Documents

User Guide

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HYLAND™

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About documents

A document contains data or files that Perceptive Content captures so that users can add comments and annotations, and link to different files and applications for business processing.

Documents are created, updated, and shared using Perceptive Content. Documents normally consist of one or more pages, and they can be emails, reports, invoices, and non-image file formats such as DOC and TXT. Perceptive Content can also import pages in any file format, and pages in different formats can reside in a single document. For example, an imported document might contain several pages in Microsoft Word format and additional pages in PDF or Microsoft Excel format. Perceptive Content stores, secures, and retrieves a document using document properties.

Launch and navigate between Apps

To launch and navigate between Apps, complete the following steps.

1. Click to return to the **Home** page. All apps available to your system are displayed.
2. Select the desired App. On mobile devices navigate to the list of all available Apps by selecting **Profile** > **Home**.

Create an Out of Office event

To create an Out of Office event, complete the following steps:

1. On the **Home** page, select **Out Of Office**.
2. In the **Out of Office** dialog box, complete the following substeps.
    1. In **Begin Date** field, specify the date and time you want your out of office event to start. The default begin date is the current date and time.
    2. In the **End Date** field, specify the date and time you want your out of office event to end, or leave the field blank if you do not know the end date.

        Note:
        If you leave the field blank, you must disable the event to begin processing items again.

    3. In the **Reason** list, select the reason for your out of office event.
    4. Optional. In the **Delegate User** list, select the user who will serve as the delegate task assignee.
    5. Optional. In the **Comments** field, enter any comments about the out of office event.
3. Select **Enable**.

View package version information

To view the packages and dependencies installed, complete the following steps.

1. On the **Home** page, select **Profile**, and then select **Settings** .
2. Under **General Settings**, select **About**.

   Under **Packages and Dependencies,** the name and version number of packages and dependencies are listed.

Choose a logging level

To set the logging level for the current user, complete the following steps.

1. On the **Home** page, select **Profile**, and then select **Settings** .
2. Under **General Settings**, select **Global**.
3. Select one of the following logging levels.
   - To set the maximum logging level, select **All Messages**.
   - To set the default logging level, select **Warnings and Errors**.
   - To set the minimum logging level, select **Errors Only**.
4. In the **Language** list, select the appropriate language.

Log off from Perceptive Experience

The method you use to log off is determined by the device you use.

1. To disconnect from **Perceptive Experience**, complete one of the following actions.

Situation	Steps
Access Perceptive Experience on a mobile device.	1. In the lower-left corner of the window, select **Disconnect**.
Access Perceptive Experience on a desktop computer or web browser.	1. Select **Profile**. 2. Select **Disconnect**.

Open a document

In the Documents App, the viewer enables you to open a document from a list based on the privileges the administrator configures for you. To open a document, complete the following steps.

1. To display the list of available documents, select a document view.
2. In the displayed list, select the document you want to open.
3. Select **Show or Hide Thumbnails** .
4. Optional. To navigate between pages, select **Previous Page** and **Next Page** , or type the specific page number in the **Current Page** box. When viewing on a mobile device, swipe and then tap the thumbnails to navigate between pages.

 Note: To open a different document from the same view, select **Back** , or when viewing on a mobile device.

Create a link to a document

From the Documents App, you can view documents available in Perceptive Content. To access document views and the list of documents under each view, you must create a URL.

URL parameters

The URL must contain various query parameters to enhance the search criteria. It must have a domain name, port, and a path. For example, *http://<domain name>:<port>/perceptive*.

The URL supports a VSL string as a search constraint. The URL formats explain the usage of a constraint as an optional query parameter to provide a VSL string as a search constraint.

VSL strings used in query parameters must be URL encoded.

Note: For more VSL documentation, see the Use VSL help at Perceptive Content>Manage Content>Content System>Set up Content system.

You must also create a URL for the user to access the hosted documents.

URL for hosted documents

The URL for a hosted document displays the hosted document directly in the viewer. To view the hosted document, you must append the URL with the path and query parameters. The path and query parameters for a hosted document are given below.

Note: The constraint and client obj ID parameters are optional.

Description	URL
View a hosted document in the viewer	`http://<domain name>:<port>/perceptive/#hosteddocument/{clientDocumentId}?view={viewID}&clientType={clientType}&clientInstance={clientInstanceId}&constraint={vsl}`
Open a particular page in the hosted document in the viewer	`http://<domain name>:<port>/perceptive/#hosteddocument/{clientDocumentId}/clientLogob/{clientlogobId}?view={viewID}&clientType={clientType}&clientInstance={clientInstanceId}&constraint={vsl}`

URL for documents

The Documents App supports the following URLs.

Description	URL
Displays the list of document views	`http://<domain name>:<port>/perceptive/#documents`
Displays the list of documents in a view	`http://<domain name>:<port>/perceptive/#documents/view/{viewID}`
Displays the document in the viewer	`http://<domain name>:<port>/perceptive/#documents/view/{viewID}/document/{DocID}`
Displays the view list pane	`http://<domain name>:<port>/perceptive/#documents/view/{viewID}?fullscreen=true`
Displays the properties of the document	`http://<domain name>:<port>/perceptive/#documents/view/{viewID}/document/{DocID}?showproperties=true`
Displays the forms associated with the document	`http://<domain name>:<port>/perceptive/#documents/view/{viewID}/document/{DocID}?showforms=true`

Description	URL
Displays the related documents pane	http://<domain name>:<port>/perceptive/#documents/view/{viewID}/document/{DocID}?showrelateddocs=true
Displays the related tasks pane	http://<domain name>:port>/perceptive/#documents/view/{viewID}/document/{DocID}?showrelatedtasks=true
Displays the thumbnails of the pages associated with the document	http://<domain name>:<port>/perceptive/#documents/view/{viewID}/document/{DocID}?showthumbnails=true
Displays a page fit to height, width, best fit, or its original size based on the zoomvalue assigned to the URL. Values include <FittoHeight>, <FittoWidth>, <FittoWindow>, or any integer zoomvalue greater than 0 and less than 500.	http://<domain name>:<port>/perceptive/#documents/view/SysDocumentsAll/document/<*DocID*>?pageid=<*PageID*>&zoomvalue=<*fitToHeight*>
Displays the position of the thumbnails based on the criteria set for thumbnailposition in the URL. Thumbnail position values include <left>, <right>, and <bottom>.	http://<domain name>:<port>/perceptive/#documents/view/SysDocumentsAll/document/<*DocID*>?pageid=<*PageID*>&thumbnailposition=<*left*>

Note: Provide the port number in the URL if applicable. You can append the URLs with the VSL constraint parameter, `constraint={vsl}`, as a query parameter to filter the search results.

Simple mode

As an administrator, you can provide access to all or some features of the App using the simple mode query parameter in the URL. Simple mode in a URL enables the user to access limited features of the application based on the privileges you set.

Note: The simple mode is applicable to documents only. It is not used for hosted documents.

The query parameter used in the URL to activate the simple mode is simplemode=true. When the simple mode is active,

- the list of documents opens in a full screen, and you cannot go back to the document views screen.
- the document opens in a full screen in the viewer.
- the Back to View button is not available.

Note: If the simple mode is set to true in the document list page, the Back to View button is available in the viewer page when you select a document.

The following table provides the URLs with their scenarios when simple mode is set to true in the Documents App.

Scenario	URL
Opens the document using the URL in the viewer	http://<domain name>:<port>/perceptive/#documents/view/{viewID}/document/{DocID}?simplemode=true
Displays the list of documents for a view	http://<domain name>:<port>/perceptive/#documents/view/{viewID}?simplemode=true

Move a document

You can move a document to a drawer or folder within the system. To move a document, complete the following steps.

1. From the document views grid, select a document.

   Note: A check box appears next to the document name when you move the pointer over a row. You can select multiple documents except when you view the app on a mobile device.

2. Select **Move Content** , or select **Show or Hide Properties** followed by **Move Content** when viewing on a mobile device.

Note: You cannot move content if the item is in version control and not checked out by another user.

3. In the **Select a location** dialog, choose the destination location for the document by completing the following procedure.
   1. Refine the destination search results by selecting a drawer using the **Filter by** list.
   2. Optional. Refine the destination search results by entering search criteria.
   3. Select **Search**.
   4. Select a location from the list of results.
4. Select **OK**.

Delete a document

To delete a document from the views grid, complete the following steps.

1. From the views grid, select the documents you want to delete.
2. Click **Delete** .
3. Click **Yes** to verify.

Document search conditions

A Search applies a single condition or multiple conditions to the documents in the current view and returns the results that satisfy the condition. You define each condition by selecting an available combination of field, operator, and value as described in the Fields list below.

Document searching guidelines

When building a document search condition, keep the following guidelines in mind:

- If you are performing a prompted search, you do not specify a value when creating a search condition. A message box appears instead of a value box.
- If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Fields

The following fields are available to use when defining a condition.

Any document key

The value for the Drawer, Name, Type, Field1, Field2, Field3, Field4, or Field5 associated with the document.

Possible values include any alphanumeric value.

Check out comments

The comments entered by the user that checked out a version of the document in version control. This field only returns documents that are currently checked out.

Possible values include any alphanumeric value.

Checked out

The date the document was checked out in version control.

Checked out by

The user who checked out the document in version control.

Created

The date the document was captured.

Created by

The user who created the document.

Created within (days)

The number of days within which the document was captured.

Possible values include any numeric value.

Current version

The number of the current version of the version controlled document.

Possible values include any numeric value.

Digital signature status

The status of the digital signature for the document.

Possible values include Valid, Invalid, Void, and Not signed.

Document ID

The unique ID of the document.

Possible values include any alphanumeric value.

Drawer

The drawer value for the document. If you specified a different label for the Drawer column for the selected view, the label you defined appears in the Field list.

Possible values include all drawers the user can access.

Field1

The Field1 value for the document. If you specified a different label for the Field1 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field2

The Field2 value for the document. If you specified a different label for the Field2 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field3

The Field3 value for the document. If you specified a different label for the Field3 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field4

The Field4 value for the document. If you specified a different label for the Field4 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field5

The Field5 value for the document. If you specified a different label for the Field5 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Has hold applied

Whether the document is under a direct or inherited retention hold.

Has physical file reference

Whether the document has a reference to a physical file.

Has shortcut

Whether shortcuts to the document appear in other folders or drawers.

Hold name

The name of the retention hold applied to the document.

Possible values include all retention holds the user can access.

Is checked out

Whether the document is checked out in version control.

Is in workflow

Whether the document is in workflow.

Is private

Whether the document is marked private in version control.

Is version controlled

Whether the document is in version control.

Last viewed

The date a user last viewed the document.

Last viewed by

The user who last viewed the document.

Modified

The date a user last modified the document.

Modified by

The user who last modified the document.

Name

The document name value for the document. If you specified a different label for the Document name column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Next task due

The nearest date a task is due for the document.

Notes

The contents of the Notes box in the Properties pane for the document.

Possible values include any alphanumeric value.

Number of pages

The total number of pages in the document.

Possible values include any numeric value.

Pending approval by

The user assigned to an approval task for the document.

Private by

The user who marked the document private in version control.

Summary task count (active)

The number of active tasks assigned for the document.

Possible values include any numeric value.

Summary task count (inactive)

The number of inactive tasks associated with the document.

Possible values include any numeric value.

Summary task status

The status of the task associated with the document.

Possible values include Assigned, Returned, Complete, Complete Pending Review, Canceled, and Invalid.

Type

The document type value for the document. If you specified a different label for the Document type column for the selected view, the label you defined appears in the Field list.

Possible values include all document types the user can access.

Workflow item ID

The unique ID of the workflow item associated with the document.

Possible values include any alphanumeric value.

Workflow queue

The workflow queue the document is currently in.

Possible values include all workflow queues the user can access.

Workflow status

The status of the document in workflow.

Possible values include Idle, Working, On hold, Pending, Waiting for routing, and Waiting for inbound action.

Workflow user

The user who added the item to workflow.

Types of searches

Search allows you to define multiple constraints to filter documents, folders, tasks, or workflow items in the current view and returns the results that satisfy any or all of the defined conditions. After you define the search constraints you want to apply, you can group the constraints, reorder the constraints, and save the search criteria as a filter. The options in the field list vary depending on which module you are using. The options in the operator list vary depending on which field you select. You can use the following search types in Perceptive Experience.

Normal constraint search

A normal type constraint allows you to search on a static value that you define when creating the constraint. The view only returns the results that satisfy that constraint.

For example, when you create a normal type constraint on the document field Type, select the operator equal to and then type the value `Invoice`, the system only returns documents that have a document type of invoice.

Variable constraint search

A variable type constraint allows you to use a variable value, such as the current user or current date and time, instead of a static value. You can specify a user or date variable for any search constraint that could use a date or user variable as a value.

For example, when you create a variable type constraint on the document field Created by, select the operator equal to and then select the value Current user's user name, the system only returns documents created by you.

Prompted constraint search

A prompted type constraint allows you to enter a value when running the view. When you run a view, the system displays a dialog box allowing you to enter the value you want to search for. The view only returns the results that satisfy the constraints with the value you entered in the prompt dialog.

For example, when you create a prompted type constraint on the folder field folder status and select the operator equal to, you can then search for folders by selecting either Active or Inactive from a drop-down list in the prompt dialog. You can re-run the searches and change the prompt value at any time.

What is a composite property?

A composite property stores multiple values or sets of values that are based on one or more existing custom properties, and groups and refines the metadata that users use to describe the items in your system. With composite properties, you can add multiple sets of values.

You can perform a search to locate documents, folders, tasks, and workflow items based on composite property values just as you would when searching on any item property.

Search for an item

To create a search constraint and search for a document, folder, task or workflow item, complete the following steps.

1. In the **Views** pane, select the view you want to use as a basis for your search.
2. To create a normal or variable constraint, complete the following sub-steps.
    1. Click anywhere in the **Search in <View_name>** box located to the left of the **Search** button.
    2. Under **Add Constraint**, in the constraint type list, select **Normal Constraint** or **Variable Constraint**.
    3. In the **Field** list, select the field to use.
    4. If you selected a composite property from the **Field** list, then select a value from the **Custom Property** list.
    5. In the **Operator** list, select an operator to use in the comparison.
    6. For normal constraints, in the **Value** box, select or type a value. For variable constraints, in the **Value** list, select a value.
    7. Click **Add** to complete the constraint.
    8. Click **Search**. The system returns the appropriate search results.
3. To create a prompted constraint, complete the following sub-steps.
    1. Click anywhere in the **Search in <View_name>** box located to the left of the **Search** button.
    2. Under **Add Constraint**, in the constraint type list, select **Prompted Constraint**.
    3. In the **Field** list, select the field to use.
    4. If you selected a composite property from the **Field** list, then select a value from the **Custom Property** list.
    5. In the **Operator** list, select an operator to use in the comparison.
    6. In the **Message Input** box, type a message to display in the prompt dialog.
    7. Click **Add** to complete the constraint.
    8. Click **Search**.
    9. In the **<Prompt_Name>** dialog box, select or enter the appropriate search value.
    10. Click **OK**. The system returns the appropriate search results.

    See the list below for more search constraint options.

    - Constraints that have not been run are outlined with a dashed border.
    - To edit a constraint, select the constraint and update the necessary parameters.
    - To change from an AND to an OR constraint statement, click **AND**. Click **OR** to change it back to **AND**.
    - To use multiple constraints in a single search, click ✚ and repeat the steps to create a constraint.
    - After you define the search constraints you want to apply, you can group the conditions, reorder the

conditions, and save searches performed with the search as a filter. The search evaluates the conditions in the order in which you define them. You can save a multiple condition search as a filter.

Export grid search results

To export grid search results to a CVS file, complete the following steps.

1. To display the list of available items, select a document, folder or workflow view.
2. From the views grid, select the items you want to export.
3. From the toolbar, select **Export Grid**.

Result

The system exports all rows of the grid, whether the entire list is visible on the screen or not.

Create a private filter

A private filter is saved search criteria that is accessible to you. To create a private filter, complete the following steps.

Note that when creating a new private filter, the system does not save column sorting and ordering.

1. In the **Views** pane, select the view you want to use as a basis for your filter.
2. In the right pane, define your quick search or create conditions for a search.
3. If the search returned the results you want, in the **Current View** toolbar, click the **Create New Filter** button. If not, refine your search and then repeat this step.
4. In the **Create Filter** dialog box, type a name and an optional description for the filter and then click **OK**.

   After you save the private filter, it appears below the view you used to create it in the **Views** pane.

Modify or rename a private filter

You can change the name and description of a saved search filter or the conditions associated with the filter. To modify a private filter, complete the following steps.

1. In the **Views** pane, select the view associated with the filter and then select the appropriate filter.
2. In the **Search** box, modify the necessary components of the condition and then click **Save Filter**.
3. Optional. In the **Save Filter** dialog box, in the **Name** and **Description** boxes, update the name and description of the filter.
4. Click **OK**.

Delete a private filter

To delete a saved search filter, complete the following steps.

1. In the **Views** pane, select the view that contains the filter you want to delete and then select the appropriate filter.
2. Click the **Delete Filter** button.
3. In the confirmation dialog box, click **Yes** to confirm the deletion of the filter.

Add to workflow

You can add a document to the workflow environment. To add a document to workflow, complete the following steps.

1. From the views grid, select a document or open an item in the viewer.
2. Select **Add to Workflow** .
3. In the **Add to Workflow** dialog, complete the following steps.
    1. From the **Select a workflow process** list, select a workflow process.
    2. From the **Select a queue** list, select a queue.
    3. From the **Priority** list, select a priority.
    4. Select **Add** to add the document to workflow or **Cancel** to quit the action.

Open a document in workflow

You can open a document in the workflow environment. To open a document in workflow, complete the following steps.

Prerequisite The document must already be added to the workflow environment.

1. From the views grid, select a document or open an item in the viewer.
2. Select **Open in Workflow** .
3. In the **Open in Workflow** dialog, select a queue if the document is exists in more than one workflow queues.

Create a task

To create and assign a pointer, signature or document deficiency task, complete the following steps.

1. Open the document for which you want to create a task.
2. Select **Task** .
3. Select the **Task Type** and **Task Template**.

4. Select the **Users or Groups** box, then select the desired users or groups to assign the task to.
5. From the **Location** list select one of the following locations to place the task.
   - **Document**. Creates a task for a document.
   - **Page**. Creates a task for a page in a document with no visual representation.
   - **Page with an annotation**. Creates a task, along with a visual representation, for a page in a document.
6. In the **Start date** box, set the start date for the task.
7. In the **Due date** box, set the due date.
8. Set the **Expedite** toggle button to indicate if the task should be expedited.
9. Optional. **Comments** and **Instructions**enter text to provide further information for the task.
10. Click **OK**.
11. Optional. Drag the visual representation to the location you want on the document.

About forms

Forms are an optional component of Perceptive Content. Forms are available if your administrator configures them for your use. You administrator specifies which forms are available, including any workflow queues to which they are associated. Depending on your system configuration, you may use the following types of forms.

A form displayed as a stand-alone document or folder

When you open a document or folder, a form appears in the viewer. Depending on your system configuration, each field can map to a corresponding custom property. After you fill in the fields and save the form, the system can automatically populate the values for the corresponding custom properties.

A form displayed as supplemental information for a document or folder

This type of form allows you to capture additional data for your documents or folder. When you open a document or folder, such forms appear in the forms pane. You can select from the available forms and fill in the fields to provide additional information about a document or folder.

About presentation

A presentation represents a view of the form data based on the privileges defined by your administrator.

A form can have one or more presentations. Each presentation represents a different view of the form data. The first presentation of the form displays by default. You can select the presentation you want to view.

Save a stand-alone form

A stand-alone form appears in the viewer when you open a document or folder. To modify and save a form, complete the following steps.

1. Open the document or folder you want to modify.
2. Optional. If there are multiple presentations, from the drop-down list, select the required presentation.
3. Modify the information in the form.
4. Select **Save**.

Save a form as supplemental information

Forms that provide supplemental information associated with a document or folder appear in the forms pane of the viewer. To modify and save a form that displays supplemental information, complete the following steps.

1. Open the document or folder you want to modify.
2. To display the forms pane, select **Form**.
3. In the forms pane, from the drop-down list, select the form you want to modify.
4. Optional. If there are multiple presentations, from the drop-down list, select the required presentation.
5. Modify the information in the form.
6. Select **Save**.

View a stand-alone form

A stand-alone form appears in the viewer when you open a document or folder. To view a stand-alone form, complete the following steps.

1. Open the document or folder you want to view.
2. Optional. If the form has multiple presentations, from the drop-down list, select the presentation you want to view.

   Note: If the form has only one presentation, the viewer displays that presentation.

View a form as supplemental information

Forms that provide supplemental information associated with a document or folder appear in the forms pane of the viewer. To view a form that displays as supplemental information, complete the following steps.

1. Open the document or folder you want to view.
2. To display the forms pane, select **Form**.
3. In the forms pane, from the drop-down list, select the form you want to view.

4. Optional. If the form has multiple presentations, from the drop-down list, select the presentation you want to view.

   Note: If the form has only one presentation, the forms pane displays that presentation.

5. Optional. If you need more space to view the form, resize the forms pane.

Reset a form

Before you save a form, you can reset the form to display the last saved data of that form. To clear the data in a form and revert to the last saved data, complete the following steps.

1. In the forms pane, select ☰.
2. Select **Reset**.

Forms configuration properties

You can configure form properties in the `lesrdl-content-forms` section of the *config.json* file. The available properties are listed below.

loadByDefault

Specify whether the first form in the list displays by default when viewing the Forms pane. The default setting is false.

Configure forms pane to load by default

You can specify whether the first form in the list displays by default when viewing the Forms pane. You define the property in the `lesrdl-content-forms` section of the *config.json* file. To define the property, complete the following steps.

1. Go to *[drive:]\Program Files\Apache Software Foundation\Tomcat<version>\webapps\<subdirectory>*.
2. Open the *config.json* file using a text editor.
3. If necessary, add the `lesrdl-content-forms` section to the file.
4. In the `lesrdl-content-forms` section, add the `loadByDefault` property.
5. Under the property name, enter `true` or `false`.

   Example

   ```
   “lesrdl-content-forms”: {

   “loadByDefault”: true
   ```

6. Save the file.

About Document Viewer

The Document Viewer allows you to view all available documents by name, type, or custom properties. After selecting and opening a document, you can open and view its contents in the viewer by selecting specific items from the tree or by navigating through the document content views. Breadcrumbs are also available to help you easily understand where the current document stands in the hierarchy of the structure - allowing you to navigate between those items with one click.

Document Viewer file types

By default, Document Viewer uses File Conversion Service to render and display images that are not in audio format or specifically configured in the config.json configuration file. The following is a list of those file extensions.

Format	Extension	Description
ANSII Text	.TEXT .TXT	The viewer fetches the preview file from the server.
MPEG-1 Audio Layer 3	.MP3	The viewer displays the file in an audio player.
Waveform Audio File Format	.WAV	The viewer displays the file in an audio player. **Note:** WAV files may not play in Internet Explorer.
Adobe PDF	.PDF	If PDF is included under `noRenditionFileTypes` in the config.json configuration file, the viewer displays the file in a PDF plug-in or the browser’s default PDF viewer.

Note:

For more information on File Conversion Service and supported file formats, refer to the File Conversion Service Online Help.

Open an item in Document Viewer

To open an item in Document Viewer, complete the following steps.

From the views grid, complete one of the following procedures.

Viewer	Steps
Documents	1. Select a document by clicking anywhere in the views grid.
Folders	1. Select a folder. 2. Navigate to a document or select a document shortcut in a folder or sub-folder. **Note:** On a mobile device, select View Document to open the document in the Document Viewer.
Tasks	1. Select any task from the available task list. The document contained within the task opens in the Document Viewer.
Workflow	1. Open a workflow item. The document or page contained within a folder or sub-folder opens in the Document Viewer.

View document properties

Document properties define information that is specific to a document. A document can have document properties, custom properties, and page properties. To view the properties of a document, complete the following steps.

1. Open the document.
2. In the viewer, select **Show or hide properties** to show or hide the document, custom, and page properties.

> **Note:** You can edit the custom properties of any document based on the user privileges set by the administrator. The administrator defines the custom properties of a document.

Use zoom

You can zoom in or out of a page in any document with the exception of TXT and other file types, whose pages are not displayed in the viewer. You can view unsupported file formats such as DOC, EXCEL, PPT, and PDF, based on the Perceptive File Conversion Service specifications set by the administrator. To use zoom functionality in the viewer, complete the following steps.

1. Navigate to the page you want to view.
2. On the toolbar, perform any of the following actions.
   - To zoom out, drag the zoom slider to the left or select **Zoom Out** − .
   - To zoom in, drag the zoom slider to the right or select **Zoom In** + . On a mobile device, use the pinch zoom gesture on single pages, such as a JPEG file to zoom in and out. Pinch zoom gesture is not applicable to a page with multiple sub-pages.
   - To adjust the page to the width of the pane, select **Fit to Width**. On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Page Actions**, and **Fit to Width** when viewing on a mobile device.
   - To adjust the page to the height of the pane, select **Fit to Height** . On a mobile device, select the ellipsis, **Page Actions**, and **Fit to Height.**
   - To find optimal fit, select **Best Fit**.
   - To view the original size of the image, select **Original Size**. On a mobile device, select the ellipsis, **Page Actions**, and **Original Size**.
   - To use the lasso zoom feature, press CTRL and select the area you want to magnify. This feature magnifies the selected area of a page and enhances the image size to fit the screen.

> **Note:** If you reduce the size of the window so that the slider does not appear, **Move Down** allows you to select the zoom slider or an available size option.

Pick a date

Perceptive Experience allows you to pick dates, such as start and end dates, when performing tasks in any application. Besides using pointer control for selecting dates, you can also use keyboard controls to complete your action.

The table below lists the various keyboard controls you can use in a Windows operating system for Chrome, IE, and Firefox browsers.

> **Note:** Keyboard shortcuts are available only in desktop version.

Key command	Function
Page Up	Move to the previous month
Page Down	Move to the next month
Shift + Page Up	Move to the previous year
Shift + Page Down	Move to the next year
Shift/Command + Home	Open the date picker
Shift/Command + Left	Move to the previous day
Shift/Command + Right	Move to the next day
Shift/Command + Up	Move to the previous week
Shift/Command + Down	Move to the next week
Enter	Select the focused date
Shift/Command + End	Close the date picker
Escape	Close the date picker without selection

The table below lists the various keyboard controls you can use in a Mac operating system for the Safari browser.

Key command	Function
Fn + Up	Move to the previous month
Fn + Down	Move to the next month
Shift + Fn + Up	Move to the previous year
Shift + Fn + Down	Move to the next year
Shift + Fn + Left	Open the date picker
Shift + Left	Move to the previous day

Key command	Function
Shift + Right	Move to the next day
Shift + Up	Move to the previous week
Shift + Down	Move to the next week
Enter	Select the focused date
Shift + Fn + Right	Close the date picker and erase the date
Escape	Close the date picker without selection

View related documents

The viewer enables you to view related documents according to the relationship criteria defined in the Perceptive Content Management Console. Related documents are accessible in the Documents, Tasks, and Workflow applications. To view the related documents, complete the following steps.

1. In the viewer, select **Show or Hide Related Documents** .
2. In the **Relationship** list, select the relationship you want to view.

   Note: In the Relationship view pane, the list of related documents as per the selected relationship appears.

3. Select any related document from the list.

   Note: You can view the related documents as per the relationship based on the user privileges set by the administrator.

Add or edit a note

To add or edit a note for an item, complete the following steps.

1. Open the item.
2. In the viewer, select **Show or hide properties**.
3. In the **Document Properties** pane, in the **Notes** box, type the note text.
4. To ensure the note is saved to the item, select **Save**.

   Note: On a mobile device, some functions such as **Save** are grouped under an ellipsis .

Add pages

The viewer enables you to add pages to an existing document. To add pages, complete the following steps.

1. Navigate to the document where you want to add pages.
2. Select **Add Page**.

   Note: Add Page is available under an ellipsis in the pages screen if you view the app on a mobile device.

3. In the list, select **Add after Page** if you want to add pages after the selected page. Select **Add before Page** if you want to add pages before the selected page.
4. Select the capture source and then select **Done**.

   New pages are added to the existing document either before or after the selected page.

Replace pages

The viewer enables you to replace pages in an existing document. To replace pages, complete the following steps.

1. Navigate to the document where you want to replace pages.
2. Select the page thumbnail you want to replace.
3. Select **Add Page**.

   Note: Add Page is available under an ellipsis in the pages screen if you view the app on a mobile device.

4. In the list, select **Replace Page**.

   The selected page is replaced with a new page.

Rotate a page

You can rotate common image formats such as BMP, GIF, JPG, PNG, and TIFF. You can rotate other file types if individual browsers support them. For a multiple page TIFF document, you can only rotate the current page. To rotate a page, in the viewer, complete the following steps.

1. Perform any of the following actions.
   - To rotate the page 90 degrees to the right, select **Rotate Right 90°**.
   - To rotate the page 90 degrees to the left, select **Rotate Left 90°**.
2. Optional. To save the document, select **Save**.

Note: You can save page rotations only in the TIFF format. On a mobile device, some functions such as **Save**, **Rotate Right 90°**, and **Rotate Left 90°** are grouped under an ellipsis .

Reorder a page

You can reorder the pages in the thumbnails pane of the viewer. To reorder a page, complete the following steps.

1. In the thumbnails pane, select the page you want to move. You can select multiple pages.
2. Drag and drop the selected page to the new location.

   Note: If you select multiple pages, the pages are placed in the order you select them.

3. To save the changes you made to the document, select **Save** .

Delete a page

You can delete one or more pages from the viewer. To delete a page, complete the following steps.

1. In the thumbnails pane, select the page you want to delete. You can select multiple pages.
2. Select **Delete** .
3. To save the changes you made to the document, select **Save** .

Apply a retention hold

In the Documents App, you can apply a retention hold to one or more documents, based on the privileges the administrator configures for you. To apply a retention hold to a document, complete the following steps.

Prerequisite

The administrator must register the RetentionHoldsModule in the *config.json* file for the Apply Retention Hold button to appear.

1. To display the list of available documents, select a document view.
2. To apply a hold to a document, in the displayed list, select the check box on the document row.
   You can apply holds to more than one document by selecting multiple check boxes.
3. Select **Apply Retention Hold** .
   In the **Apply Retention Hold** dialog box, a list of available holds displays.
4. Select the **Not Applied** or **Partially Applied** toggle button for all retention holds you want to apply to the document.
   Partially Applied indicates that the hold is applied to some, but not all, of the selected documents.

5. Click **OK**.
6. To save the changes, click **Yes**.

Edit custom or composite property data

To change a custom property or composite property value for an item, complete the following steps.

1. Open the item.
2. Select **Information** to show or hide the properties.
3. In the **Properties** pane under **Custom Properties**, type or select a value in the property.
4. Optional. To add a new composite property row or set, select **Add**.
5. Optional. To remove a composite property row or set, select **Remove**.
6. Optional. To reorder the listing of composite properties you can drag and drop the row or set.
7. To ensure the values are saved to the item, select **Save**.

> **Note:** On a mobile device, some functions such as **Save** are grouped under an ellipsis .

About annotations

An annotation is a graphic that you can add anywhere on an image in Perceptive Experience to show markups or comments without affecting the original image.

For example, you can express the need for review of content by highlighting areas of an image or adding a sticky note to that image. In Perceptive Experience you can add annotations on BMP, GIF, JPG, PNG and TIFF file types.

Each annotation requires an annotation template that is created and customized for any supported annotation type.

> Your administrator can create a Sound Approval template based upon the sticky note type with the text: Approval by sound technicians. Users within the Sound and Lighting group can view the sticky note annotation and add text that is kept in the note history.

Contact your administrator if you need new annotation templates.

Security options are also available based on the annotation template. Your administrator can set the template security so that only users in a particular group can use, modify, or delete annotations created using a template.

> Your administrator can set the template security so that only users in the Sound and Lighting group can use, modify, or delete annotations created using that Sound Approval template. If your administrator does not grant users in the Human Resources access to view sticky notes created using that Sound Approval sticky note template, those users cannot view, modify, or delete this annotation.

Annotation Template Privileges

The following privileges are available for annotation templates and annotations created with templates. An administrator assigns privileges for users and groups within Perceptive Content.

Create

With this privilege, a user can create a new annotation using this template.

Delete

With this privilege and the **Annotation Template > View** privilege, a user can delete annotation instances created using this template.

Hide

With this privilege and the **Annotation Template > View** privilege, a user can hide annotation instances created using this template.

Modify

With this privilege and the **Annotation Template > View** privilege, a user can modify annotation instances created using this template.

- This privilege and the **Annotation Template > View** privilege are required to edit font properties for text and text stamp annotations created from a template that does not contain default text, but are not required to edit the content of the text or text stamp annotation.

View

With this privilege a user can view annotation instances created using this annotation template.

Launch a URL annotation

To launch a URL annotation and view the destination web page complete the following steps.

1. Select the URL annotation text.

   The action menu appears.
2. Select **Link**.
3. Optional. On a desktop computer press `Ctrl` and select the URL annotation to launch the URL.

Code variables for annotation templates

You can insert the following predetermined codes in a stamp or text annotation to represent current time, dates, and user attributes. For example, the default code "% m/%d/%y" displays the current date (month/day/year).

The following codes are available:

Code	Description	Example
%%	Percent sign	%
%a	Abbreviated weekday name	FRI
%A	Full weekday name	FRIDAY
%b	Abbreviated month name	OCT
%B	Full month name	OCTOBER
%c	Date and time representation appropriate for locale	10/18/01 10:15:45
%d	Day of month as decimal number (01-31)	18
%H	Hour in 24-hour format (00-23)	22
%I	Hour in 12-hour format (01-12)	10
%j	Day of year as decimal number (001-366)	245
%M	Minute as decimal number (00-59)	02
%m	Month as decimal number (00-12)	05
%m/%d/%y	Mm/ dd/ yy	10/18/01
%m/%d/%Y	Mm/ dd/ yyyy	10/18/2001
%p	Current locales AM/PM indicator for 12-hour clock	AM

Code	Description	Example
%S	Second as decimal number (00-59)	45
%U	Week of year as decimal number, with Sunday as first date of week (00-51)	19
%W	Week of year as decimal number, with Monday as first date of week (00-51)	20
%w	Weekday as decimal number (0-6; Sunday is 0)	5
%x	Date representation for current locale	10/18/01
%X	Time representation for current locale	10:15:45
%Y	Year with century, as decimal number	2001
%y	Year without century, as decimal number (00-99)	01
%z or %Z	Time-zone name; no characters if time zone is unknown	CENTRAL STANDARD TIME
<user.e>	User e-mail	Bwhite@conacm.xyz
<user.eid>	An identifier that logs the user in to a separate system, such as a business application	bwhite77
<user.f>	User fax number	999-000-0000
<user.fn>	User first name	bob
<user.l>	User location	san rafael
<user.ln>	User last name	white

Code	Description	Example
<user.m>	User mobile number	999-000-0000
<user.o>	User organization	consolidated acme
<user.ou>	User organizational unit	budgeting & Planning
<user.p>	User prefix	Dr.
<user.pa>	User pager number	999-000-0000
<user.ph>	User phone number	999-000-0000
<user.s>	User suffix	esq.
<user.t>	User title	vice president Planning
<user>	User name	Bob White

Add an arrow annotation

To add an arrow annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer select **Annotation** and then select **Create Annotation**.
2. Select the area of the image where you want to add the arrow.
3. From the **Annotation Type** list, select **Arrow**.
4. From the **Annotation Template** list, select an arrow annotation template.
5. Select **Add** and apply the annotation.
6. To ensure the annotation is saved to the item, select **Save**.

Add a check annotation

To add a check mark annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer select **Annotation** and then select **Create Annotation**.
2. Select the area of the item image where you want to add the check.

3. From the **Annotation Type** list, select **Check**.
4. From the **Annotation Template** list, select a check annotation template.
5. Select **Add** and apply the annotation.
6. To ensure the annotation is saved to the item, select **Save**.

Add a highlight annotation

The highlight annotation allows you to highlight an area on an item image. To add a highlight annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer, select **Annotation** and then select **Create Annotation**.
2. Select the area of the item image where you want to add the highlight.
3. From the **Annotation Type** list, select **Highlight**.
4. From the **Annotation Template** list, select a highlight annotation template.
5. Select **Add** and apply the annotation.
6. To ensure the annotation is saved to the item, select **Save**.

Add a line annotation

To add a line annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer, select **Annotation** and then select **Create Annotation**.
2. Select the area of the image where you want to add the line.
3. From the **Annotation Type** list, select **Line**.
4. From the **Annotation Template** list, select a line annotation template.
5. Select **Add** and apply the annotation.
6. To ensure the annotation is saved to the item, select **Save**.

Add an oval annotation

To add an oval annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer, select **Annotation** and then **Create Annotation**.

2. Select the area of the image where you want to add the oval.
3. From the **Annotation Type** list, select **Oval**.
4. From the **Annotation Template** list, select an oval annotation template.
5. Select **Add** and apply the annotation.
6. To ensure the annotation is saved to the item, select **Save**.

Add a pen annotation

To add a pen annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer, select **Annotation** and then **Create Annotation**.
2. Select the area of the image where you want to add the annotation.
3. From the **Annotation Type** list, select **Pen**.
4. Apply the annotation to the image.
5. When you have completed applying the annotation Select **Add**.
6. To ensure the annotation is saved to the item, select **Save**.

Add a picture stamp annotation

The picture stamp annotation allows you to place a predefined image on items. To add a picture stamp annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated stamp annotation template.

1. In the viewer, select **Annotation** and then **Create Annotation**.
2. Select the area of the image where you want to add the picture stamp.
3. From the **Annotation Type** list, select **Picture Stamp**.
4. From the **Annotation Template** list, select a picture stamp annotation template.
5. Select **Add**.
6. To ensure the annotation is saved to the item, **Save**.

Add a rectangle annotation

The rectangle annotation allows you to place a rectangle on an item image. The rectangle image can appear hollow or filled, depending on the appearance defined in the annotation template. To add a rectangle annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer, select **Annotation** and then **Create Annotation**.
2. Select the area of the image where you want to add the rectangle annotation.
3. From the **Annotation Type** list, select **Rectangle**.
4. From the **Annotation Template** list, select a rectangle annotation template.
5. Select **Add** and apply the annotation.

   Note: When you view documents with solid rectangle annotations applied over content, the hidden content can be intermittently visible while the system loads the image. The rectangle annotation is not intended as a redaction tool. Use the redaction annotation type in Perceptive Content to ensure permanent masking of sensitive, private, or confidential information.

6. To ensure the annotation is saved to the item, select **Save**.

Add a text stamp annotation

The text stamp annotation allows you to place a stamp with predefined or custom messages on item images. To add a stamp annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated stamp annotation template.

1. In the viewer, select **Annotation** and then **Create Annotation**.
2. Select the area of the image where you want to add the text stamp.
3. From the **Annotation Type** list, select **Text Stamp**.
4. From the **Annotation Template** list, select a text stamp annotation template.
5. Select **Add**.
6. To ensure the annotation is saved to the item, **Save**.

Add a sticky note annotation

The sticky note annotation lets you add small notes to images. To add and populate a sticky note annotation, complete the following steps. After you populate sticky note text, you cannot change the text, but you can append additional information to the same sticky note annotation.

Prerequisite This procedure requires that you have the Create privilege for the associated annotation template.

1. In the viewer, select **Annotation** and then **Create Annotation**.
2. Select the area of the image where you want to add the annotation.
3. From the **Annotation Type** list, select **Sticky Note**.
4. From the **Annotation Template** list, select a sticky note template.
5. Select **Add** to accept placement of the annotation.
6. In the **Sticky Note** dialog box, type your text and select **Add**.

   Note: If you do not add any text during creation of the sticky note annotation, the annotation representation is removed from the image.

7. Select **Close**.
8. To ensure the annotation is saved to the item, select **Save**.

Add a text annotation

The text annotation allows you to place text on item images. To add a text annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer select **Annotation** and then **Create Annotation**.
2. Select the area of the image where you want to add the text.
3. From the **Annotation Type** list, select **Text**.
4. From the **Annotation Template** list, select a text annotation template.

   Note: You cannot apply text annotation templates that contain predetermined codes; these templates do not appear in the annotation template list.

5. Select **Add** and enter the annotation text.
6. Define the font appearance properties and select **OK**.
7. To ensure the annotation is saved to the item, select **Save**.

Add a URL annotation

The URL annotation allows you to place a link to a URL address on item images. To add a URL annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer select **Annotation** and then **Create Annotation**.
2. Select the area of the image where you want to add the annotation.
3. From the **Annotation Type** list, select **URL**.
4. From the **Annotation Template** list, select a URL annotation template.
5. Select **Add**.
6. If you are prompted to do so, in the **URL** dialog box, complete the following substeps.
    1. In the **Address** box, type the web address.
    2. In the **Text To Display** box, type the text you want to appear on the image.
    3. Select the font, size, and color of the text to display.
    4. Click **OK**.
7. To ensure the annotation is saved to the item, select **Save**.

Add comment to a sticky note annotation

Sticky note text cannot be changed after the initial annotation creation. You can add text to a sticky note and the text is saved in the note history. To append text to a sticky note annotation, complete the following steps.

1. Select the sticky note annotation to which you want to add text.
2. Select **Edit**.
3. In the **Add Comment** box, type your text and select **Add**.
4. Select **Close**.
5. Select **Save** to ensure the annotation is saved to the item.

Edit an arrow annotation

To edit an arrow annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Select **Edit**.
3. Make any necessary edits to the line weight and color properties and select **OK**.
4. To ensure the annotation is saved to the item, select **Save**.

Edit a check annotation

To edit a check mark annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Select **Edit**.
3. Make any necessary edits to the line color properties and select **OK**.
4. To ensure the annotation is saved to the item, select **Save**.

Edit a line annotation

To edit a line annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Select **Edit**.
3. Make any necessary edits to the line weight and line color properties and select **OK**.
4. To ensure the annotation is saved to the item, select **Save**.

Edit an oval annotation

To edit an oval annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Select **Edit**.
3. Make any necessary edits to the line weight, line color, and fill color properties and select **OK**.

   Note: When you view documents with solid oval annotations applied over content, the hidden content can be intermittently visible while the system loads the image. The oval annotation is not intended as a redaction tool. Use the redaction annotation type inPerceptive Content to ensure permanent masking of sensitive, private, or confidential information.

4. To ensure the annotation is saved to the item, select **Save**.

Edit a pen annotation

To edit a pen annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Select **Edit**.

3. Make any necessary edits to the line weight and line color properties and select **OK**.
4. To ensure the annotation is saved to the item, select **Save**.

Edit a rectangle annotation

To edit a rectangle annotation, complete the following steps.

1. Select the rectangle annotation you want to edit.
2. Select **Edit**.
3. Make any necessary edits to the rectangle line weight, line color, and fill color properties and select **OK**.

   Note: When you view documents with solid rectangle annotations applied over content, the hidden content can be intermittently visible while the system loads the image. The rectangle annotation is not intended as a redaction tool. Use the redaction annotation type in Perceptive Content to ensure permanent masking of sensitive, private, or confidential information.

4. To ensure the annotation is saved to the item, select **Save**.

Edit a text or text stamp annotation

To edit a text or text stamp annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Select **Edit**.
3. Make any necessary edits to the text and font appearance and select **OK**.
4. To ensure the annotation is saved to the item, select **Save**.

Edit a URL annotation

To edit a URL annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Select **Edit**.
3. Make any necessary edits to the address, text to display, and text font appearance.
4. Select **OK**.
5. To ensure the annotation is saved to the item, select **Save**.

Hide annotation

To hide or show an annotation, you must complete the following steps. By default, a document displays with all the annotations. If you cannot view the annotations, you must select the Show Annotation option.

Prerequisite You must have the Annotation Template > Hide privilege for the associated annotation template.

- To hide an annotation, in the viewer, in the Annotation list, select Hide Annotation. The document displays without annotations.

Resize an annotation

To resize an annotation, complete the following steps.

You cannot resize the text, text stamp, or sticky note annotation.

1. Select the annotation you want to resize.
   1. On a mobile device, select the annotation and then **Resize**.
2. Drag the edges or corners to resize the annotation to the desired size.
3. To ensure the annotation is resized, select **Save Document**.

Select a highlight annotation color

To select a new highlight annotation color, complete the following steps.

Prerequisite You must have the Annotation Template > View privilege and the Annotation Template > Modify privilege for the associated annotation template.

1. Select a highlight annotation.
2. Select **Edit**.
3. Under **Fill Color**, select the color indicator.
4. In the **Color** dialog box, select a color.
5. To ensure the annotation color is saved, select **Save Document**.

Shortcut keys for highlight annotations

To modify a highlight annotation, you must have the Annotation Template > View privilege and the Annotation Template > Modify privilege for the associated annotation template. You can modify a selected highlight annotation with the following shortcut keys.

Shortcut	Description
Arrow keys	Move in the desired direction
SHIFT + Arrow keys	Resize in the desired direction

Move an annotation

To move an annotation, complete the following steps.

Prerequisite You must have the Annotation Template > View privilege and the Annotation Template > Modify privilege for the associated annotation template.

1. Select the annotation, and drag it to a new location.
2. To ensure the annotation is moved, select **Save**.

Delete an annotation

To delete an annotation, complete the following steps.

Prerequisite You must have the Annotation Template > View privilege and the Annotation Template > Delete privilege for the associated annotation template.

1. Select an annotation.
2. Select **Delete**.
3. To ensure the annotation is deleted from the item, select **Save**.

View annotation properties

To view the properties of an annotation, complete the following steps.

1. Select an annotation.
2. Select **Information**.

Add to version control

You can add a document to version control. Version control helps you track your documents over time and prevents multiple users from editing the same document at the same time. To add a document to version control, complete the following steps.

1. Open a document in the viewer.

> **Note:** When selecting a document from the views grid in the Documents and Workflow apps, select the check box that appears next to the document name when you move the pointer over a row.

2. On a desktop, from the toolbar, select **Version Control** and then select **Add to Version Control** . On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Additional Actions**, **Version Control**, and **Add to Version Control**.

> **Note:** This option is not available if the document is already added to version control.

3. In the **Add to Version Control** box, in the **Comments** section, enter your comments and select **OK**.
4. Optional. Select the **Retain previous version history** check box if you want to retain the document version history.

   The document is added and checked in to version control.

Check out a document from version control

You can check out a document from version control for editing. Checking out a document prevents multiple users from editing the same document at the same time. To check out a document from version control, complete the following steps.

Prerequisite The document should be checked in to version control.

1. Open a document in the viewer.

> **Note:** When selecting a document from the views grid in the Documents, Folders, and Workflow apps, select the check box that appears next to the document name when you move the pointer over a row.

2. From the toolbar, select **Version Control** and then select **Check Out from Version Control** .

   On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Additional Actions**, **Version Control**, and **Check Out from Version Control**.
3. In the **Check Out** box, in the **Comments** section, enter your comments and select **OK**.

Check in a document to version control

You can check in a document to version control after you complete editing the document. Checking in a document adds the changes you make to a document and replaces the previous version. To check in a document to version control, complete the following steps.

Prerequisite The same user must have checked out the document from version control.

1. Open a document in the viewer.

   Note: When selecting a document from the views grid in the Documents and Workflow apps, select the check box that appears next to the document name when you move the pointer over a row.

2. From the toolbar, select **Version Control** and then select **Check In to Version Control**. On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Additional Actions**, **Version Control**, and **Check In to Version Control**.

   Note: You might be prompted to save any unsaved changes you made to the document.

3. In the **Check In** box, in the **Comments** section, enter your comments and select **OK**.

Undo checkout from version control

If a document is checked out from version control, you can undo the check out and reinstate the document to its previous version. However, use your discretion when selecting this option as you might lose the changes to the document made by another user. To undo check out from version control, complete the following steps.

Prerequisite The document must be checked out.

1. Open a document in the viewer.

   Note: When selecting a document from the views grid in the Documents, Folders, or Workflow apps, select the check box that appears next to the document name when you move the pointer over a row.

2. From the toolbar, select **Version Control** and then select **Undo Checkout from Version Control** . On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Additional Actions**, **Version Control**, and **Undo Checkout from Version Control**.
3. Select **OK.**

View version control history

The version history of a document contains version number, check in date, user name, privacy status, and comments associated with different versions of a document. To see the version history of a document, complete the following steps.

Prerequisite The document must be in version control.

1. Open a document in the viewer.

   Note: When selecting a document from the views grid in the Documents, Folders, or Workflow apps, select the check box that appears next to the document name when you move the pointer over a row.

2. From the toolbar, select **Version Control** and then select **View Version Control History** . On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Additional Actions**, **Version Control**, and **View Version Control History**.

Remove from version control

To remove a document from version control, complete the following steps.

Prerequisite The document must be added to version control and must not be checked out.

1. Open a document in the viewer.

   Note: When selecting a document from the views grid that fulfill the prerequisite, select the check box that appears next to the document name when you move the pointer over a row.

2. From the toolbar, select **Version Control** and then select **Remove from Version Control** . On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Additional Actions**, **Version Control**, and **Remove from Version Control**.
3. Select **OK**.
4. Optional. Select the **Retain version history** check box if you want to retain the document version history.

Download a document

To download a document in its original format, complete the following steps.

1. Open a document in the viewer.

   Note: When selecting a document from the views grid in the Documents, Folders, and Workflow apps, select the check box that appears next to the document name when you move the pointer over a row.

2. On a desktop, from the toolbar, select **Download Document** to download a document in its original format. On a mobile device, some functions are grouped under an ellipsis. Select the ellipsis, **Output Actions**, and **Download Document**.

   Note: Download Document is available only on mobile browsers and not in the mobile app. Documents are downloaded as a ZIP file and follow a documentID-pageindex naming convention. A ZIP file is created when you download multiple documents.

Download a page

To download a page in its original format from the viewer, complete the following steps.

1. Navigate to the page you want to download.
2. Select **Download Page** .

   Note: You can download only the current page. The file name of the page downloaded is its page ID. You cannot download a page when you view the app on a mobile device.

Export to PDF

To convert a document to PDF, complete the following steps.

1. Open a document in the viewer.

   Note: When selecting a document from the views grid in the Documents, Folders, or Workflow app, select the check box that appears next to the document name when you move the pointer over a row.

2. From the toolbar, select **Export to PDF** . On a mobile device, some functions are grouped under an ellipsis . Select the ellipsis, **Output Actions**, and **Export to PDF**.

Send an email

You can send folder and document links through email. The administrator can configure the email recipients and the email body. To send folder or document links through email, complete the following steps.

1. Open an item in the viewer.

   Note: When selecting an item from the views grid in the Documents, Folders, or Workflow app, select the check box that appears next to the item name when you move the pointer over a row.

2. From the toolbar, select **Send Email** . On a mobile device, some functions are grouped under an

ellipsis ⋮ . Select the ellipsis, **Output Actions**, and **Send Email**.

A composed email with the relevant items' links opens.

Upload a document

To upload a document to ShareBase and then share it with other users, complete the following steps.

1. Open a document in the viewer.

   > **Note:** When selecting a document from the views grid in the Documents, Folders, and Workflow apps, select the check box that appears next to the document name when you move the pointer over a row.

2. From the toolbar, select **Send to ShareBase** to upload the document.
3. In the **Create Secure Share** dialog box, complete the following sub-steps.
   1. Under **Recipients**, type the email addresses of the users you want to share the item.
   2. Select **Restrict recipients from Downloading**if you do not want users downloading the item.
   3. Click **MORE OPTIONS**.
   4. Under Message to Recipients, type any additional information you want the recipients to have.
   5. Under Access expires after, select the amount of time you want the recipients to have access to the item.
   6. Click **Share**.

Print a document

To print a document, complete the following steps.

1. Open a document in the viewer or select a document from the views grid.

   > **Note:** You can select multiple documents except when you view the app on a mobile device.

2. Select **Print Document** from the toolbar. On a mobile device, some functions are grouped under an ellipsis ⋮ . Select the ellipsis, **Output Actions**, and **Print Document** when viewing on a mobile device.
3. In the **Printing Preferences** box, select the following printing options as required.
   1. Optional. Clear the **Enable annotations** check box to remove the annotations in the print output.

      > **Note:** This option is selected by default.

   2. Optional. Clear the **Include cover page** check box to exclude the document properties as the cover page of the print output.

      > **Note:** This option is selected by default.

   3. Optional. Select the **Page size** of the print output.

      Note: The default page size is `Letter`.

   4. Optional. Specify the maximum image width in pixels.
   5. Optional. Specify the maximum image height in pixels.
4. Alternatively, select **Convert to PDF** to convert the document to a single PDF file to print.

   Note: Selecting this option will disable other printing preferences.

5. Select **OK**.

   Note: You can print the document with the default settings or change the print settings as required on the Print tab. If multiple documents are printed using **Convert to PDF**, the files are downloaded in ZIP format.