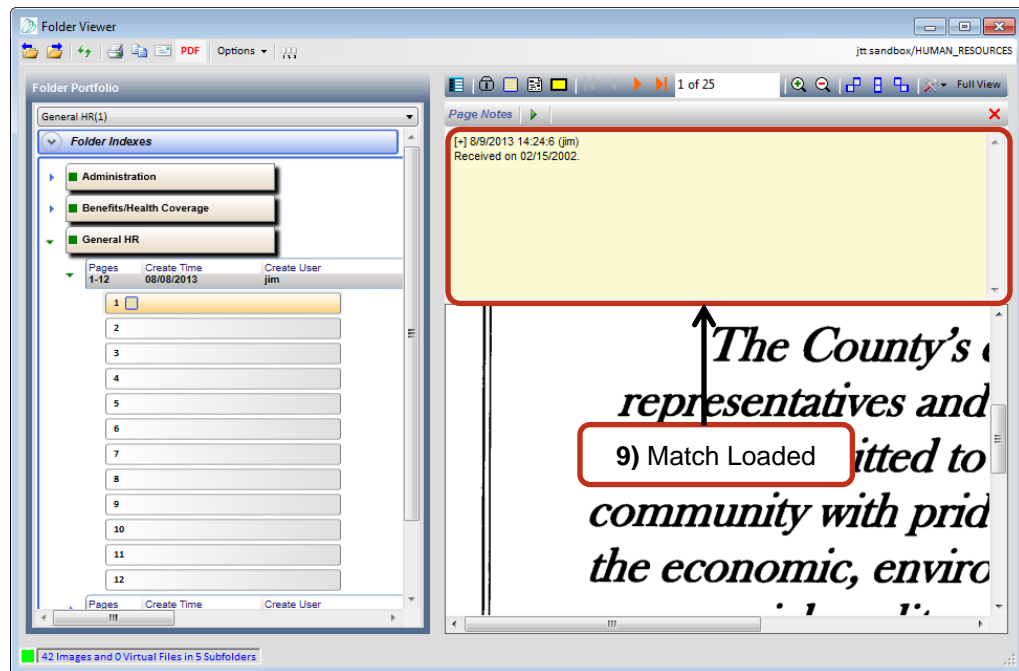
6. Select the folder from the search results list that you want to view (see Figure 4.4).
7. The additional folder tab search results will appear in the **Folder Viewer** window in the **<Goto Bookmark>** drop down list (see Figure 4.4).
8. Select a match from the search results list (see Figure 4.4).

Figure 4.4



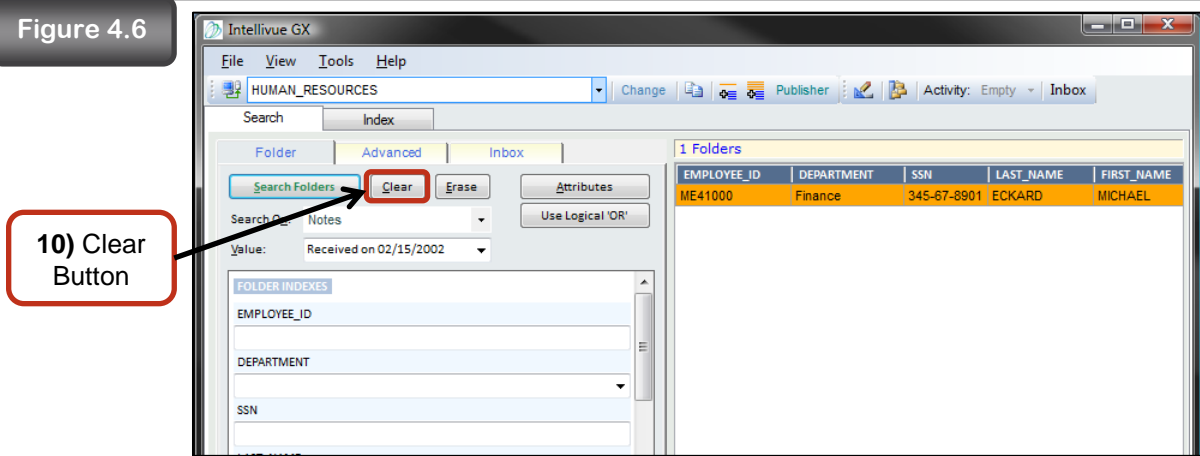
9. The match will load in the folder view window (see Figure 4.5).

Figure 4.5



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*).

Figure 4.6



Section 5 – Advanced Search

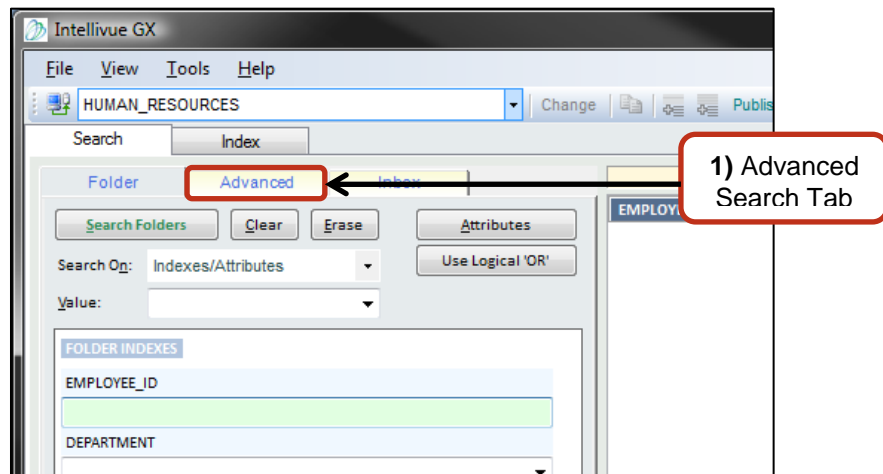
Section 5 – Advanced Search

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:

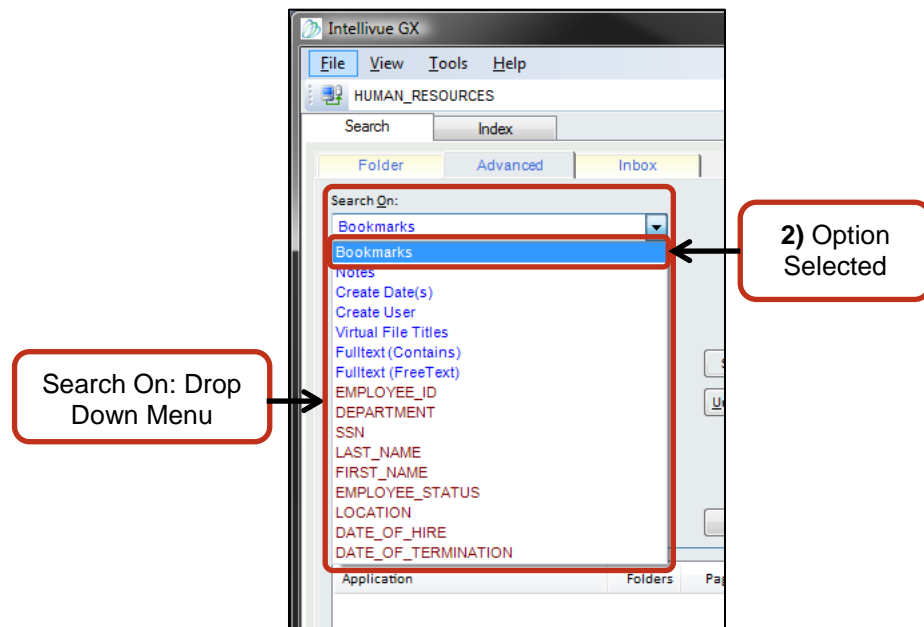
1. Click on the **Advanced** search tab (see *Figure 5.1*).

Figure 5.1



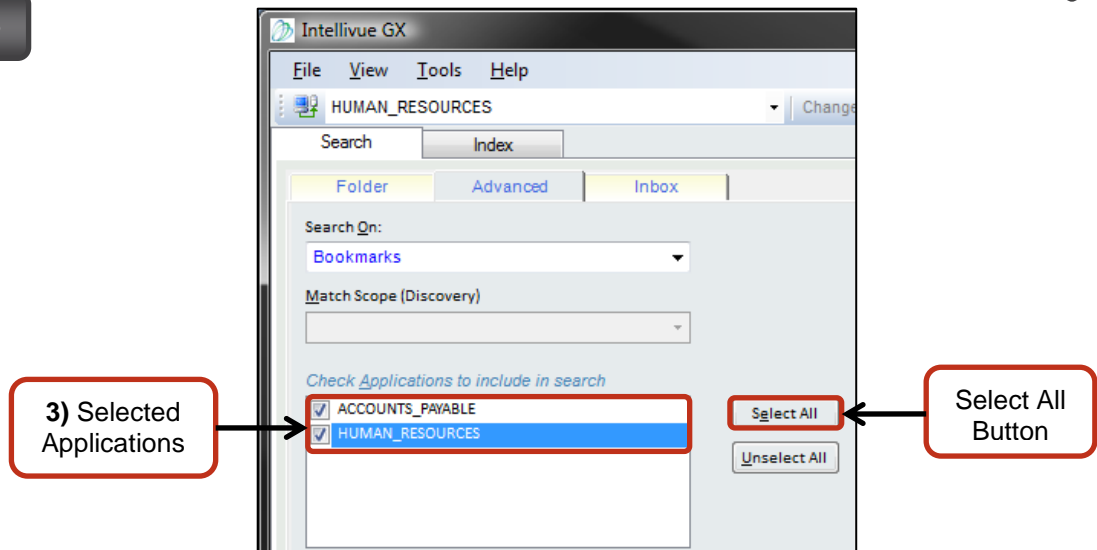
2. Select which option you would like to search with from the **Search On:** drop down menu (see *Figure 5.2*). For more details on advanced search options, see **Appendix E – Advanced Search Options**.

Figure 5.2



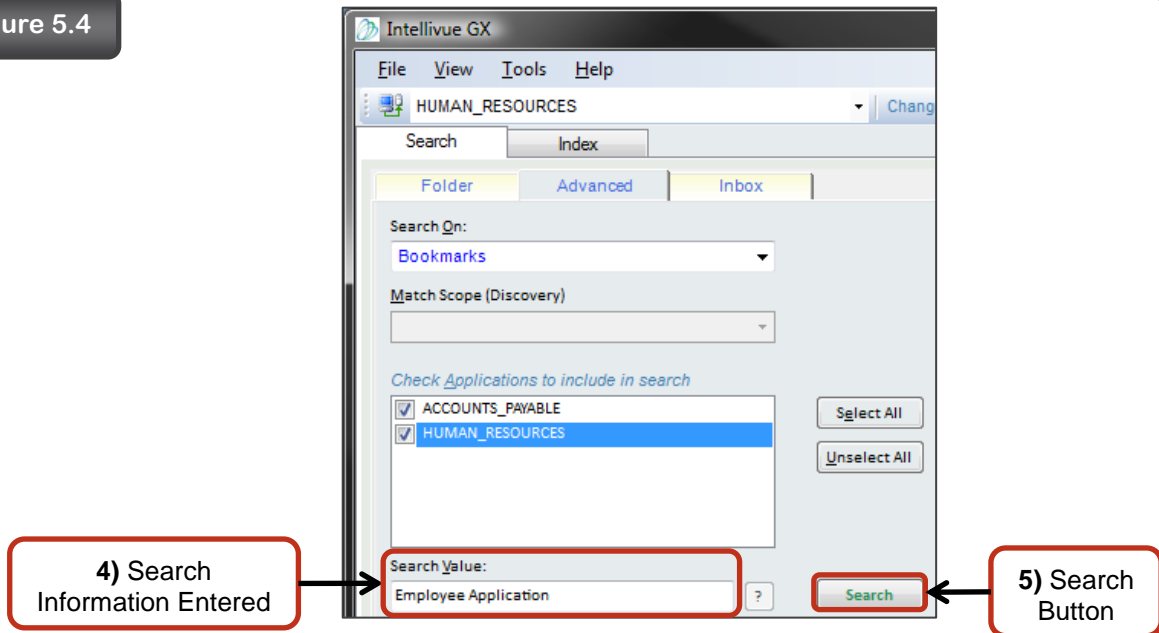
3. Select which applications you want to search in or click the **Select All** button to select all of the listed applications (see Figure 5.3)

Figure 5.3



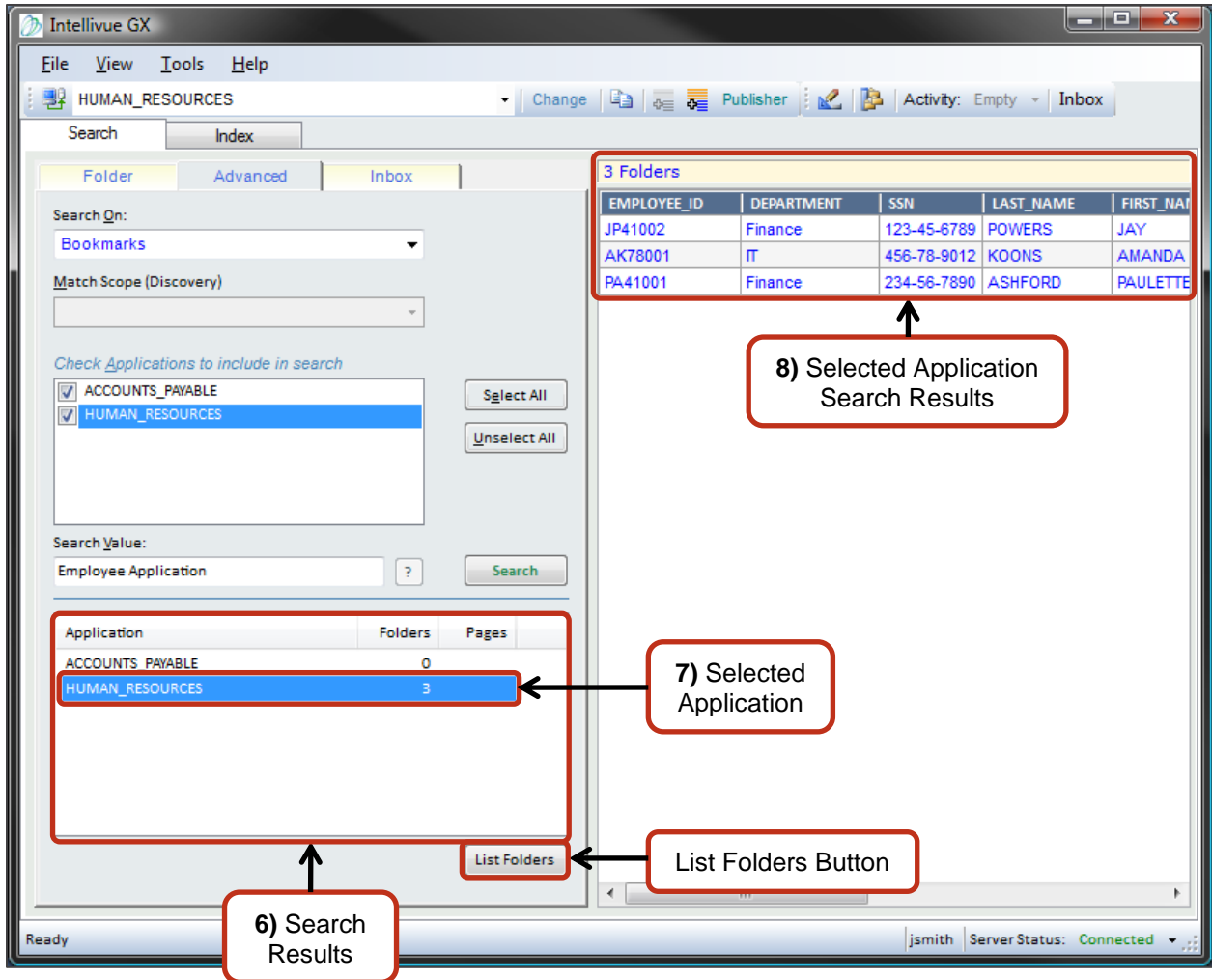
4. Enter the information you want to search for into the **Search Value:** field (see Figure 5.4).
5. Click on the **Search** Button (see Figure 5.4).

Figure 5.4



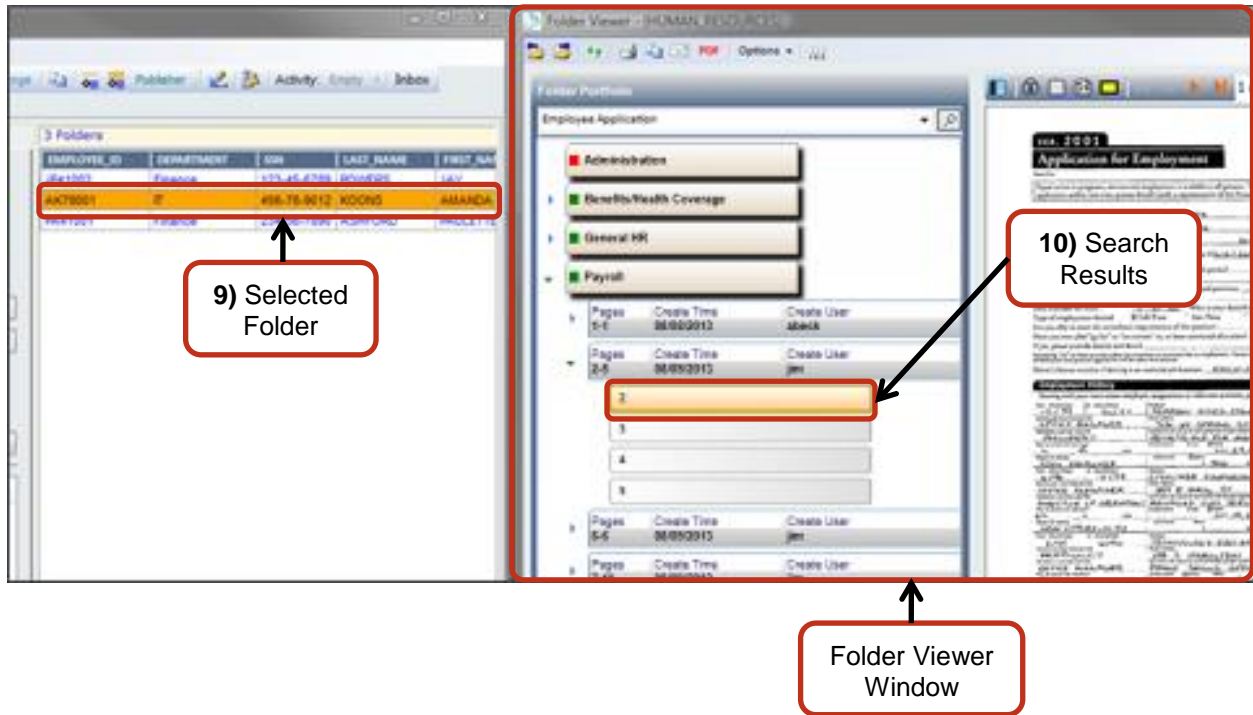
6. Search results will appear below the **Search Value:** field (see Figure 5.5).
7. To view the search results for one application, select an application and click on the **List Folders** button (see figure 5.5).
8. The selected application search results will be listed in the search results area (see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

Figure 5.5



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).

Figure 5.6



Section 6 – Activity Center

Section 6 - Activity Center

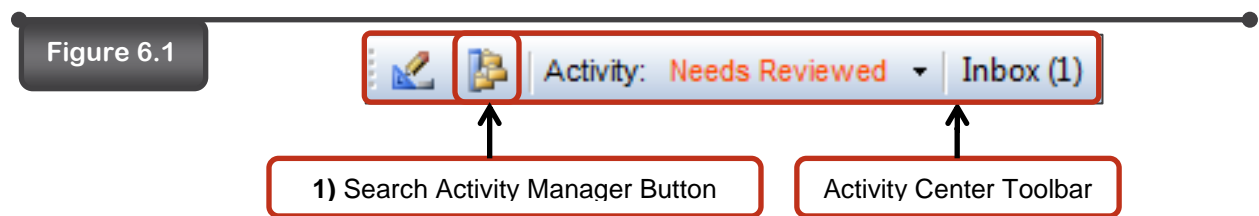
The activity center performs searches of various criteria across multiple fields. Search methods that can be used are equal to (=), not equal to (<>), less than (<), less than or equal to (<=), greater than (>), greater than or equal to (>=), null, not null, in, not in, like, not like, between, not between, 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.

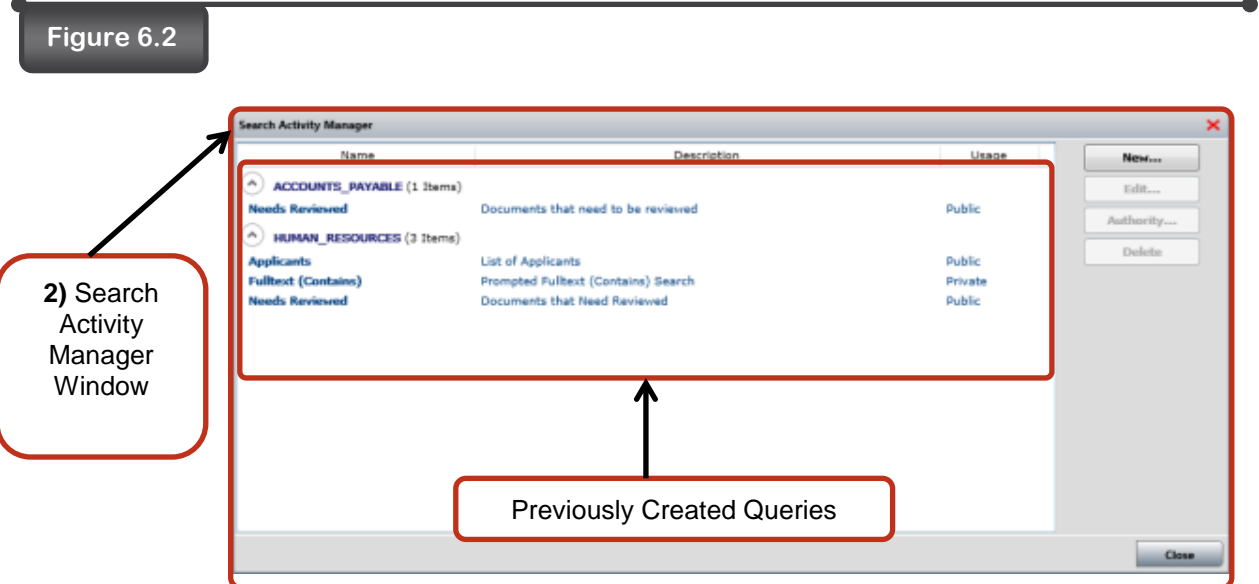
Steps:

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



2. The **Search Activity Manager** window will pop up (see Figure 6.2).

Note a) Any previously created queries will be listed here.



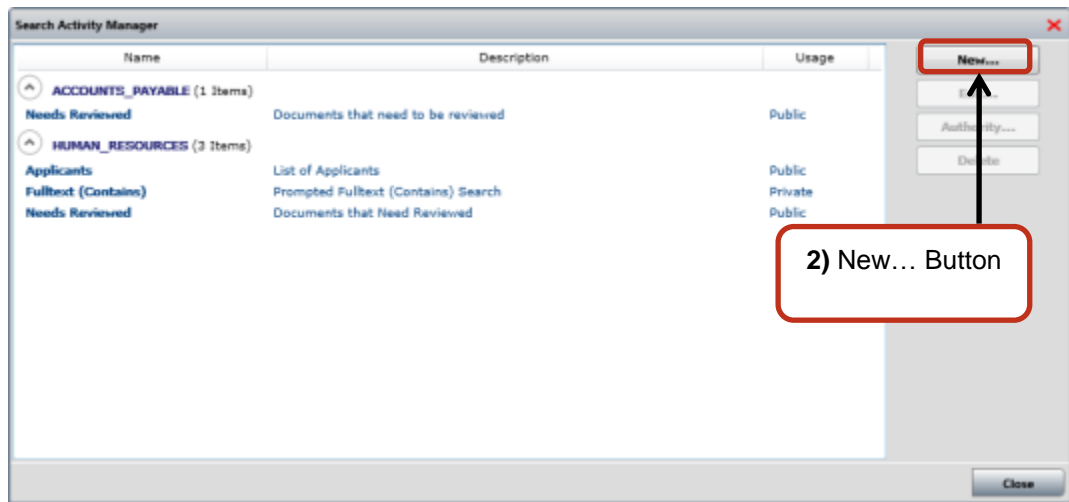
Section 6.1a – New Activity

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

Steps:

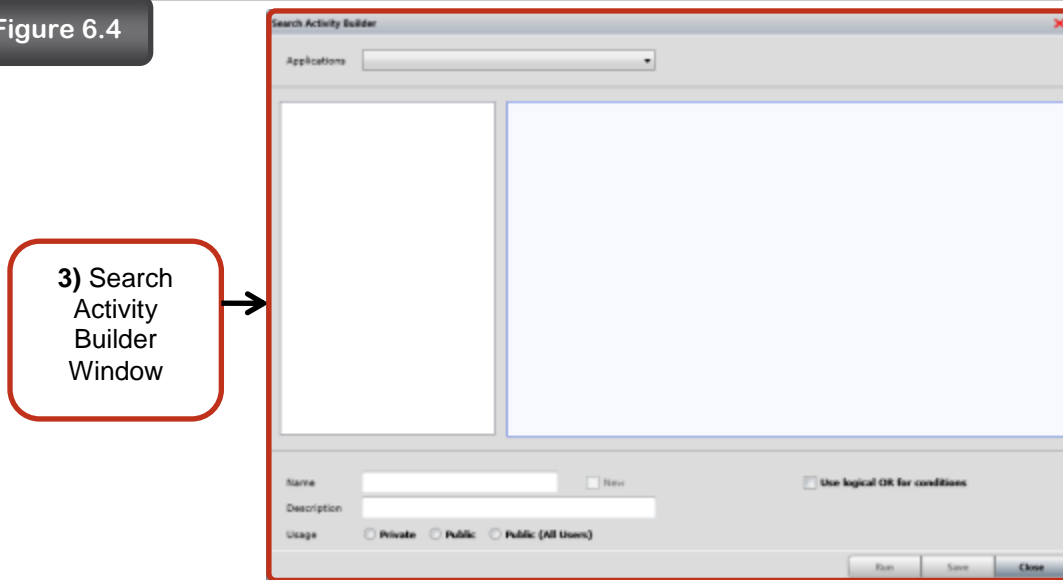
1. To launch the **Search Activity Manager** window, follow steps 1 through 2 from **Section 6.1 – Search Activity Manager**.
2. To create a new query, click on the **New...** button (see Figure 6.3).

Figure 6.3



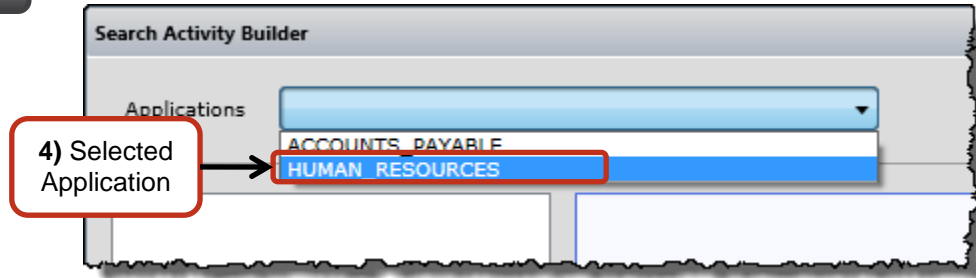
3. The **Search Activity Builder** window will pop up (see Figure 6.4).

Figure 6.4



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

Figure 6.5

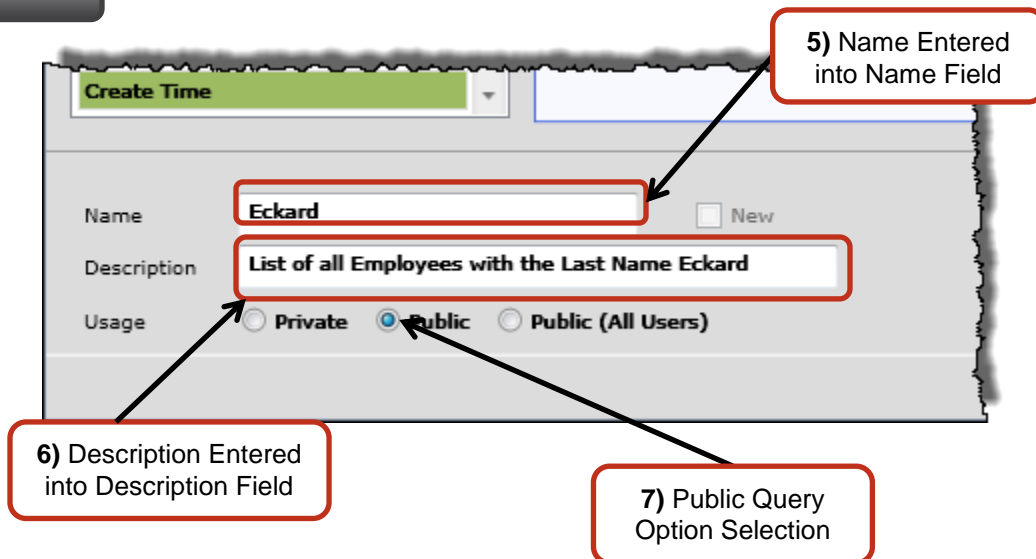


5. Enter a name for the new query into the **Name** field (see Figure 6.6).
6. Enter a description for the new query into the **Description** field (see Figure 6.6).
7. Set the type of **Usage** applicable to the new query by choosing one of the following options (see Figure 6.6):
 - a. **Private** – 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.

Note

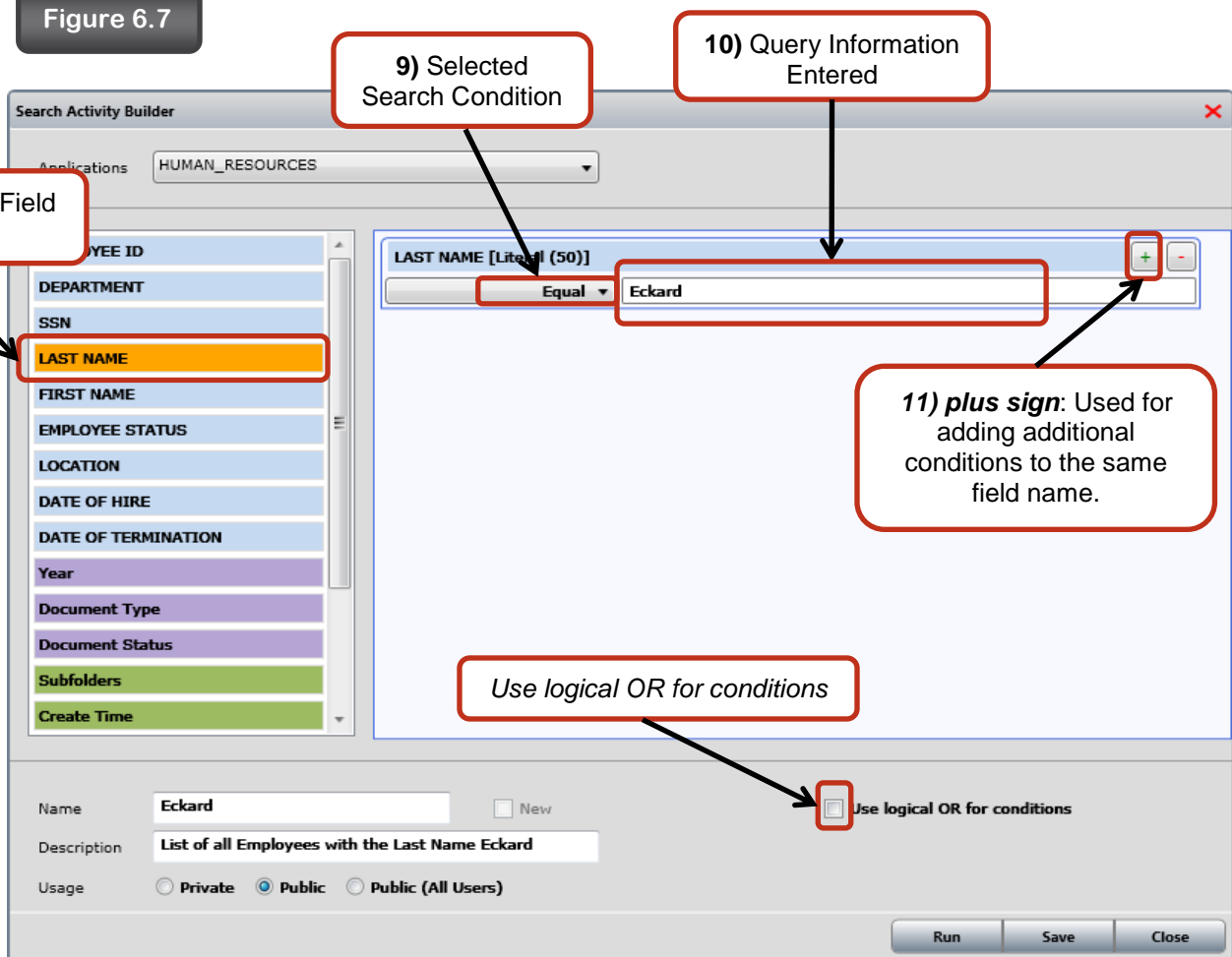
- a) If the **Public (All Users)** box is checked, all users will be able to automatically see the newly created query in the **Activity Drop Down**

Figure 6.6



8. Select the field name you wish to create a query on (see Figure 6.7).
9. 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).

Figure 6.7



Note

- a) The Search Activity Builder will originally display results that must exclusively meet ALL the search criteria you set up in it. You can change this by placing a check mark in the **Use logical OR for conditions** box. Doing so will configure the Search Activity Builder to display results that meet one or more portions of the criteria, giving you more results to choose from.

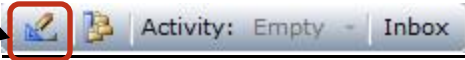
11. Repeat steps 9 through 11 until you are finished selecting your fields. If you need to create a query on a different field name, select the field name from the list. If you wish to create a query on the same field name, click on the + (*plus sign*) button (see Figure 6.7).

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

Note

a) Before you save the results, you can preview the type of search you have set up by clicking the **Run** button. The Search Activity Builder will then disappear and any results will then show on the results pane. To return to the Search Activity Builder and make changes, click the **Search Activity Editor** button on the Activity Center Toolbar.

Search Activity Editor Button



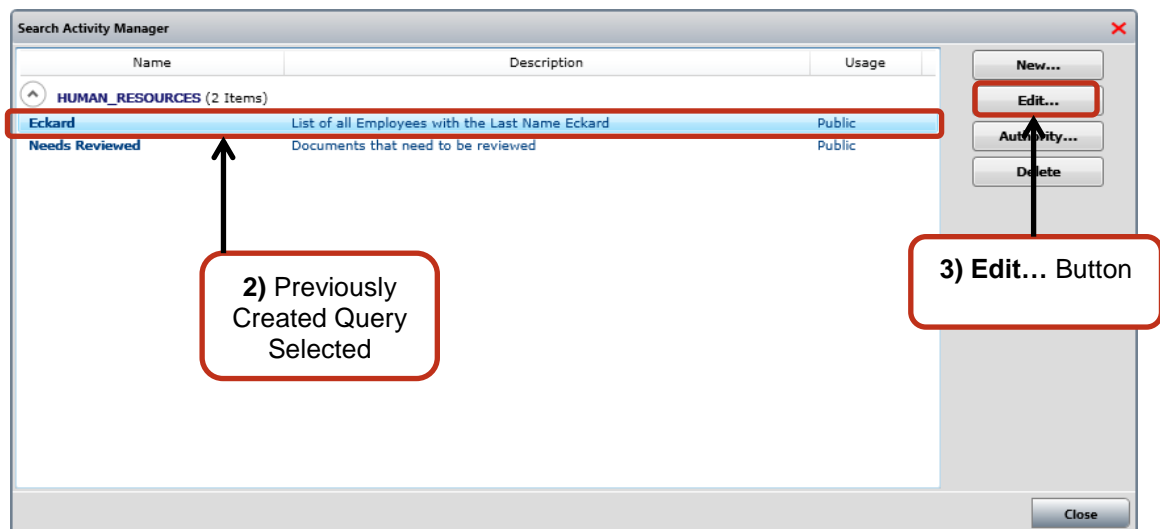
Section 6.1b – Edit Activity

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

Steps:

1. 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



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.

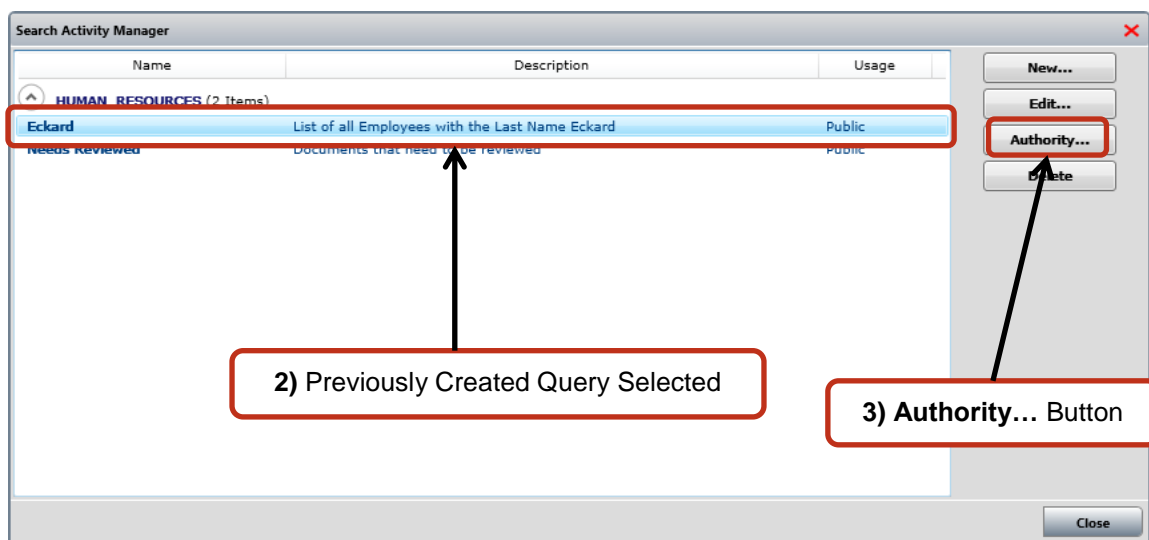
Section 6.1c – Authority

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

Steps:

1. 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*).

Figure 6.9



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.

Note

- a) This option can only be used with public queries.

- 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.

Note

- a) This option can only be used with public queries.

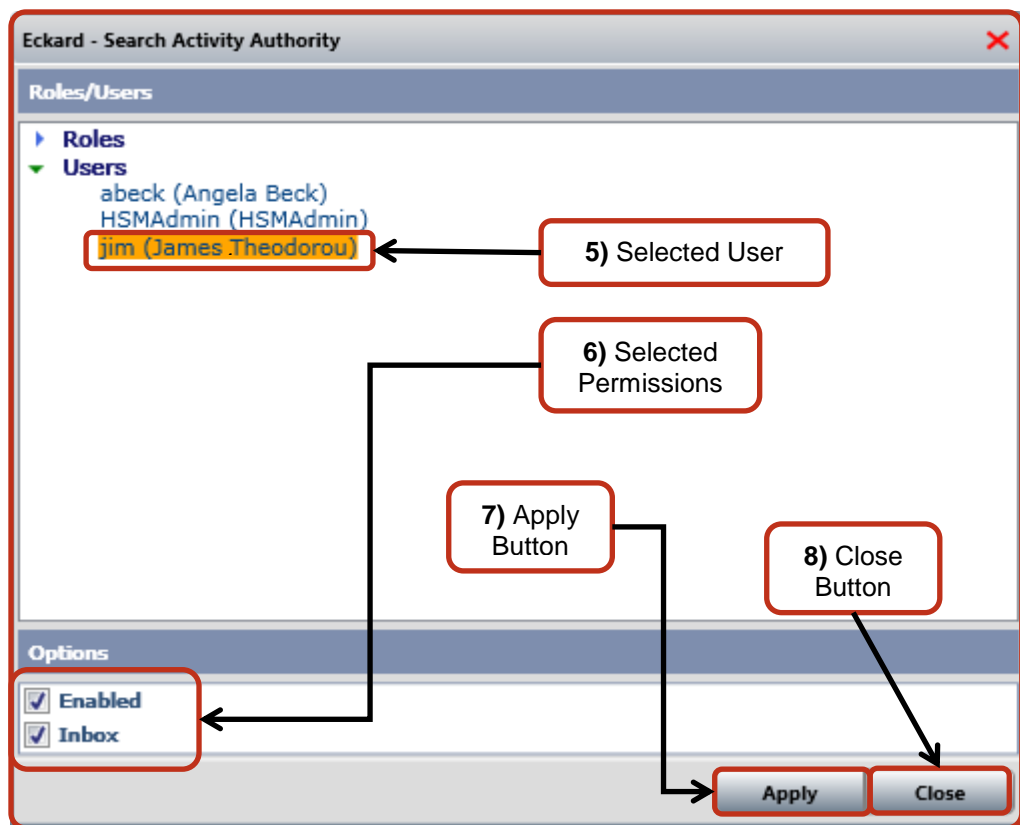
- c. **Observable** – Allows the selected role/user to observe the selected public query in their inbox.

Note

- a) The Enabled permission option must be selected in order for this permissions option to work

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.

Figure 6.10



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

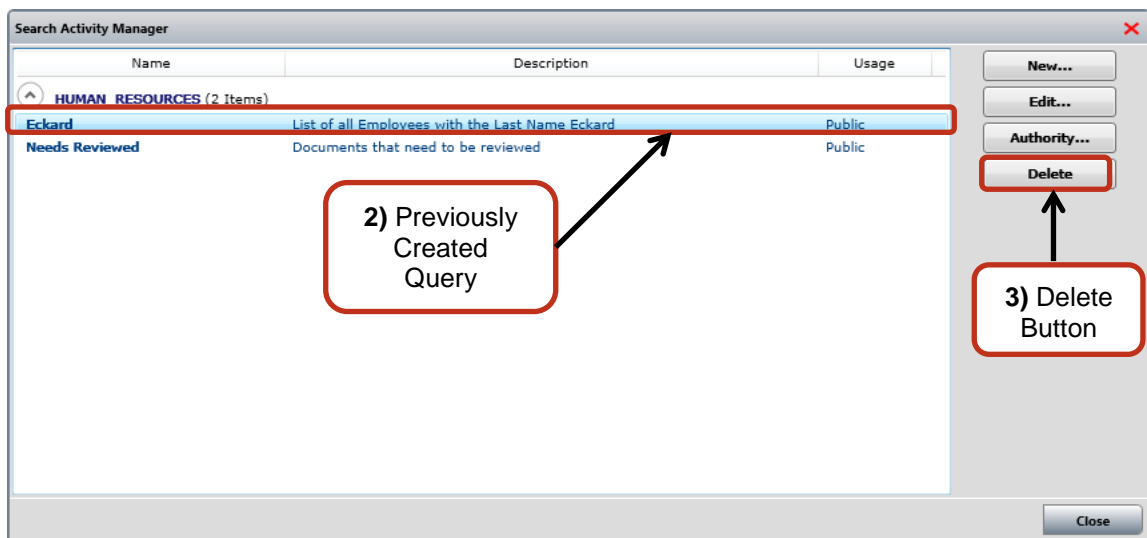
Section 6.1d – Delete

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

Steps:

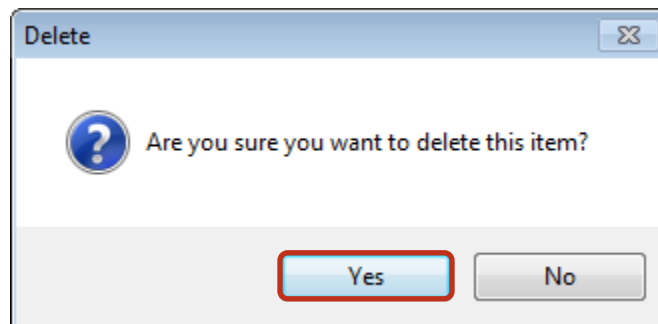
1. To launch the **Search Activity Manager** window, follow steps 1 through 2 from **Section 6.1 – Search Manager**.
2. Select the previously created query you want to delete (see *Figure 6.11*).
3. Click on the **Delete** button (see *Figure 6.11*).

Figure 6.11

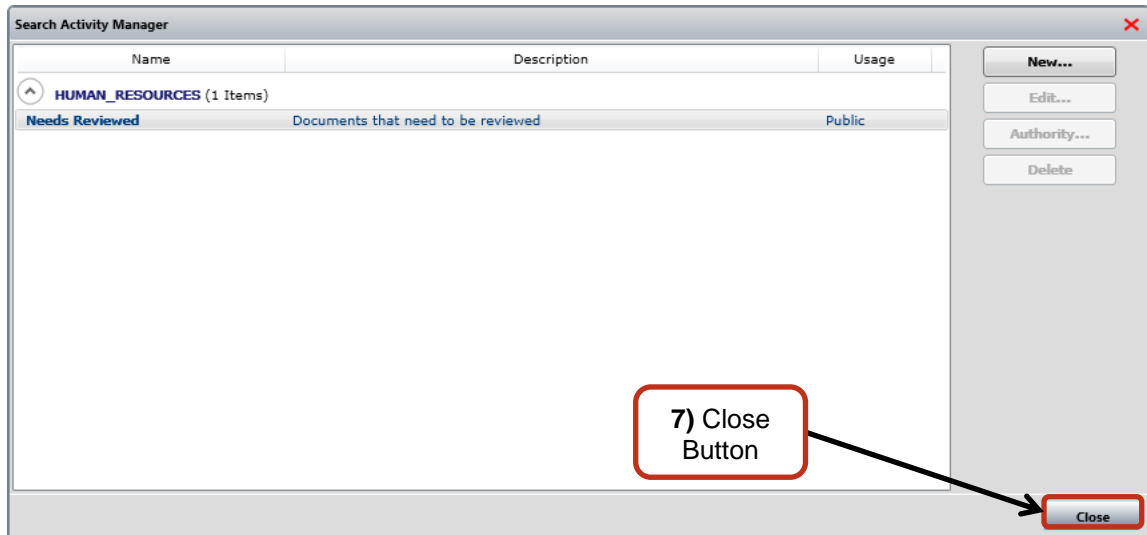


4. A **Delete** window will pop up (see *Figure 6.12*).
5. Click on the **Yes** button (see *Figure 6.12*).

Figure 6.12



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*).

Figure 6.13

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:

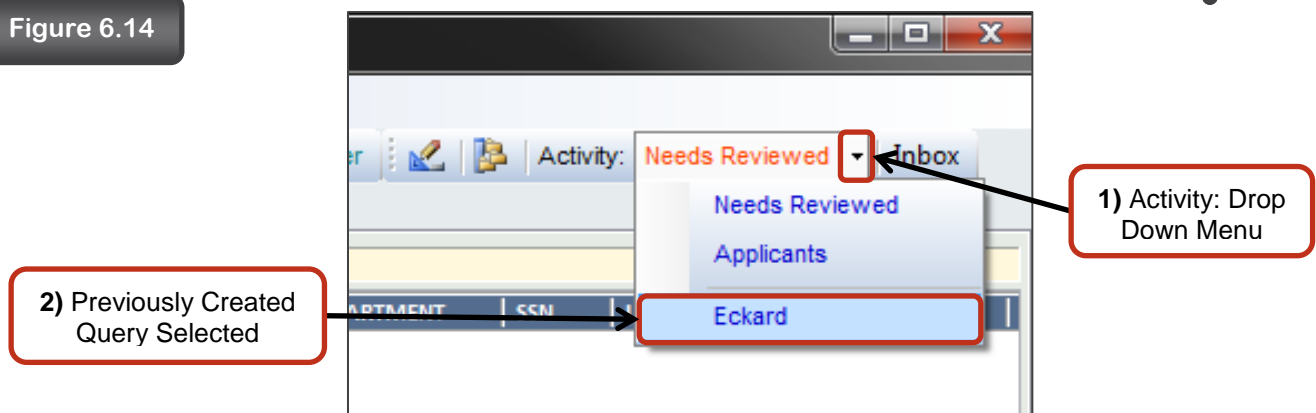
1. Click on the **Activity:** drop down menu (see *Figure 6.14*).

Note

- a) 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.
- b) Private queries are automatically added to the **Activity:** drop down menu.
- c) 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.
- d) 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.

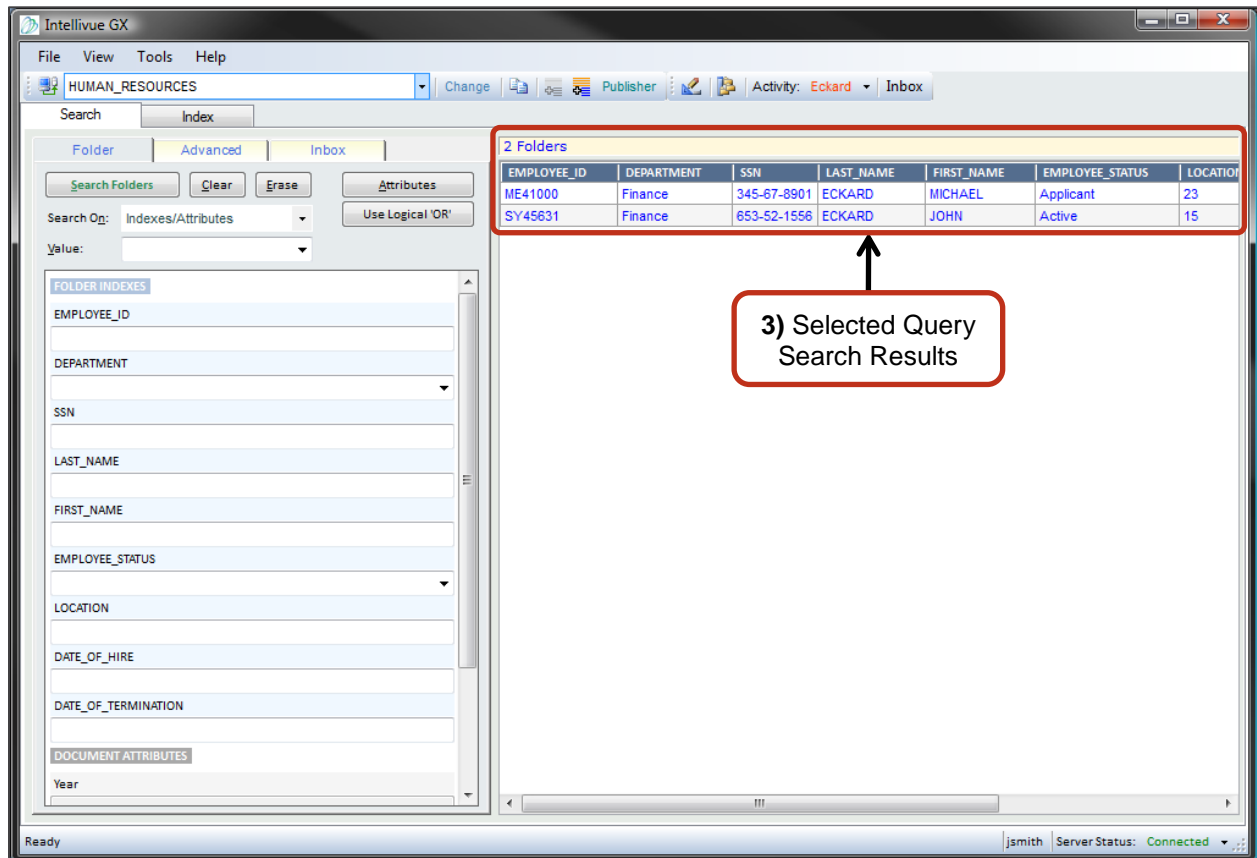
2. Select a previously created query (see *Figure 6.14*).

Figure 6.14



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

Figure 6.15



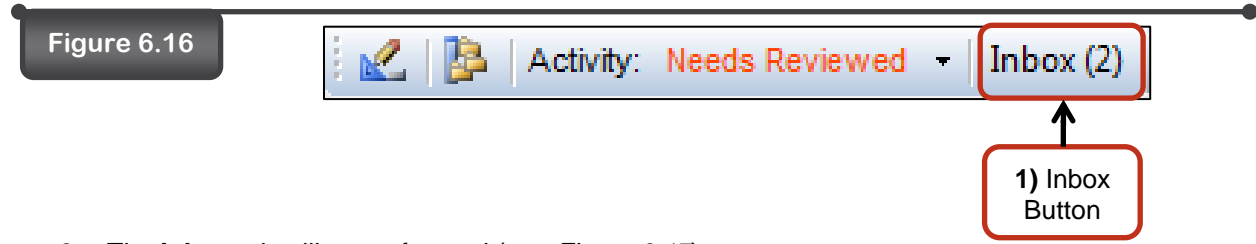
Section 6.3 – Inbox

When a public query is added to the inbox, the query is run automatically every time you login to the **Intellivue™ 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:

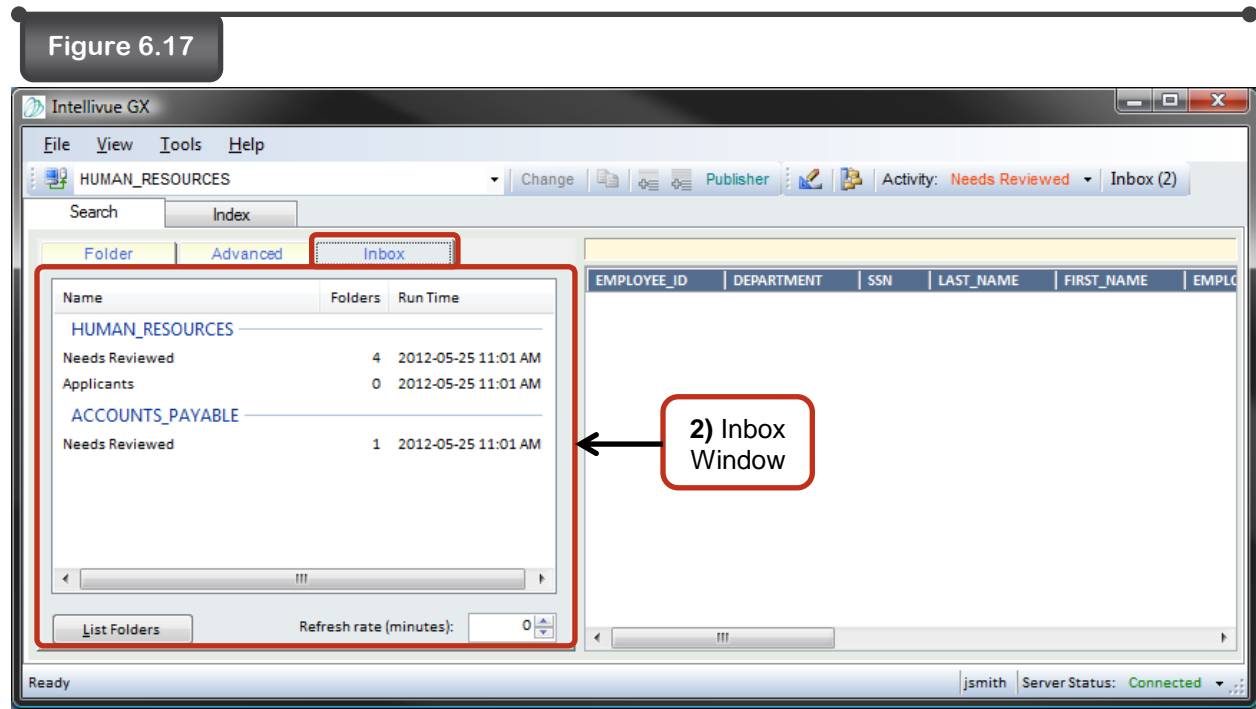
1. To view the search results of a public query, click on the **Inbox** button located in the **Activity Center** toolbar (see Figure 6.16).

Note a) In order for a public query to be seen in the inbox by users, you must have the **Enable** permission option and the **Observable** permission option selected in the **Authority** window.



2. The **Inbox** tab will come forward (see Figure 6.17).

Note a) The **Inbox** will list the time the public queries were last run.

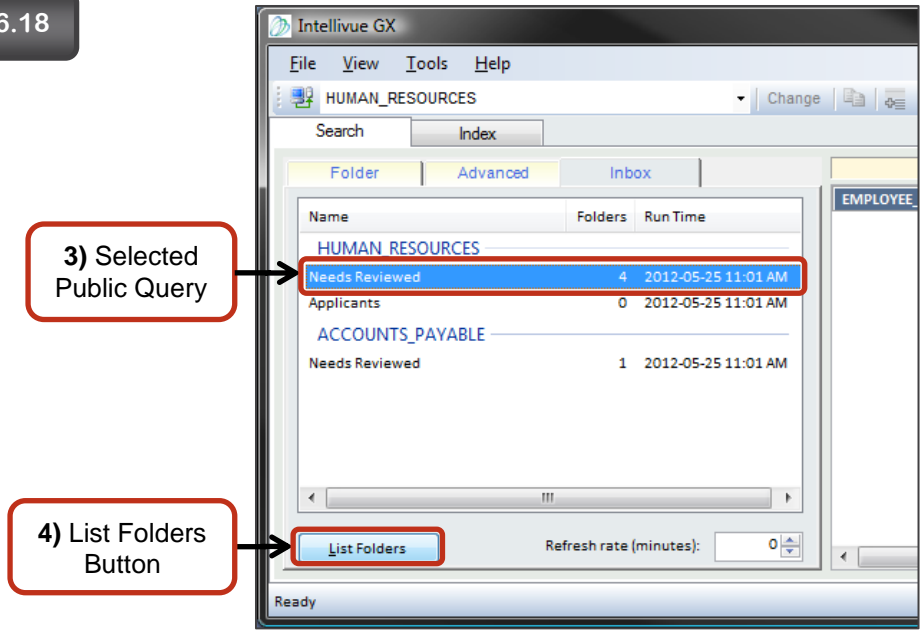


3. To review the search results of a public query, select a public query (see Figure 6.18).

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

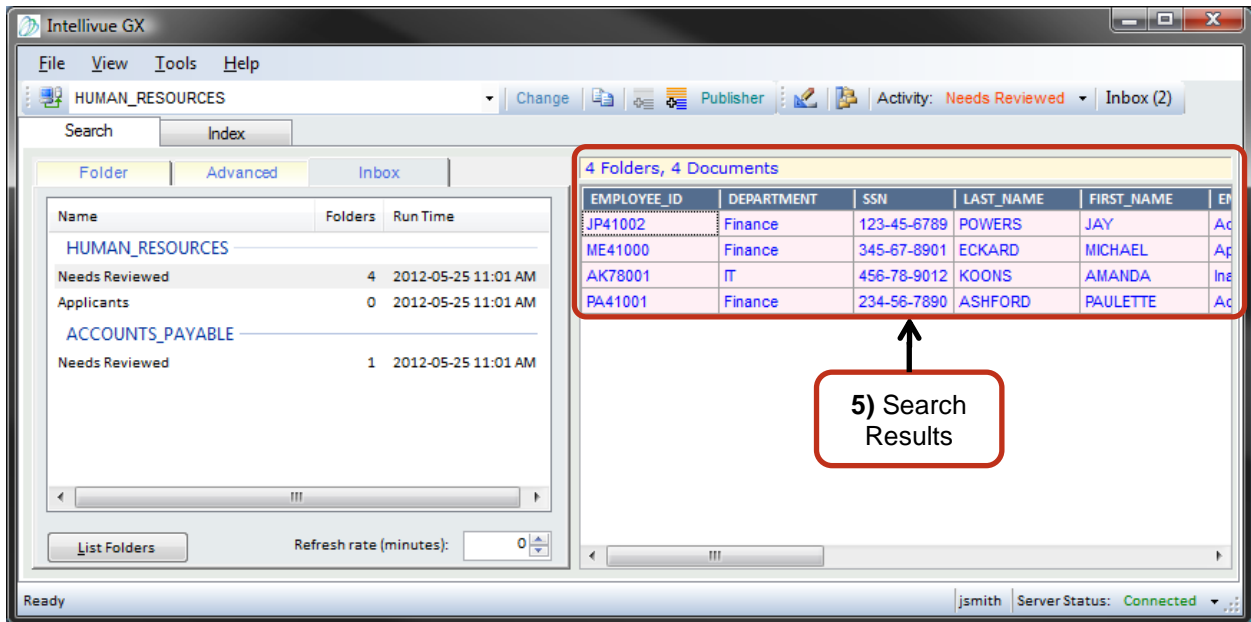
Note a) You can also view the search results of a public query by double-clicking on the selected query.

Figure 6.18



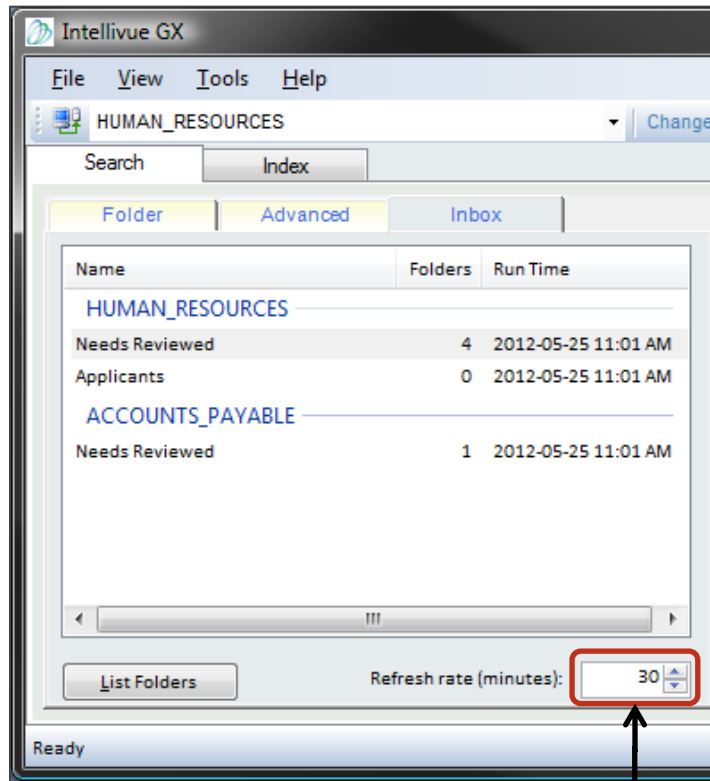
- The search results for the selected public query will appear in search results area (see Figure 6.19).

Figure 6.19



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*).

Figure 6.20



6) Refresh Rate Entered

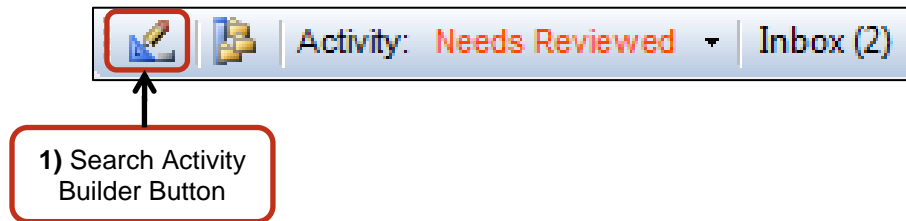
Section 6.4 – Search Activity Builder

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*).

Figure 6.21

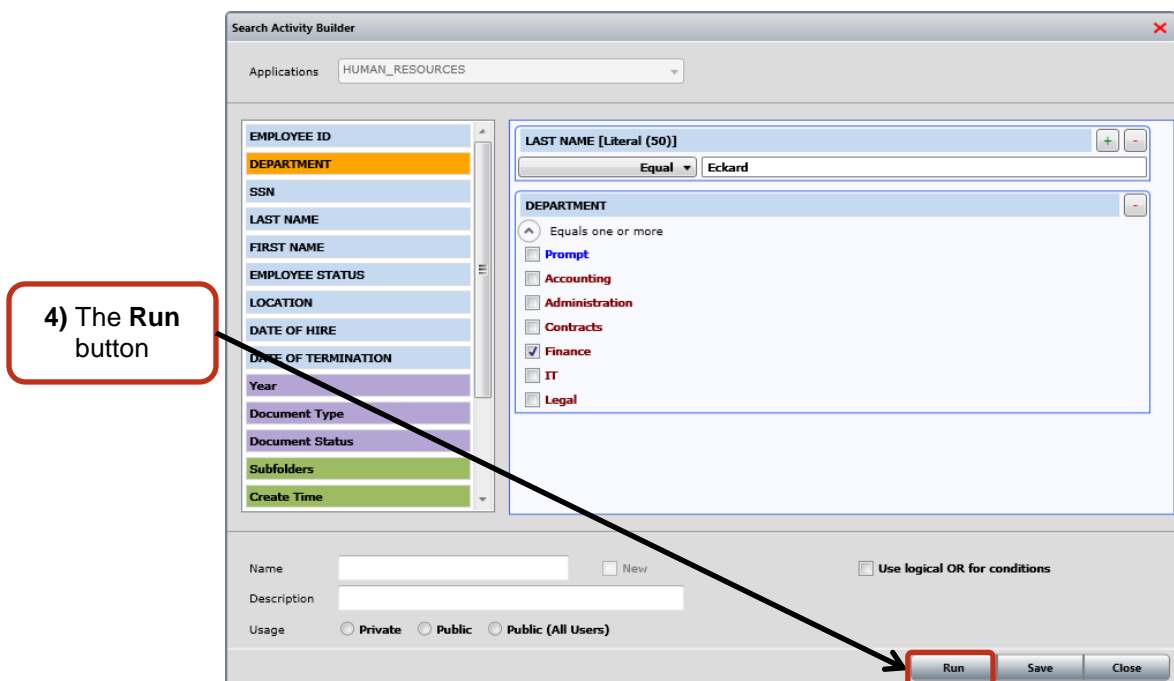


2. A **Search Activity Builder** window will pop up (see *Figure 6.22*).
3. Fill out the **Search Activity Builder** (see *Section 6.1a – New Activity*).
4. Click on the **Run** button (see *Figure 6.22*).

Note

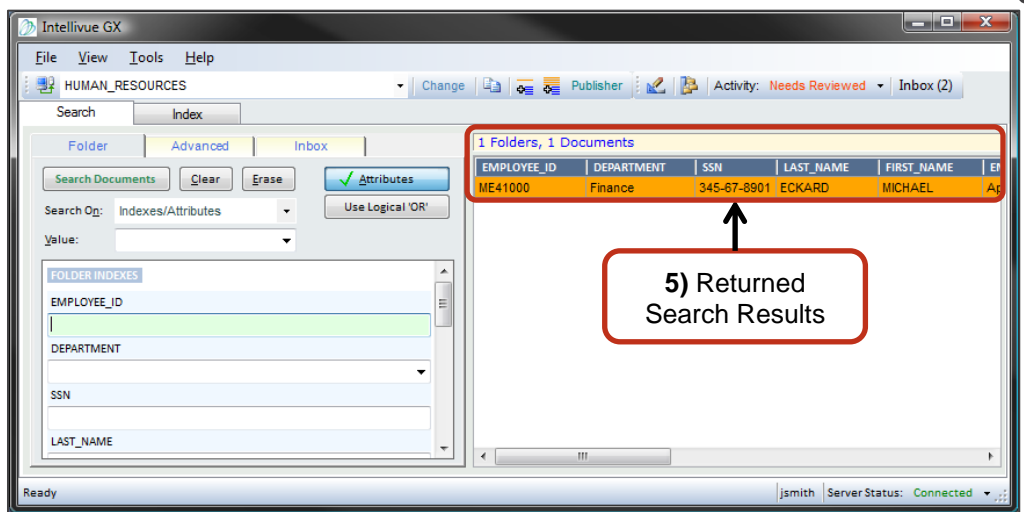
- a) You can save the quick detailed query by clicking on the **Save** button. Make sure to give the query a **Name**, **Description**, and **Usage** type. These items are required before you can save the query. To access the saved query at a later point in time, look for the query in the **Search Activity Manager** window.

Figure 6.22



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

Figure 6.23



Section 7 – Modifying Folder Indexes

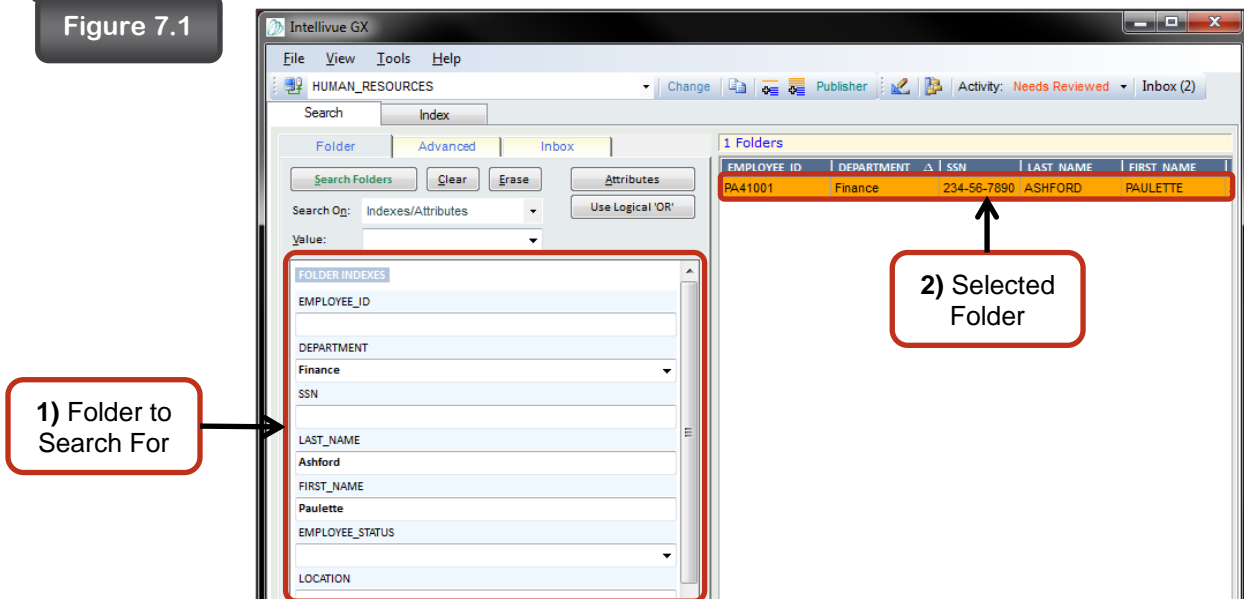
Section 7 – Modifying Folder Indexes

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.

Steps:

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*).

Figure 7.1



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*).

Figure 7.2

The screenshot shows a form titled "Folder Indexes" with a red border. At the top left, a red circle highlights an upward-pointing arrow icon. A callout box labeled "4) Expands and retracts the Folder Indexes pane." points to this icon. The form contains the following fields:

- EMPLOYEE_ID: PA41001
- DEPARTMENT: Finance (dropdown menu)
- SSN: 234-56-7890
- LAST_NAME: ASHFORD
- FIRST_NAME: PAULETTE
- EMPLOYEE_STATUS: Active (dropdown menu)
- LOCATION: HQ
- DATE_OF_HIRE: 3/20/2000 (calendar icon)
- DATE_OF_TERMINATION: Select a date (calendar icon)

At the bottom right, a button labeled "Apply" is highlighted with a red box and a callout box labeled "6) Apply button". On the right side of the form, a red box labeled "5) Folder Indexes pane" encompasses the entire form area.

Figure 7.3

The screenshot shows the "Folder Indexes" pane with a red circle highlighting a downward-pointing arrow icon at the top left. A callout box labeled "7) Expands and retracts the Folder Indexes pane." points to this icon. The pane contains a list of categories, each with a colored square and a right-pointing arrow:

- Administration (red square)
- Benefits/Health Coverage (red square)
- General HR (red square)
- Payroll (green square)
- Performance Review (green square)

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

Section 8 – Modifying Document Attributes

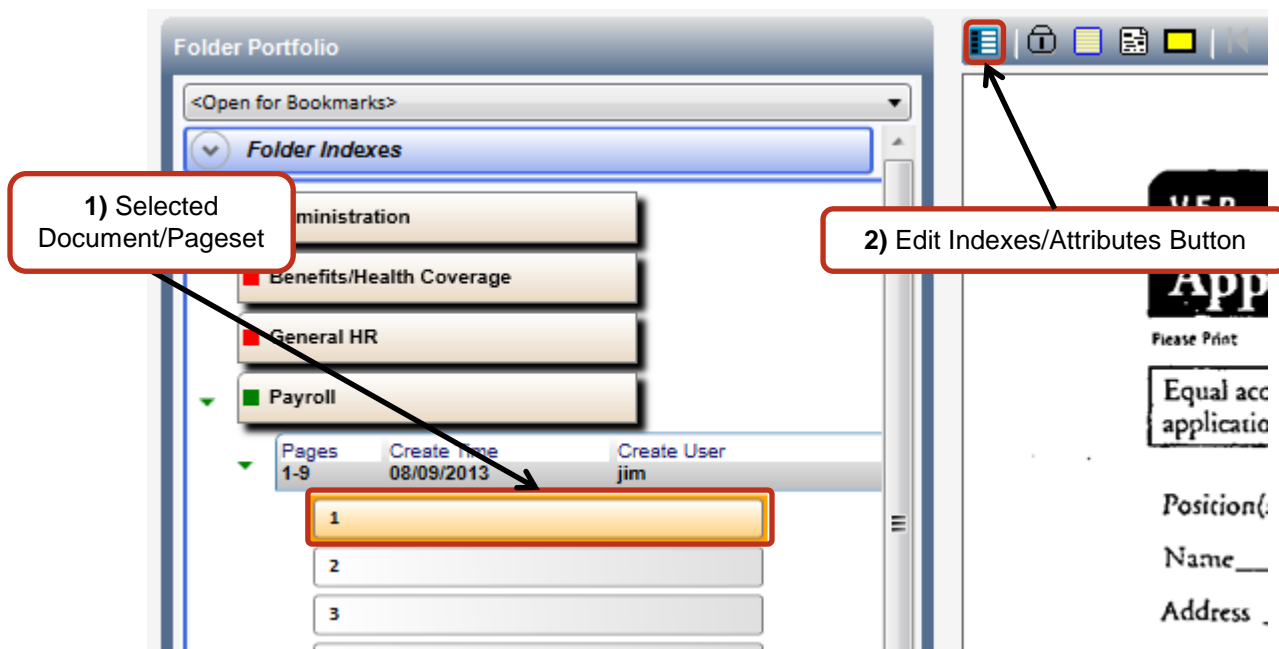
Section 8 – Modifying Document Attributes

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.

Steps:

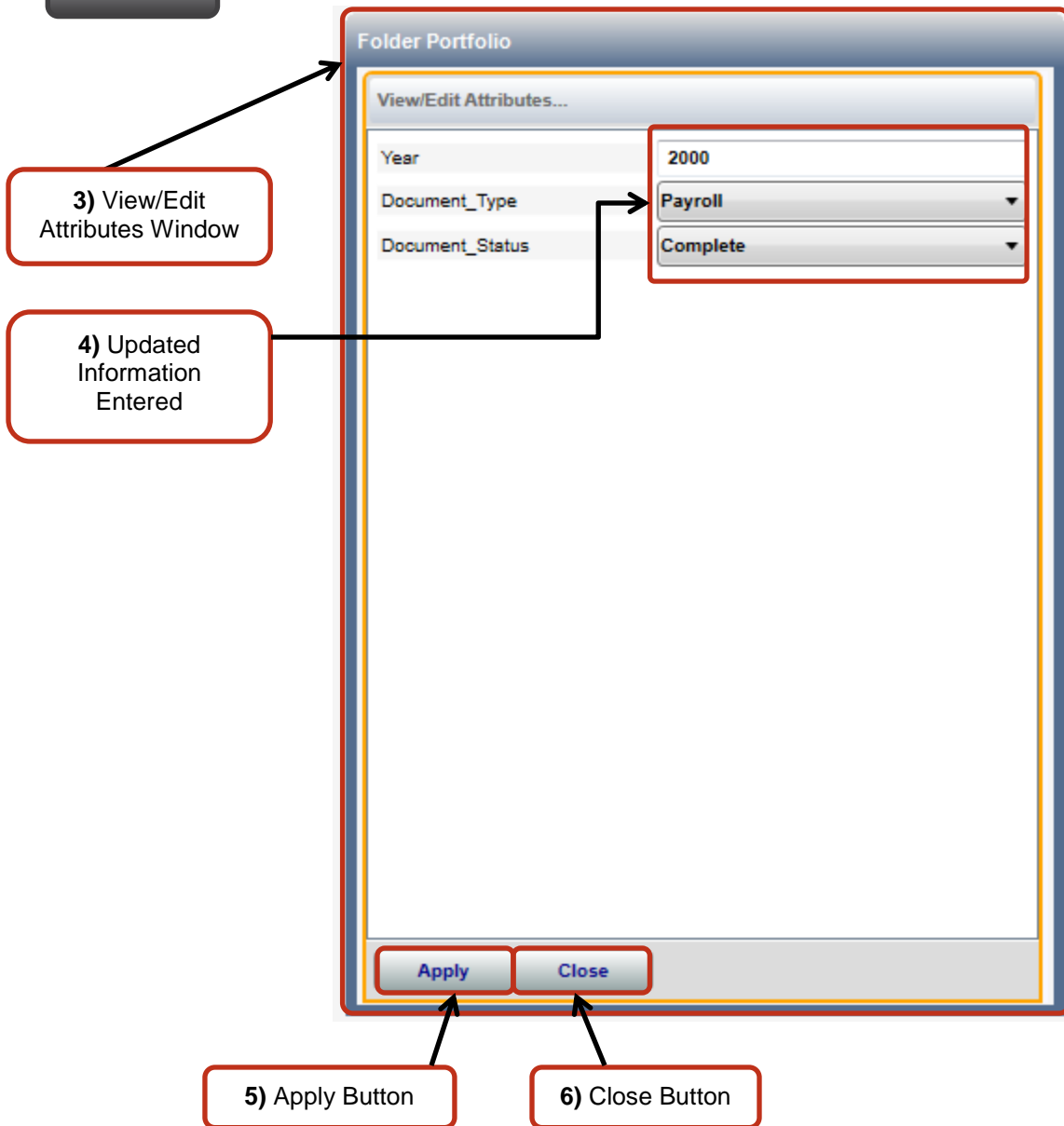
1. Locate and select the document/pageset you want to update (see *Figure 8.1*).
2. Click on the **Edit Indexes/Attributes** button (see *Figure 8.1*).

Figure 8.1



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.

Figure 8.2



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.

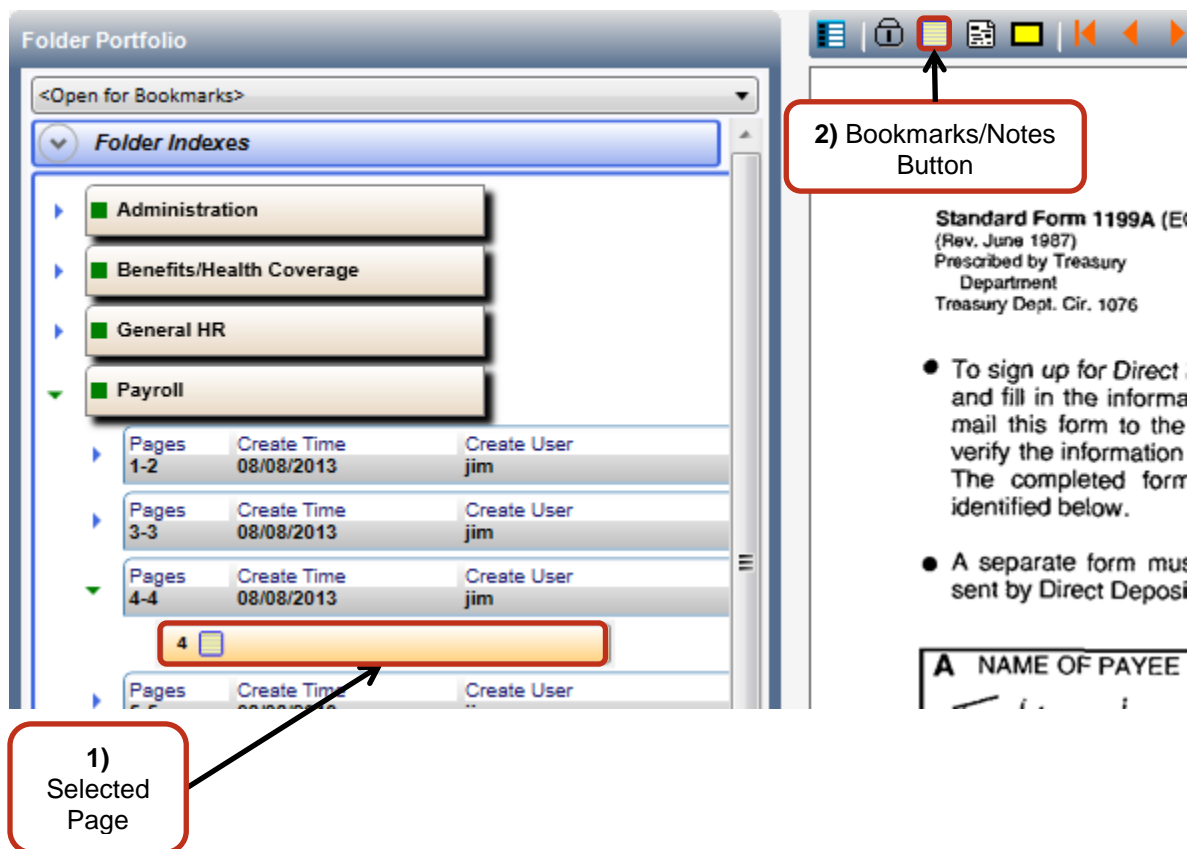
Section 9.1 – Adding a Bookmark

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.

Steps:

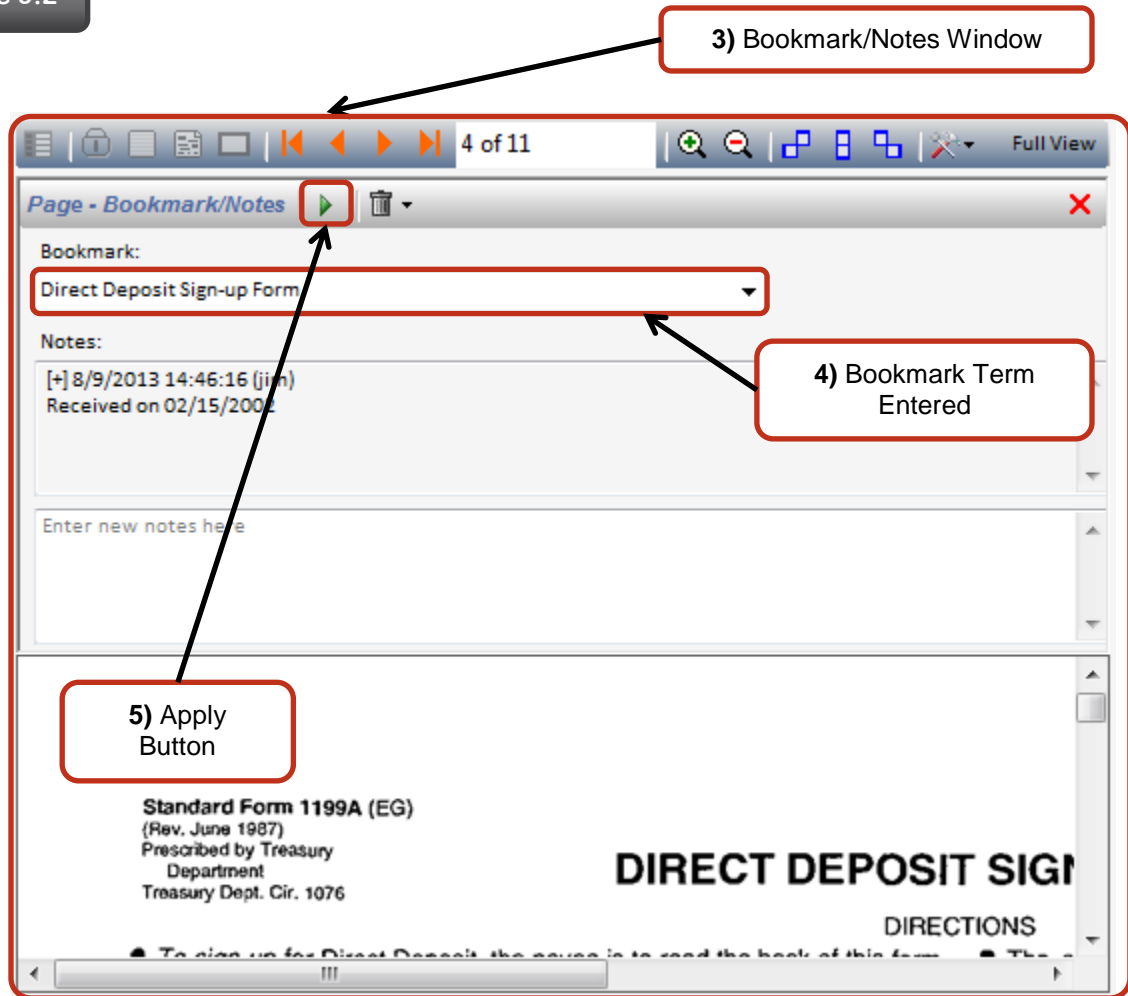
1. Select the page you would like to add a bookmark to (see *Figure 9.1*).
2. Click on the **Bookmarks/Notes** button (see *Figure 9.1*).

Figure 9.1



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



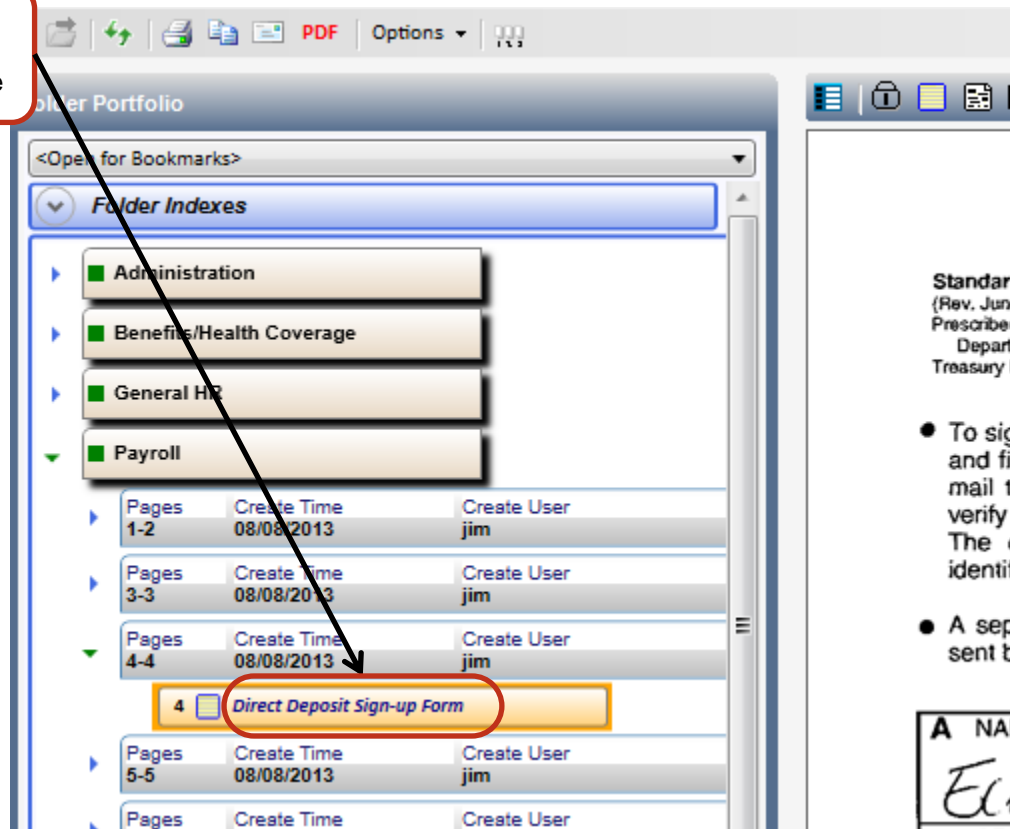
6. The **Bookmark/Notes** window will automatically close adding the bookmark to the selected page (see Figure 9.3).

Note

- a) The newly added bookmark will appear on the selected page within the subfolders.

Figure 9.3

6) Bookmark
Added to
Selected Page



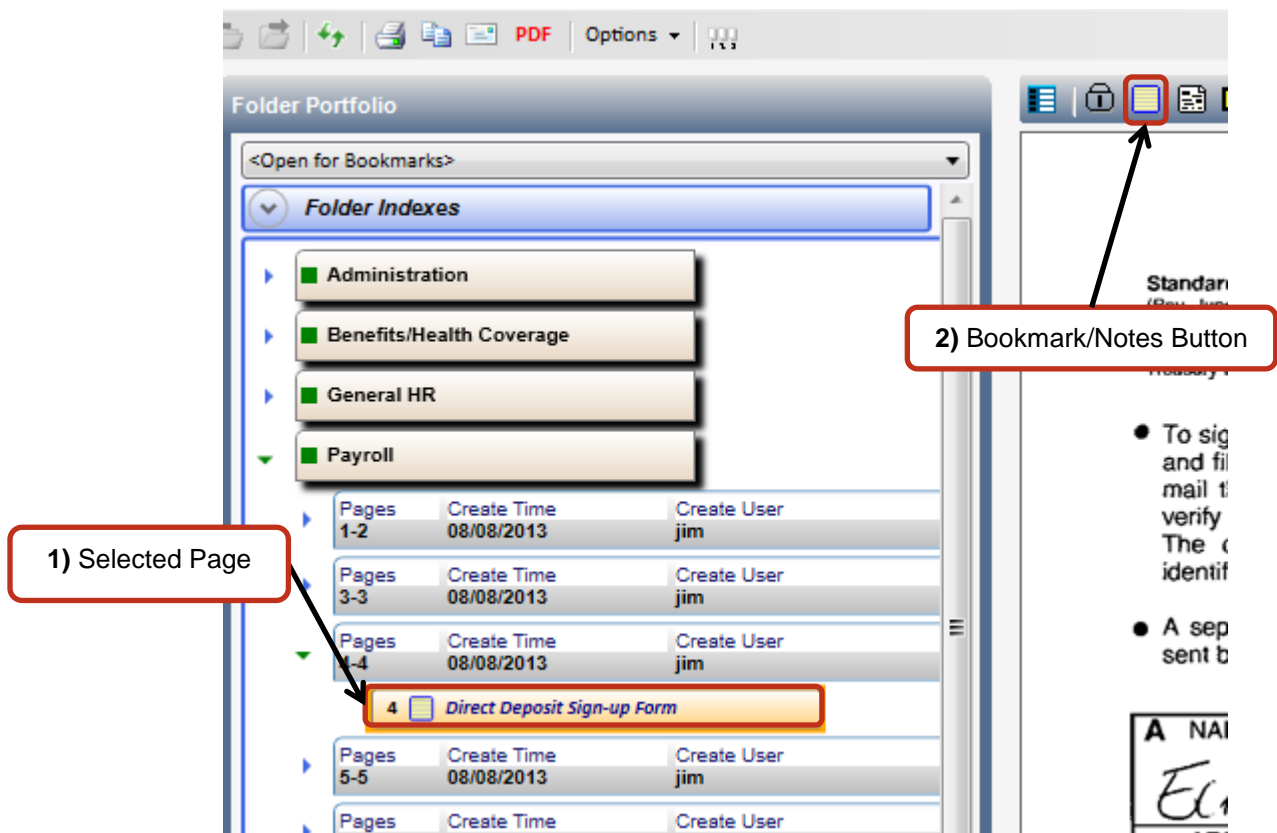
Section 9.2 – Deleting a Bookmark

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

Steps:

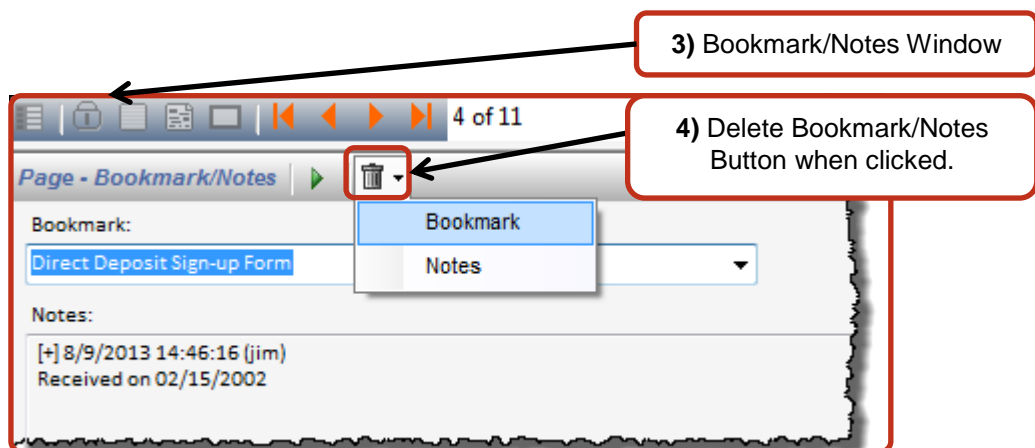
1. Select the page you would like to delete a bookmark from (see Figure 9.4).
2. Click on the **Bookmark/Notes** button (see Figure 9.4)

Figure 9.4



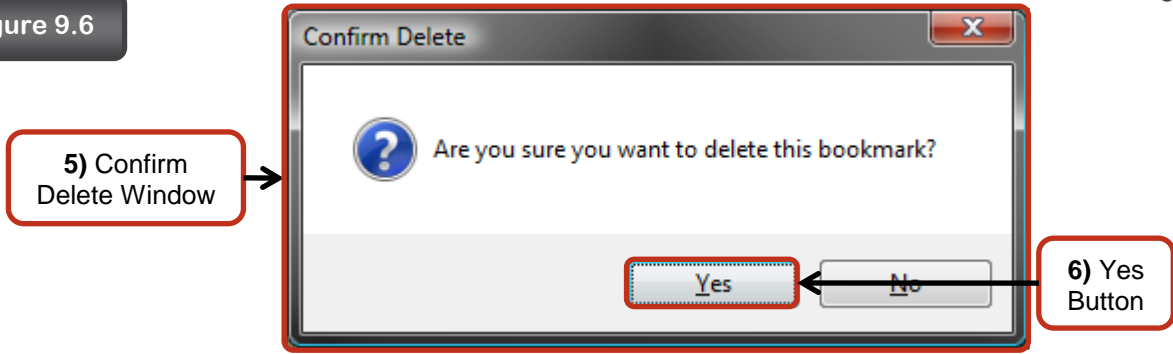
3. A **Bookmark/Notes** window will expand (see Figure 9.5).
4. Click on the **Delete Bookmark/Notes** button. Then, click **Bookmark** (see Figure 9.5).

Figure 9.5



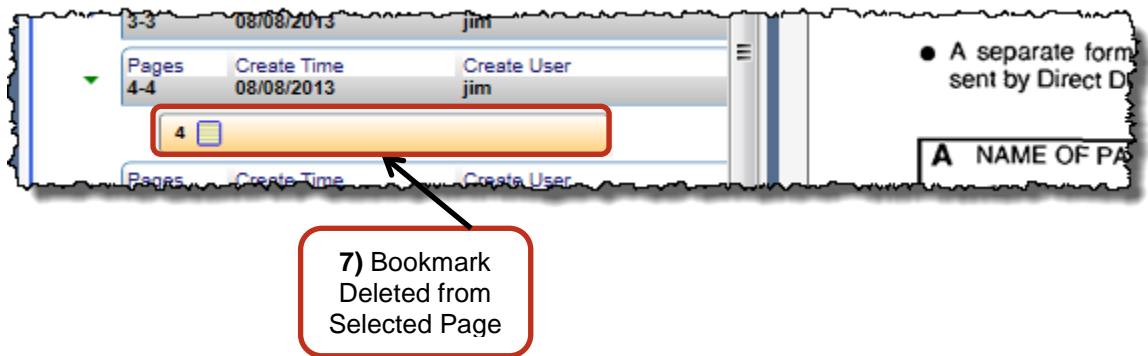
5. A **Confirm Delete** window will pop up asking if you are sure you want to delete the selected bookmark (see Figure 9.6).
6. Click on the **Yes** button (see Figure 9.6).

Figure 9.6



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

Figure 9.7



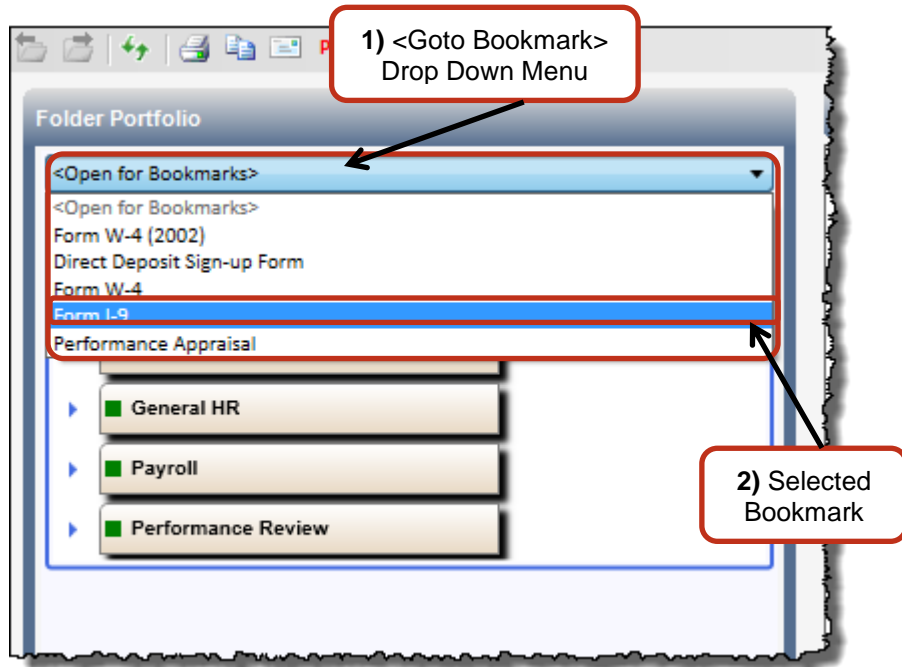
Section 9.3 – Search for a Bookmark

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

Steps:

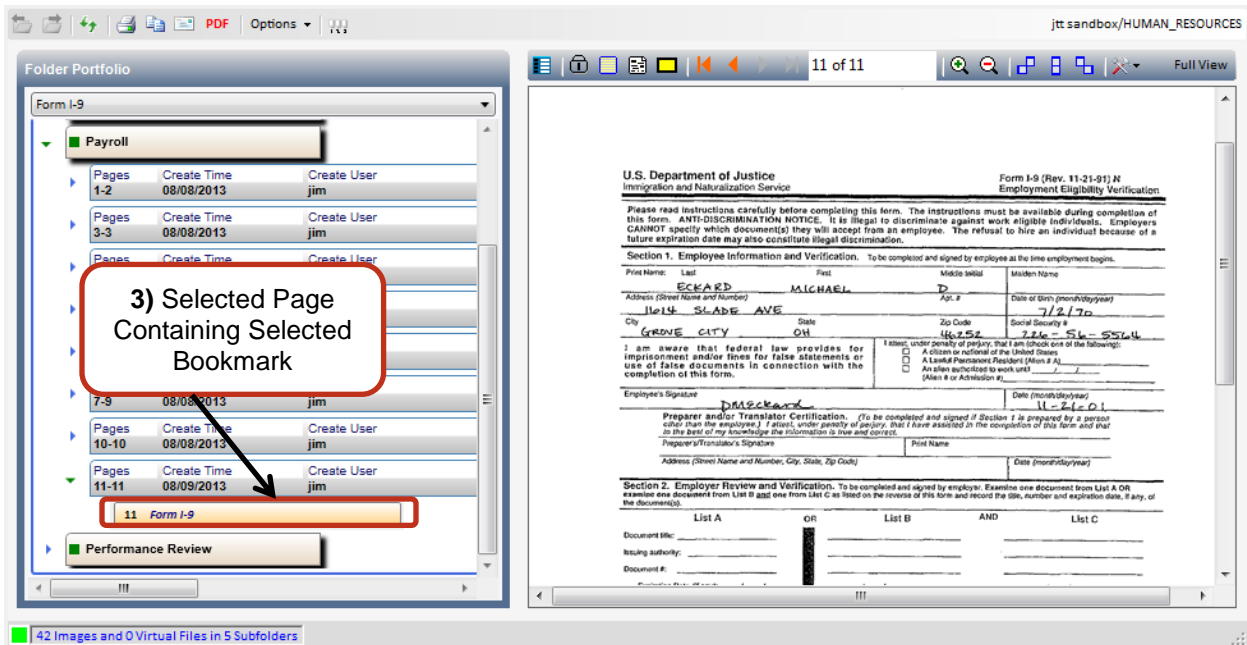
1. Click on the **<Goto Bookmark>** drop down menu (see Figure 9.8).
2. Select the bookmark you want to search for (see Figure 9.8).

Figure 9.8



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

Figure 9.9



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.

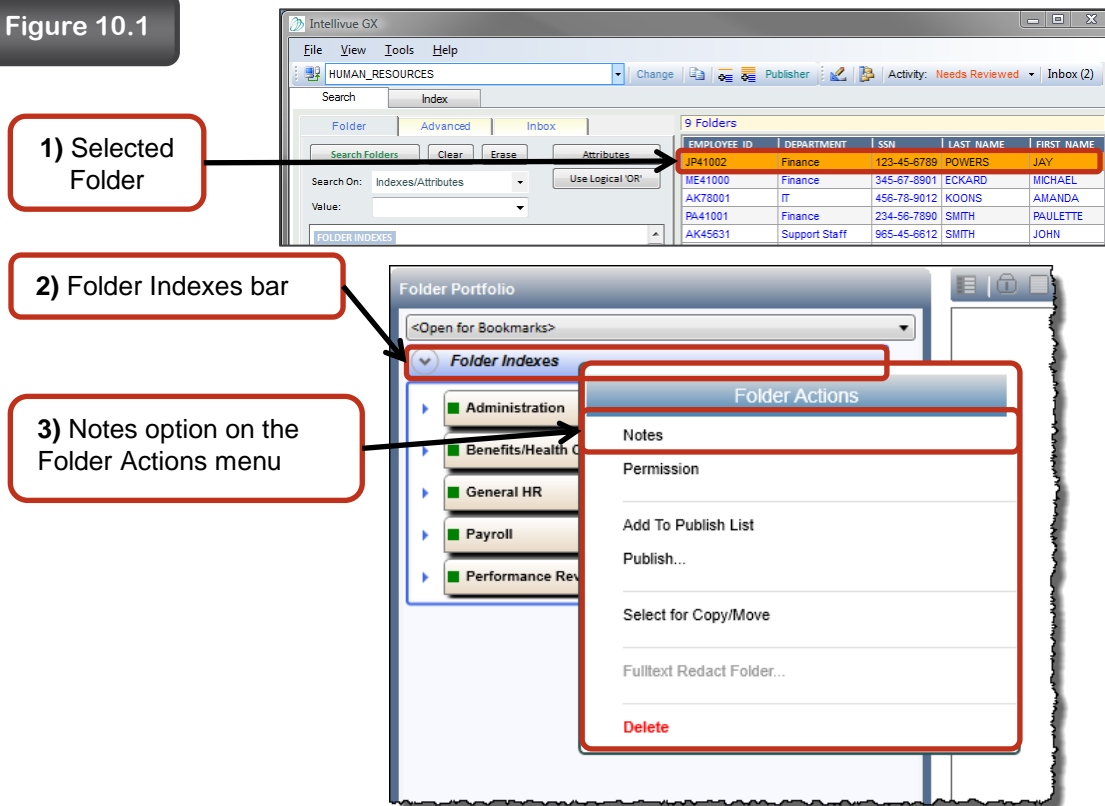
Section 10.1a – Adding a Folder Note

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).

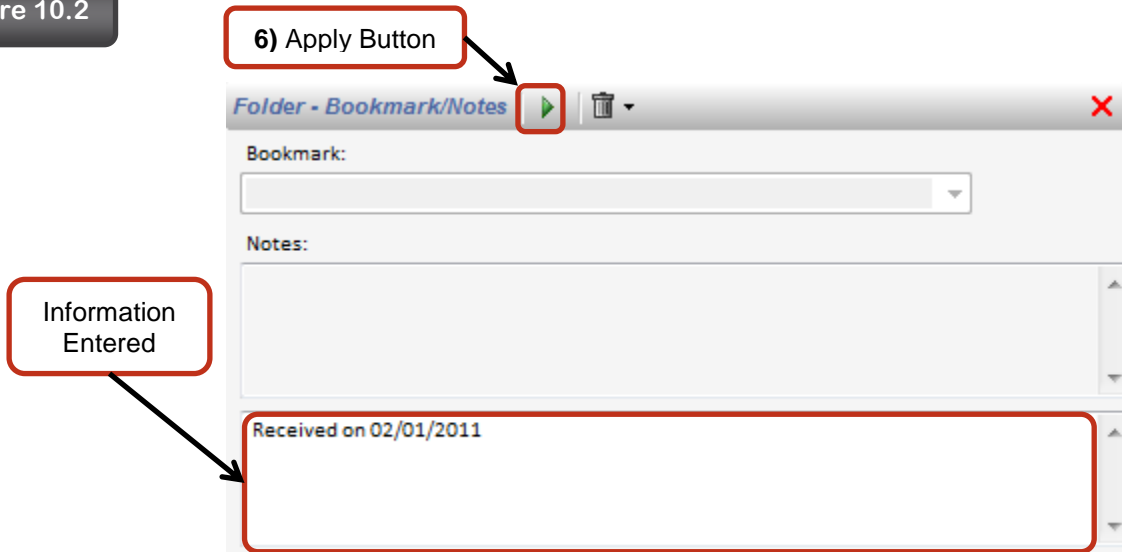
Figure 10.1



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

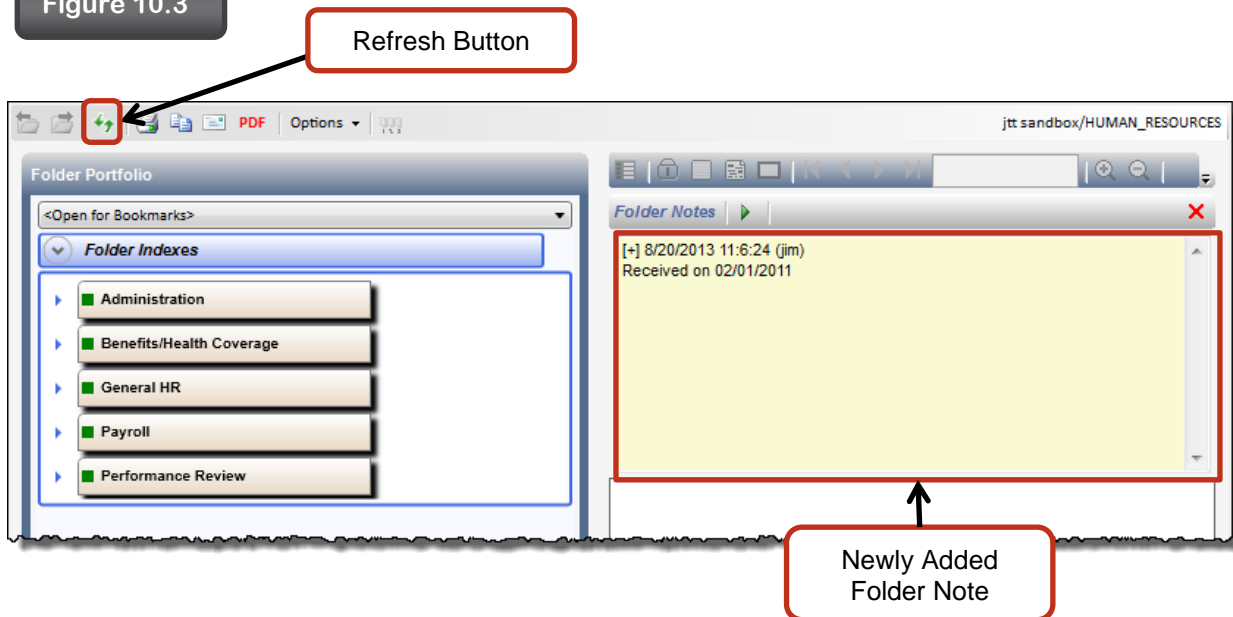


7. A message asking you “Are you sure you want to apply these changes?” will appear on your screen. Click **Yes** to apply. The **Folder - Bookmark/Notes** window will automatically close adding the note to the selected folder.
8. Click on the **Refresh** button. The newly added folder note will appear 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



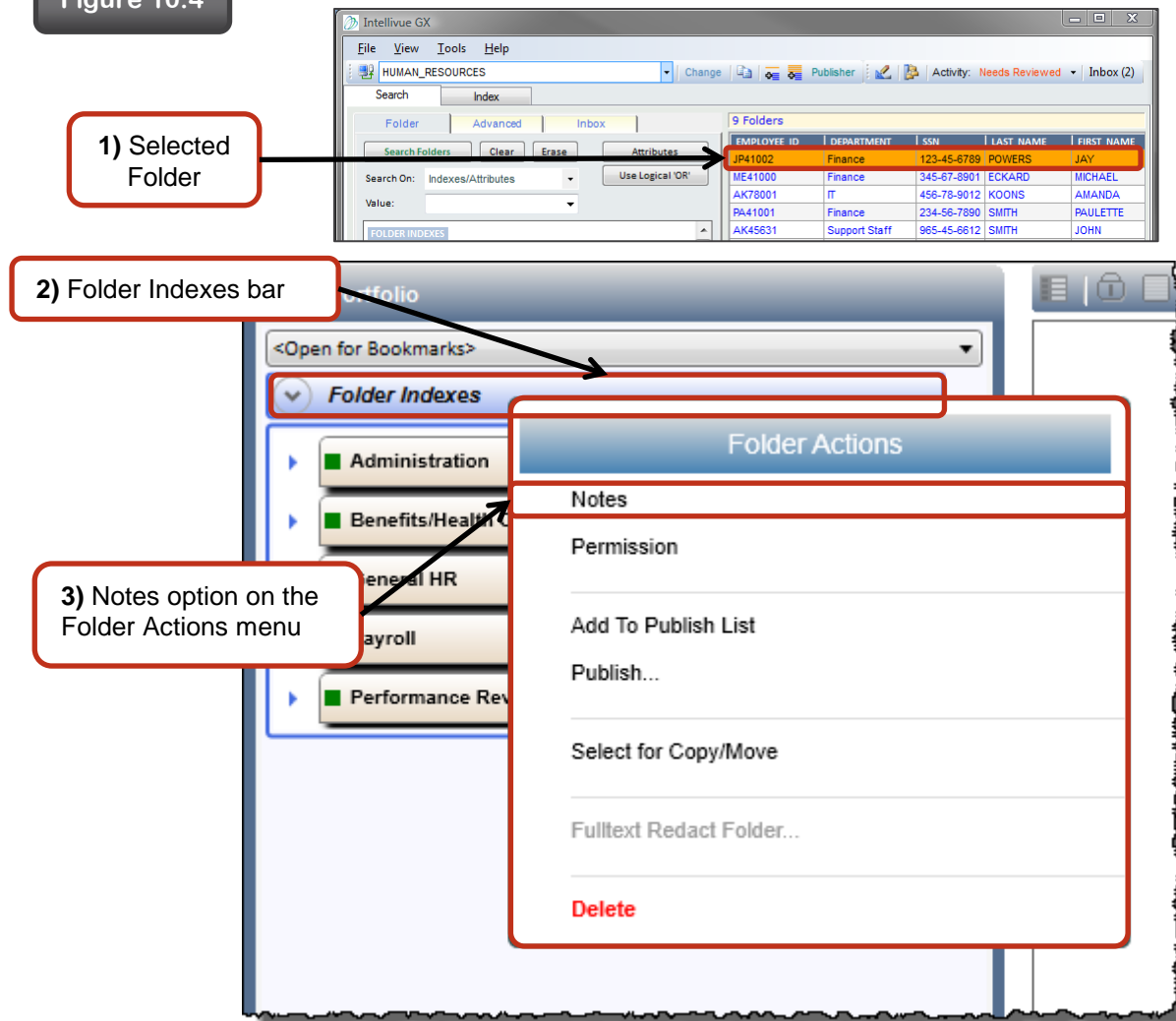
Section 10.1b – Deleting Folder Notes

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).

Figure 10.4

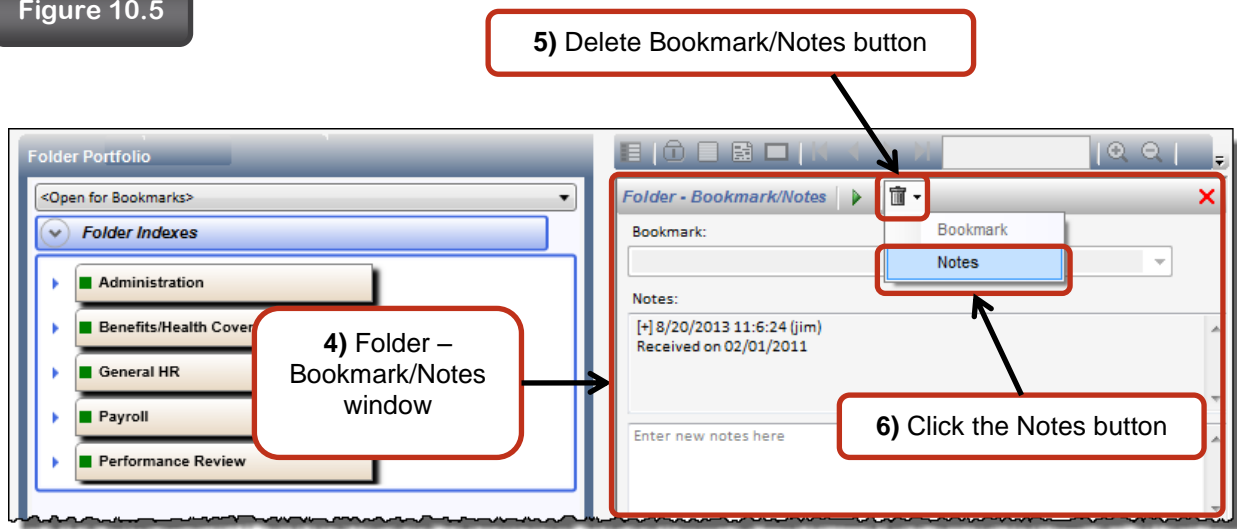


4. The **Folder - Bookmark/Notes** window will expand (see Figure 10.5)
5. Click the **Delete Bookmarks/Notes** button (see Figure 10.5).
6. Click the **Notes** menu option (see Figure 10.5).

Note

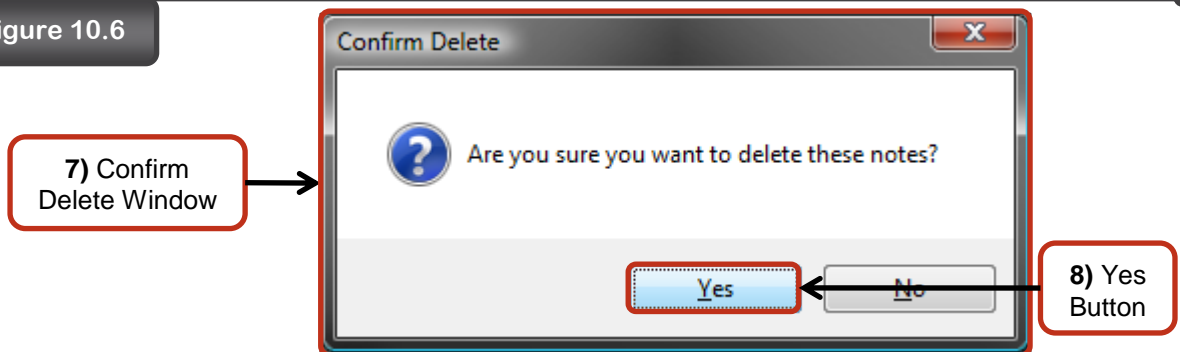
- a) The **Notes** button will delete all of the folder notes. You are not able to choose which individual notes can be deleted.

Figure 10.5



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).

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.

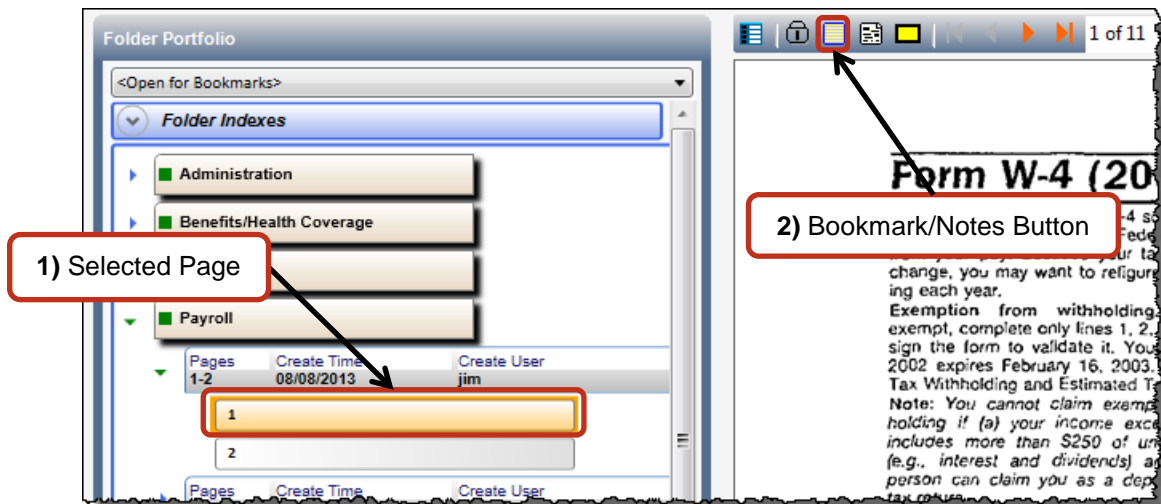
Section 10.2a – Adding a Page Note

To add page notes, follow the steps listed below.

Steps:

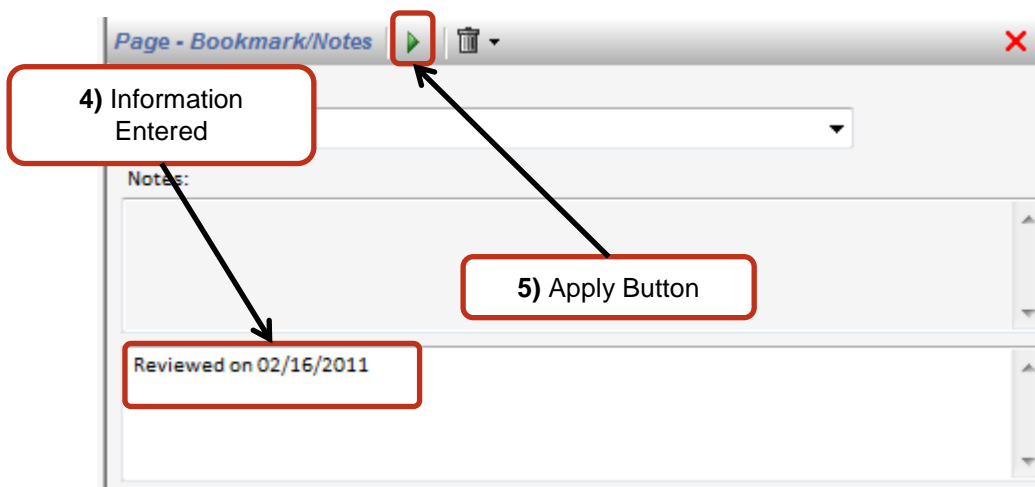
1. Select the page you want to add a note to (see Figure 10.7).
2. Click on the **Bookmark/Notes** button (see Figure 10.7).

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).

Figure 10.8

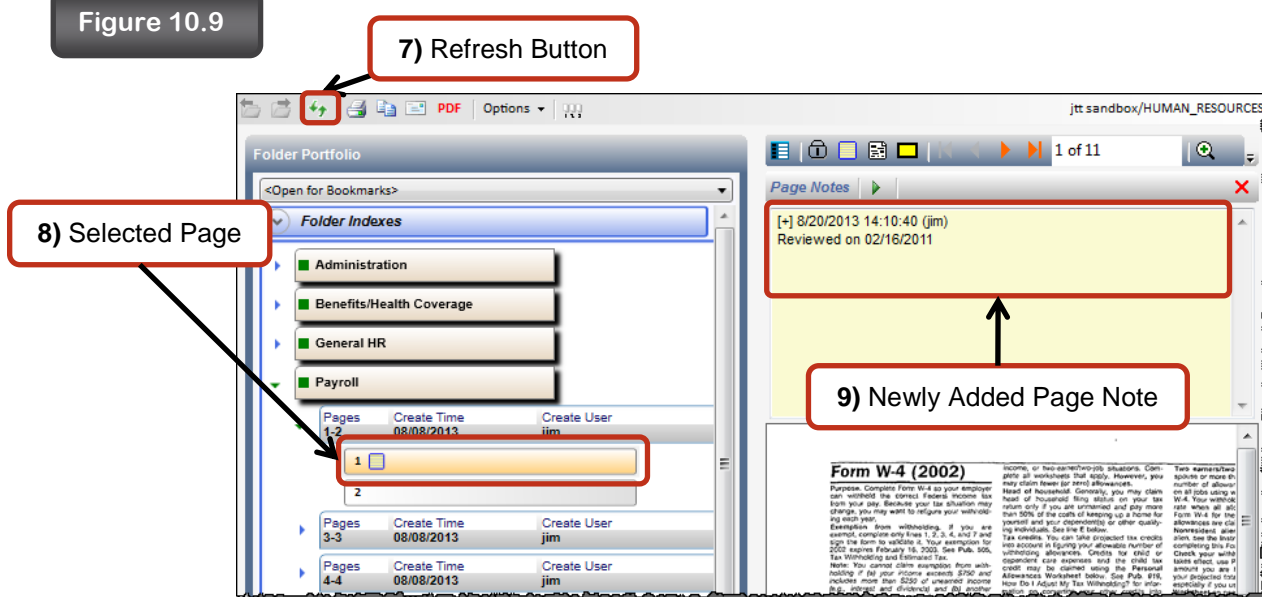


6. A message asking “Are you sure you want to apply these changes?” will appear. Click **Yes** to continue. The **Page - Bookmark/Notes** window will automatically close adding the note to the selected page.
7. Click on the **Refresh** button (see *Figure 10.9*).
8. The newly added page note will appear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

Note

- 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.

Figure 10.9



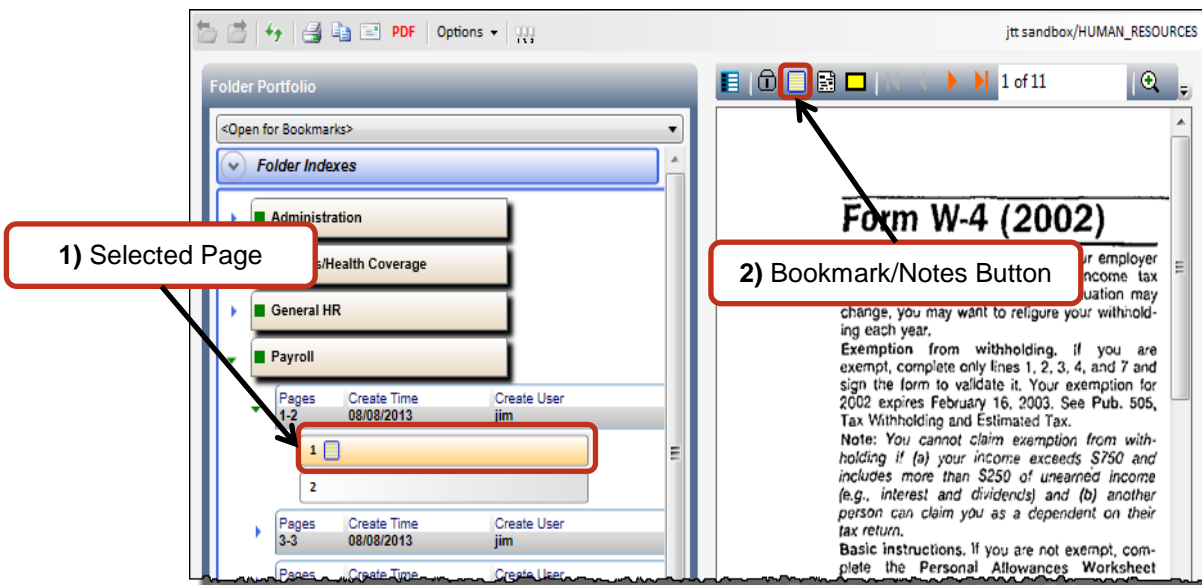
Section 10.2b – Deleting Page Notes

To delete page notes, follow the steps listed below.

Steps:

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*).

Figure 10.10

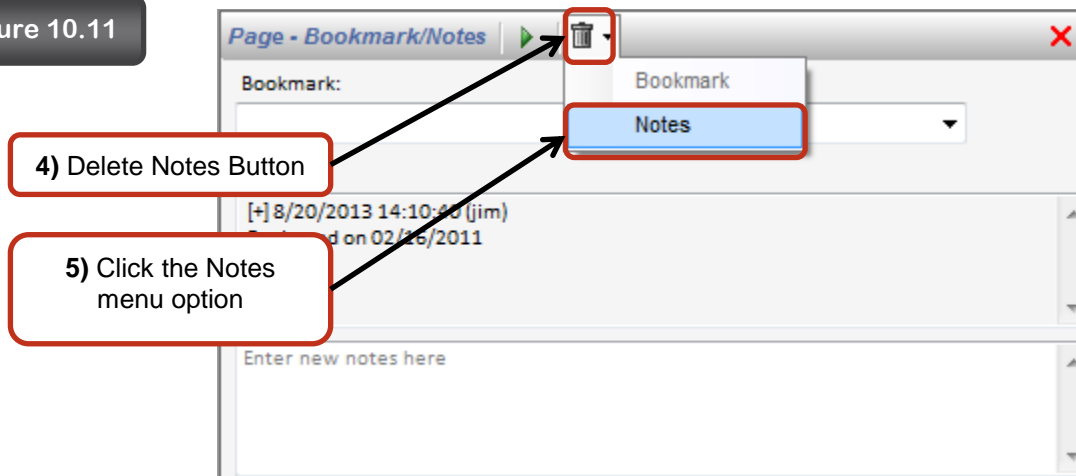


3. The **Page - Bookmark Notes** window will expand (see Figure 10.11)
4. Click on the **Delete Bookmark/Notes** button (see Figure 10.11).
5. Click the **Notes** menu option (see Figure 10.11).

Note

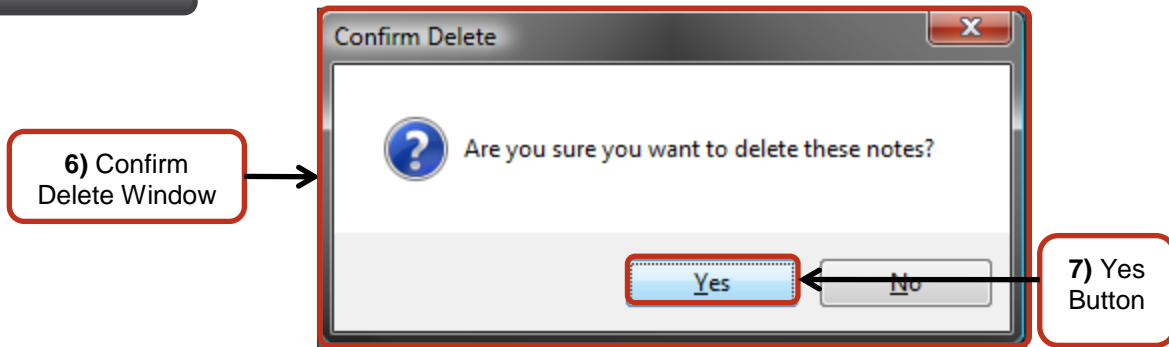
- a) The **Delete Notes** button will delete all of the page notes. You are not able to choose which individual notes can be deleted.

Figure 10.11

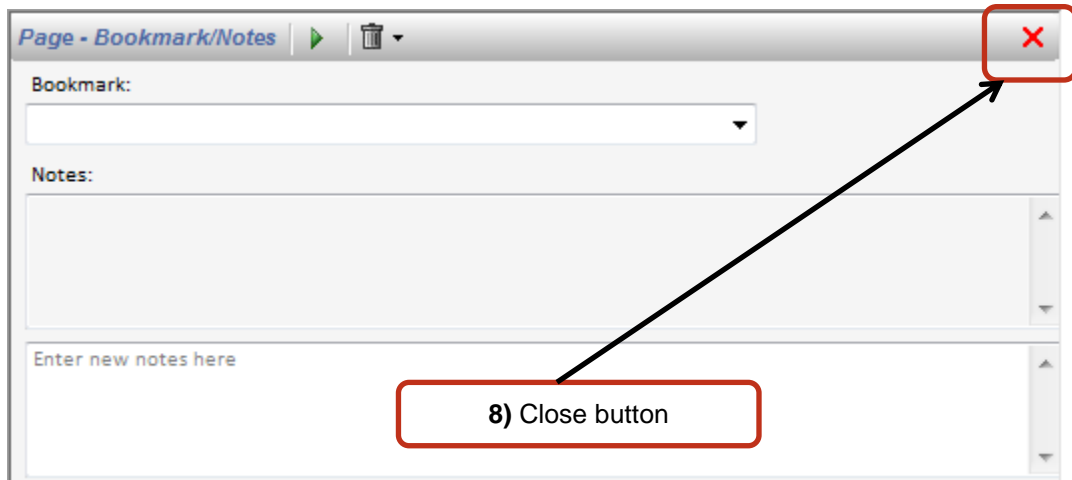


6. A **Confirm Delete** window will pop up asking if you are sure you want to delete all page notes (see Figure 10.12).
7. Click on the **Yes** button (see Figure 10.12).

Figure 10.12



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.

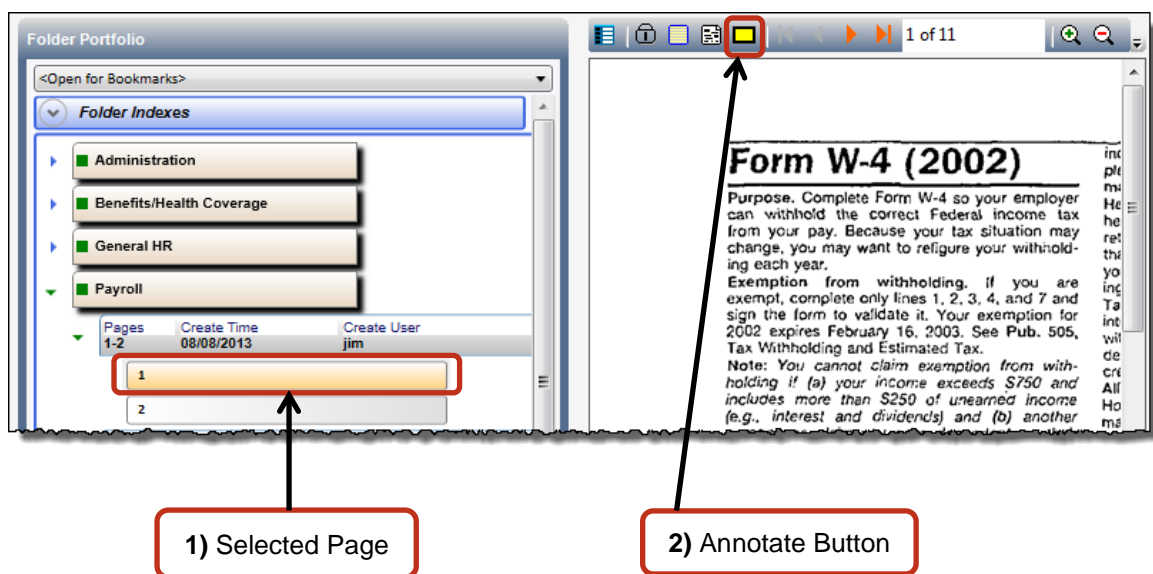
Section 11.1 – Highlight Annotations

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).

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.

Note

- a) To highlight 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 highlight box over the selected area. Once you are done drawing the highlight box, let go of the left button on your mouse.

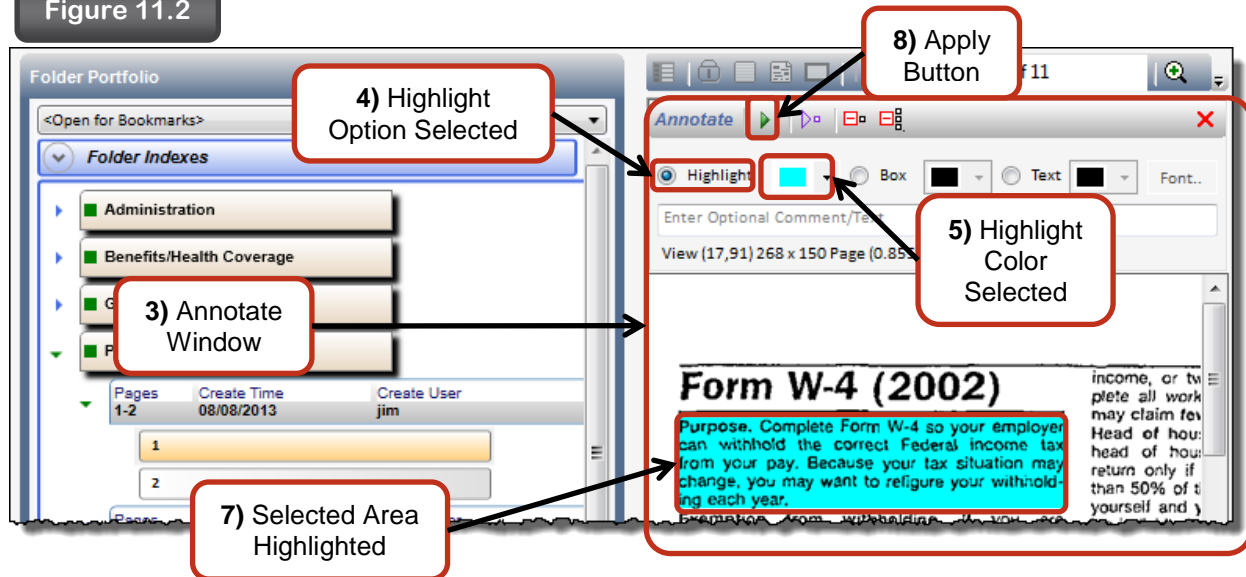
7. The selected area will now be highlighted (see Figure 11.2).

Note

- 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).

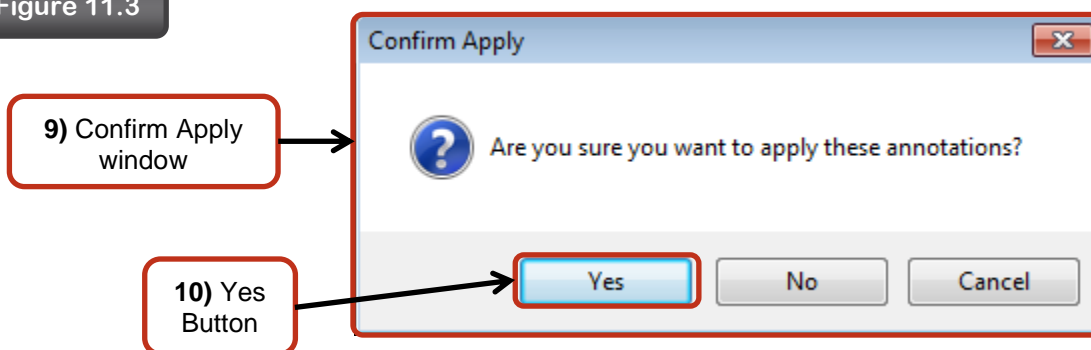
Figure 11.2



9. A **Confirm Apply** window will pop up (see Figure 11.3).

10. Click on the **Yes** button (see Figure 11.3).

Figure 11.3

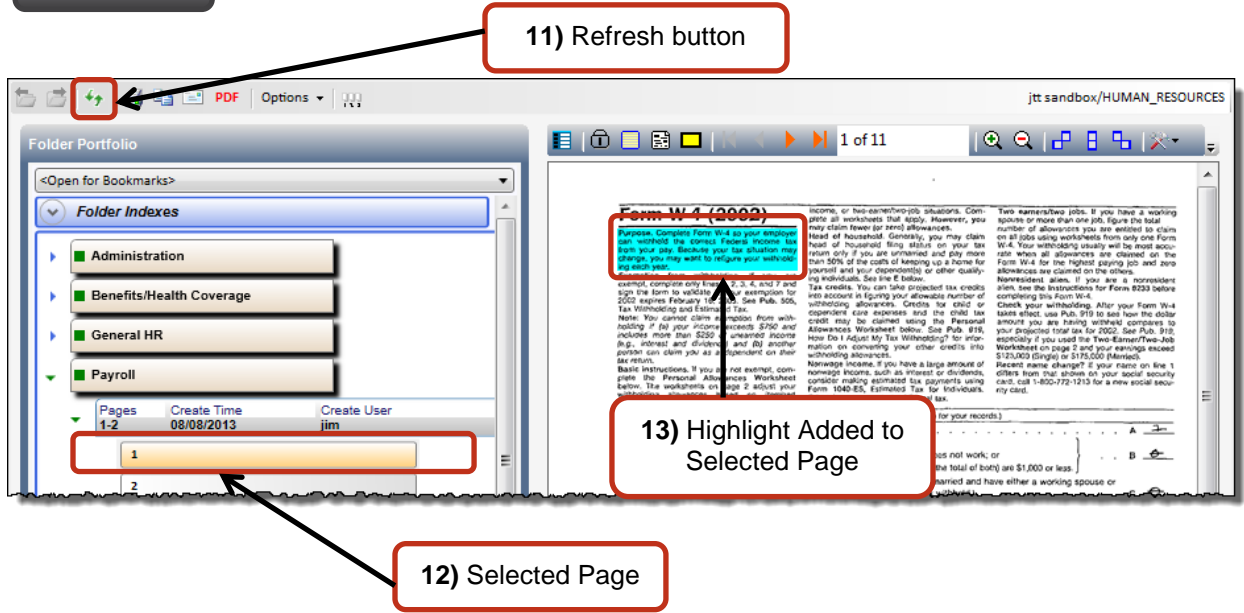


11. Click on the **Refresh** button (see Figure 11.4).

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).

Figure 11.4



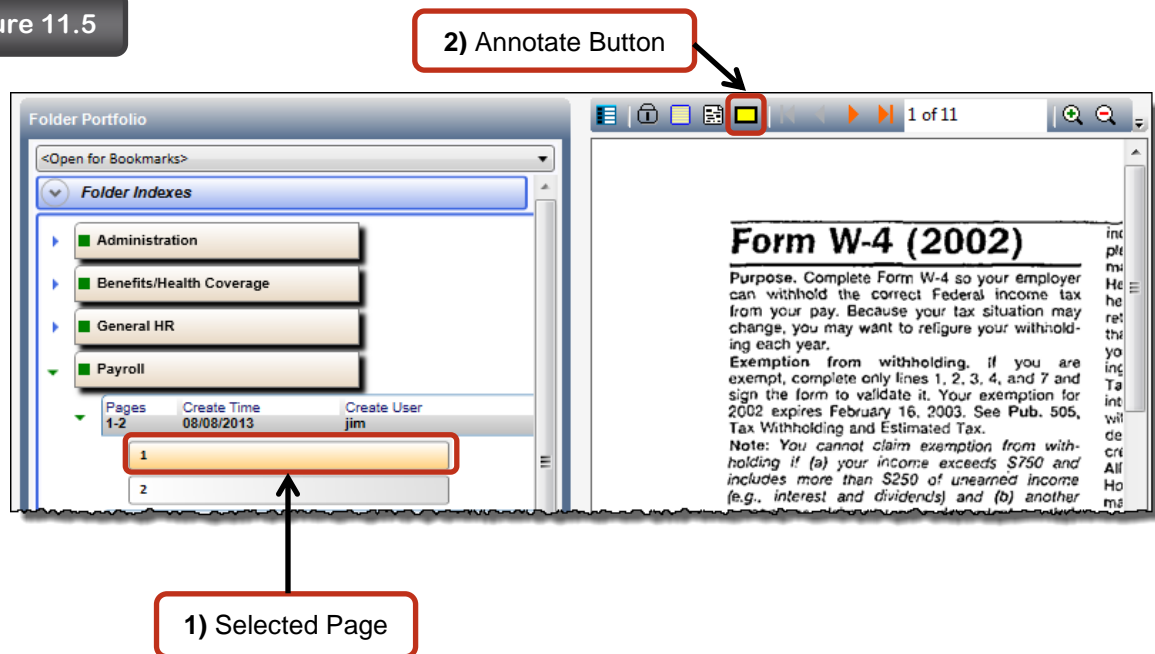
Section 11.2 – Box Annotations

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



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 cursor 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 drawing the box annotation, let go of the left button on your mouse.

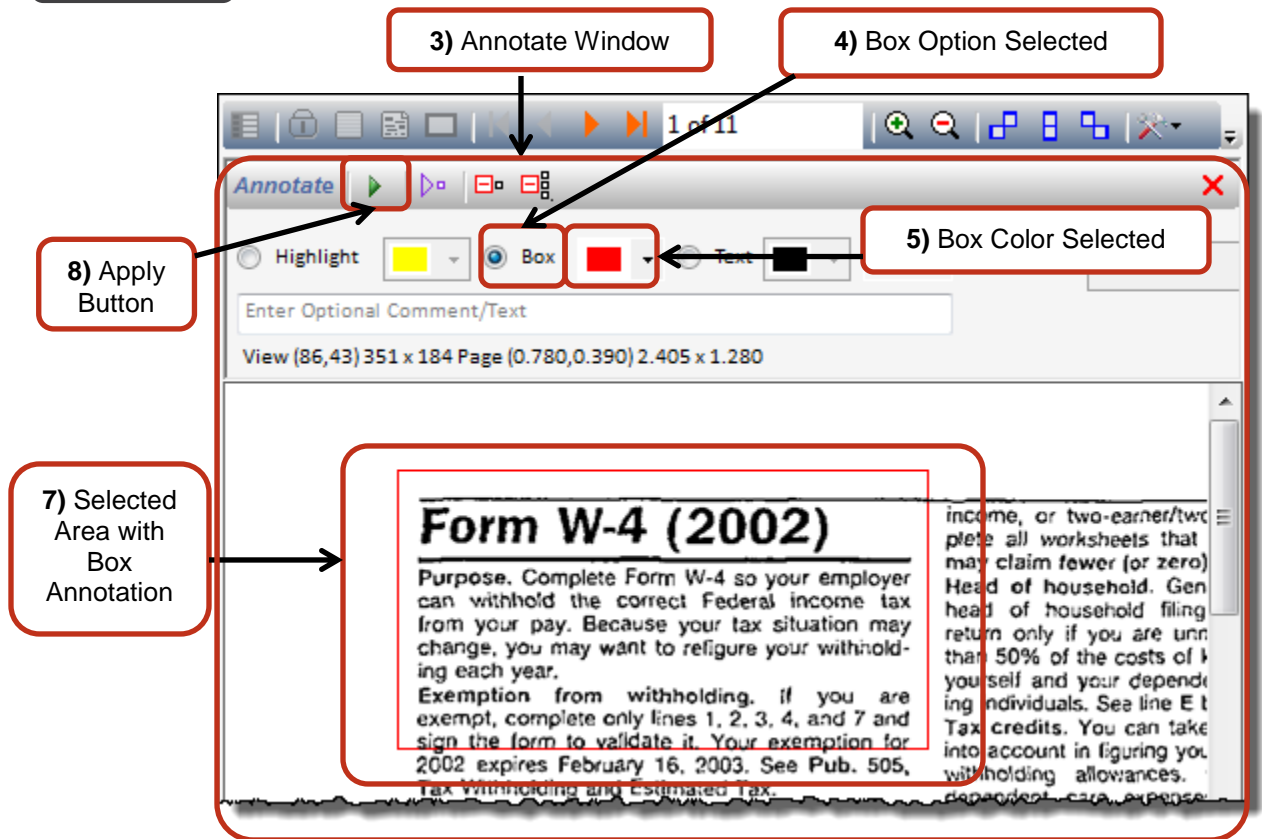
7. The selected area will now have a box annotation around it (see *Figure 11.6*).

Note

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

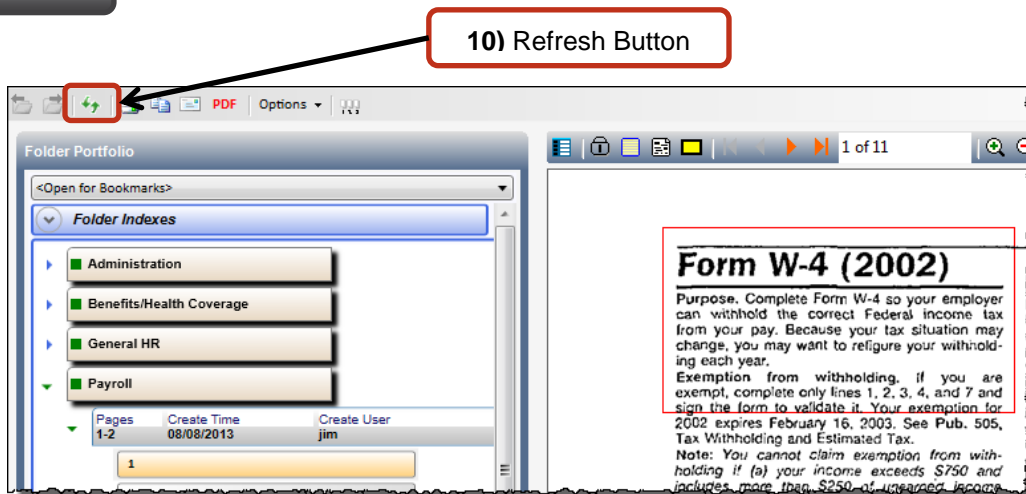
8. Click on the **Apply** button (see Figure 11.6).

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



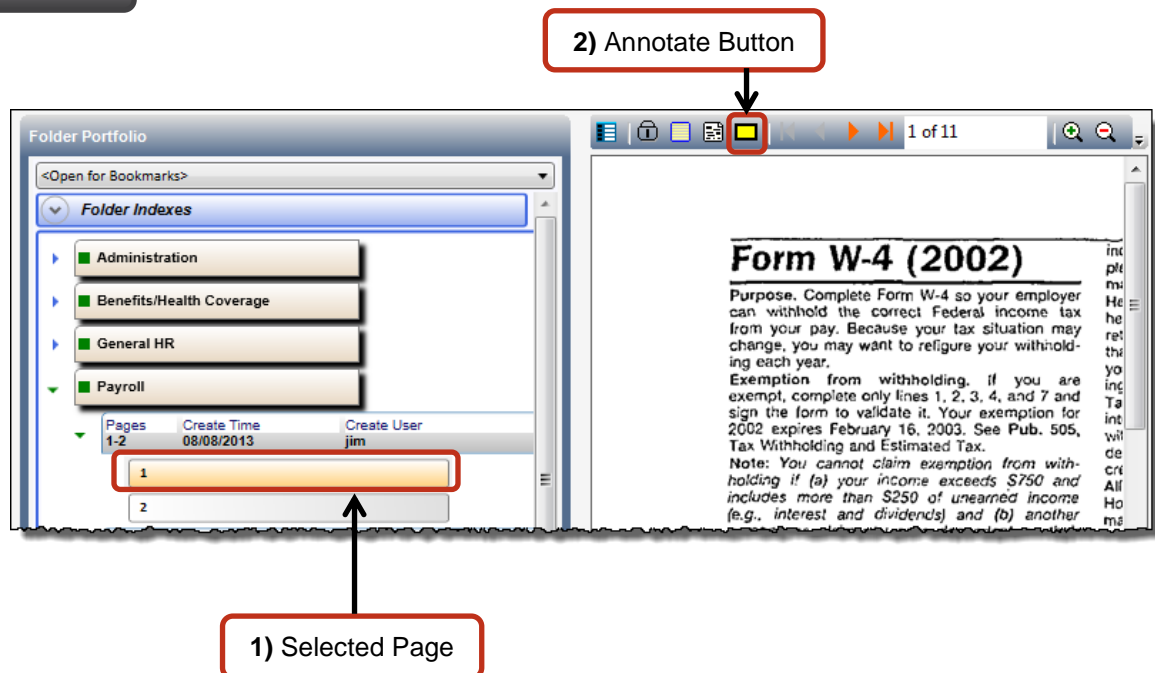
Section 11.3 – Text Annotations

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:

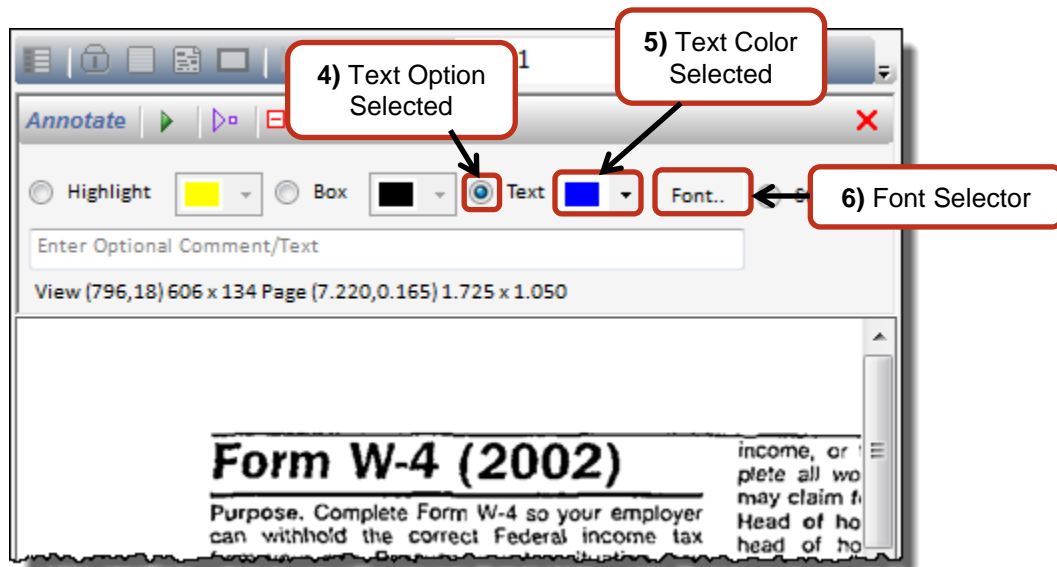
1. Select the page you want to add text annotations to (see *Figure 11.8*).
2. Click on the **Annotate** button (see *Figure 11.8*).

Figure 11.8



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



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

Note

- 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.

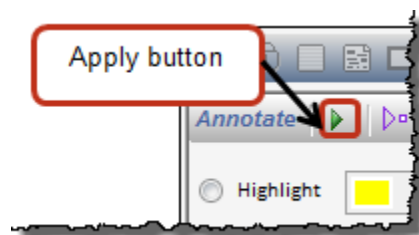
8. The selected area will now contain a text annotation box.
9. To add text to the text annotation box, select the text annotation box.
10. Enter the text you want to add to the text annotation box into the **Enter Optional Comment/Text** field.
11. The entered text will now be added to the text annotation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

Note

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

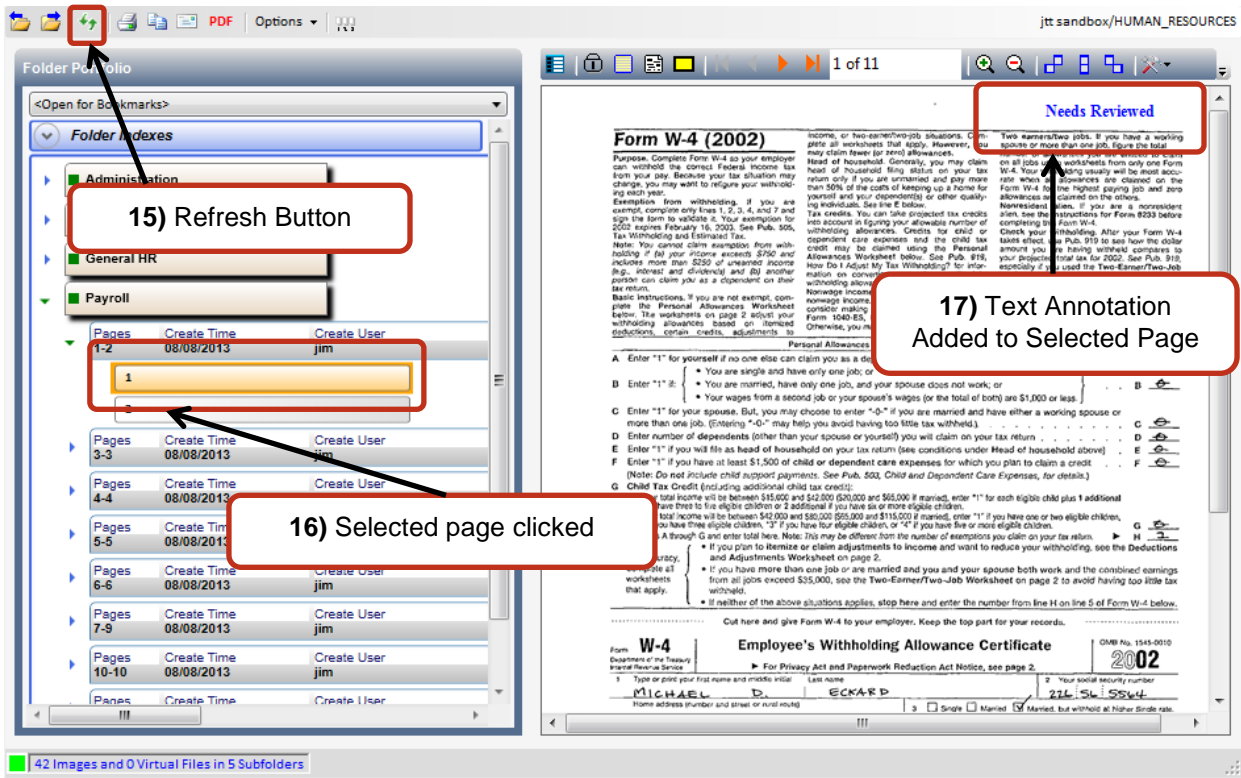
12. Click on the **Apply** button (see *Figure 11.10*).

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).

Figure 11.11



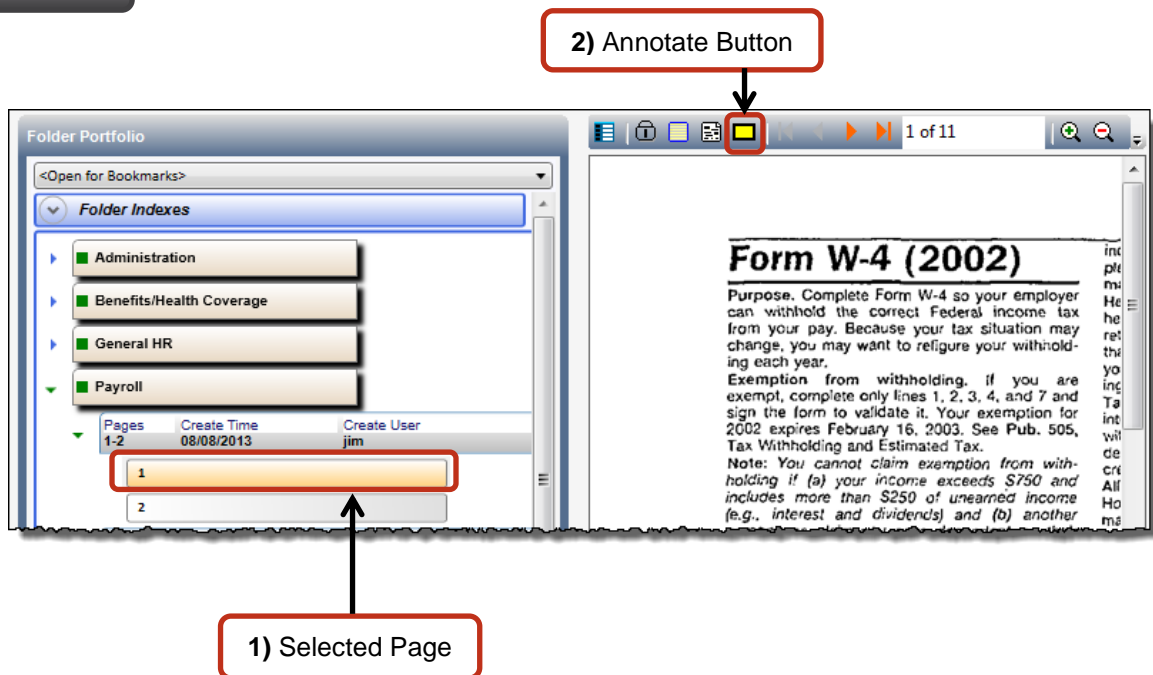
Section 11.4 – Stamp Annotations

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:

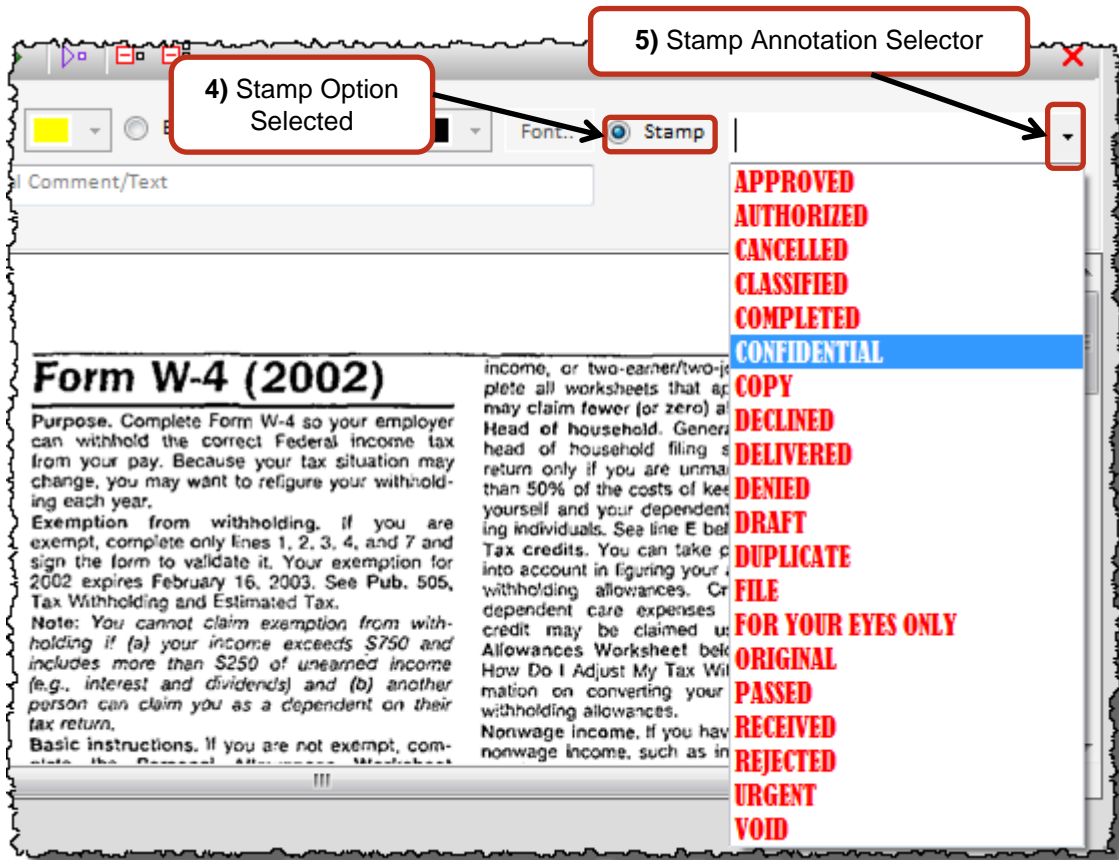
1. Select the page you want to add text annotations to (see *Figure 11.12*).
2. Click on the **Annotate** button (see *Figure 11.12*).

Figure 11.12



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

Figure 11.13



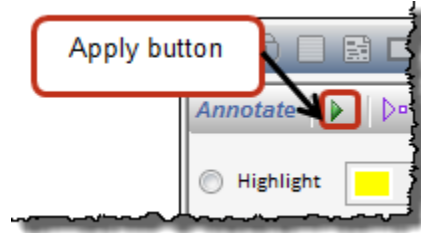
5. Click the dropdown to reveal a list of stamp annotations. Select the desired stamp annotation.
6. Select the area on the selected page where you want to add the stamp annotation box.

Note

- 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.

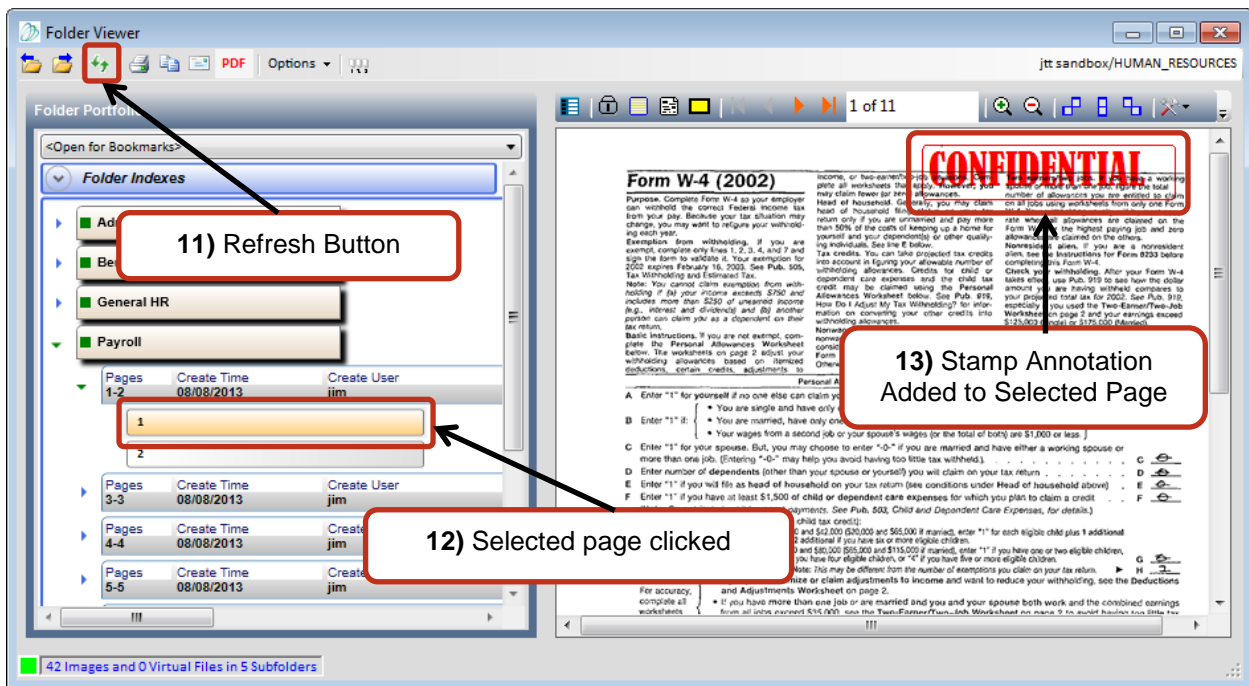
7. The selected area will now contain a stamp annotation box with the stamp text you chose. The font size of the text in the stamp adjusts to the size of the selected area.
8. Click on the **Apply** button (see *Figure 11.14*).

Figure 11.14



9. A message asking “Are you sure you want to apply these annotations?” appears.
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



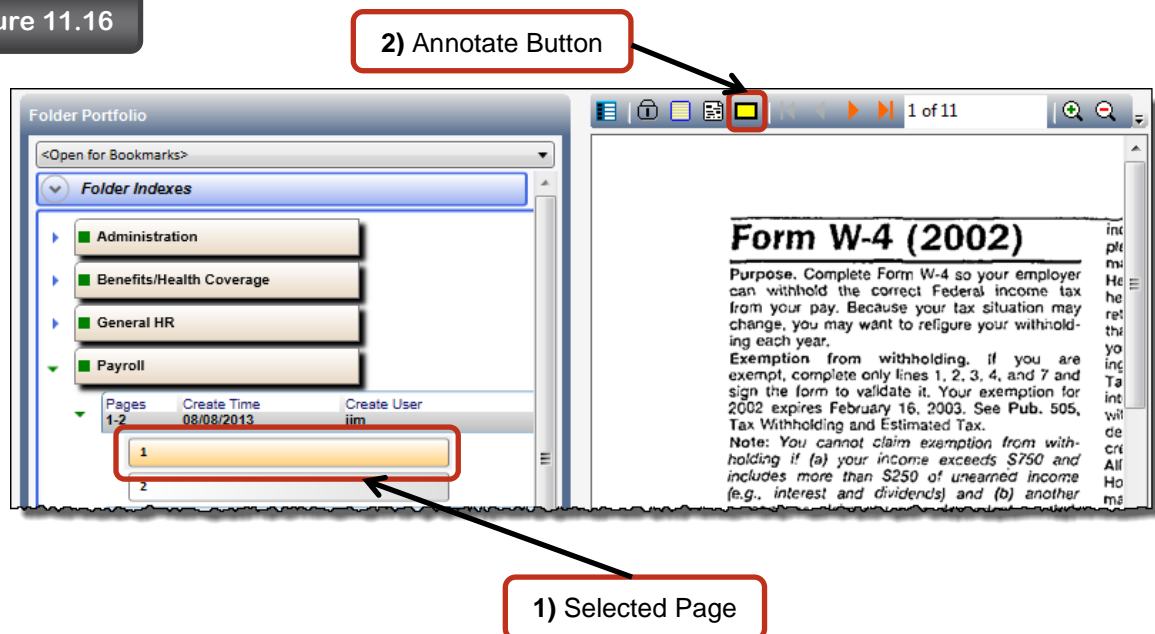
Section 11.5 – Adding Comments

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



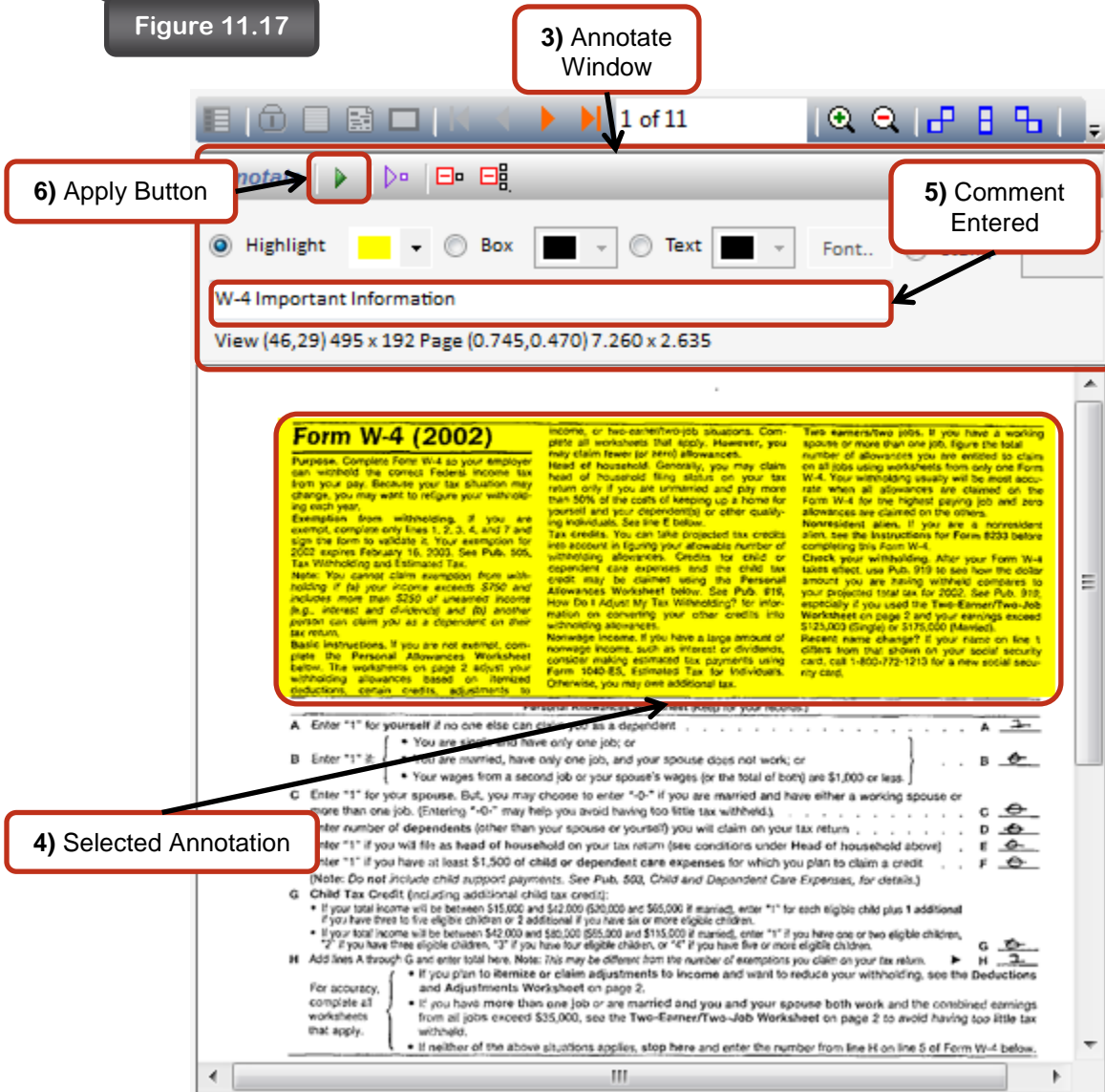
3. The **Annotate** window will expand (see *Figure 11.17*).
4. Select the annotation you want to add a comment to (see *Figure 11.17*).

Note

- a) Comments can only be added to highlight annotations and box annotations.

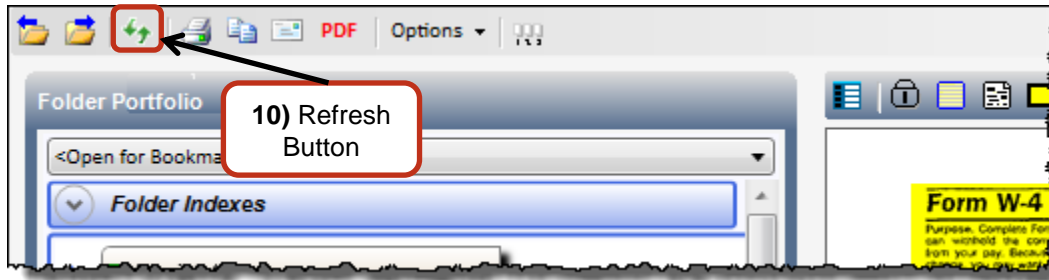
5. Enter the comment into the **Enter Optional Comment/Text** field (see *Figure 11.17*).
6. Click on the **Apply** button (see *Figure 11.17*).

Figure 11.17



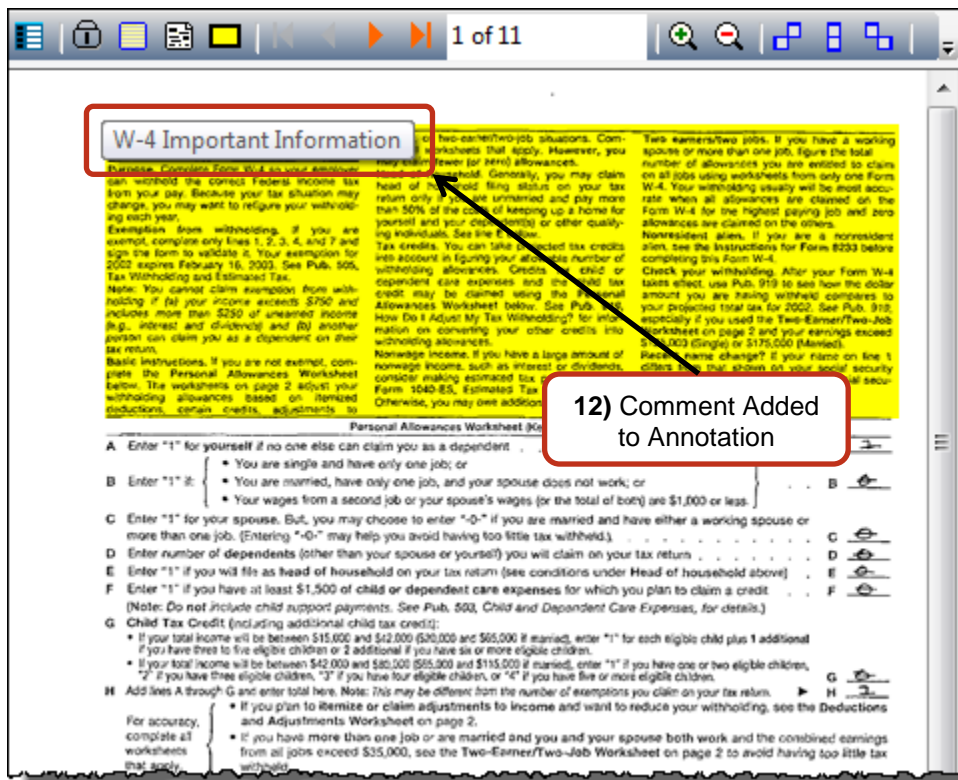
7. A message will ask “Are you sure you want to apply these annotations?” will appear.
8. Click on the **Yes** button.
9. Click on the **Refresh** button (see *Figure 11.18*).

Figure 11.18



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

Figure 11.19



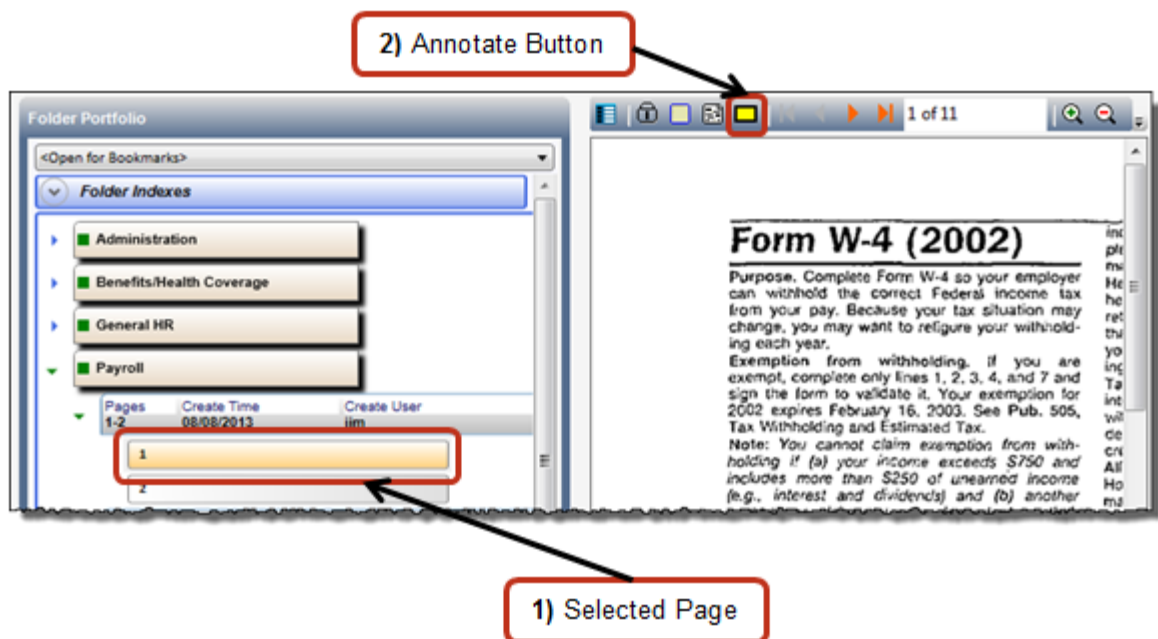
Section 11.6 – Deleting Annotations

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*).

Figure 11.20



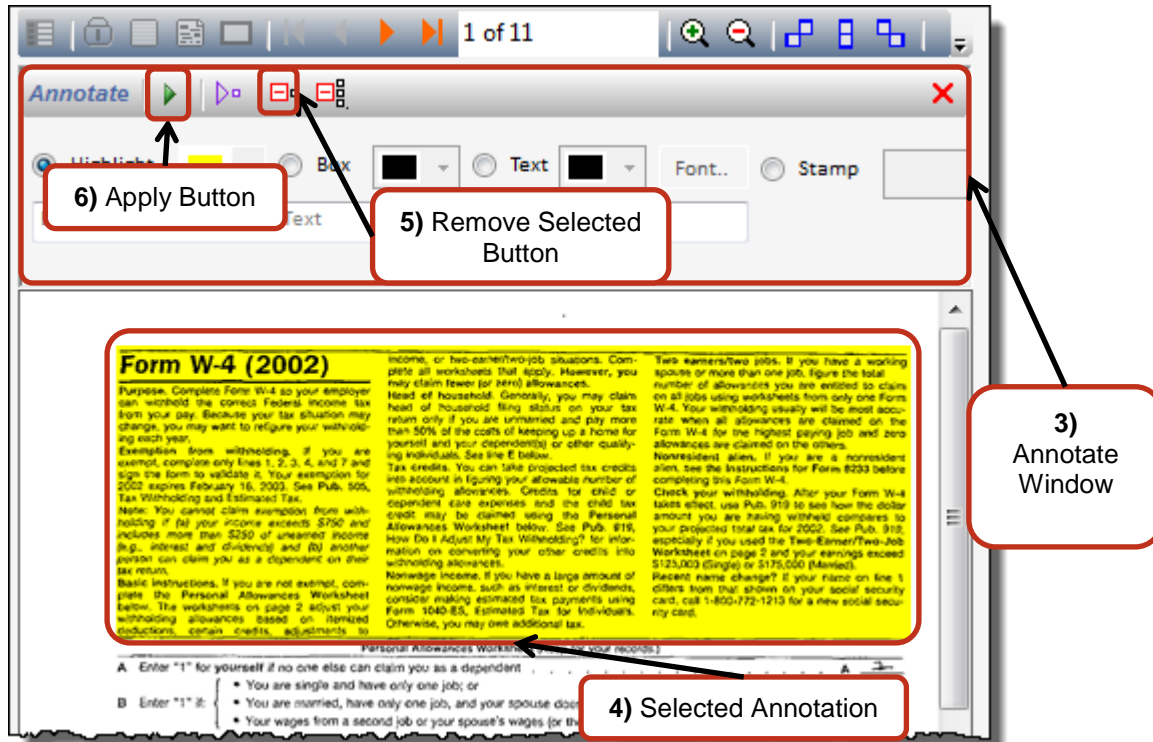
3. The **Annotate** window will expand (see *Figure 11.21*).
4. Select the annotation you want to delete (see *Figure 11.21*).
5. Click on the **Remove Selected** button (see *Figure 11.21*).

Note

- a) Only one annotation can be selected for removal at a time.
- b) To remove all annotations from the selected page, click on the **Remove All** button.

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

Figure 11.21



7. A message asking “Are you sure you want to apply these annotations?” appears.
8. Click on the **Yes** button.
9. Click on the **Refresh** button (see Figure 11.22).

Figure 11.22



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.

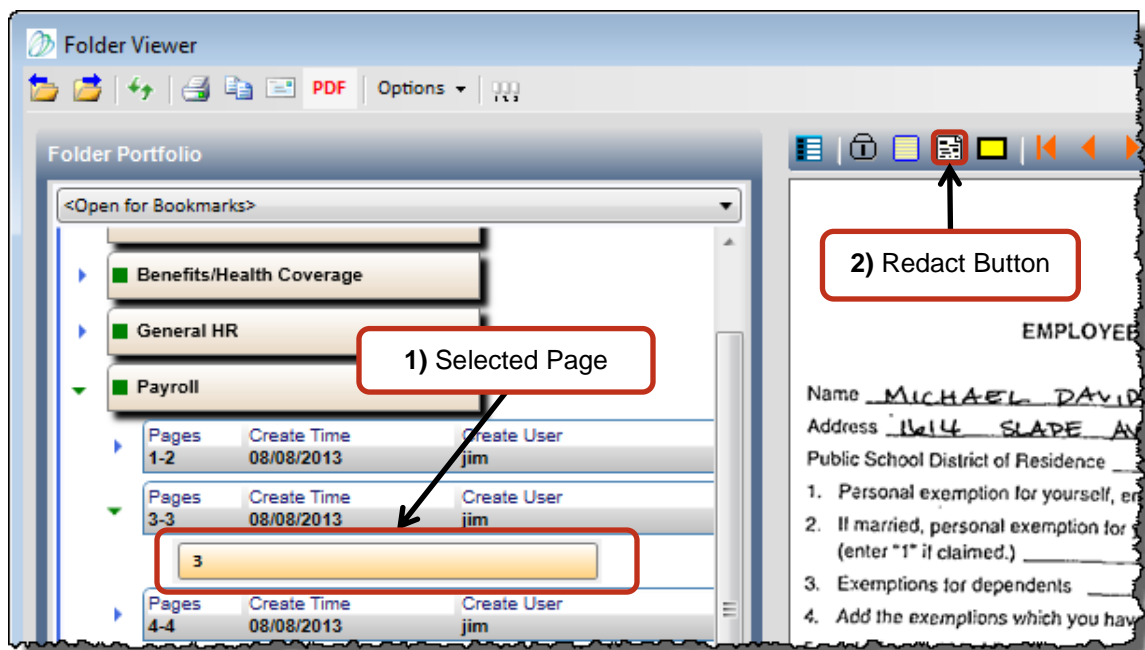
Section 12.1 – Adding Redactions

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

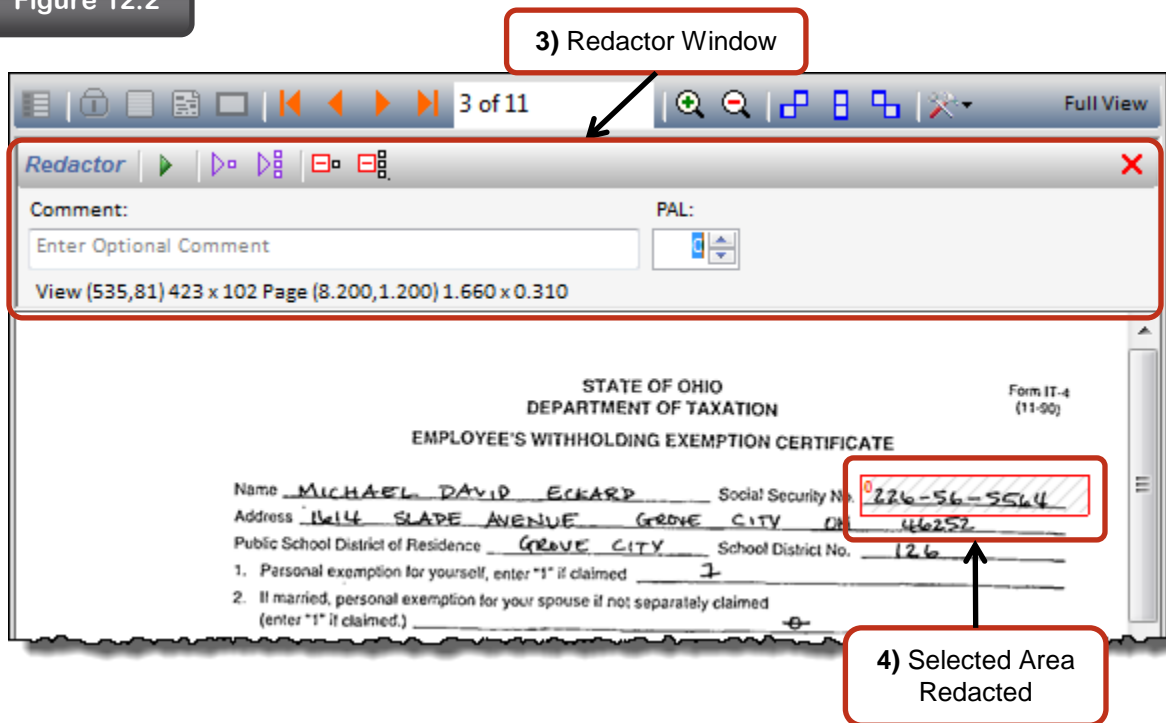


3. The **Redactor** window will expand (see *Figure 12.2*).
4. Select the area on the selected page you wish to redact (see *Figure 12.2*).

Note

- a) To add a redaction zone to a selected area on a page, place your cursor 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 drawing the redaction zone, let go of the left button on your mouse.
- b) 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.
- c) A selected page can contain multiple redactions.

Figure 12.2



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.

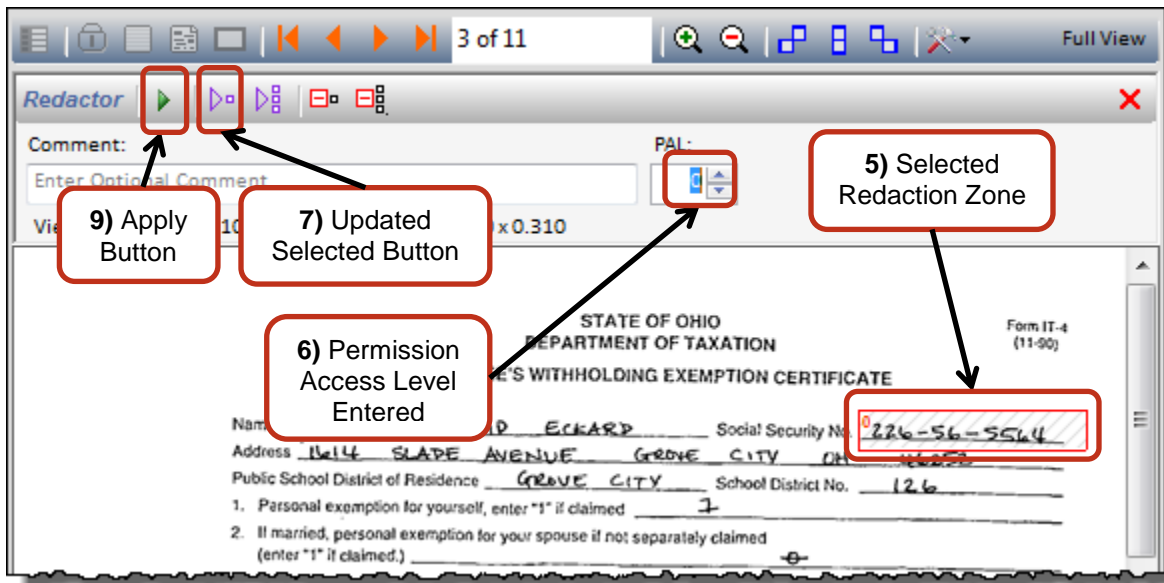
6. Enter the Permission Access Level you want to give the currently selected redaction zone in the **PAL:** field (see Figure 12.3).
7. Click on the **Update Selected** button. This option only applies to the currently selected redaction zone (see Figure 12.3).

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).

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).

Figure 12.4



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.

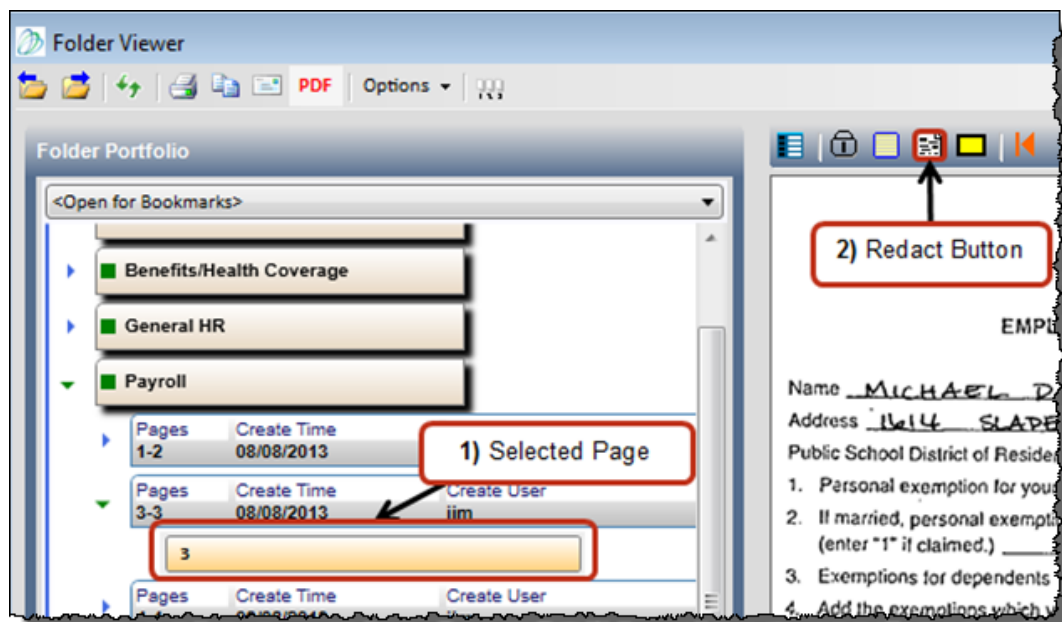
Section 12.2 – Removing Redactions

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



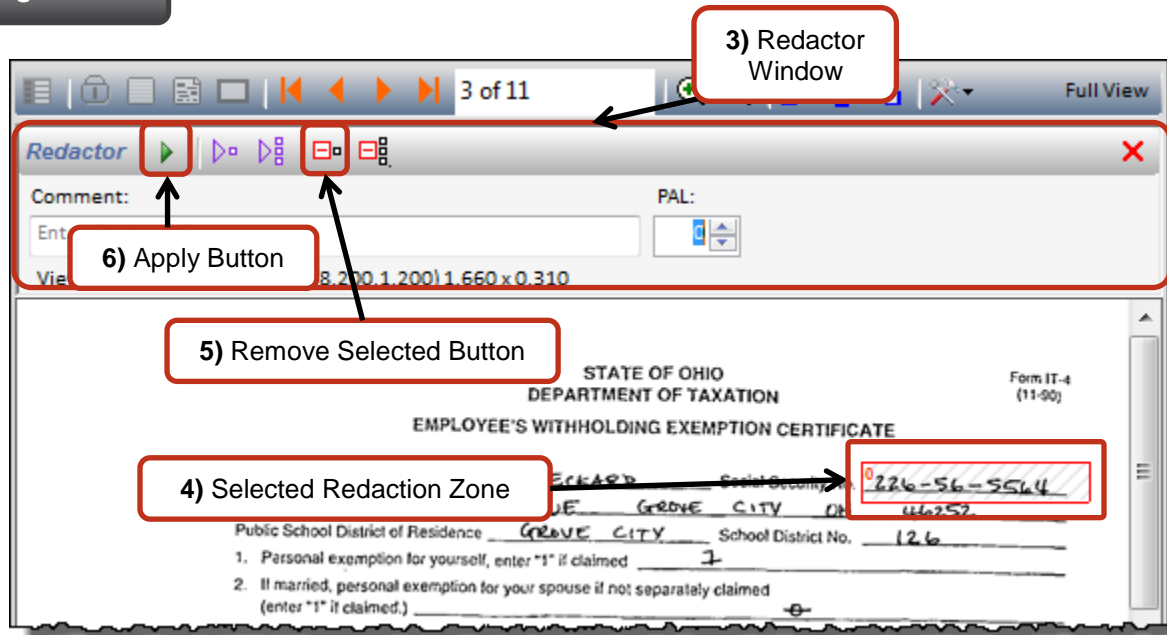
3. The **Redactor** window will expand (see *Figure 12.7*).
4. Select the redaction zone you wish to remove (see *Figure 12.7*).
5. Click on the **Remove Selected** button (see *Figure 12.7*).

Note

- 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*).

Figure 12.7



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



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.

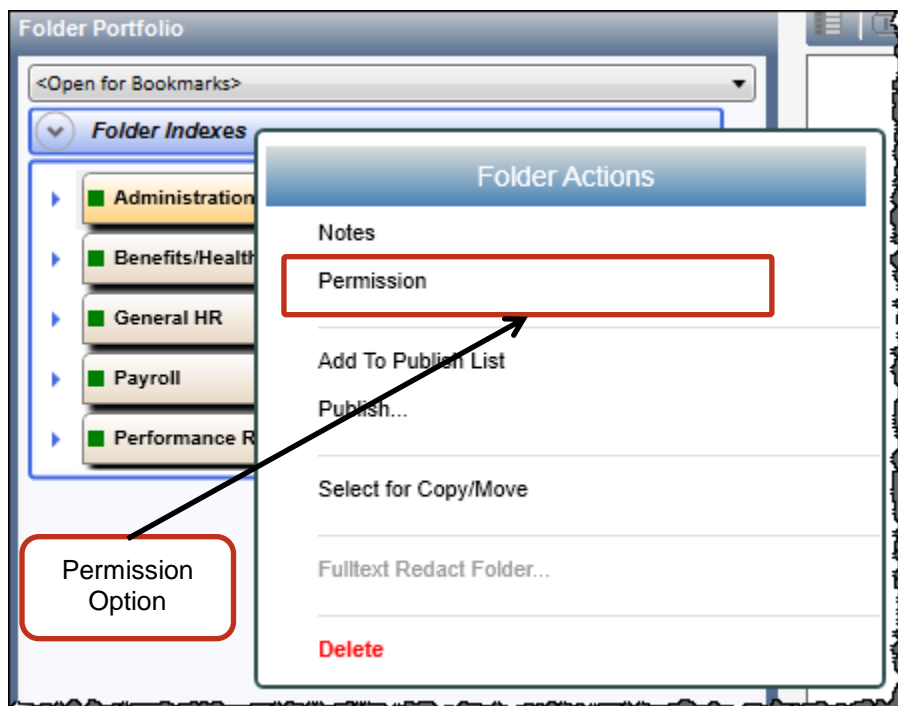
Section 13.1 – Adding Folder Permissions

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



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

Figure 13.2



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

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.

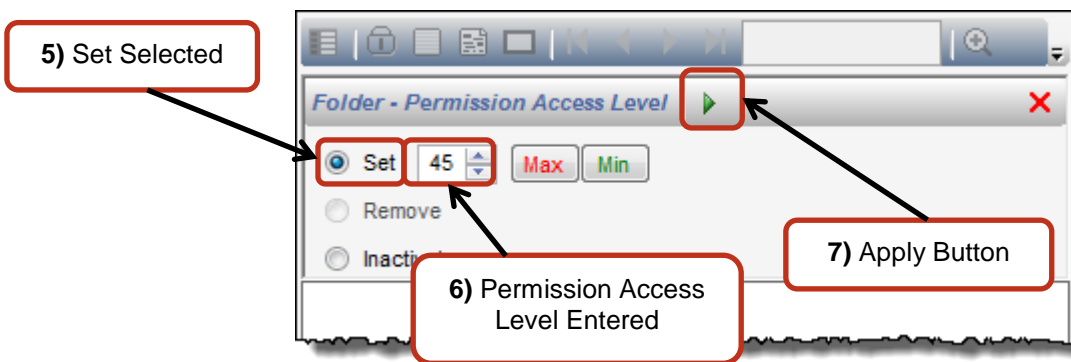
6. Enter the Permission Access Level you want the selected folder to have (see Figure 13.3).

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.

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**.

Figure 13.3



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

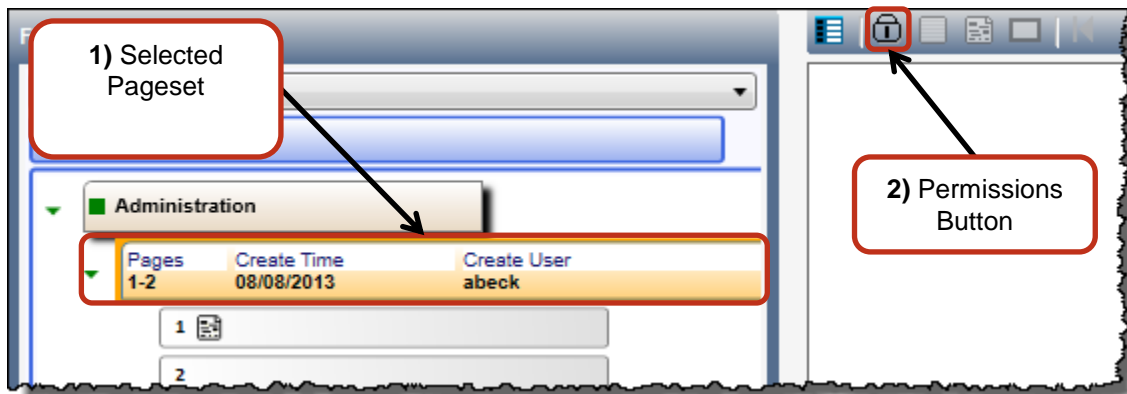
Section 13.2 – Adding Pageset Permissions

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)

Figure 13.4



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.

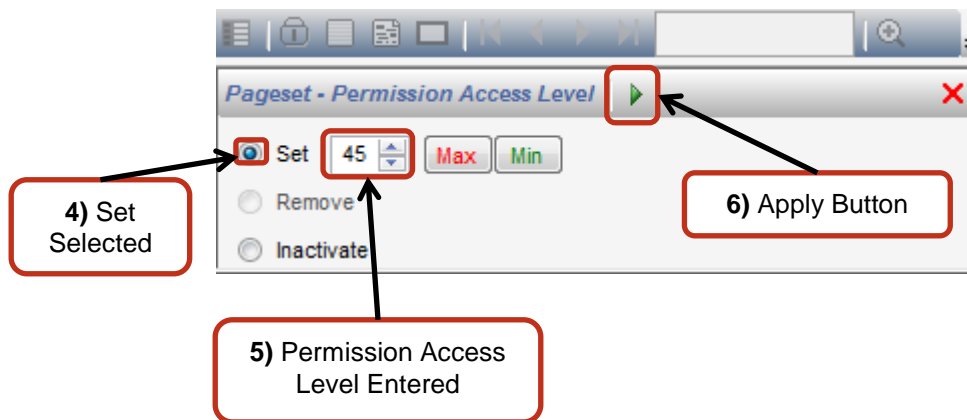
5. Enter the Permission Access Level you want the selected pageset to have (see Figure 13.5).

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



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

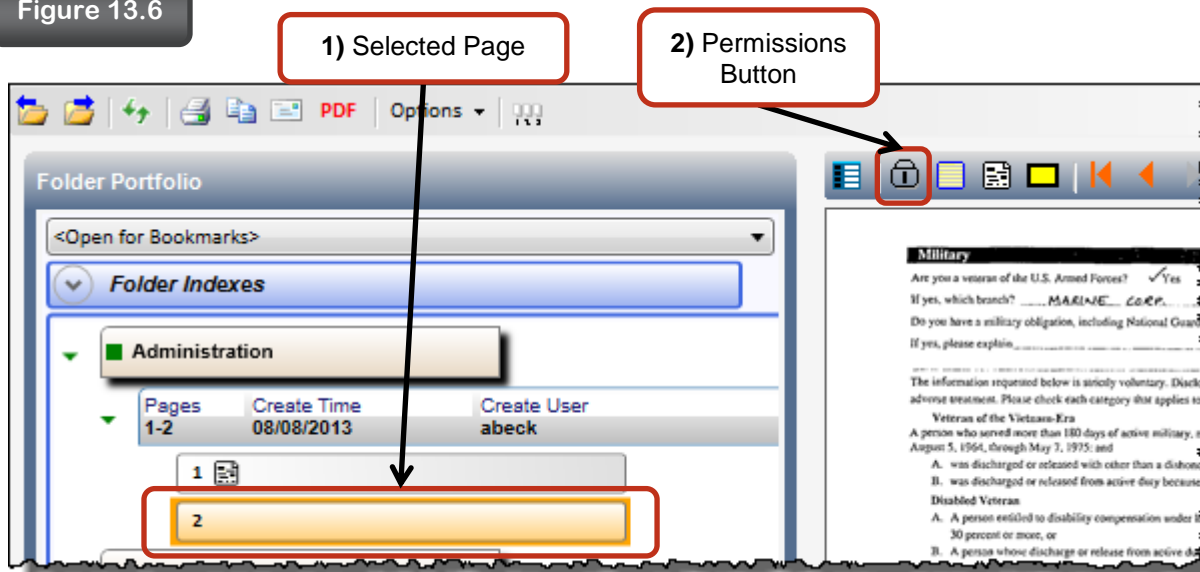
Section 13.3 – Adding Page Permissions

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



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 **Inactivate** option and click on the **Apply** button to save the changes.

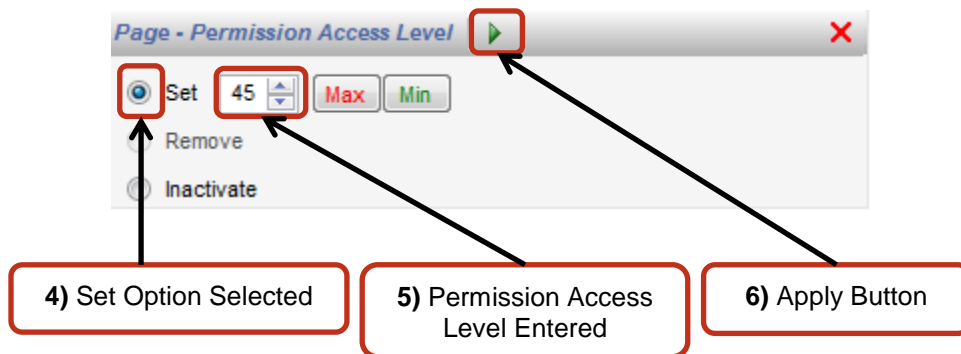
5. Enter the Permission Access Level you want the selected page to have (see Figure 13.7).

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).

Figure 13.7

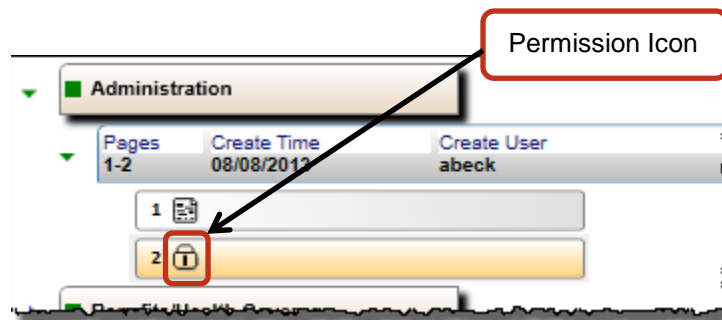


7. A message asks “Are you sure you want to apply this permission?” Click **Yes**.
8. The page permissions have now been successfully added to the selected page.

Note

- a) A permissions icon will appear on the selected page within the subfolders indicating the selected page’s permissions have been set.

Figure 13.8



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

To publish multiple folders, follow the steps listed below.

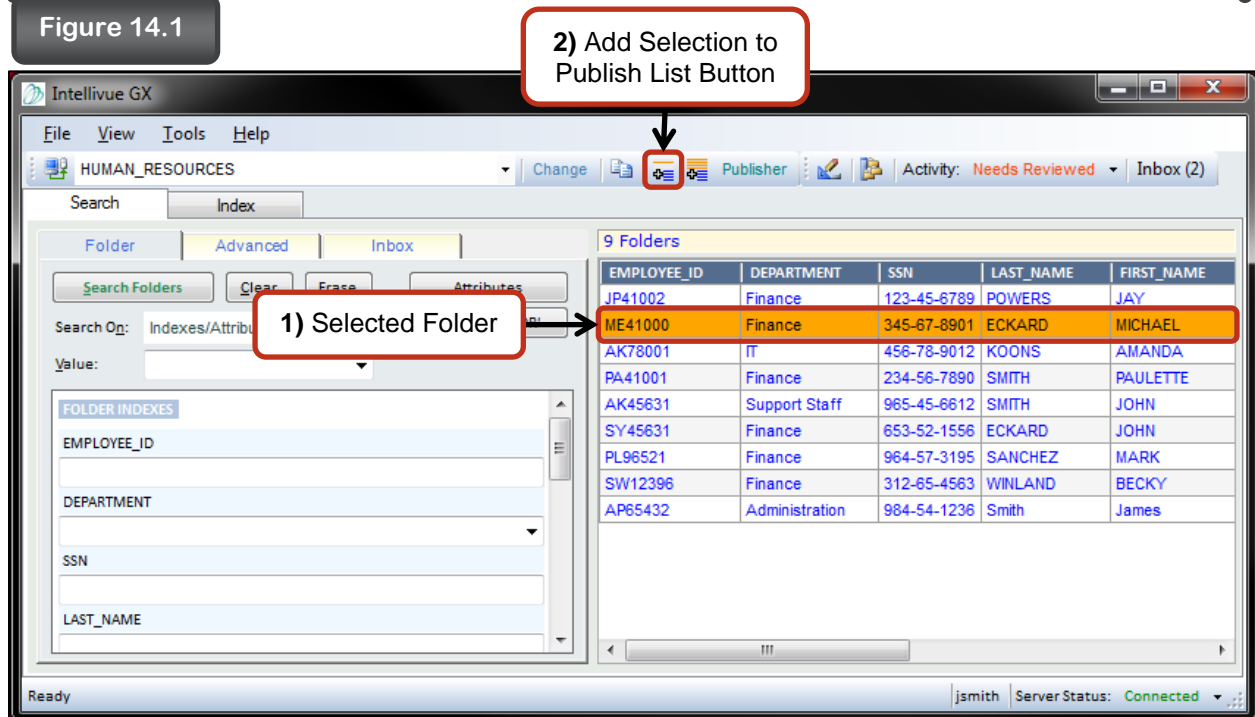
Steps:

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*).

Note

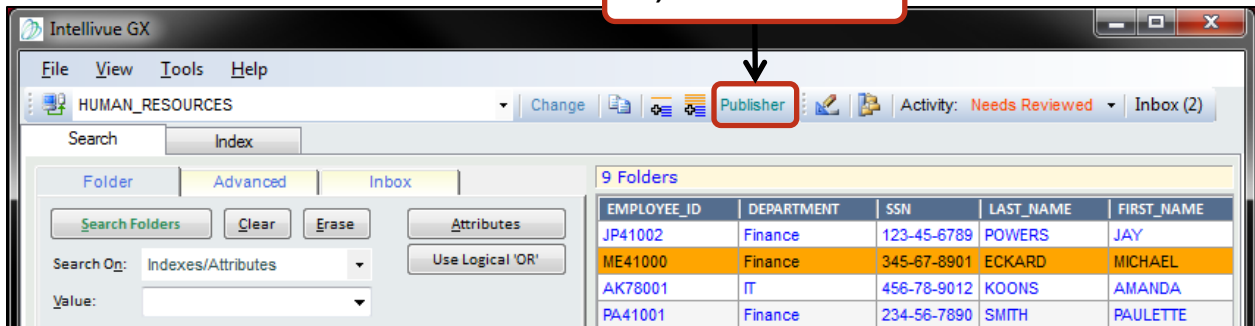
- a) If you wish to add multiple folders to the publish list, follow steps 1 through 2 from **Section 14.1a – Publish Multiple Folders**.
- b) If you click on the **Add All to Publish List** button, all of the folders located in the search results area will be added to the publish list and the **Content Publisher** window will automatically pop up.

Figure 14.1



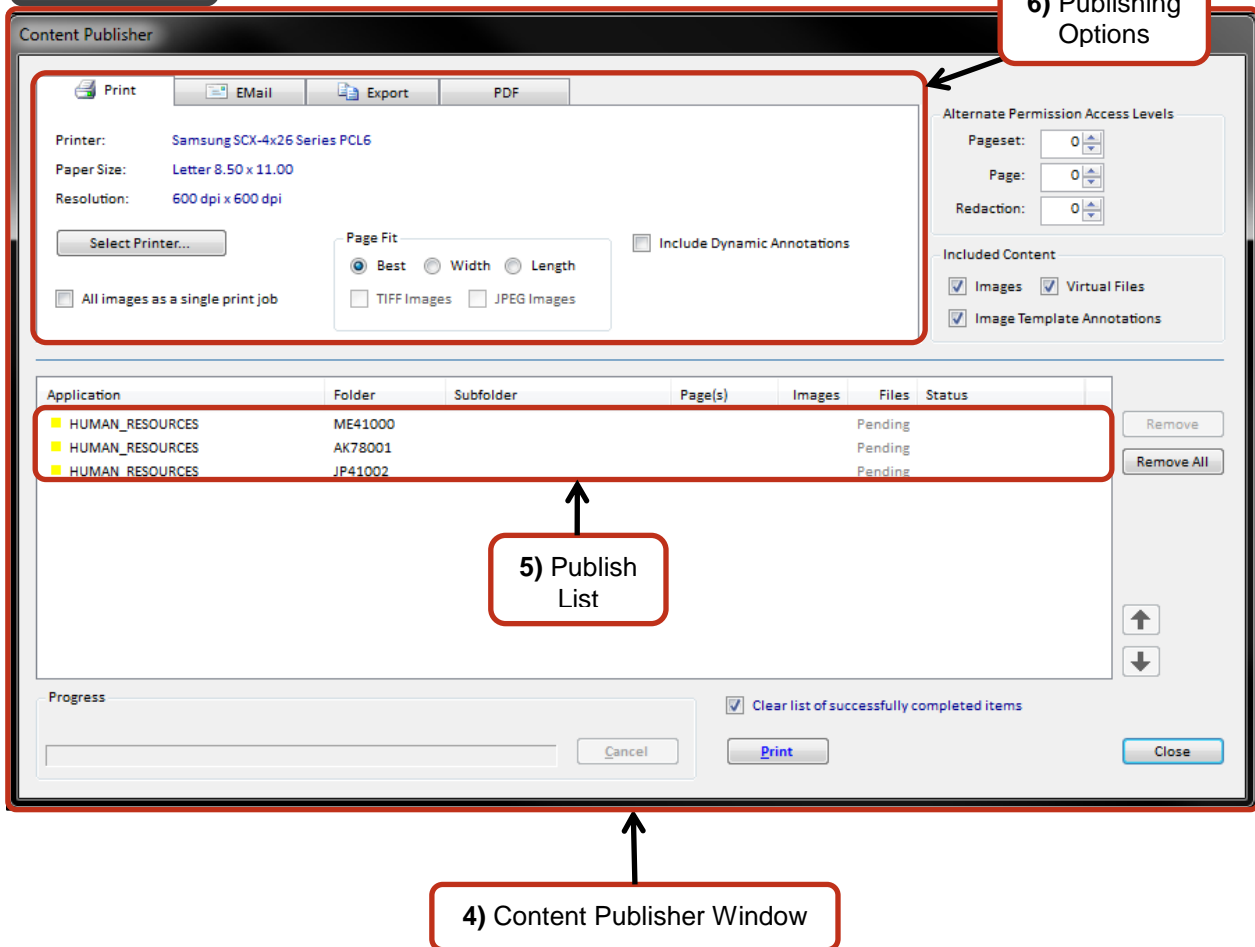
- Click on the **Publisher** button (see Figure 14.2).

Figure 14.2



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

Figure 14.3



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*).

Note

- 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*).

Note

- 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.

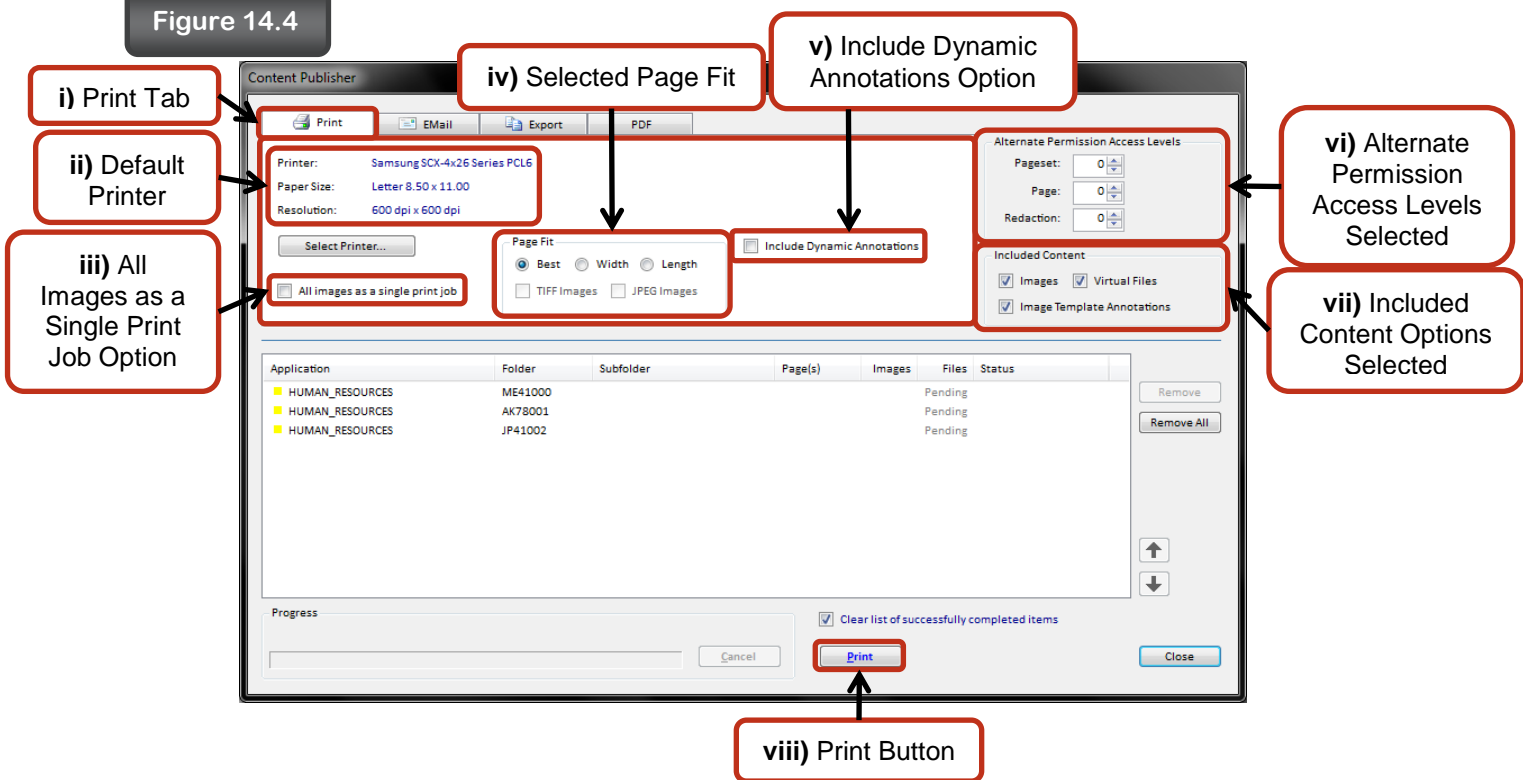
3. **Image Annotations** – This will print all image annotations on all of the images that are added to the publish list. This content option can only be used when the images content option is checked.

viii. Click on the **Print** button (see Figure 14.4).

Note

- a) You will have an option at the bottom of the publish list asking if you want to **Clear List of Successfully Completed Items**. This option will remove all of the folders added to the publish list once the **Print** button is clicked. If you do not want folders removed from the publish list, do not place a check in the box next to this option.
- b) This option is automatically checked to remove all items from the publish list every time the **Content Publisher** window opens. If you uncheck the box, the option will remain unchecked every time until you decide to place a check in the box again.

Figure 14.4



ix. The publish list will now be printed.

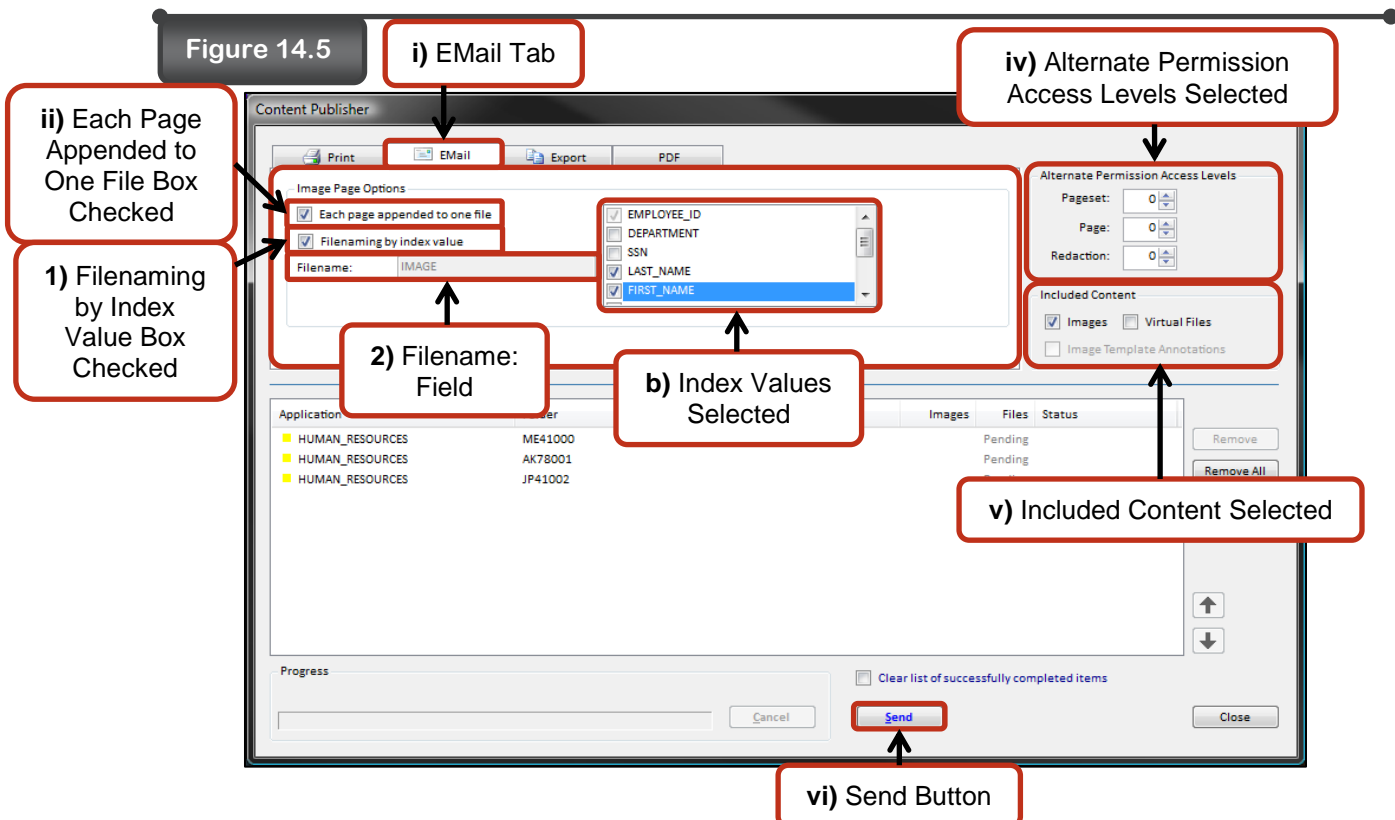
b. **To E-mail a Publish List:**

- i. Click on the **E-Mail** 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*).

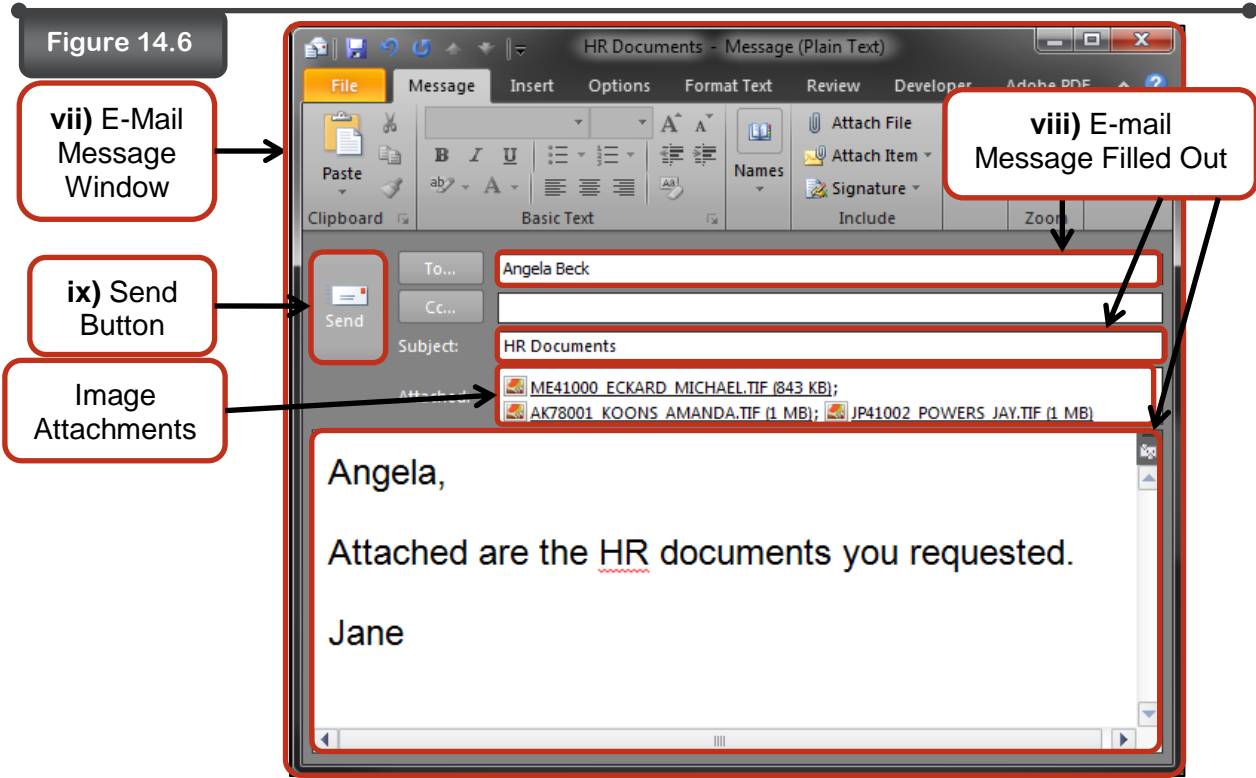
Note

- 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 **Filenameing 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*).



- 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.

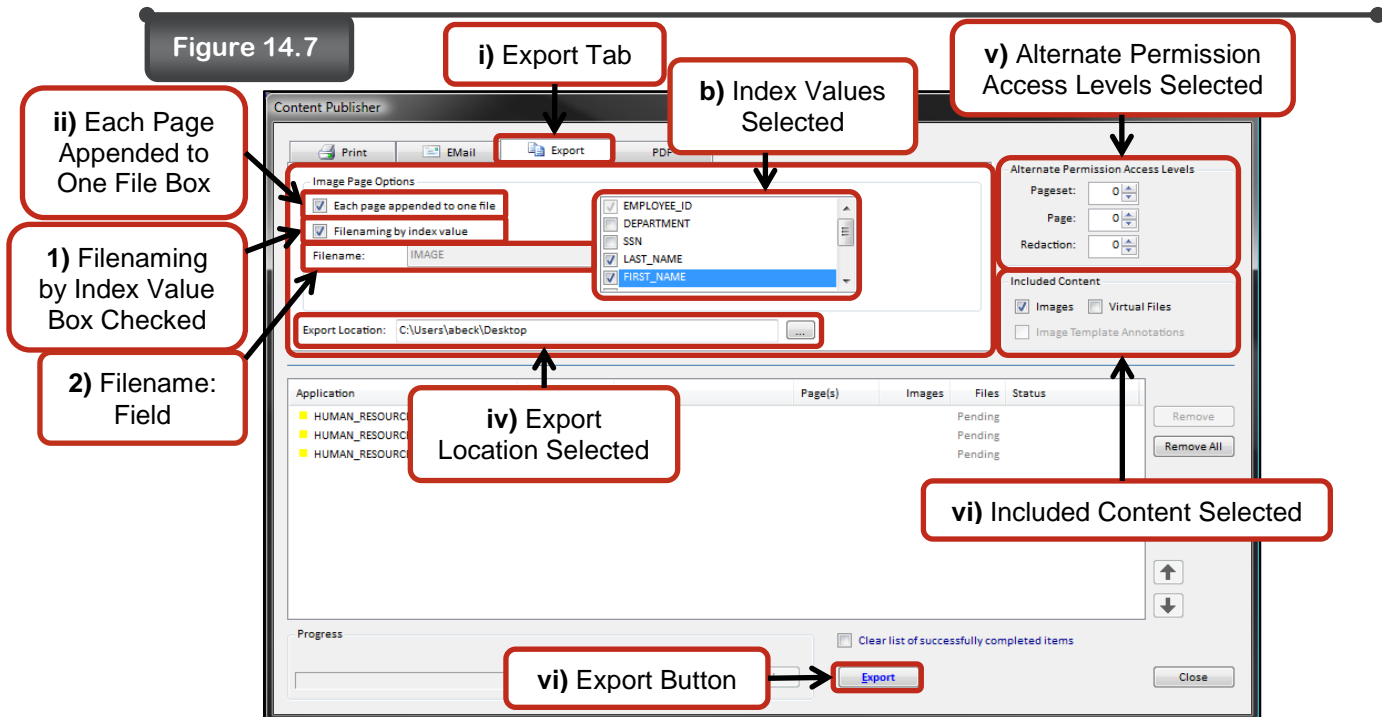
c. **To Export a Publish List:**

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).

Note

- 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.
 2. 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).

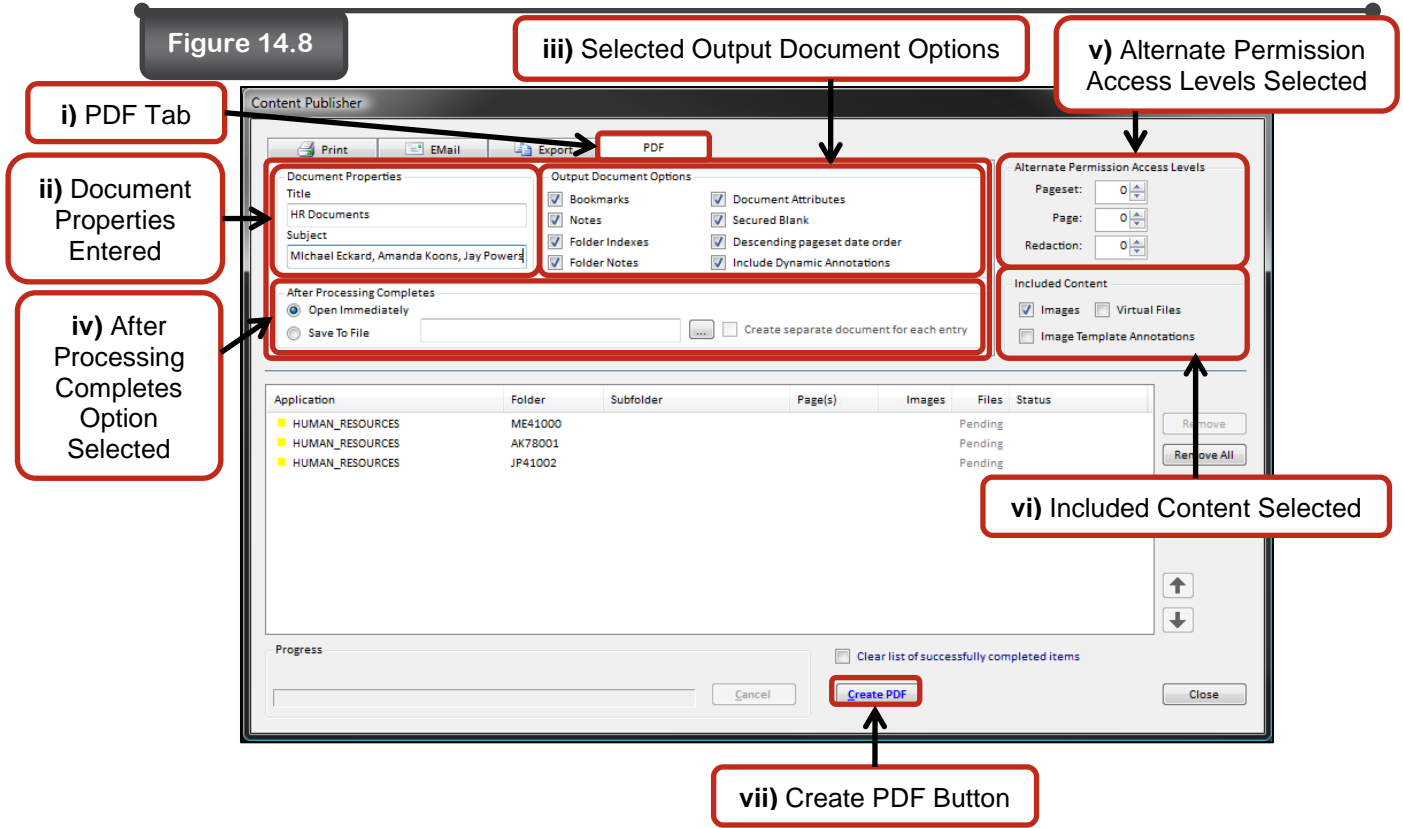


8. The publish list will now be exported to the selected folder.

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

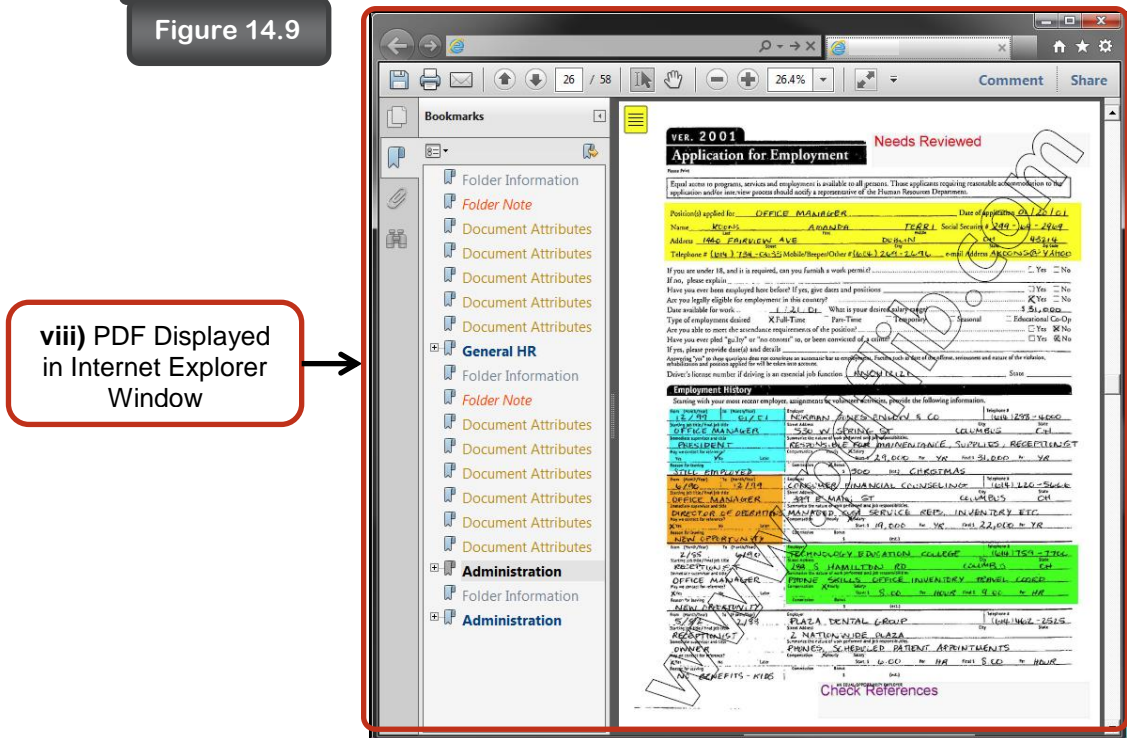
- i. Click on the **PDF** tab (*see Figure 14.8*).
- ii. Enter the **Document Properties** you wish to give the PDF (*see Figure 14.8*).
 1. **Title** – Gives the PDF a title.
 2. **Subject** – Gives the PDF a subject.
- iii. Select the **Output Document Options** you wish to add to the PDF (*see Figure 14.8*).
 1. **Bookmarks** – All bookmarks associated with the selected folder will be added to the PDF.
 2. **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.
 6. **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.
 2. **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 14.8



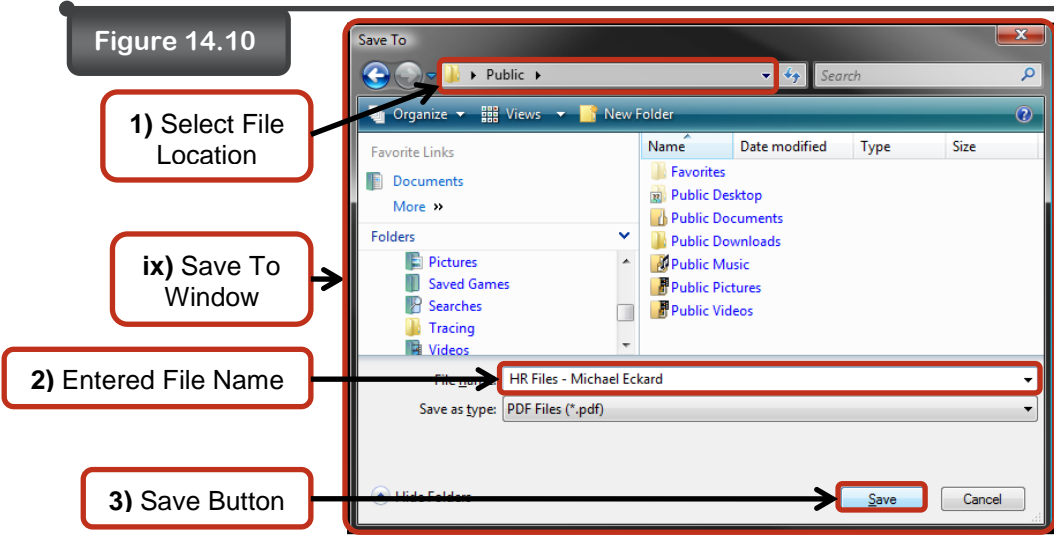
viii. If **Open Immediately** is selected from the **After Processing Completes** options, the PDF will appear in an internet explorer window (see Figure 14.9).

Figure 14.9



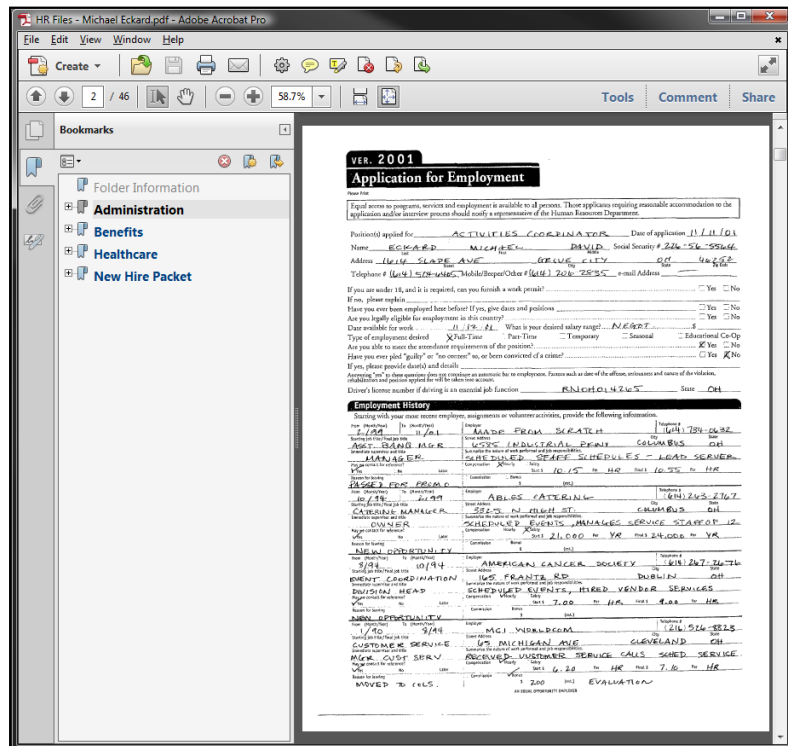
- ix. If **Save To File** is selected from the **After Processing Completes** options, a **Save To** window will pop up (see *Figure 14.10*).
 1. Select the file location you want to save the PDF to (see *Figure 14.10*).
 2. Enter the file name you want to give the PDF (see *Figure 14.10*).
 3. Click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

Figure 14.10



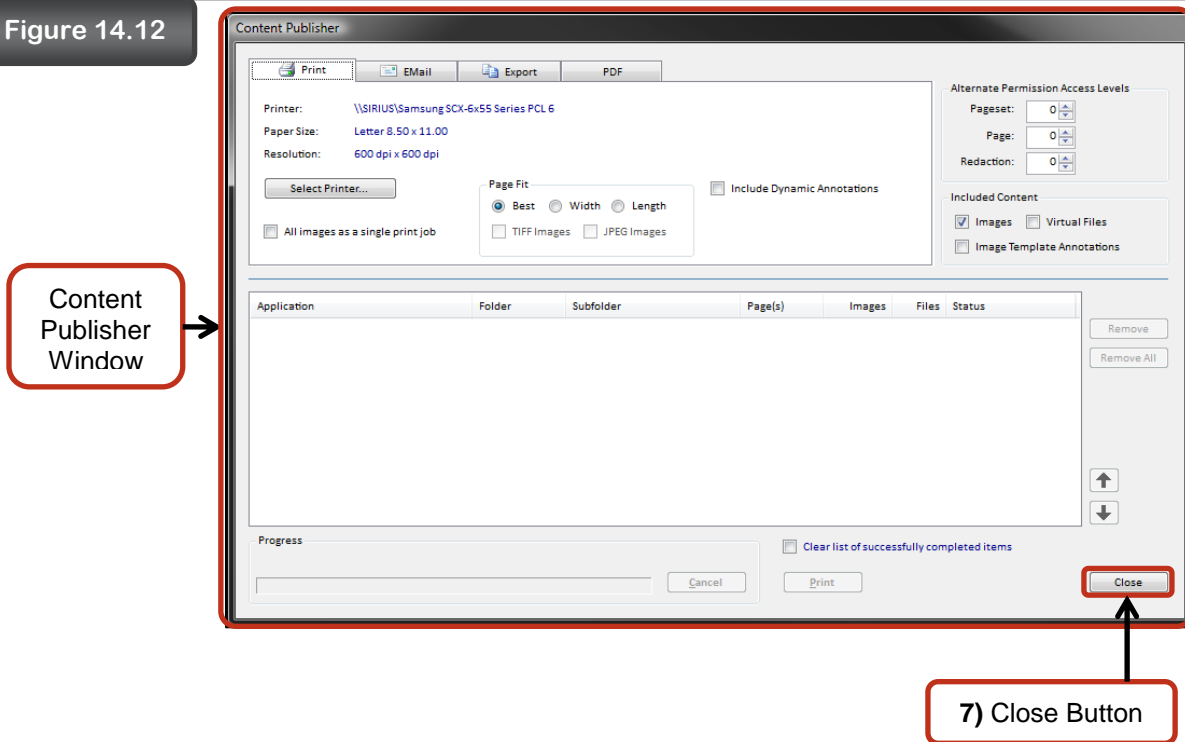
- x. The PDF will now be saved (see *Figure 14.11*).

Figure 14.11



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

Figure 14.12



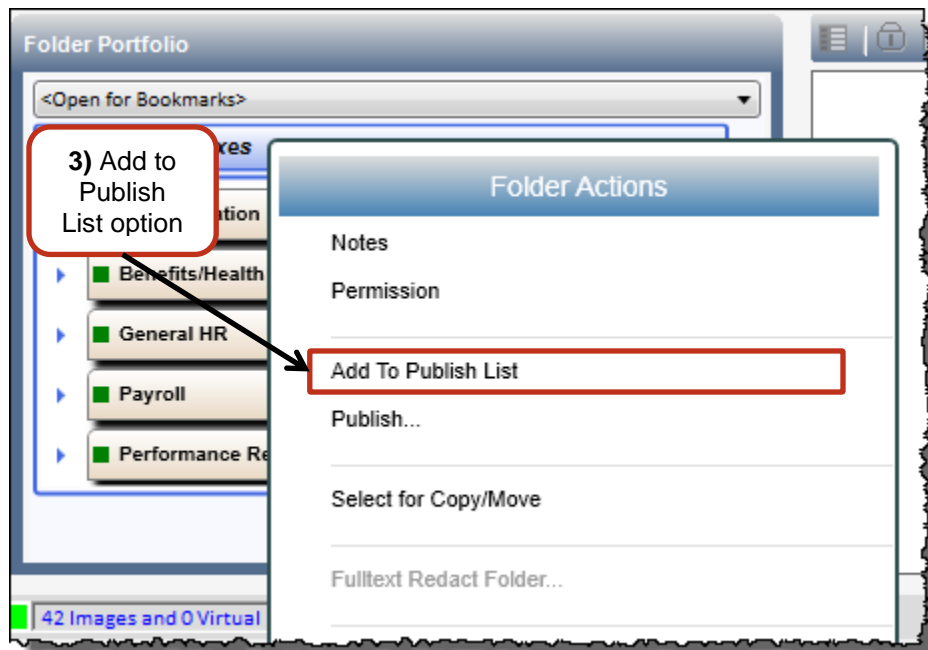
Section 14.1b – Publish a Single Folder

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*).

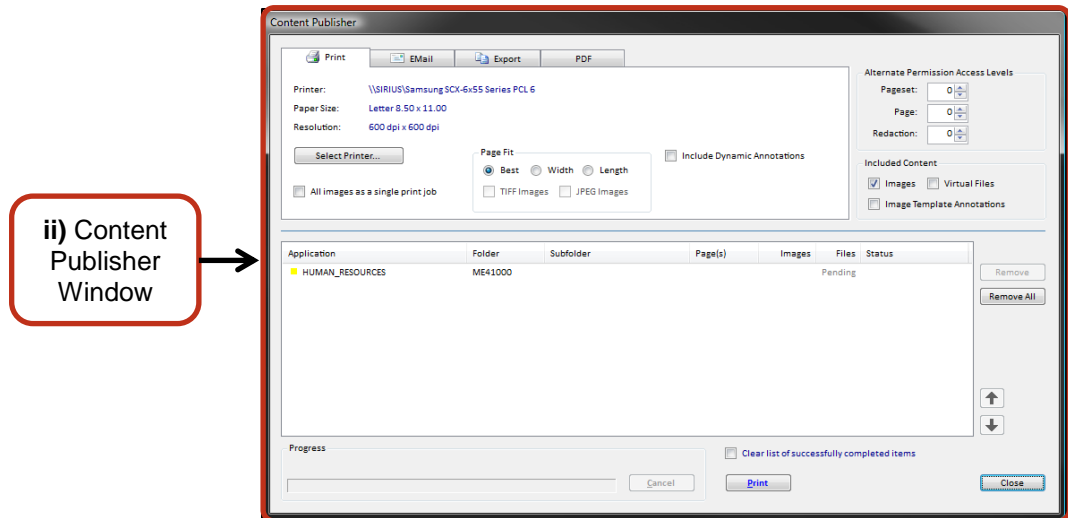
Figure 14.13



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*).

Figure 14.14



- 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:**

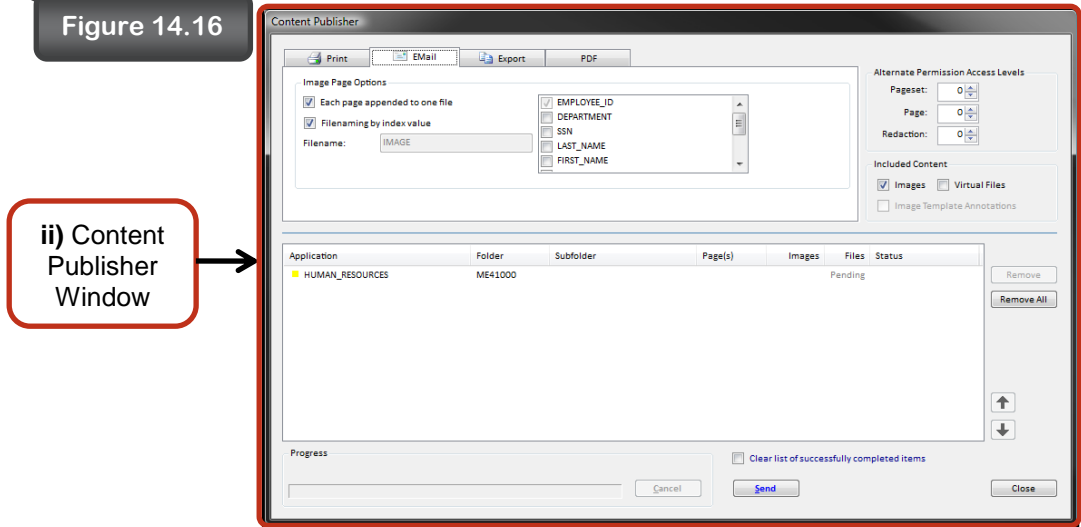
- i. Click on the **E-mail** button (see Figure 14.15).

Figure 14.15



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

Figure 14.16

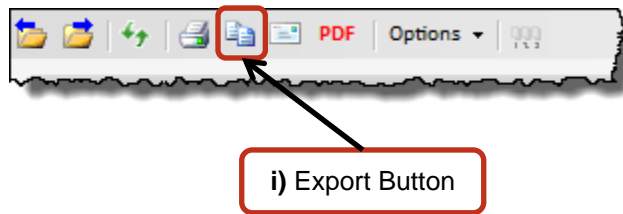


iii. Follow step **B** from **Section 14.1a – Publish Multiple Folders** to complete the e-mailing of the publish list.

c. To Export a Publish List:

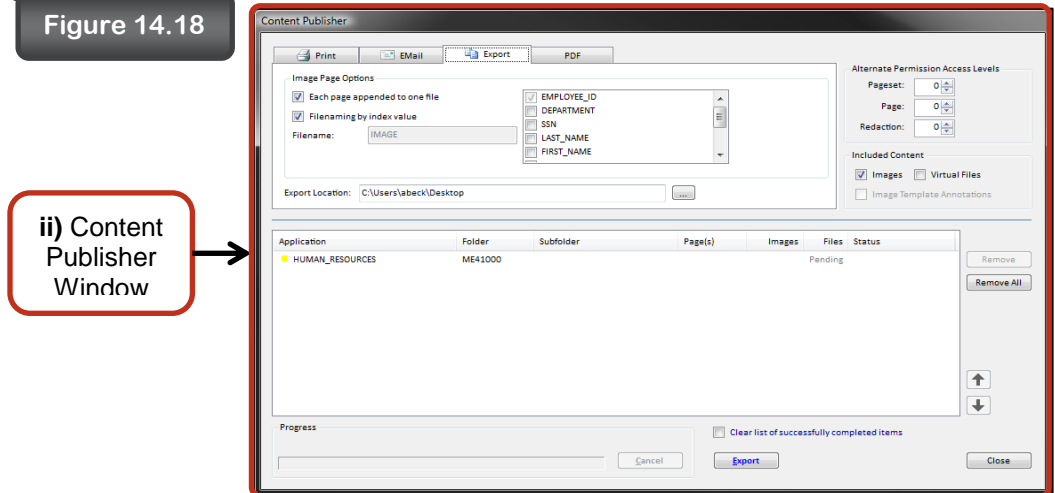
i. Click on the **Export** button (see *Figure 14.17*).

Figure 14.17



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

Figure 14.18



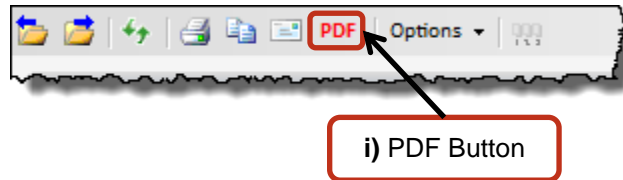
ii) Content
Publisher
Window

- 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).

Figure 14.19

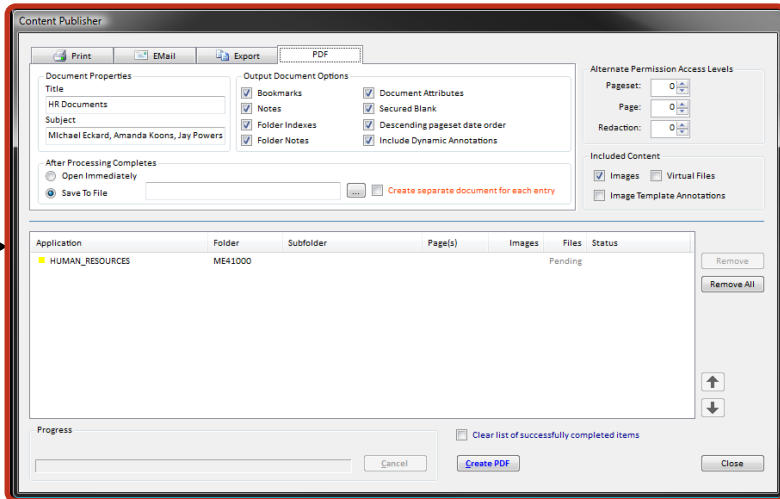


i) PDF Button

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

Figure 14.20

ii) Content Publisher Window



- iii. 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).

Figure 14.21



- ii. A **Content Publisher** window will pop up.
- 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 14.22*).

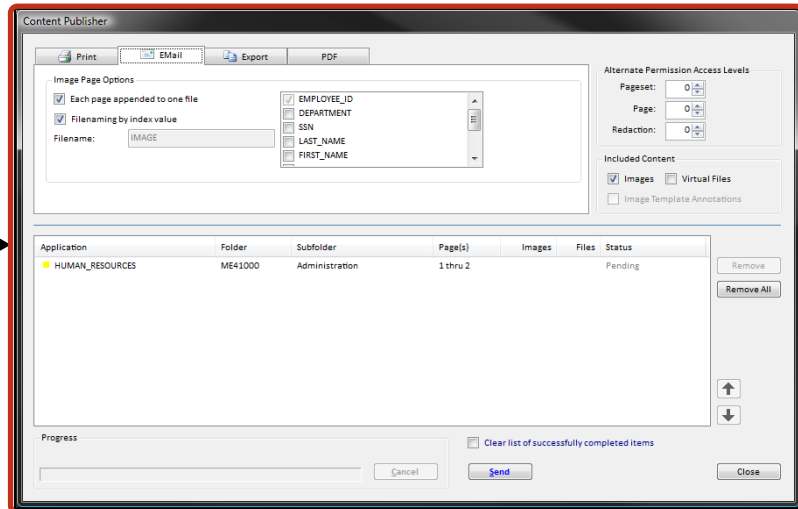
Figure 14.22



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

Figure 14.23

ii) Content
Publisher
Window →



- iii. Follow step **B** from **Section 14.1a – Publish Multiple Folders** to complete the e-mailing of the publish list.

c. **To Export a Publish List:**

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

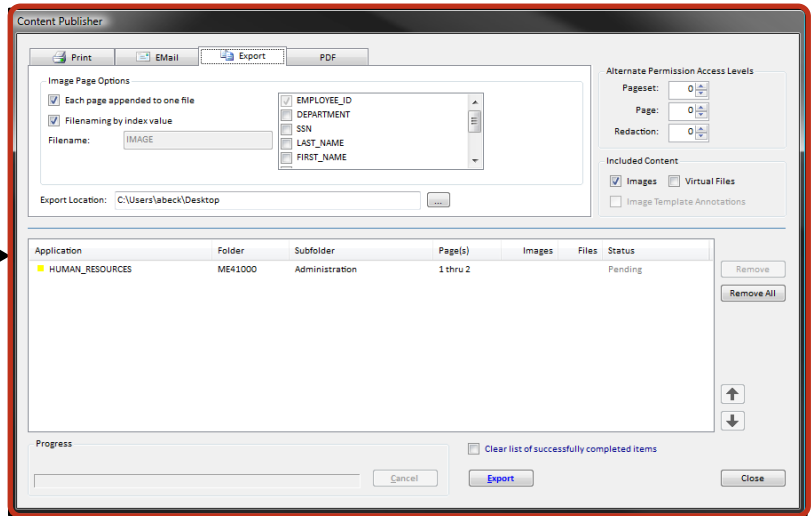
Figure 14.24



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

Figure 14.25

ii) Content Publisher Window



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).

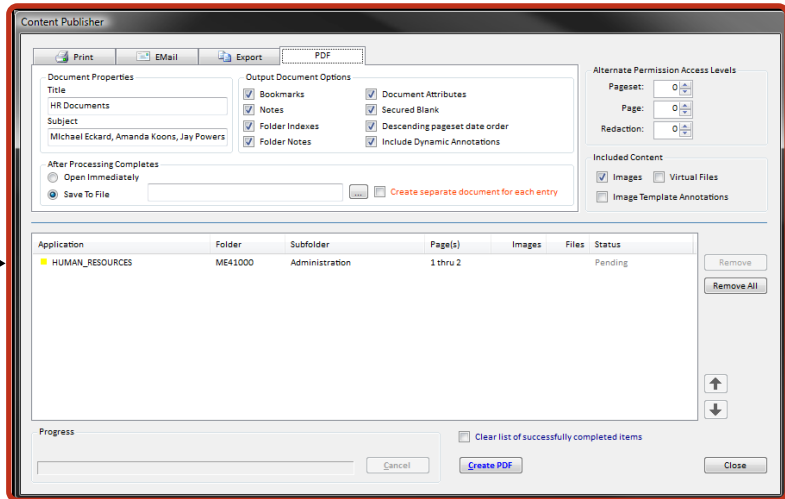
Figure 14.26



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

Figure 14.27

ii) Content Publisher Window



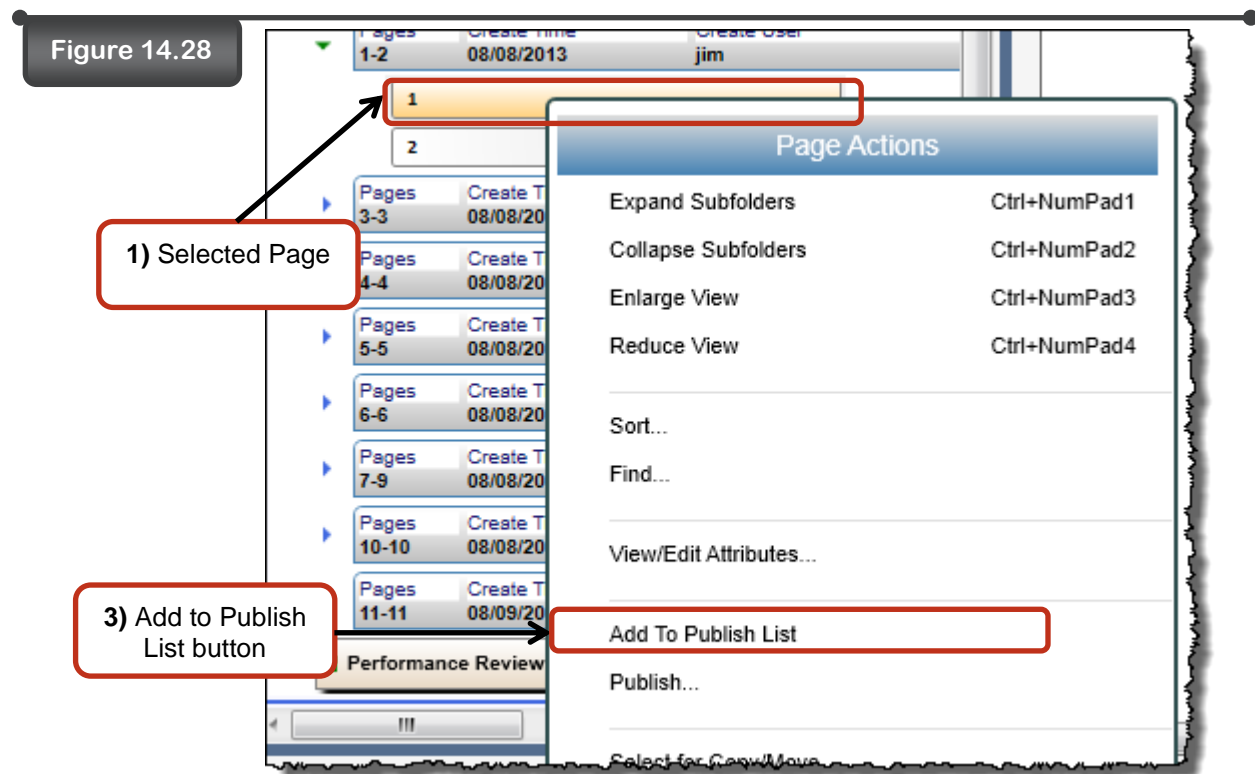
iii. Follow step **D** from **Section 14.1a – Publish Multiple Folders** to complete the creation of a PDF from the publish list.

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*).



a. To Print a Publish List:

- i. Click on the **Print** button (see *Figure 14.29*).

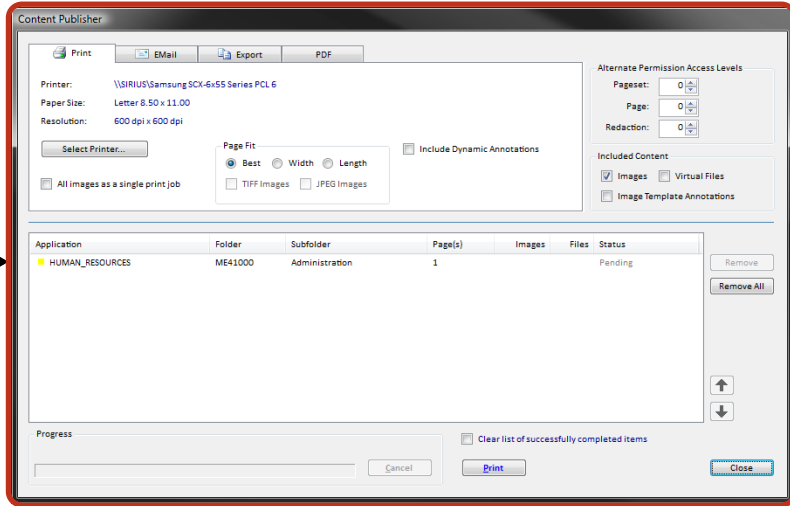
Figure 14.29



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

Figure 14.30

ii) Content Publisher Window



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).

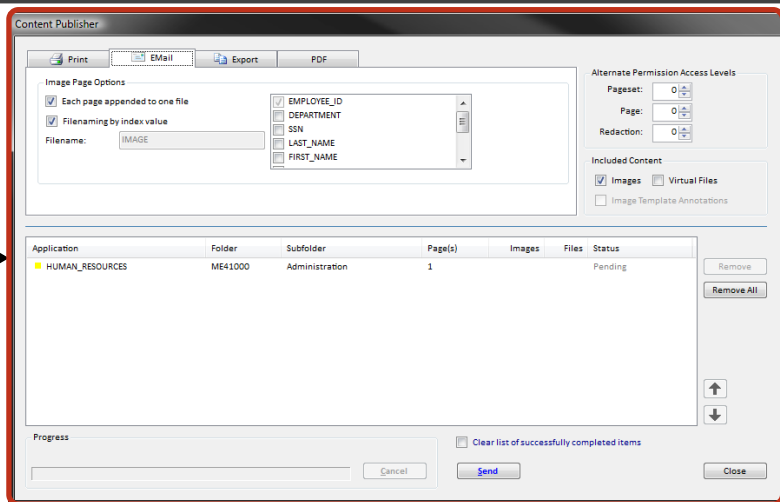
Figure 14.31



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

Figure 14.32

ii) Content Publisher Window



- iii. Follow step **B** from **Section 14.1a – Publish Multiple Folders** to complete the e-mailing of the publish list.

c. **To Export a Publish List:**

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

Figure 14.33



- ii. A **Content Publisher** window will pop up.
- 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 14.34*).

Figure 14.34



- ii. A **Content Publisher** window will pop up.
- iii. 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.

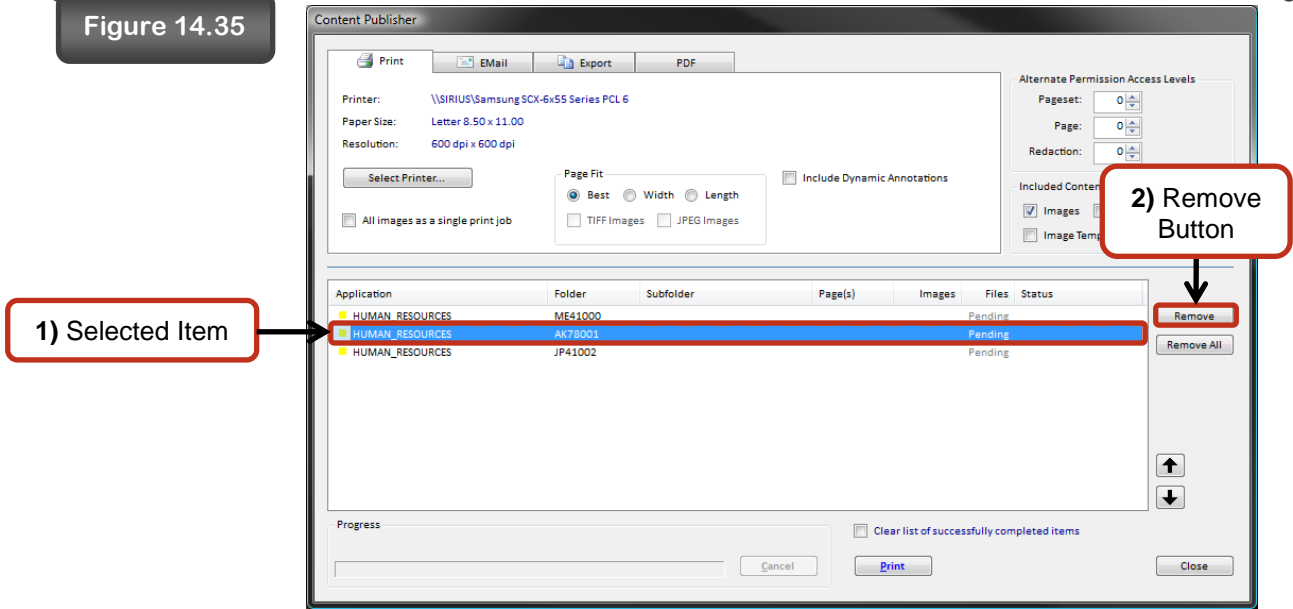
Steps:

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*).

Note

- a) If you want to remove all of the items from the publish list, click on the **Remove All** button.

Figure 14.35



1) Selected Item

2) Remove Button

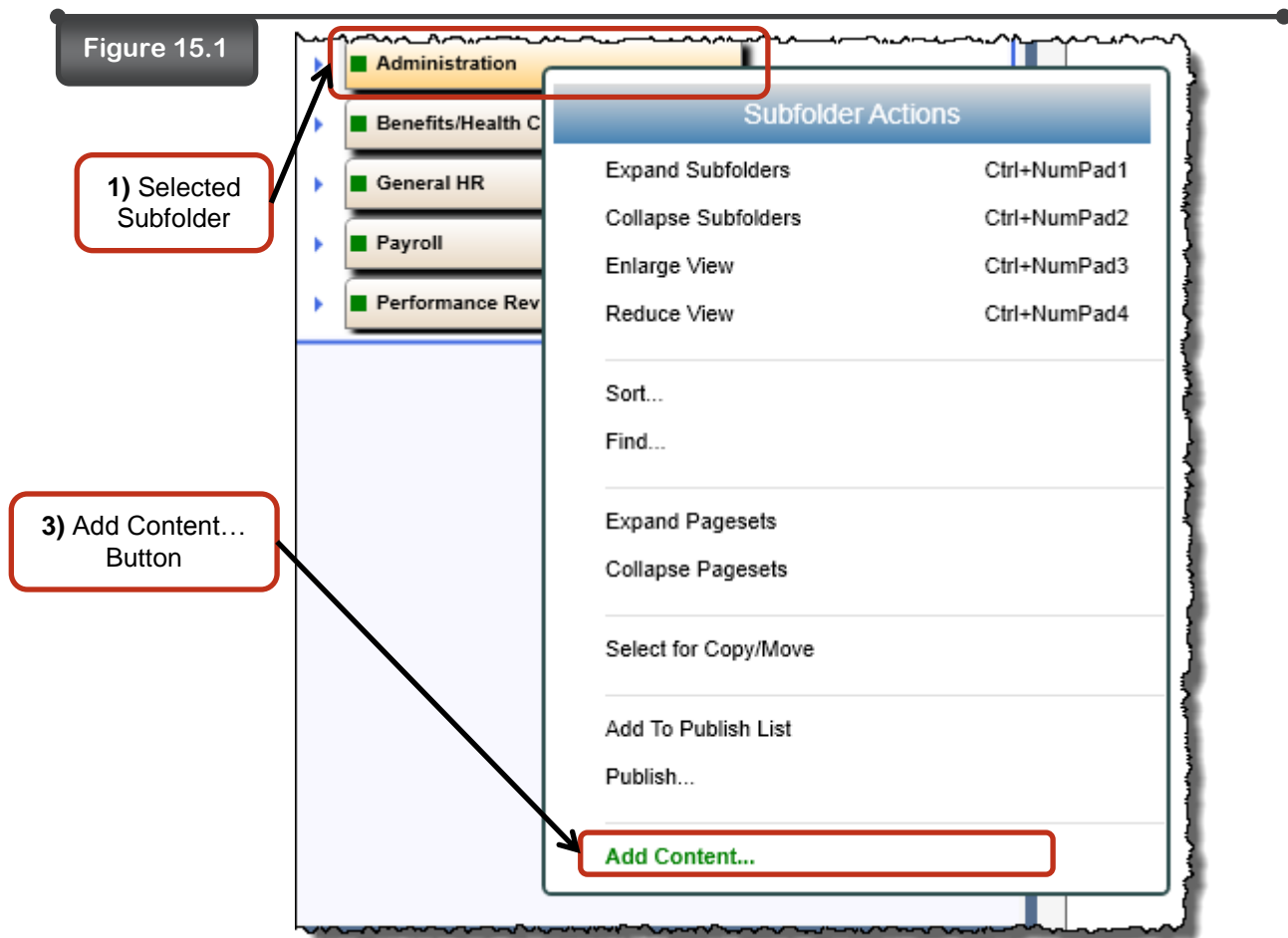
Section 15 – Adding Content

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*).

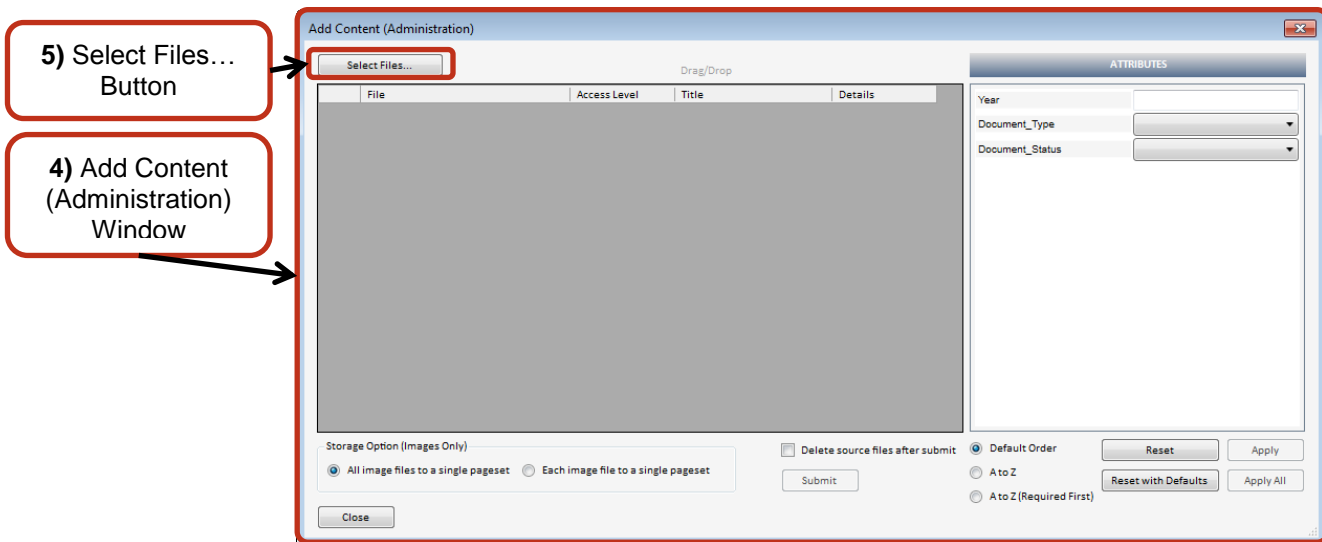


4. An **Add Content (Administration)** window will pop up (see *Figure 15.2*).
5. Click on the **Select Files...** button (see *Figure 15.2*).

Note

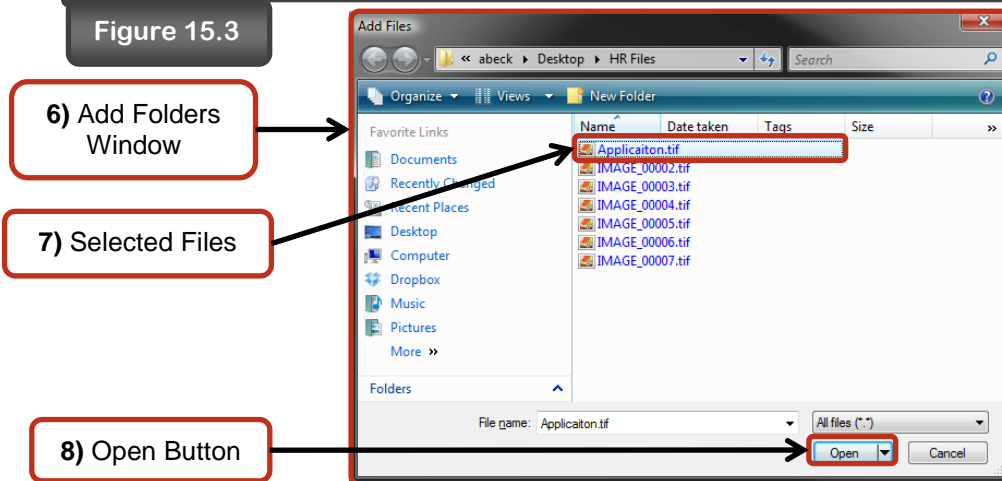
- a) You can also add files to the **Add Content (Administration)** window by selecting the files, dragging them to the area below the **Select Files...** button, and dropping them into this area.

Figure 15.2



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).

Figure 15.3



9. The selected file will now appear in the **Add Content (Administration)** window (see Figure 15.4).

Note

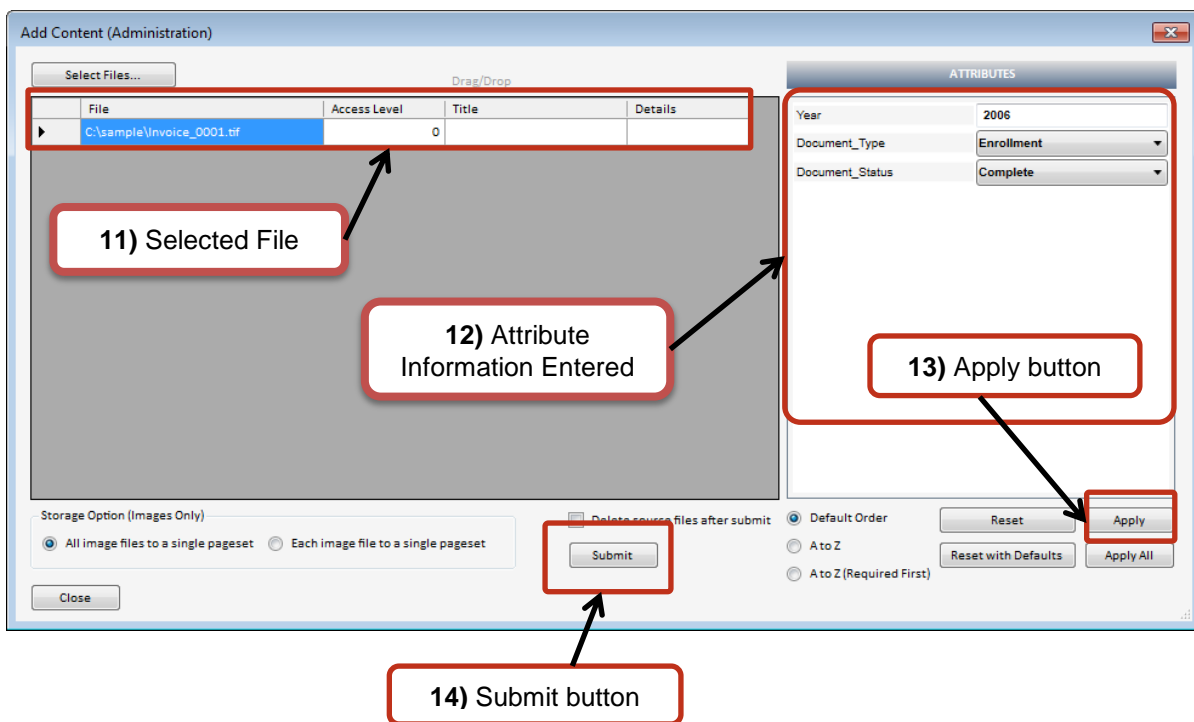
- a) A **Permission Access Level** can be given to the selected file so only certain people can view the file.
- b) A **Title** can be given to the selected file.
- c) If the selected file contains multiple pages, a **Storage Option (Images Only)** is available. You can choose to have all pages placed 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 **Delete source files after submit** box.

Figure 15.4



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).

Figure 15.5



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.

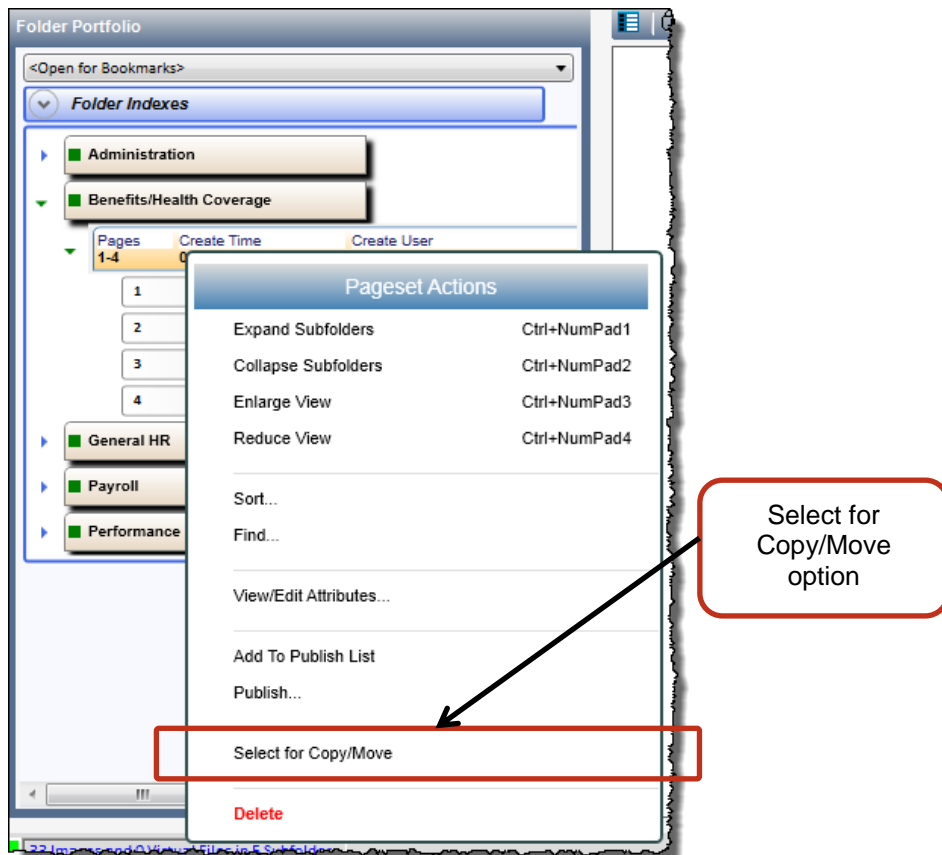
Section 16.1 – Copy/Move a Pageset to a Different Subfolder

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

Steps:

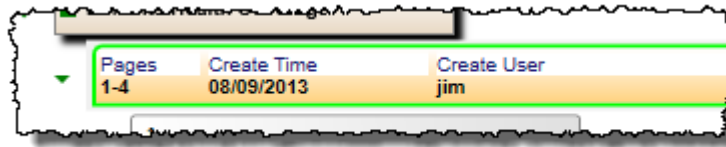
1. Select a subfolder (see Figure 16.1).
2. Select the pageset you want to copy/move (see Figure 16.1).
3. Right-click on the selected pageset.
4. Click on the **Select for Copy/Move** button (see Figure 16.1).

Figure 16.1



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

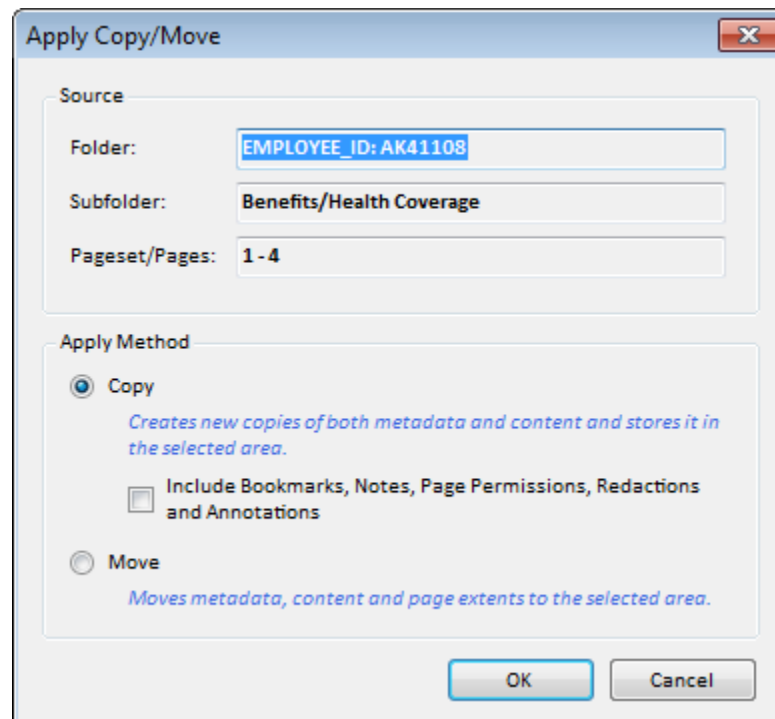
Figure 16.2



Pages	Create Time	Create User
1-4	08/09/2013	jim

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

Figure 16.3



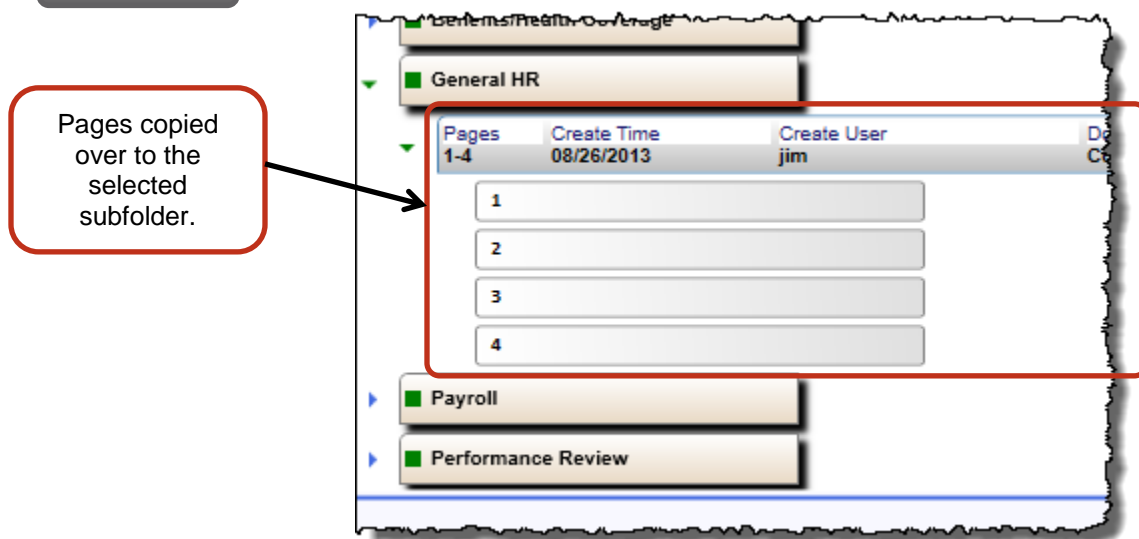
12. Click on the **Refresh** button (see *Figure 16.4*)

Figure 16.4



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

Figure 16.5



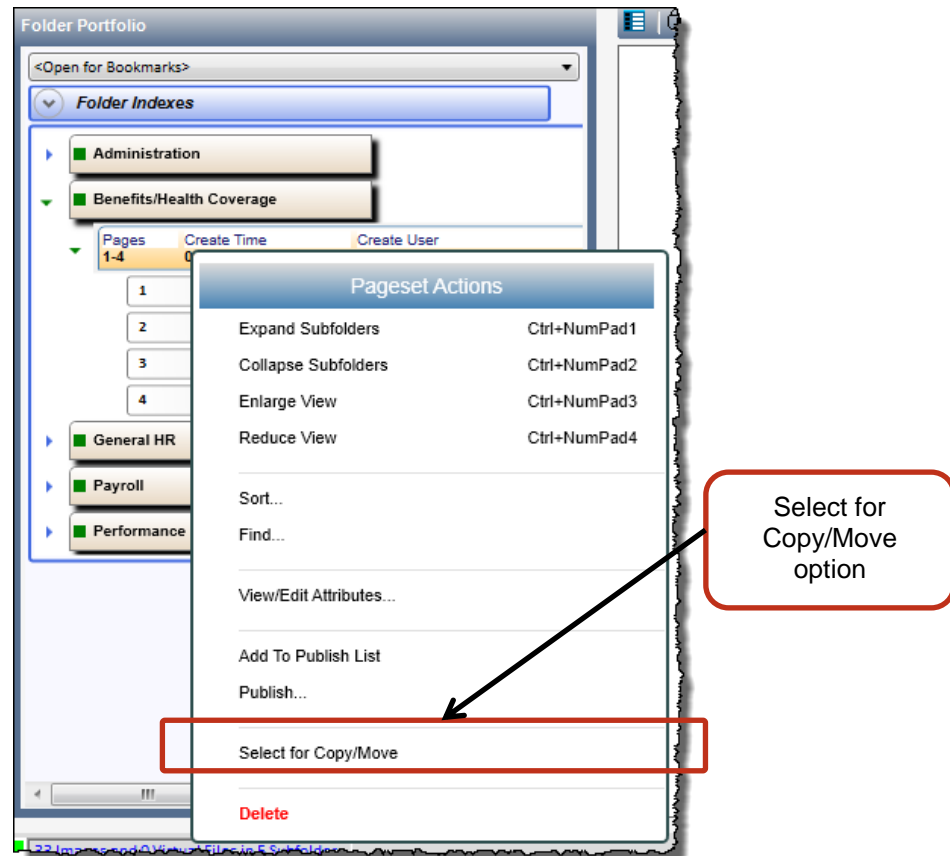
Section 16.2 – Copy/Move a Pageset to a Different Folder

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

Steps:

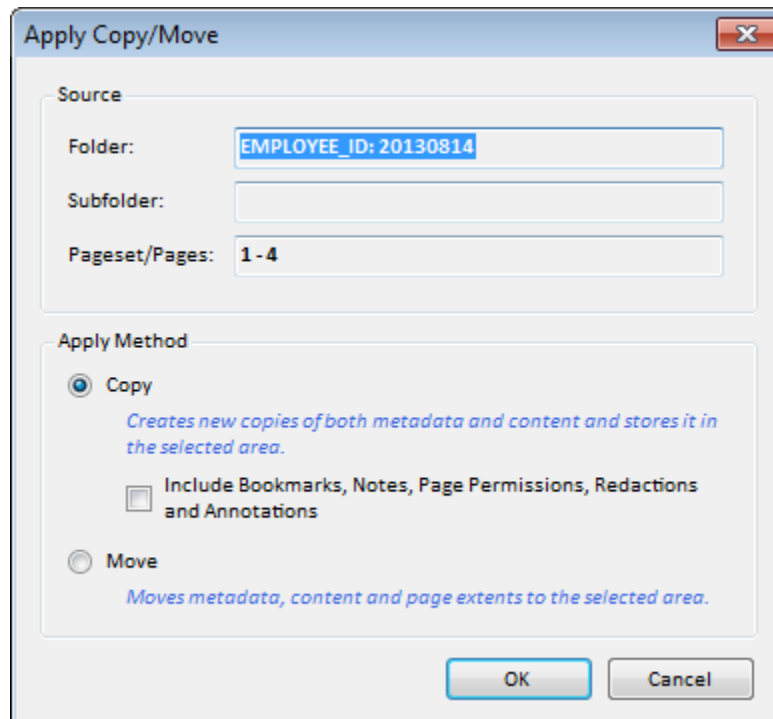
1. Select a folder.
2. Select a subfolder.
3. Select the pageset you want to copy/move.
4. Right-click on the selected pageset.
5. Click on the **Select for Copy/Move** button (see *Figure 16.6*).

Figure 16.6



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



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.

Steps:

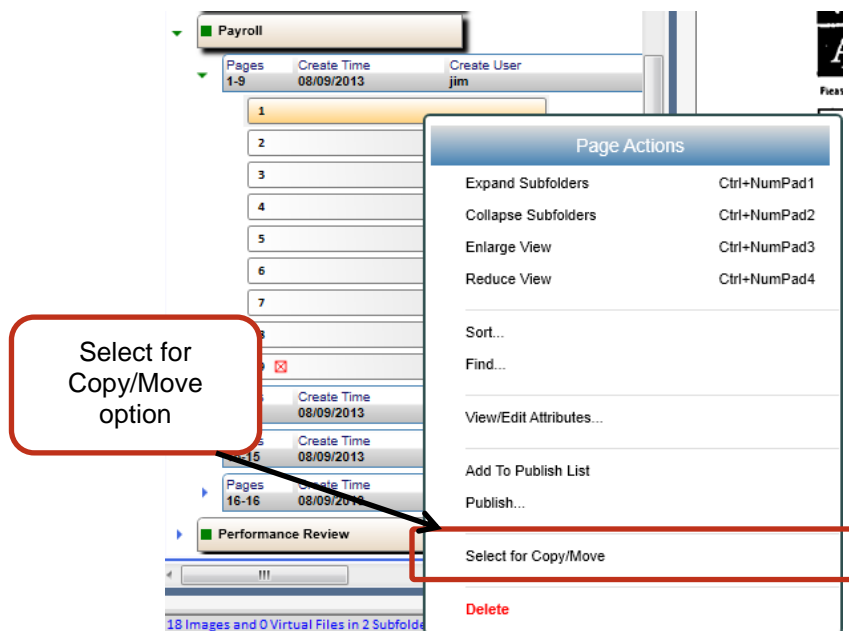
1. Select a subfolder.
2. Select the page(s) you want to copy/move.

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.

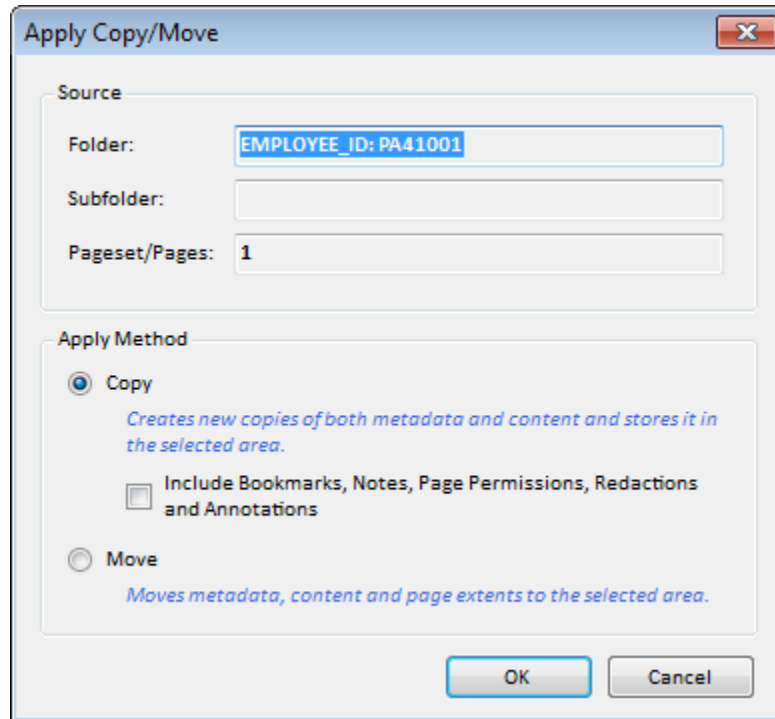
3. Right-click on the selected page(s).
4. Click on the **Select for Copy/Move** button (see Figure 16.8).

Figure 16.8



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



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

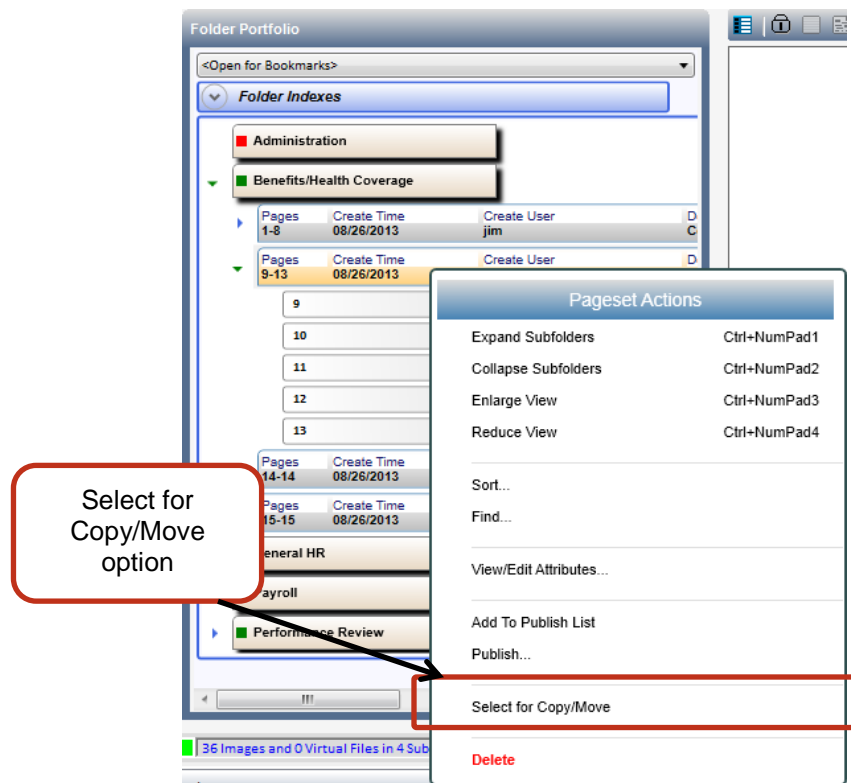
Section 16.4 – Copy/Move a Page(s) to a Different Folder

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

Steps:

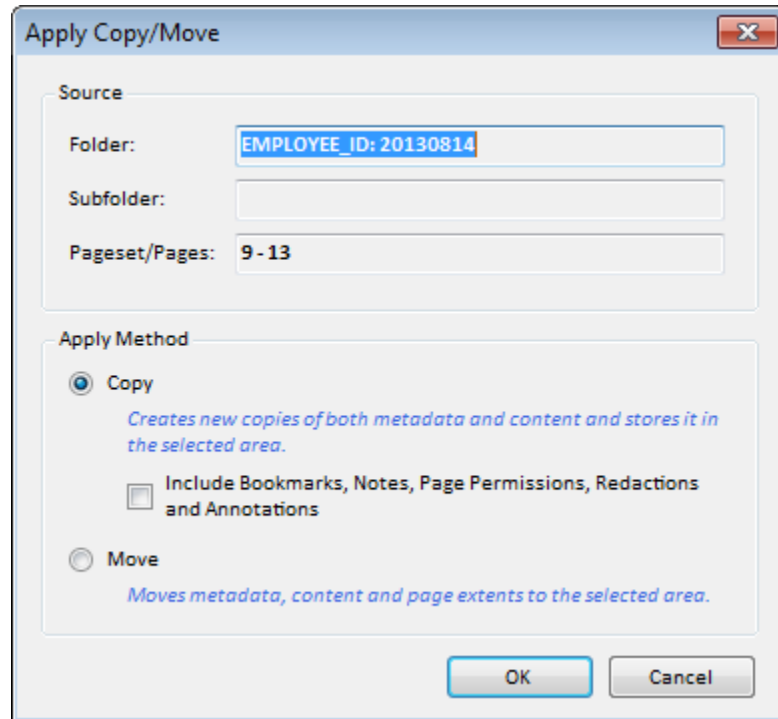
1. Select a folder.
2. Select a subfolder.
3. Select the page(s) you want to copy/move.
4. Right-click on the selected page(s).
5. Click on the **Select for Copy/Move** button (see Figure 16.10).

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

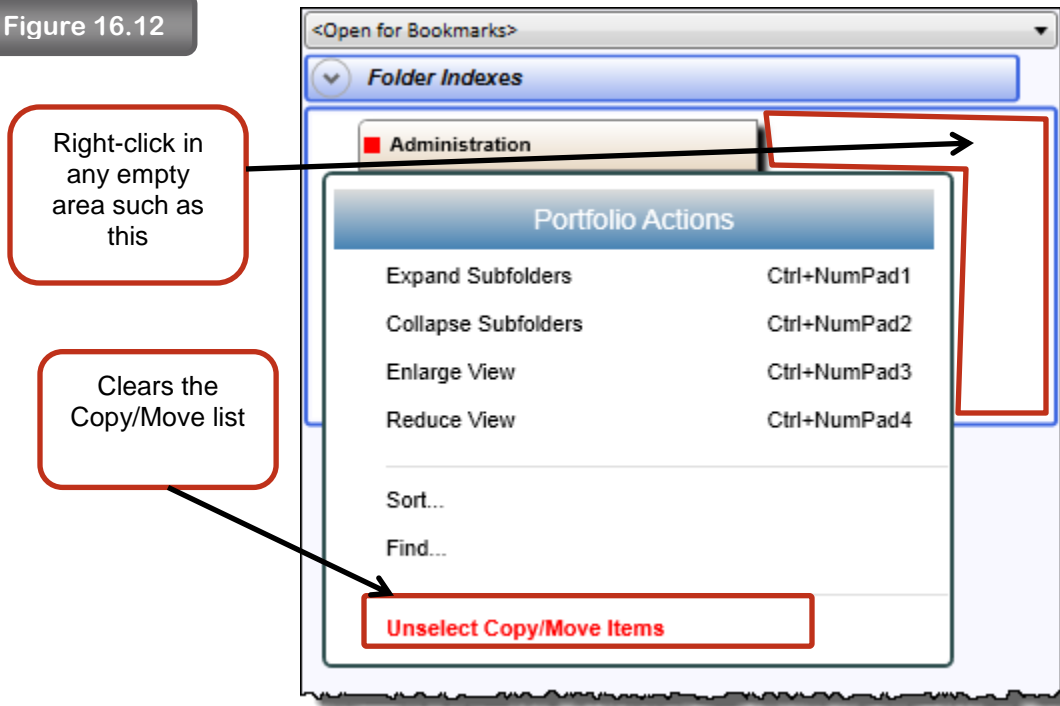


15. Click on the **Refresh** button.
16. The selected page(s) has now been successfully copied/moved to the selected folder and selected subfolder.

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**.

Figure 16.12



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.

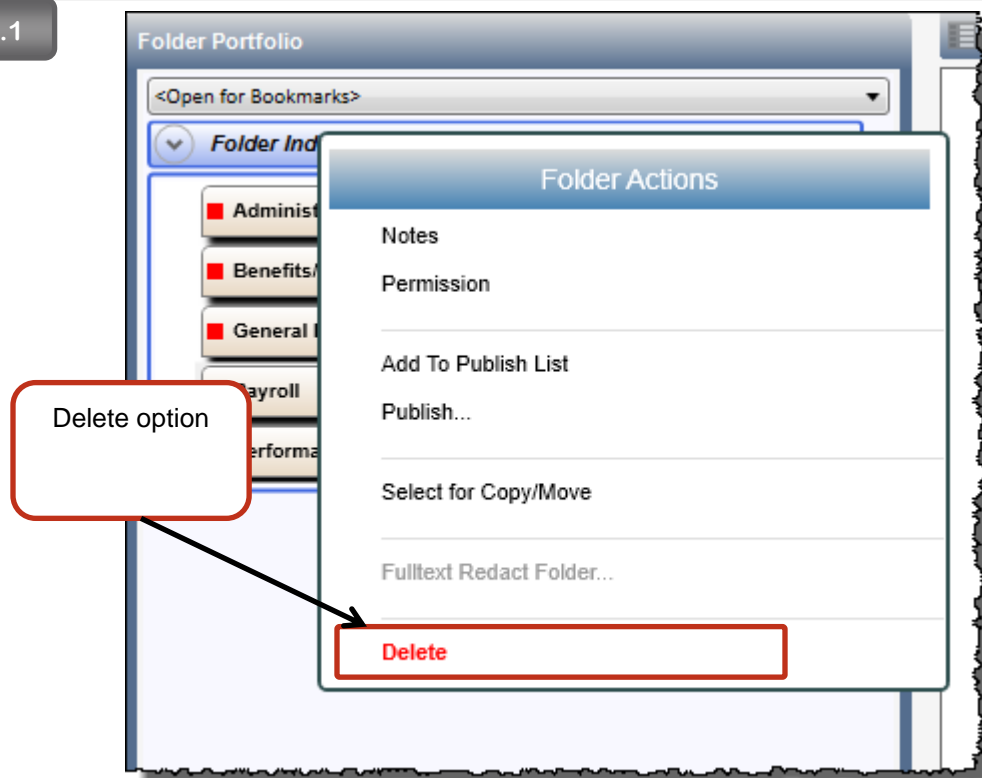
Section 17.1 – Deleting a Folder

To delete a folder, follow the steps listed below.

Steps:

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



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.

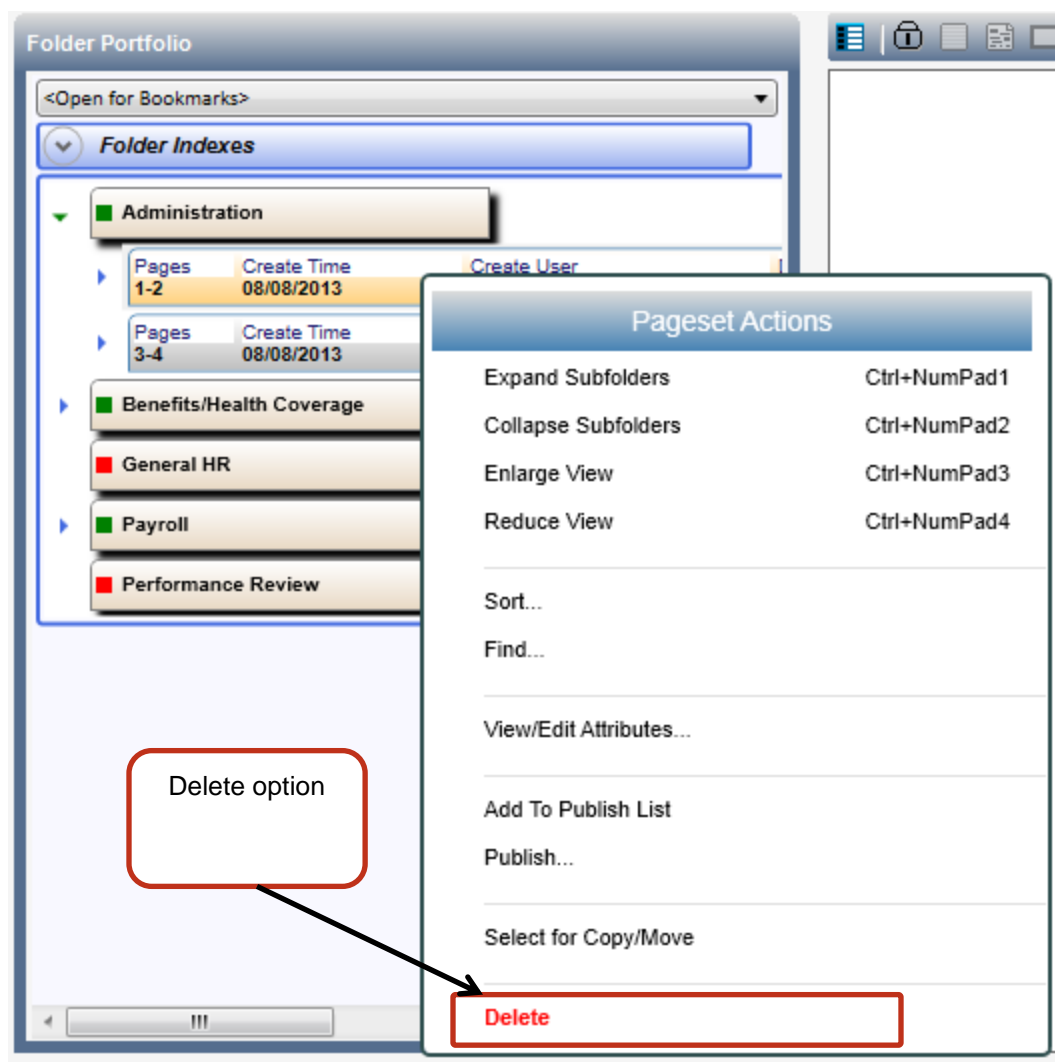
Section 17.2 – Deleting a Pageset

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.

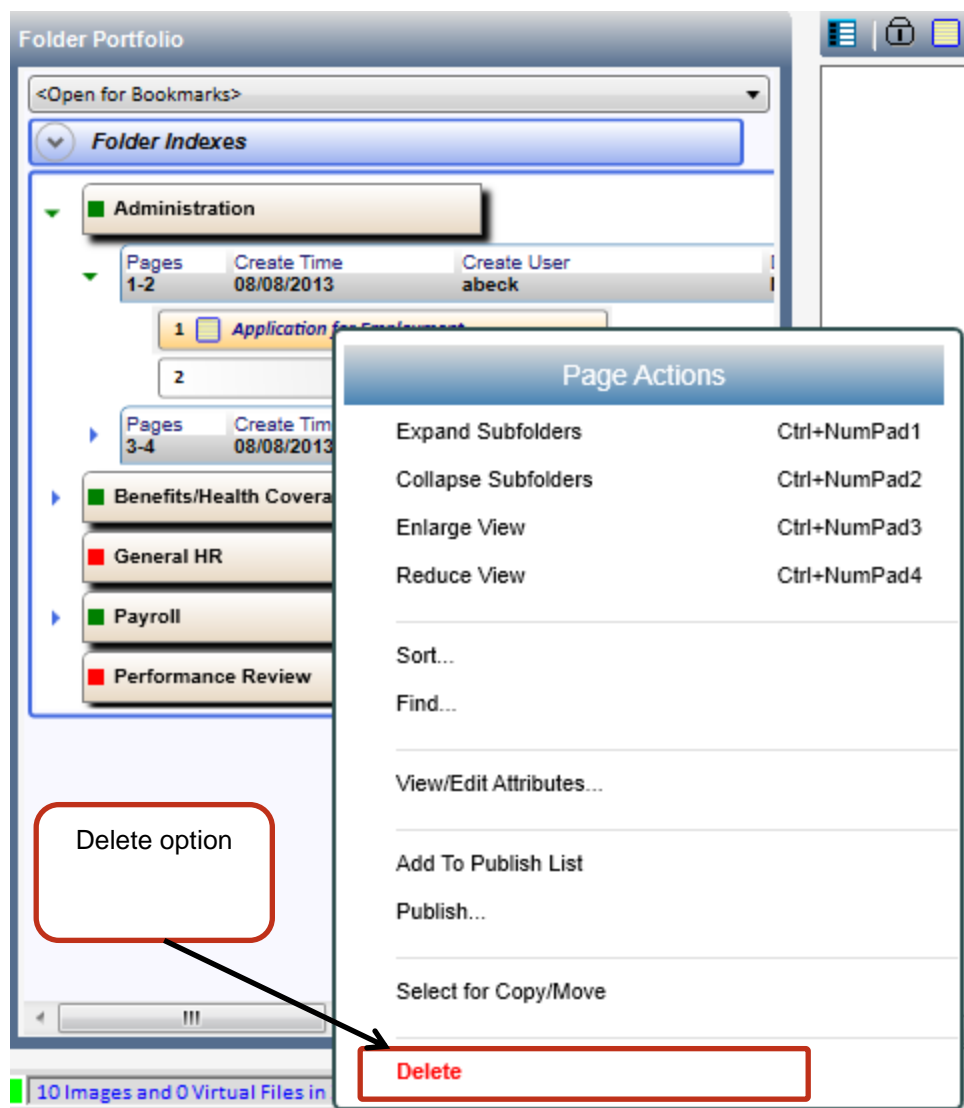
Section 17.3 – Deleting a Page

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



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.

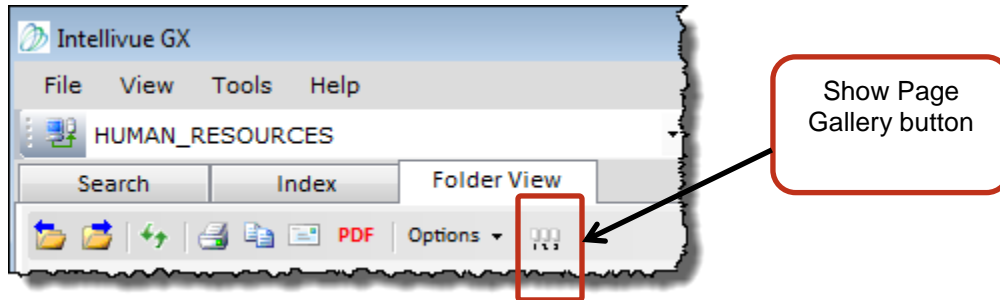
Section 18 – Page Gallery

Section 18 – Page Gallery

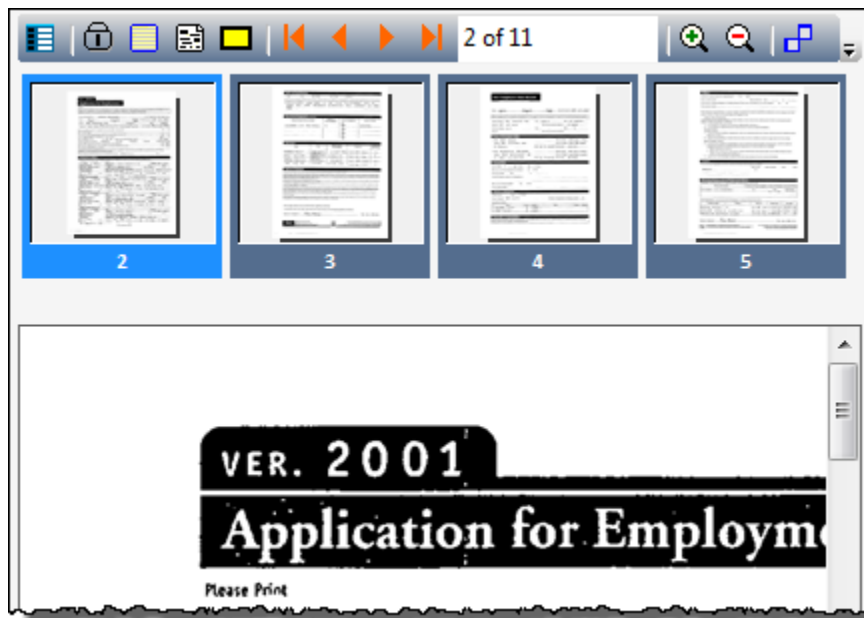
Page gallery allows you to view the pages within a subfolder as thumbnails.

Steps:

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

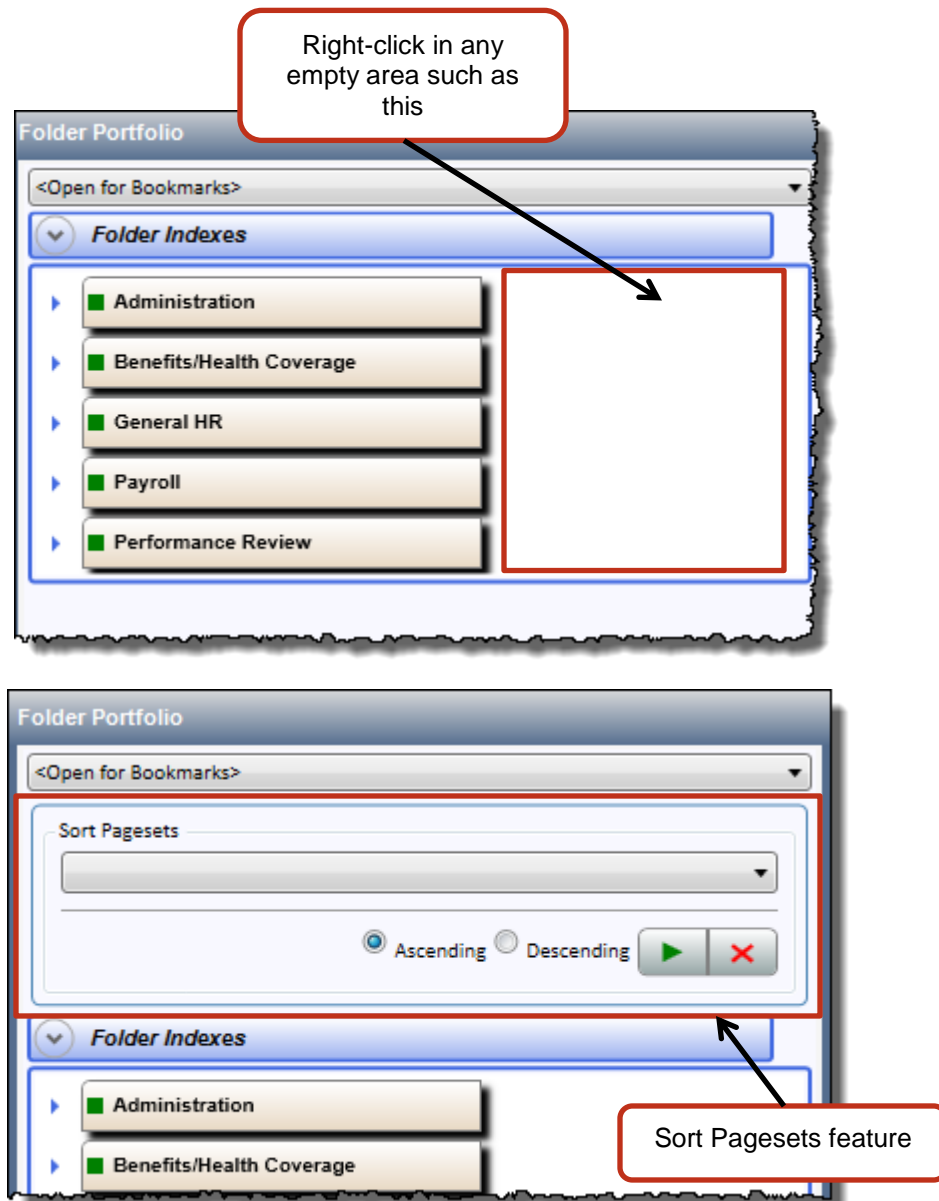
Section 19 – Sort Pagesets

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:

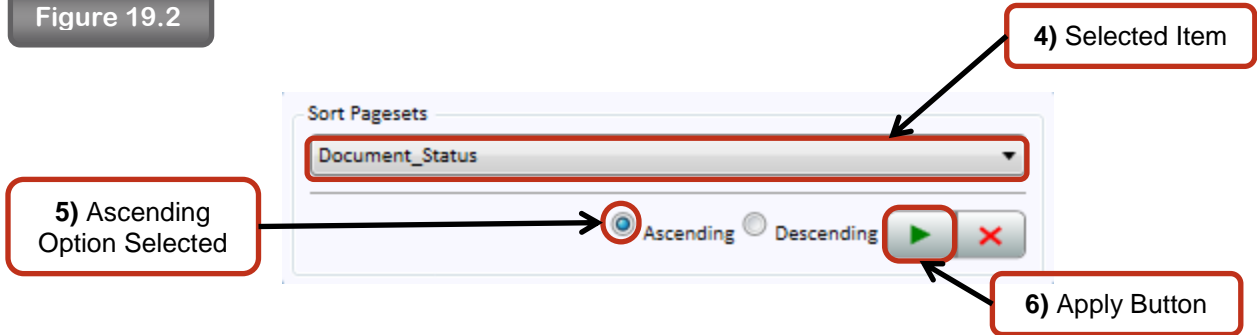
1. Right-click in an empty area (see Figure 19.1).
2. From the menu that appears, click the **Sort...** option (see Figure 19.1).
3. The **Sort Pagesets** feature will appear above the Folder Indexes bar (see Figure 19.1).

Figure 19.1



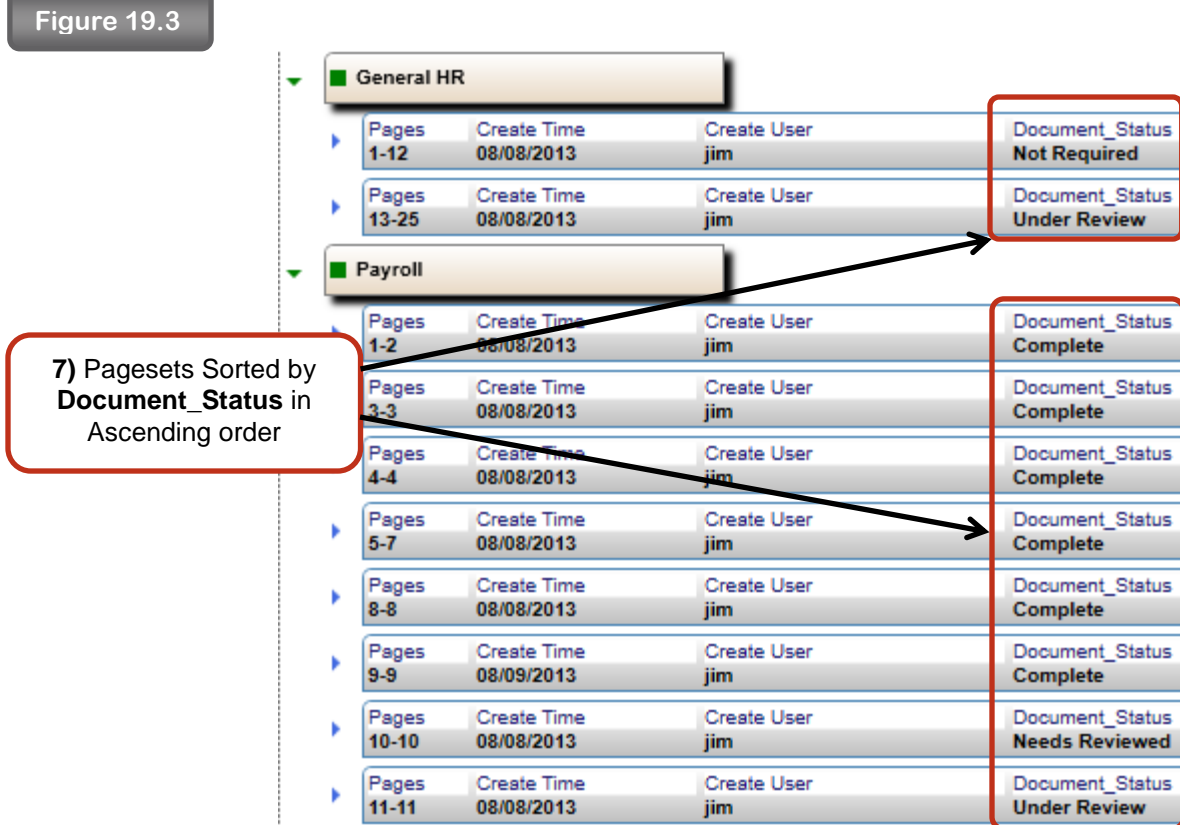
4. Select the item you want the pagesets to be sort by (see Figure 19.2).
5. Select the order in which you want the pagesets sorted (see Figure 19.2).
6. Click on the **Apply** button (see Figure 19.2).

Figure 19.2



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

Figure 19.3



Section 20 – Save Rotated

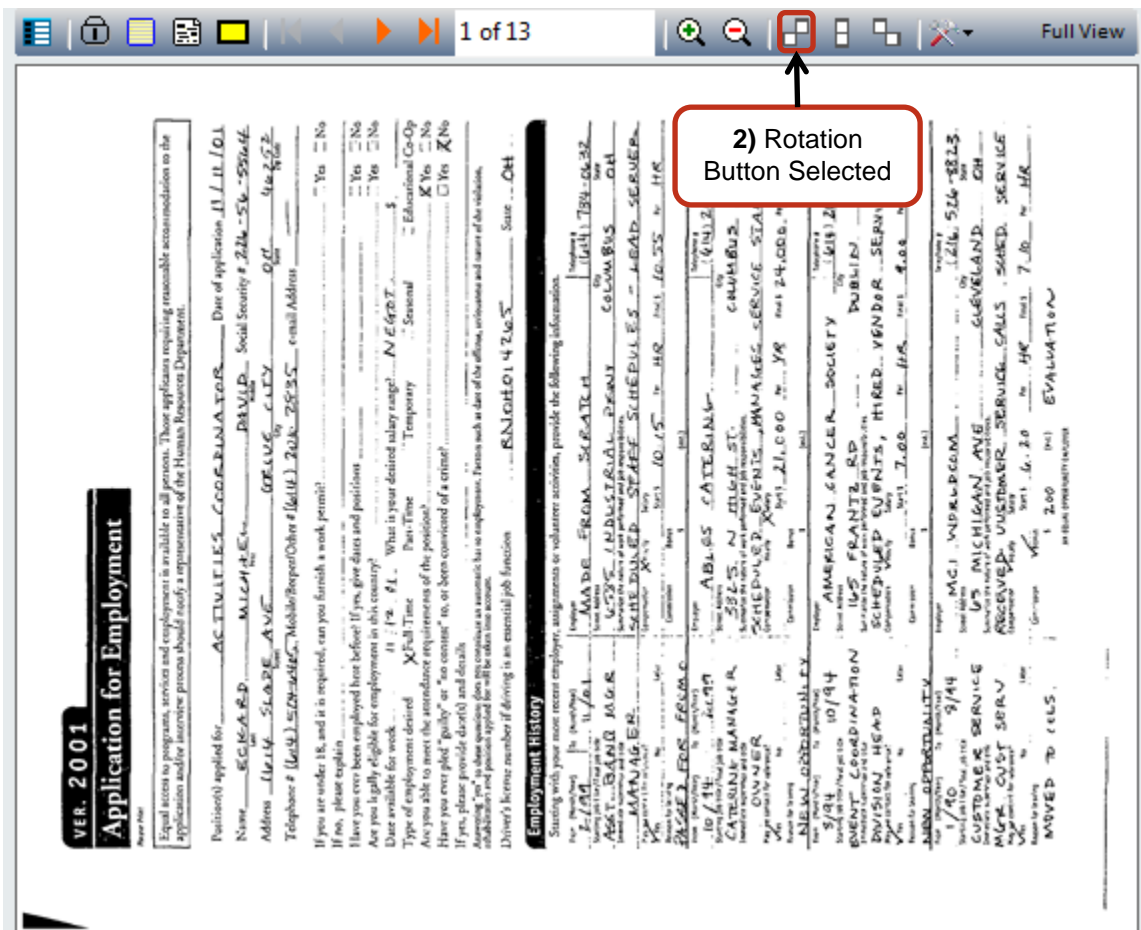
Section 20 – Save Rotated

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:

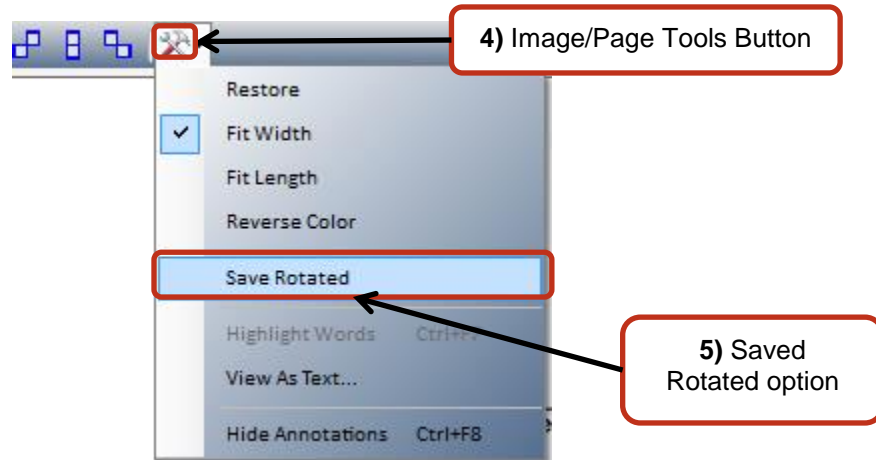
1. Select the page that needs to be rotated.
2. Choose one of the three rotation buttons to rotate the selected page (see Figure 20.1).
 - a. **Rotate Left** – Rotates the currently selected page 90 degrees to the left.
 - b. **Flip** – Rotates the currently selected page 180 degrees.
 - c. **Rotate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

Figure 20.1



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*).

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

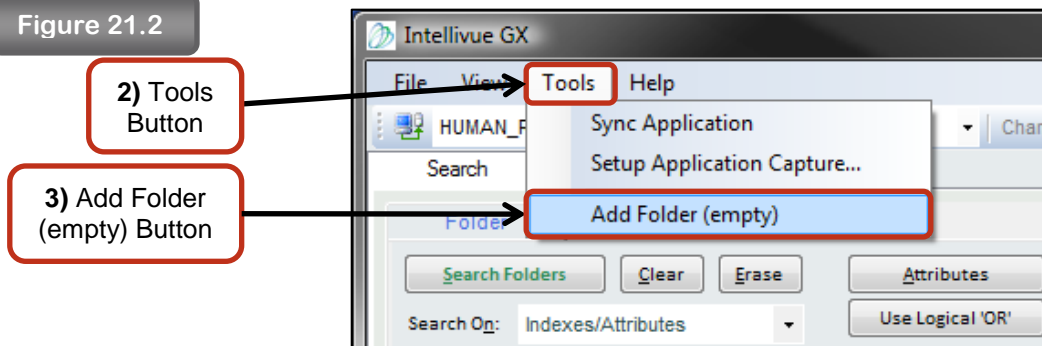
The screenshot shows the Intellivue GX application window with the 'Folder Indexes' section highlighted. The fields are populated with the following information:

Field Name	Value
EMPLOYEE_ID	JS78965
DEPARTMENT	Accounting
SSN	954-65-6541
LAST_NAME	SMITH
FIRST_NAME	JOHN
EMPLOYEE_STATUS	Active
LOCATION	54
DATE_OF_HIRE	05/01/2002
DATE_OF_TERMINATION	

A callout box on the left contains the text: "1) Entered Information into the Folder Index Fields" with an arrow pointing to the highlighted fields.

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

Figure 21.2



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

Section 22 – Change Data of All Folders

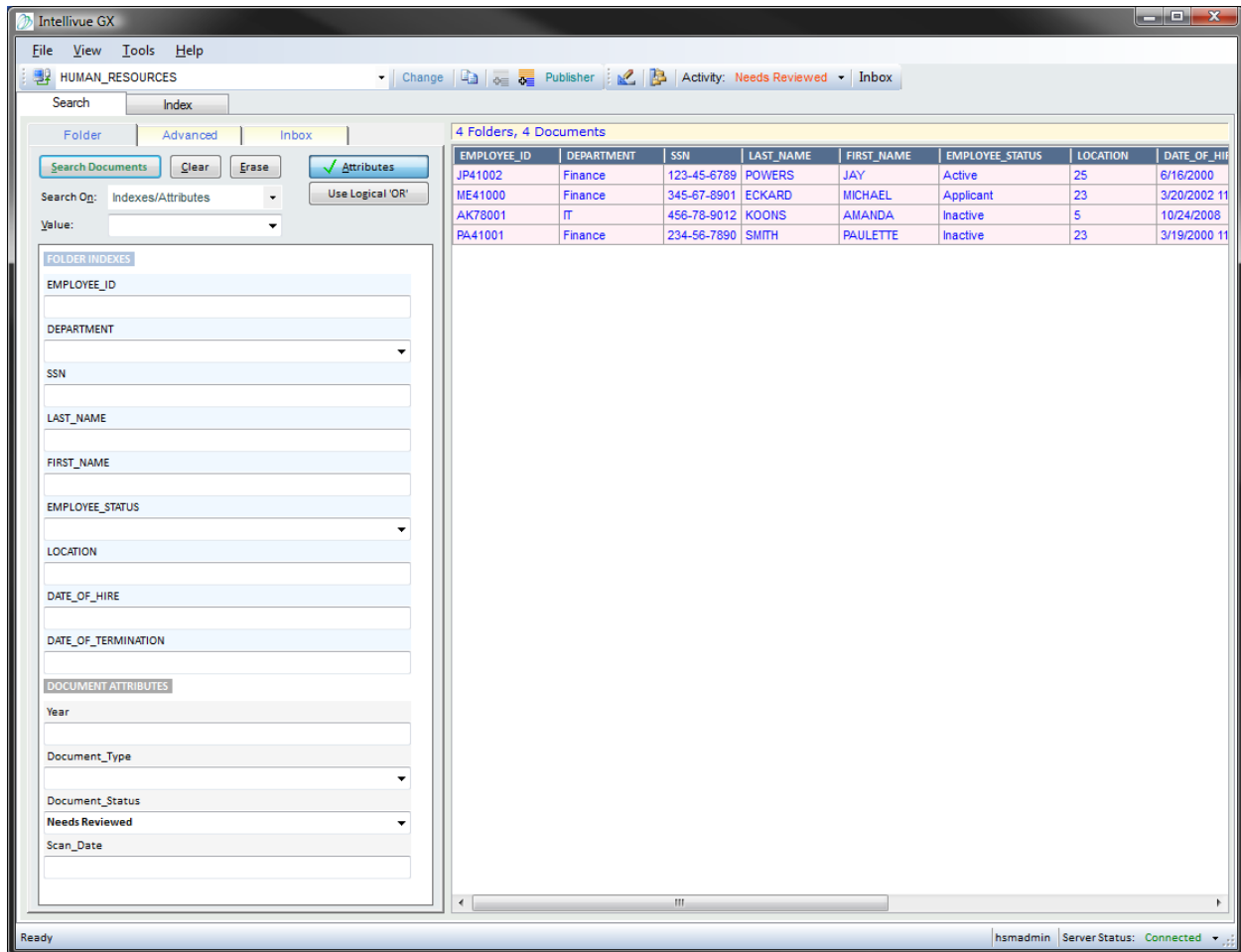
Section 22 – Change Data of All Listed Folders

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:

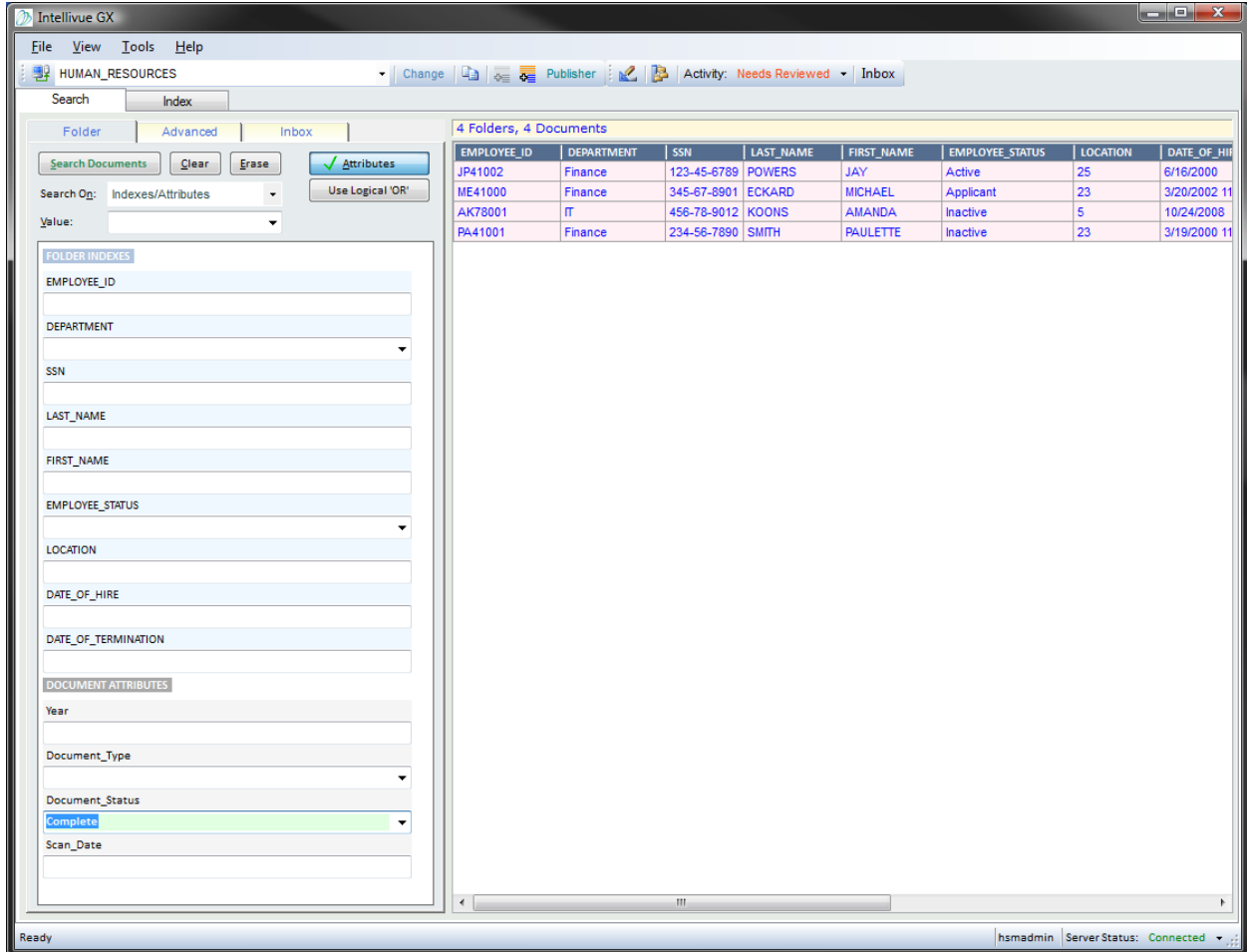
1. Search for the group of folders that need a updated (see *Figure 22.1*).

Figure 22.1



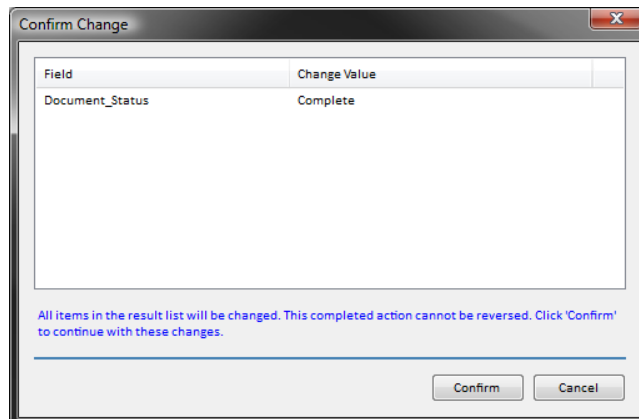
2. Enter the information that needs updated (see Figure 22.2).
3. Click on the **Change** button (see Figure 22.2).

Figure 22.2



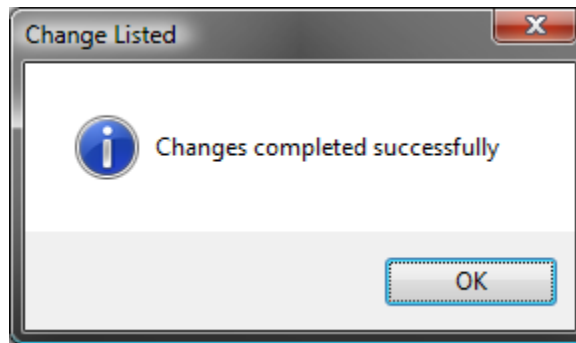
4. A **Confirm Change** window will pop up (see Figure 22.3).
5. Click on the **Confirm** button (see Figure 22.3).

Figure 22.3



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

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:


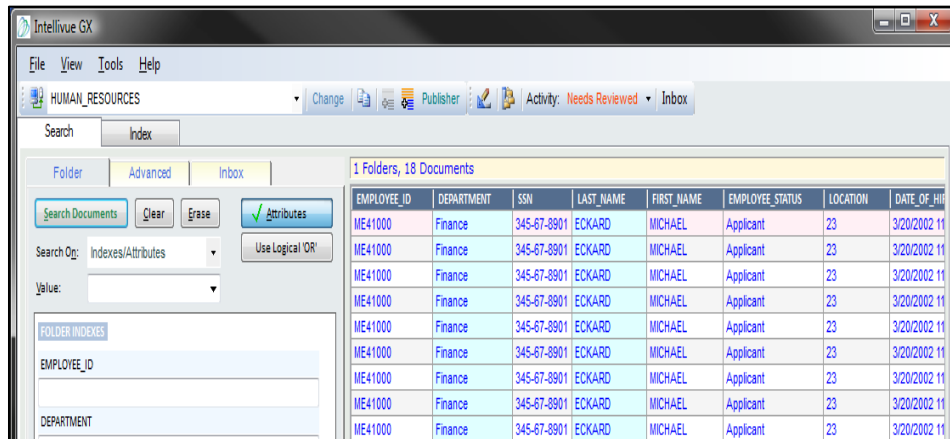
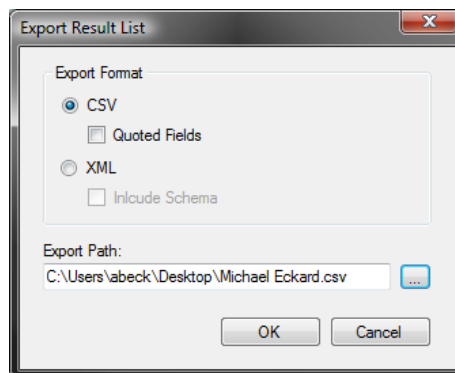
1. Perform a search (see *Figure 23.1*).
2. The search results will be returned (see *Figure 23.1*).
3. Click on the **Export Result List** button  (see *Figure 23.1*).

Figure 23.1



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*).

Figure 23.2



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

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.

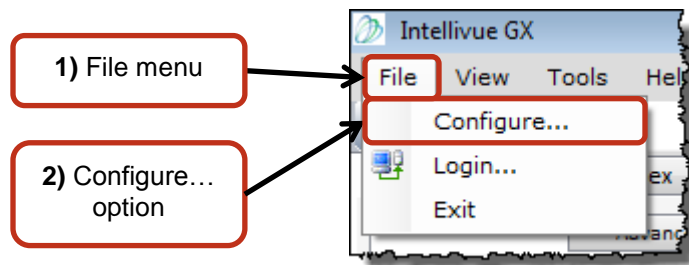
Section 24.1 Intellivue™ GX Configuration

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.

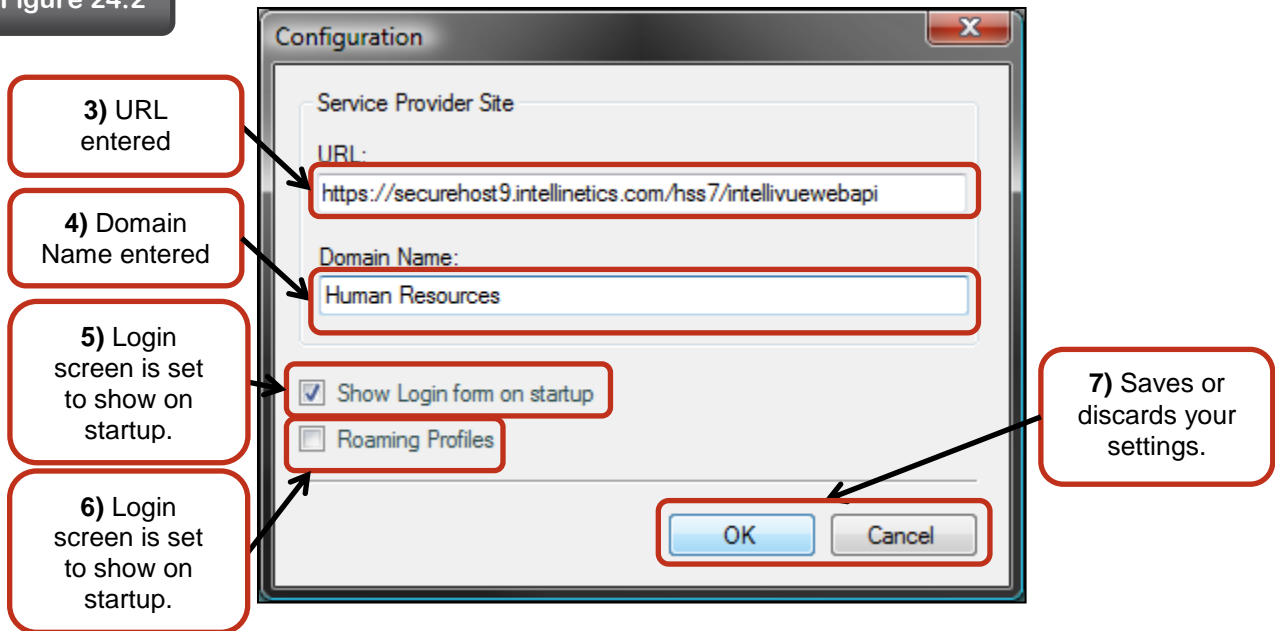
1. Click the **File** menu option located in the top left corner (see Figure 24.1).
2. Click **Configure...** from the menu (see Figure 24.1).

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



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

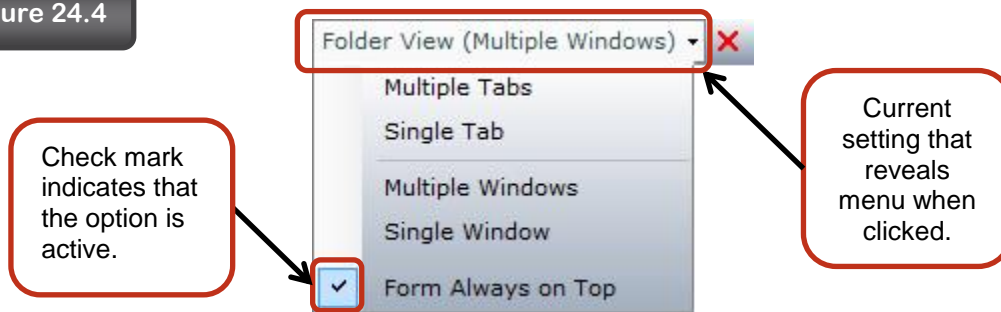

 Folder View (Single Window) ▾ ✕

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).

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.

Note

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  button at any time.

Section 24.3 Application View Options

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:

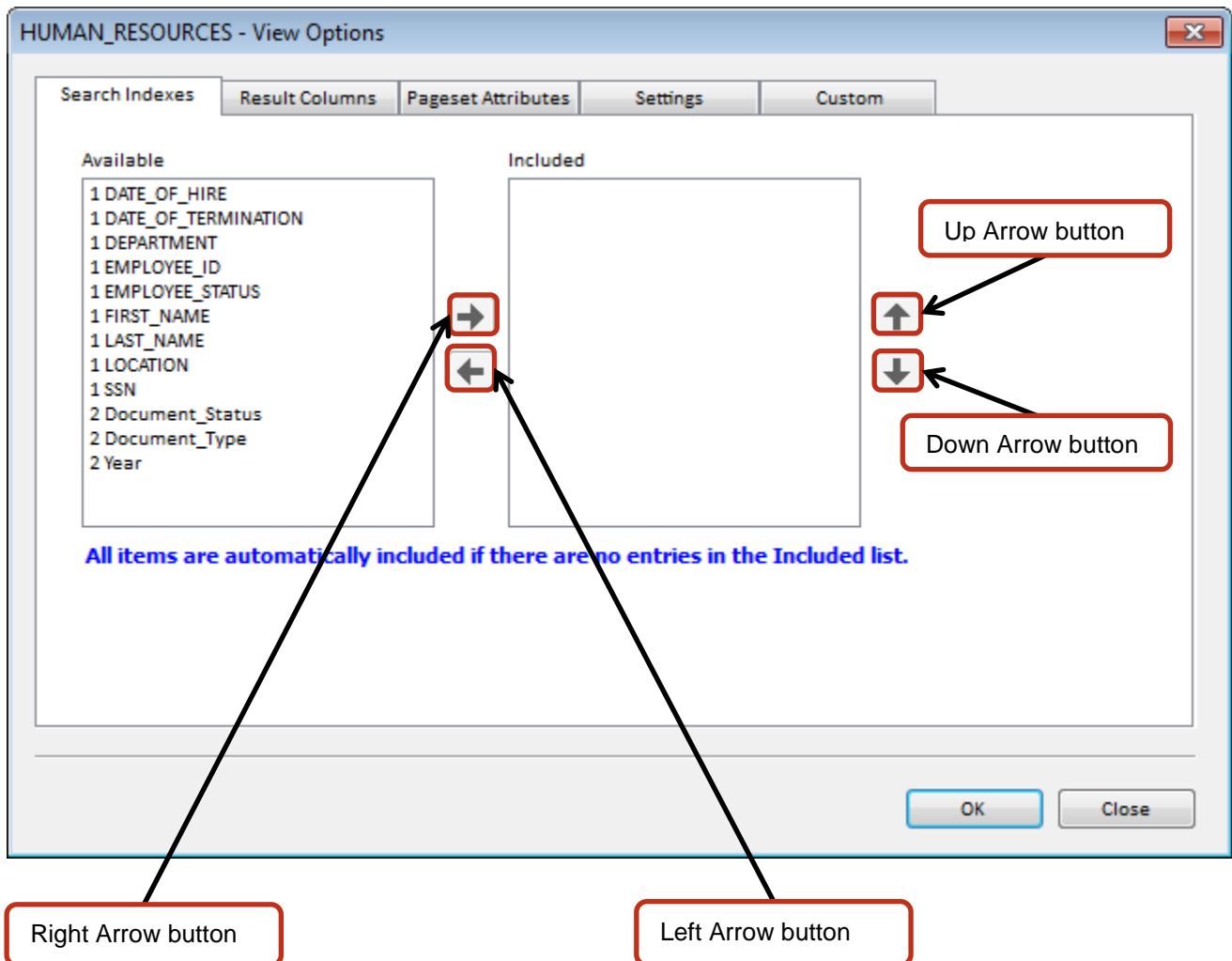
1. Click the **View** menu at the top of the screen (see *Figure 24.5*).
2. Click **Options...** (see *Figure 24.5*).

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 [Section 2 – Folder Index Search](#) and [Section 3 – Document Attributes Search](#) 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

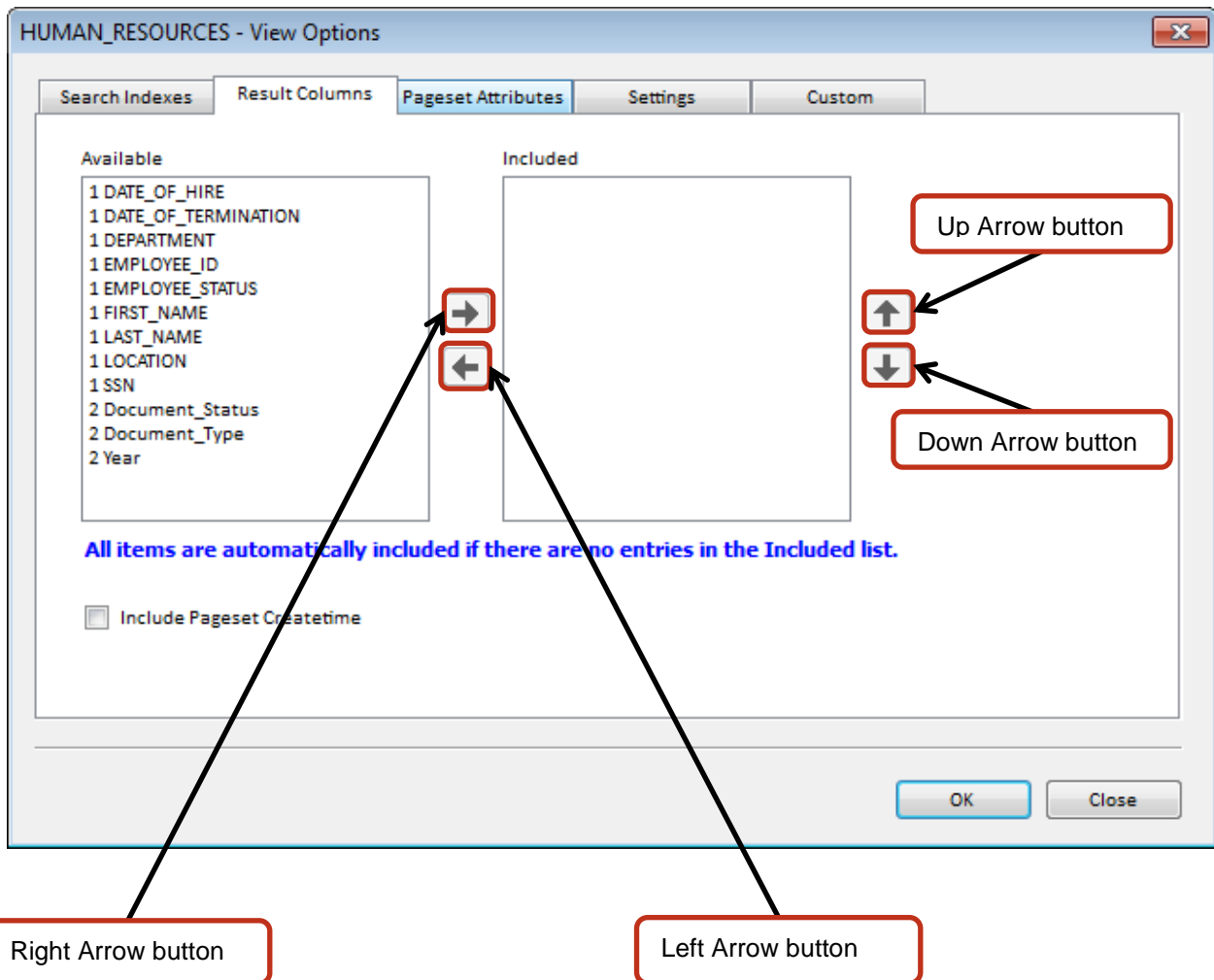
The Pageset Createtime represents the time and date that the pageset was created. Regardless of which columns are included to show in the results pane, the Pageset Createtime will only show if you click the specific checkbox for it located beneath the Available and Included lists (see *Figure 24.7*).

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

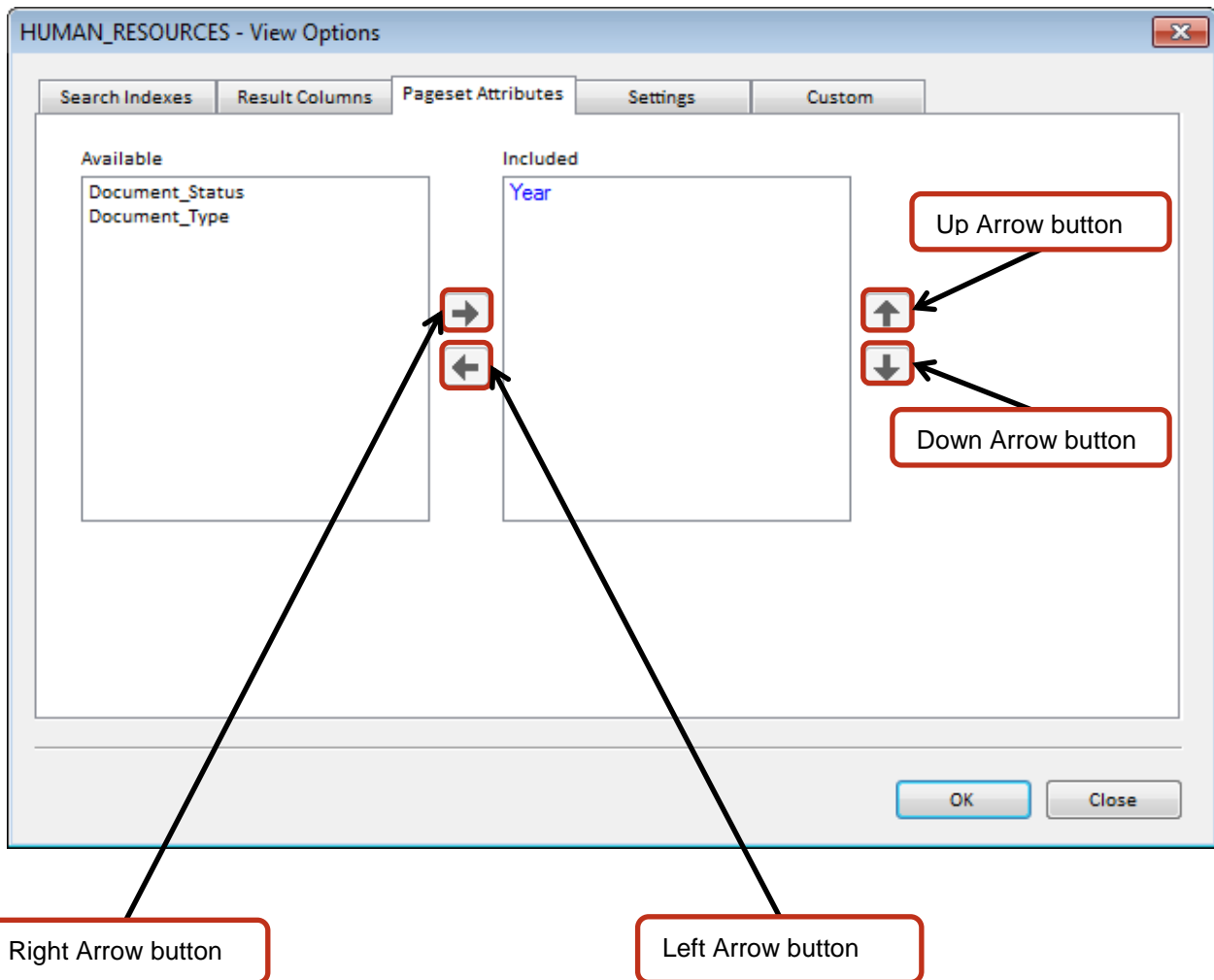


Section 24.3c Pageset Attributes

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



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.

Figure 24.9

- **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.

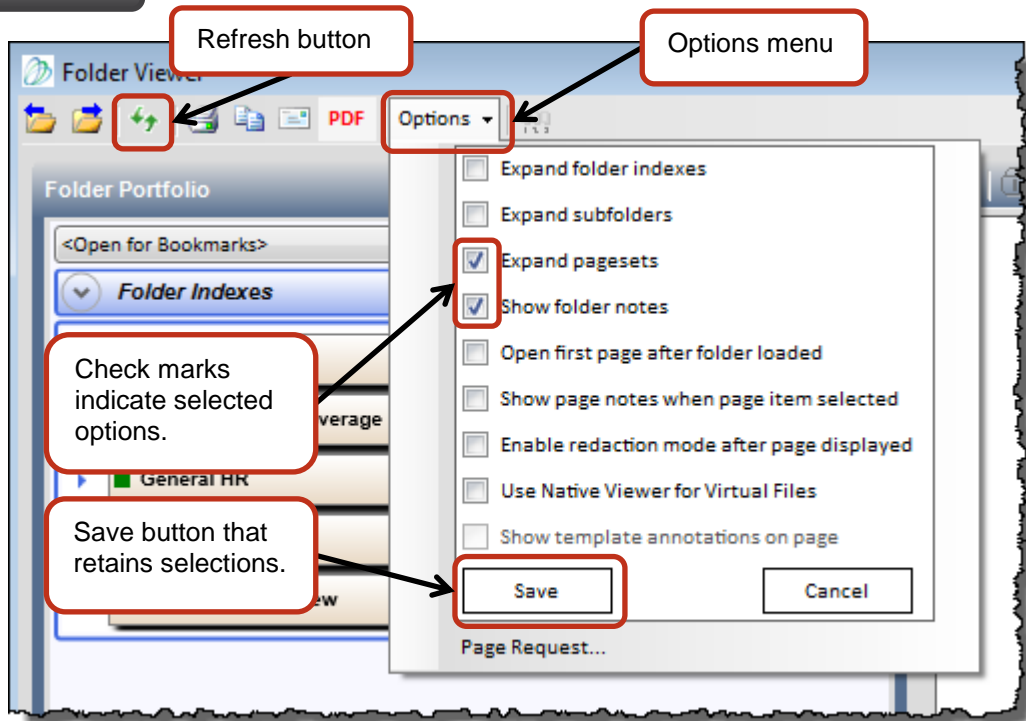
Section 24.4 Folder Viewer Options

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.

Figure 24.10



Expand folder indexes

Reveals the Folder Indexes fields.

Expand subfolders

Reveals the Pagesets of each Subfolder.

Expand pagesets

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

Show folder notes

Loads the Folder Notes when the Folder Viewer is open.

Open first page after folder loaded

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

Show page notes when page item selected

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

Enable redaction mode after page displayed

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

Use Native Viewer for Virtual Files

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

Show template annotations on page

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

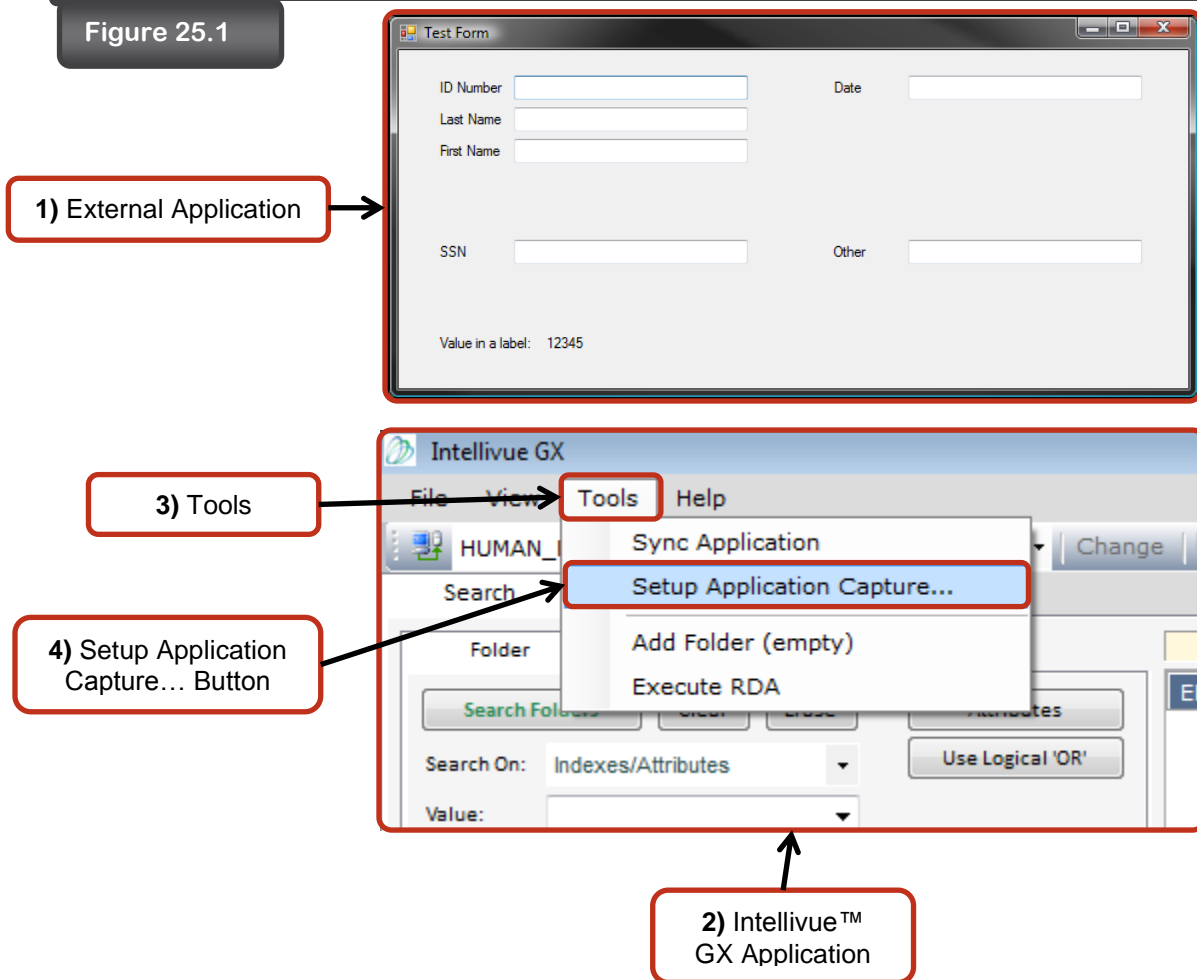
DirectVUE™ is a tool used to link a data field from an external application to a data field in the **Intellivue™ GX** application. Once configuration is complete, a user will have the ability to execute a search from the external application and images related to the search will be displayed in the **Intellivue™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

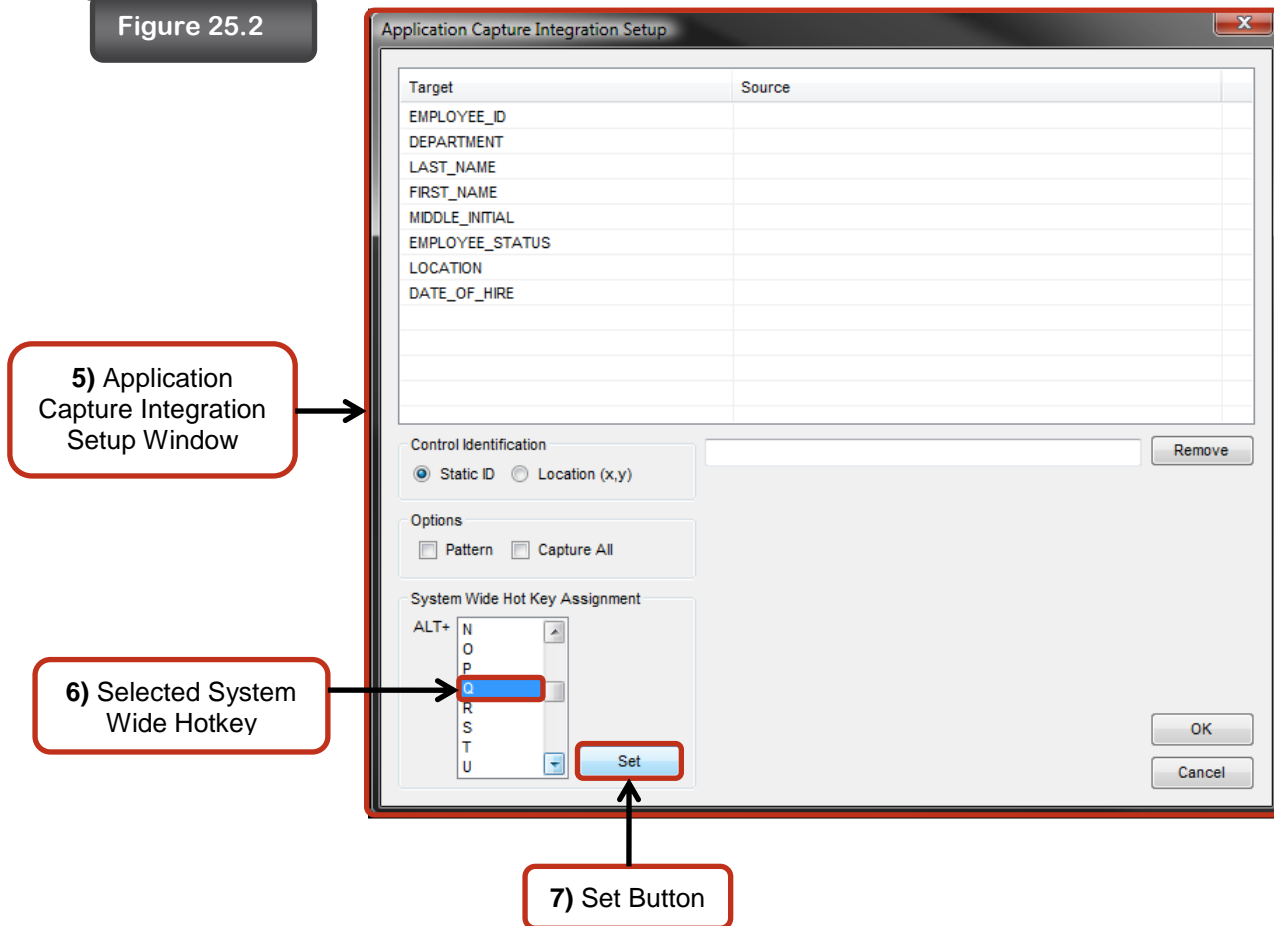
Figure 25.1



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

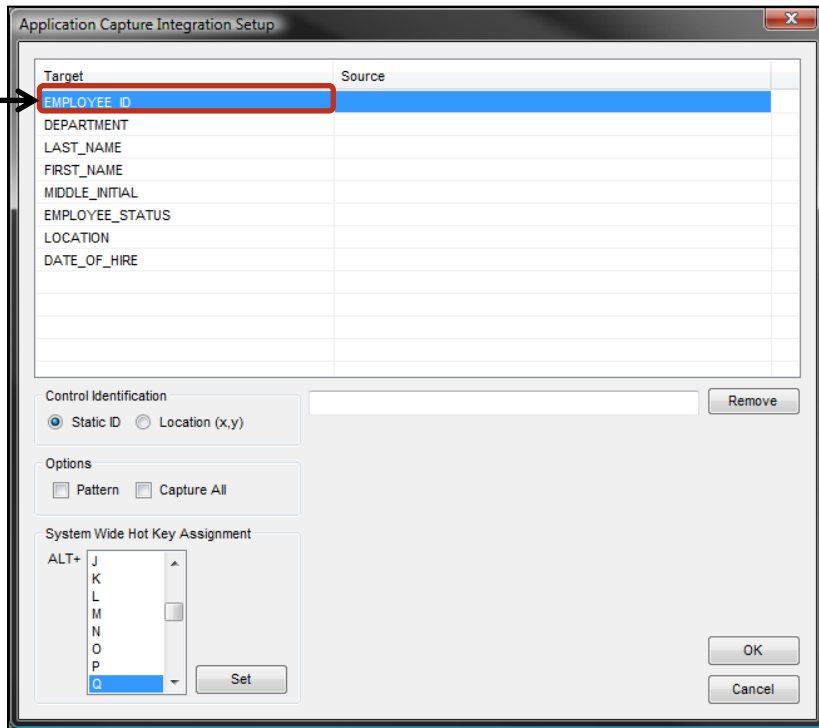
Figure 25.2



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

Figure 25.3

8) Selected Target Data Field

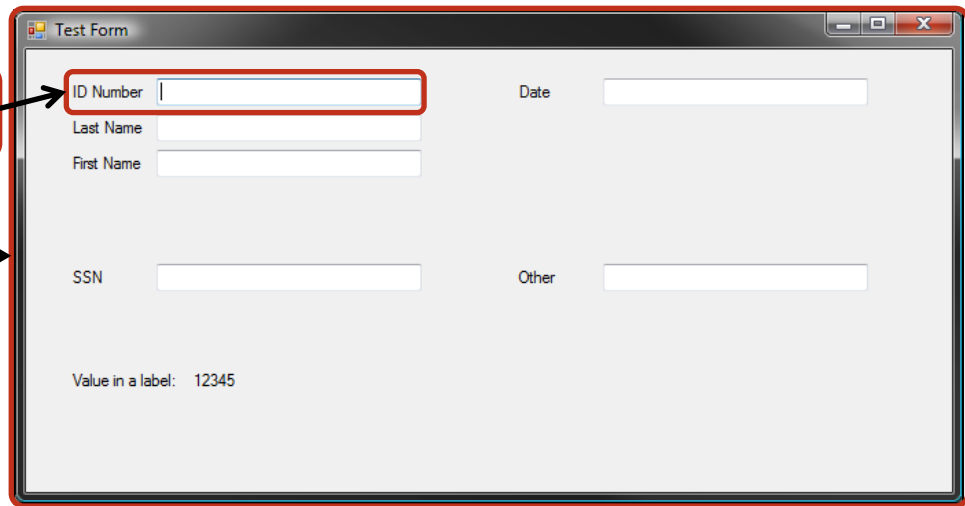


- In your external application, locate the data field you would like to link with the **Intellivue™ GX** application (See *Figure 25.4*).
- Place your cursor in the selected data field.
- Invoke your selected system wide hotkey, which you setup in the **Application Capture Integration Setup** window,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

Figure 25.4

9) Selected Data Field

External Application



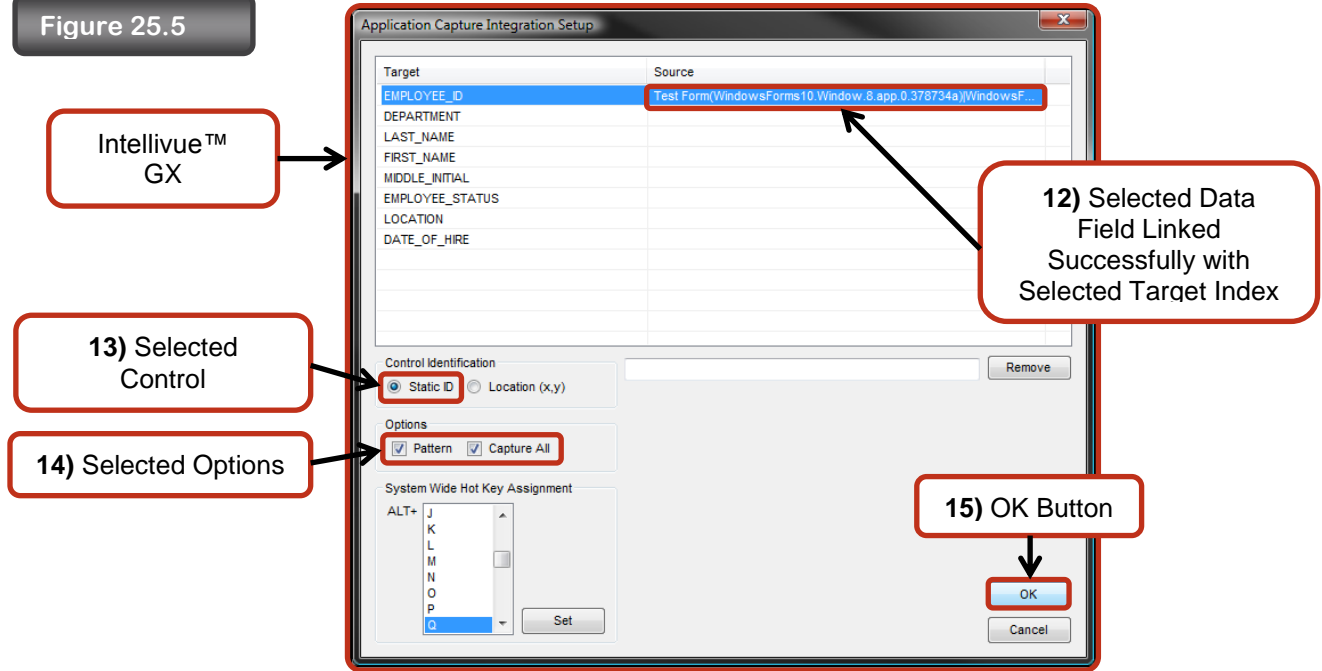
12. Go back to the **Intellivue™ GX** application. You will see the selected data field from your external application linked successfully with the selected target data field in the **Intellivue™ GX** application (See *Figure 25.5*).
13. Select which **Control Identification** you want to use (See *Figure 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



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