Perceptive Content

Manage Workflow User Guide

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Manage workflow

Create a workflow process

A workflow process contains a series of tasks and rules reflecting the review path a workflow item must take in order to meet the sign off and approval requirements of your work group. To create a workflow process, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, click **New**.
4. In the **Add Process** dialog box, type a name and an optional description.

   The description appears in the ToolTip for the process.
5. Click **OK**.

Next Create queues, routes, and rules to define the components in your new workflow process in Workflow Designer.

Modify a workflow process

To modify a workflow process, complete the following steps.

Prerequisite All other users must close the process.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, select a process and then click **Modify**.
4. When you are finished modifying your workflow process, close **Workflow Designer**.

Rename a workflow process

To change the name of a workflow process, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **Workflow** tab, select a process and then click **Rename**.
4. Enter a new name for your process.

Delete a workflow process

To delete a workflow process and remove all workflow items in its associated queues from workflow, complete the following steps.

Prerequisite All users must close the process before it can be deleted.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. On the **Workflow** tab, select a process and then click **Delete**.
4. In the **Delete Process** confirmation box, to remove items from the queues in this process and then delete the process, select the **Remove all items from workflow and then delete this process** check box and then click **Yes**.

Test an alarm

To test an email, icon, or audible alarm that you created in Workflow Designer, complete the following steps.

1. On the **Perceptive Content** toolbar, click the **Workflow** arrow, point to your process, and then select the queue where you added the alarm.
2. Verify that there are some workflow items in the queue that meet the conditions you defined in your rule, and then complete one of the following actions.

Situation	Steps
Test an email alarm	1. Check your email account. You should receive an email with a Subject field of the name you gave to the alarm and a body text message such as the following: There are 5 email items in the email queue. 2. Select all the workflow items, right-click, point to **Workflow**, and then click **Route Forward**. 3. In the **Route Forward** dialog box, select a queue and then click **Route**. This clears the alarm state for the queue.
Test an audible alarm	• Verify the sounds plays if the alarm condition is true.
Test an icon alarm	• Verify the Perceptive Content icon flashes if the alarm condition is true.

Run a script upon opening a workflow item

You can create a VBScript that executes each time a workflow item is open. This is a global script that executes for all workflow queues in all workflow processes that exist on the ImageNow Server you are running. To run a script upon opening a workflow item, complete the following steps.

1. Open a workflow item.
2. In **ImageNowViewer**, click **Workflow > Page Load Script**.
3. In the **Workflow Page Load Script** dialog box, type in your VBScript, and then click **OK**.
4. Close the item, and then in the confirmation box, click **Yes**.

Share a workflow process with another department

You can enable a workflow process to share among multiple departments. To share a workflow process with other departments, complete the following steps.

Important: You should cautiously consider the impact of sharing a workflow process, and have a calculated design and implementation plan in place. Once you share a workflow process, you cannot unshare or delete it from the system.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, select the workflow process you want to share, and then click **Share**.
4. In the **Share <process name>** dialog box, select the departments you want to share the workflow process with, and then click **OK**.

Share a workflow rule with another department

To share a workflow routing or alarm rule with another department, complete the following steps.

Important: You should cautiously consider the impact of sharing a workflow rule, and have a calculated design and implementation plan in place. Once you share a workflow rule, you cannot unshare or delete it from the system.

1. In **Workflow Designer**, in the **Tasks** pane, click **Actions**.
2. Click **Manage Actions**.
3. In the **Action Settings** dialog box, on the **Rules** tab, select the rule that you want to share and click **Share**.
4. In the **Share <*Rule*>** dialog box, check the boxes of the departments you want to share the reason list with and then click **OK**.
5. In the **Share <*Rule*>** confirmation dialog box, click **OK**.
6. In the **Actions Settings** dialog box, click **OK**.

Manage reasons

What is a reason list?

Reason lists provide users the ability to indicate why they are putting a workflow item on hold.

When putting an item on hold in a workflow queue, users are prompted to select a reason from a reason list. As manager of a workflow process, you control the contents of every On Hold reason list. You can define a reason list as part of a workflow queue's properties.

Add a reason list for putting an item on hold

When putting an item on hold in a workflow queue, the user must select the reason for the change from a reason list. To create and edit a reason list, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Create a hold reason list in Perceptive Content	1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list. 2. In the left pane, click **Workflow**. 3. On the **Reason Lists** tab, click **New**.
Create a hold reason list in **Workflow Designer**	1. In **Workflow Designer**, double-click the queue. 2. In the **Queue Properties** dialog box, click **Reasons > New**.

2. In the **Reason List** dialog box, type a name and optional description for the reason list and then leave the **Is active** check box selected.
3. On the **List Members** tab, add, remove, and rearrange reasons as necessary.
4. Click **OK**.

Modify or rename a reason list for putting an item on hold

Reason lists are created to provide users with predefined reasons for putting workflow items on hold. To modify a reason list for putting an item on hold, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Modify a hold reason list in **Management Console**	1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list. 2. In the left pane, click **Workflow**. 3. Click the **Reason Lists** tab. 4. Click the list you want to change and then click **Modify**.
Modify a hold reason list in **Workflow Designer**	1. Double-click the queue. 2. In the **Queue Properties** dialog box, click **Reasons** in the left pane. 3. In the **Select a reason list to use when placing items On Hold in this queue** list, click the list you want to change and then click **Modify**.

2. In the **Reason List** dialog box, on the **General** tab, change the name and description if necessary.

   Note: You cannot change the name of a system list (Apply Signature, Void/Expire Digital ID, or Void Signature).

3. To make the reason list inactive, clear the **Is active** check box.

   Note: You cannot disable a system list.

4. In the **List Members** tab, add, remove, or rearrange reasons.
5. Click **OK**.

Share a workflow reason list with another department

You can enable a workflow reason list to share among multiple departments. To share a workflow reason list with other departments, complete the following steps.

Important: You should cautiously consider the impact of sharing a workflow reason list, and have a calculated design and implementation plan in place. Once you share a workflow reason list, you cannot unshare or delete it from the system.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. In the right pane, in the **Reason Lists** tab, select the workflow reason list you want to share and then click **Share**.

4. In the **Share *<Reason list name>*** dialog box, check the boxes of the departments with which you want to share the workflow reason list and then click **OK**.

Delete a reason list for putting an item on hold

To delete a reason list for putting an item on hold, complete the following steps.

You cannot remove a system list (Apply Signature, Void/Expire Digital ID, or Void Signature).

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Workflow**.
3. Click the **Reason Lists** tab.
4. Click the reason list you want to delete and then click **Delete**.

Manage tasks

About administering tasks

To administer tasks in Management Console, you create task templates for your users.

You can assign one or more users a task on a particular document or folder. You choose the task type that best matches the work that needs to be done. The three available task types are described below.

- `Document deficiency`. The document deficiency task type is used to indicate when a document is missing or is incomplete.
- `Pointer`. The pointer task type is used to draw attention to a specific document or folder location for further action.
- `Signature required on document`. The signature required on document task type is used when a user needs to digitally sign a document. To use this task type, a Document Management Suite license is required.

Task template security allows you to determine the roles your users have when working with tasks. You can also manage reasons and reason lists for the task templates.

Signatures required on document tasks created in Management Console are available for processing in Interact Desktop. In Interact Desktop, you can Complete, Return, or Skip a Signature required on a document task.

Troubleshoot tasks

If you experience issues using tasks, you can try any of the following possible resolutions.

I don t see a document task in Folder Viewer

Cause	Resolution
If you create a document task and then add that document to a folder, the document task does not appear in the Tasks grid in Folder Viewer.	Only document tasks you create in Folder Viewer appear in the Tasks grid in Folder Viewer.

Not all location options are available when I create a task

Cause	Resolution
The task template you are using to create a task does not have the Task location set in the Components area of the task template.	Use a different task template or select an available location option.
When you are in Folder Viewer and do not have a document open in ImageNowViewer - Folder, the only Location option available is Folder.	To create a document or page task in Folder Viewer, the associated viewer, ImageNowViewer- Folder must be open.
When in ImageNowViewer, Folder is unavailable because you are not in a folder.	Folder is only available when you create a task in Folder Viewer.

Task Templates

Create a document deficiency task template overview

Document deficiency task templates define the structure of document deficiency tasks, which indicate when a document is missing or incomplete. To create and define a document deficiency task template, complete the following sequence of procedures.

1. Create a document deficiency task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task template actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Create a signature required task template

To create a new signature required task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Signature required on document**.
4. Click **New**.

   The **Signature Required on Document Task** dialog box appears.

Next You must define the task template s general properties, components, actions, assignments, reason lists, due date, and security.

Create a pointer task template overview

To create a pointer task template, complete the following sequence of procedures.

1. Create a pointer task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task templace actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Result The Incomplete Template dialog box appears if you do not define assignments, reason lists, or if you opted to send the folder to workflow when the task location is a document in a folder box, but did not select a queue. You can save this template in any of these states, but the template is set to inactive.

Create a pointer task template

To create a new pointer task template in Management Console, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click **Pointer**.
4. Click **New**.
5. In the **Pointer Task** dialog box, define the task template.

Next Define the task template properties, components, actions, assignments, reasons, due dates, and security.

Define task template properties

To define the general properties of a pointer, document deficiency, or signature task template, complete the following steps.

Prerequisite Before completing this procedure, you must create the task template.

1. Open the task template.
2. In the **<*Task Type*>Task** dialog box, in the left pane, click **Properties**.
3. In the right pane, under **General**, in the **Name** box, type a name for your task template.
4. Optional. In the **Description** box, type a template description.
5. Under **Options**, verify that the **Is active** check box is selected to make the task template available to task creators assigning tasks from the Tasks toolbar.
6. Optional. Select the **Delete completed task** check box to automatically and permanently delete a task and its related history after the task is completed.

   If a task creator assigns a task series and this option is selected, Perceptive Content does not delete the tasks in that series until the series is complete. After a series is complete, that entire series is removed.
7. Click **OK**.

Next Define the task template components, actions, assignments, reasons, due dates, and security.

Define task template components

To define the components of a pointer, document deficiency, or signature task template, complete the following steps.

Prerequisite Before completing this procedure, you must create the task template and define its general properties.

1. Open the task template.
2. In the **<*Task Type*> Task** dialog box, in the left pane, click **Components**.
3. In the right pane, under **General**, in the **Task instructions** box, type the instructions you want your task assignees to see.
4. Optional. Select the **Modifiable during task creation** check box to allow a task creator to modify the instructions on the **Options** tab in the **New Task** dialog box.
5. In the **Task location** section, select one or more of the following locations to determine where tasks created with this template can be assigned:
   - **Folder** - Create a task for a folder.
   - **Document** - Create a task for a document.
   - **Page without a visual representation** - Create a task for a page in a document with no visual representation.
   - **Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.

   > **Note:** You must select at least one task location. Not all options are available for Signature Required

task templates.

6. In the **Completion method** box, select one of the following methods:
   - **Manual** - After task assignees complete a task, the task status is Complete.
   - **Complete pending review** - After task assignees complete a task, the tasks with this status go to a reviewer.

   If you are defining components for a Signature Required task template, the task completion method is automatic with a valid digital signature.
7. Optional. Under **Workflow Assignment**, do the following substeps:
   1. In the **Send to queue list**, select the workflow queue to send the document or folder to after the task is complete, or select **(Prompt)** to prompt the task creator for a workflow queue.

      Note: Only workflow queues for which you have the Add privilege appear in the list.
   2. If the task location is a document in a folder, select the **Send the folder to the workflow queue if the task location is a document in a folder** check box to send the folder to workflow.
8. Click **OK**.

Next You must define the task template actions, assignment, reasons, due date, and security.

Define task template actions

To define the automated actions for a pointer, document deficiency, or signature required task template, complete the following steps.

Prerequisite Before completing this procedure, you must create the task template and define its general properties and components.

1. Open the task template.
2. In the **<*Task Type*> Task** dialog box, in the left pane, click **Actions**.
3. In the right pane, under **Scripting**, complete any of the following actions to apply an **iScript** to tasks with the following statuses:
   - For assigned tasks, in the **Assigned** list, select an iScript.
   - For returned tasks, in the **Returned** list, select an iScript.
   - For complete pending review tasks, in the **Pending review** list, select an iScript.
   - For complete tasks, in the **Complete** list, select an iScript.
   - For canceled tasks, in the **Canceled** list, select an iScript.
   - For invalid tasks, in the **Invalid** list, select an iScript.
4. Optional. To send an email notification to task assignees when a task is created with this template, under **Notifications**, select the **Send email notification when task is created** check box.

   Note: A task assignee must have an email address configured in the user profile in order to receive an email notification.
5. Optional. To include an attachment or a link in the email notifications, perform one or both of the

following actions:

- Select **Include ImageNow link** to include an attachment.
- Select **Include Experience link** to include a URL link.

6. Click **OK**.

Next You must define the task template assignments, reasons, due date, and security.

Define task template assignments

To define the user or group assignments for a pointer, document deficiency, or signature required task template, complete the following steps.

Prerequisite Before completing this procedure, you must create the task template and define its general properties, components, and actions.

1. Open the task template.
2. In the **<*Task Type*> Task** dialog box, in the left pane, click **Assignment**.
3. In the right pane, click **Add**.
4. In the **Select Users and Groups** dialog box, do the following substeps:
    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
    3. Add as many users or groups as necessary.
    4. Click **OK**.

    > **Note:** The Assignment List must include at least one user or group for the task template to be active.

5. Optional. Select the **Automatically assign the task to the task creator** check box.
6. Click **OK**.

Next You must define the task template reasons, due date, and security.

Define task template reasons

To define the reason list to appear for tasks created with a pointer, document deficiency, or signature requires task template, complete the following steps.

Prerequisite Before completing this procedure, you must create the task template and define its general properties, components, actions, and assignments.

1. Open the task template.
2. In the **<*Task Type*>Task** dialog box, in the left pane, click **Reasons**.
3. Optional. Under **Action Reasons**, in the **Action** list, select the action list to display.
4. Optional. To require task assignees to select a reason after completing a task, select the **Assignee must specify a reason during task completion** check box.

> **Note:** This option is not available for signature required task templates.

5. Under **Return Reasons**, in the **Return** list, select a return list.
6. Click **OK**.

Next You must define the task template due date and security.

Define task template due date method

To define the due date method in a pointer, document deficiency, or signature required task template, complete the following steps.

Prerequisite Before completing this procedure, you must create the task template and define its general properties, components, actions, assignments, and reason lists.

1. Open the task template.
2. In the ***<Task Type>*Task** dialog box, in the left pane, click **Due Date**.
3. In the right pane, under **Due Date Calculation**, do one of the following actions:

Situation	Steps
Calculate due date based on task assignment date	1. In the **Method** list, click **Based on assignment date**. 2. In the **Days** box, set the number of days after the assignment date.
Calculate due date based on task start date	1. In the **Method** list, click **Based on start date**. 2. In the **Days** box, set the number of days after the start date.
Define no due date	• In the **Method** list, click **No due date**.
Prompt task creator to define due date	• In the **Method** list, click **Prompt task creator for date**.

4. Click **OK**.

Next You must define the task template security.

Define task template security

To define the user and group security for a pointer, document deficiency, or signature required task template, complete the following steps.

Prerequisite Before completing this procedure, you must create the task template and define its general properties, components, actions, assignments, reason lists, and due date.

1. Open the task template.
2. In the ***<Task Type>* Task** dialog box, in the left pane, click **Security**.
3. In the right pane, click **Add**.
4. In the **Select Users and Groups** dialog box, do the following substeps:
    1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
    2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
    3. Add as many users or groups as necessary.
    4. Click **OK**.
5. Under **Users and Groups**, select a user or group.
6. To grant the user or group the following privileges, click the column in front of each privilege until it appears or click **Allow All**.
    - To allow the user or group to create tasks with this template, grant the **Create** privilege.
    - To allow the user or group to delete tasks created with this template, grant the **Delete** privilege.
    - To allow the user or group to manage this template, grant the **Manage** privilege.
    - To allow the user or group to view and modify returned tasks created with this template, grant the **Manage Returned** privilege.
    - To allow the user or group to modify tasks created with this template, grant the **Modify** privilege.
    - To allow the user or group to review tasks created with this template after they have been completed by a task assignee, grant the **Review** privilege.
    - To allow the user or group to view, but not process or modify tasks created with this template, grant the **View** privilege.

    Note: The View privilege is not required for task assignees. The user or group assigned to a task automatically has the ability to view that task.

7. If you want task creators to review the tasks they create, select the **Automatically grant task creators the Review privilege for the tasks they create** check box.
8. Click **OK**.

Modify a task template overview

To make changes to a task template, complete the following steps.

1. Open a task template.
2. Define task template properties.
3. Define task template components.
4. Optional. Define task template actions.
5. Define task template assignments.
6. Define task template reasons.
7. Define task template due date method.
8. Define task template security.

Copy a task template

Task templates specify various options for task creation. To copy a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and then click **Copy**.
5. In the **Name** column, type a name and then press `ENTER`.

Rename a task template

To assign a new name to a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and click **Rename**.
5. In the **Name** column, type the text of the template name and then press `ENTER`.

Delete a task template

When you delete a task template, Perceptive Content removes the template from Management Console but retains all associated tasks. To delete a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, in the **Select a task type** box, click a task type.
4. In the **Templates** list, click a template and then click **Delete**.
5. In the **Task Template** dialog box, click **Yes**.

Configure task email notifications

To configure the options required for task creation email notifications, complete the following steps.

1. To add email addresses so that users can receive task creation notifications, perform the following substeps.
   1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
   2. In the left pane, select **Users.**
   3. In the right pane, on the **User Profiles** tab, select the user for whom you want to add an email address and then click **Modify**.

4. In the **Modify User Profile** dialog box, in the left pane, select **Contact Information**.
5. In the right pane, in the **Email** box, type the user's email address.
6. Click **OK**.
7. Define email addresses for all necessary users.

2. Optional. To include **Perceptive Content** links in task email notifications, perform the following substeps.
   1. On the **ImageNow Server** computer, navigate to the *[drive:]***\inserver\etc** folder.
   2. Open the *inserverNotification.ini* file in a text editor.
   3. In the `Email` section, configure the `smtp.server` setting.

      Example `smtp.server=<SMTP server name or IP address>`
   4. Configure the `smtp.server.port` setting.

      Example `smtp.server.port=<Port number>` By default, the port number is 25.
   5. Configure the `smtp.from` address.

      Example `smtp.from=<From address for email notifications>`
   6. Save and close the *inserverNotification.ini* file.

Result All task templates use the same Perceptive Content settings.

Share a task template with another department

You can enable a task template to be shared among multiple departments. To share a task template with other departments, complete the following steps.

Important: You should cautiously consider the impact of sharing a task template, and have a calculated design and implementation plan in place. Once you share a task template, you cannot unshare or delete it from the system.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Templates** tab, select the task template you want to share and then click **Share**.
4. In the **Share <template name>** dialog box, check the boxes of the departments you want to share the task template with and then click **OK**.

Task Reasons

About managing task reason lists

Reasons provide users with pre-set descriptions that they can select to indicate why they are signing, completing, or returning a task.

A reason list is a set of reasons that you, the administrator, bundle as a list from which the user can select. There are two types of reasons and reason lists: Action and Return. While Return reasons are required for each task template type, Action reasons are optional for document deficiency and pointer task template types.

Manage reasons

You can create reasons and then group them together in reason lists. You can assign reasons and reason lists to tasks, workflow item holds, or digital signatures. To create, modify, or delete a reason, complete one of the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, complete one of the following steps.
   1. To manage reasons for tasks or workflow item holds, under **Select Department**, select a department from the list.
   2. To manage reasons for digital signatures, under **Select Department**, select **Cross Department Settings**.
3. In the left pane, click **Tasks**, **Workflow**, or **Digital Signatures**.
4. In the right pane, on the **Reason Lists** tab, select a reason list and click **Modify**.
5. In the **Reason List** dialog box, on the **List Members** tab, complete one of the following actions.

Situation	Steps
Create a reason	1. Click **New**. 2. In the **Reason** text box, type a name.
Modify a reason	1. Select a reason and click **Modify**. 2. In the **Reason** text box, type a new name.
Delete a reason	1. Select a reason and click **Delete**. 2. In the **Delete Reason** confirmation box, click **Yes**.

Result Changes you make to the available reasons apply to all departments.

Modify a reason list

Reason lists are used when you define action and return reasons in document deficiency and pointer task templates. To modify an reason list for a task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Digital Signatures**.
3. In the right pane, on the **Reason Lists** tab, perform one of the following actions, depending on the situation.
4. Select the reason list and click **Modify**.
5. In the **Reason List** dialog box, on the **General** tab, change the name or description.
6. To enable or disable the list, clear or select the **Is active** check box.
7. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons.
8. Click **OK**.

Manage a reason list for a task template

Reason lists are used when you define action and return reasons in document deficiency and pointer task templates. To create, modify, or delete a reason list for a task template, complete one of the following procedures.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, on the **Reason Lists** tab, do one of the following actions, depending on the situation:

Situation	Steps
Create a reason list	1. Click **New**. 2. In the **Reason List** dialog box, on the **General** tab, type a name and optional description. 3. Verify that the **Is active** check box is selected to make the list available for assignment. 4. On the **List Members** tab, add, remove, or rearrange reasons. 5. Click **OK**.
Modify a reason list	1. Click **Modify**. 2. In the **Reason List** dialog box, on the **General** tab, modify the name or optional

Situation	Steps
	description. 3. To enable or disable the reason list, clear or select the **Is active** check box. 4. On the **List Members** tab, add, remove, or rearrange reasons. 5. Click **OK**.
Delete a reason list	1. Click **Delete**. 2. In the **Delete Reason List** confirmation box, click **Yes**.

Manage action reason lists for a signature required task template

To create, modify, or delete an action reason list for a signature-required task template, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, under **Select Department**, select **Cross Department Settings** from the list.
3. In the left pane, click **Digital Signatures**.
4. In the right pane, on the **Reason Lists** tab, perform one of the following actions, depending on the situation.

Situation	Steps
Create a reason list	1. Click **New**. 2. In the **Reason List** dialog box, on the **General** tab, type a name and optional description. 3. Verify that the **Is active** check box is selected to make the list available for assignment. 4. Optional. On the **List Members** tab, in the **Available** list, create, modify, or delete reasons. 5. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons. 6. Click **OK**.

Situation	Steps
Modify a reason list	1. Click **Modify**. 2. In the **Reason List** dialog box, on the **General** tab, change the name or description. 3. To enable or disable the list, clear or select the **Is active** check box. 4. Optional. On the **List Members** tab, in the **Available** list, create, modify, or delete reasons. 5. On the **List Members** tab, in the **Selected** list, add, remove, or rearrange reasons. 6. Click **OK**.
Delete a reason list	1. Select a reason list and click **Delete**. 2. In the **Delete Reason List** confirmation box, click **Yes**.

Share a task reason list with another department

You can enable a task reason list to share among multiple departments. To share a task reason list with other departments, complete the following steps.

Important: You should cautiously consider the impact of sharing a task reason list, and have a calculated design and implementation plan in place. Once you share a task reason list, you cannot unshare or delete it from the system.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, click **Tasks**.
3. In the right pane, in the **Reason Lists** tab, select the task reason list you want to share and then click **Share**.
4. In the **Share** ***<Reason list name>*** dialog box, check the boxes of the departments with which you want to share the task reason list and then click **OK**.

Manage views

About administering views

As a department manager, you create views that display only the content with which your users need to work.

By tailoring your user's view to only the items they need to see, you simplify their user experience. While the system may contain hundreds or thousands of items and other types of content, your users see only the subset of items that you enable in their view. Views enable you to add another layer of protection to content. In addition to the access privileges set for drawers, file plans, and item types, your users can see the item within a particular drawer, file plan, or type that satisfies the view definition.

You can also use a view to create a report if you have Business Insight installed in your environment.

To view records functionality, you must install a Records Manager license.

About administering related views

A user can display one or more related views from a viewer in Perceptive Content. When the user selects a related view to apply to the active document or folder, the Related Documents or Related Folders pane displays other items that match the items with respect to the conditions you define for the related view.

Users with document or folder view management privileges can create, rename, and delete related views in Perceptive Content. When you modify a related view, you automatically enter Perceptive Content View Designer, where you can create or modify relationship conditions, activate the view, and assign security settings to it.

Suppose, for example, you view a student information document with a Field2 value that contains the student's ID number. You want to see all the other documents with the same Field2 value. You can create the condition for this relationship, and the Related Documents pane displays any other documents that have a Field2 value that match the student ID number in the active document.

As another example, suppose you view an inventory document with a custom property that contains a check number. Another set of business documents contains a check number in Field3 rather than in a custom property. You want to see all documents with a Field3 value that matches the Check Number custom property in the active document. You can create the conditions for this relationship, and the Related Documents pane displays any other documents that have a Field3 value that matches the Check Number custom property in the active document.

For folders, related views are like related views for documents except that the relationship matches on folder properties. For example, suppose you work at a hospital and your Perceptive Content environment is set up so that each time a patient visits the hospital, a new folder is created. The new folder contains all documents related to that visit. If a patient makes a return visit, that patient will have two folders created, one for each visit. You view a recent patient's visit and realize you need to see all other folders from past visits. You can create the conditions for this relationship, view all folders that correspond to the patient's identification code, and open any folders that you need to view.

Types of views

The following list summarizes views available in Perceptive Content, including views created by you, your view manager, and views created automatically by the Perceptive Content system.

Application Plan

An application plan view returns a set of documents captured using a specific application plan. Application plans that do not have a defined view action do not display results.

Modifiable components

View conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with application plan management privileges can modify application plan views, including view actions and components, in Application Plan Designer.

Users with the View privilege for the application plan can run the view. For the active business application plan screen, the view returns the associated results.

Batches

A batch view returns the batches in your Perceptive Content system. By default, batch users can see all batches, batches that are ready for QA, and batches that are ready for linking.

Modifiable components

Column layout

Sorting and grouping

Document

A document view returns a set of documents. Document views appear in the Views pane under Documents.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a document view.

File Plans

A file plan view returns a set of records within a particular record category or record folder. File plan views appear in the Views pane under File Plans, and are organized according to the hierarchy of file plans, record categories, and record folders in the system. When you select one of these items, Perceptive Content retrieves the set of records within that item.

ImageNowExplorer uses the system-defined view and it cannot be modified. You can modify a view during a viewing session, but you can t create and save filters or views for file plan view.

File plan view does not use Quick Search, only Advanced Search.

Modifiable components

View conditions

Column layout

Sorting and grouping

Security considerations

In the views tree, users see only the file plans for which they have been granted Search privileges, and the record categories and record folders for which they have been granted Use privileges.

Folder

A folder view returns a set of folders. Folder views appear in the Views pane under Folders.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a folder view.

Folder content

When the user opens a folder, Folder Viewer displays a secondary grid that lists the folder's contents. This secondary grid is called a folder content view. Because document and folder shortcuts can belong to any number of folders, the same document or folder might appear as a representation in Folder Viewer with different grid layouts, depending on the type of folder the user opens.

Changes you make apply to all folders associated with the modified folder type. Because you can represent a document or folder using shortcuts in any number of folders, the same item might appear in a folder content view with different grid layouts, depending on the folder's type.

Modifiable conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with folder type management privileges can modify components of the folder content view in Management Console.

Recently received documents

Recently received documents appear in a temporary view that appears when one Perceptive Content user transfers documents to another user with the Send to User feature. This transfer must occur while both users are connected to the same ImageNow Server. The view sorts the received documents according to the name of the sending user and the time they were sent.

Record

To view records functionality, you must install a Records Manager license.

A record view returns a set of records. Record views appear in ImageNowExplorer, in the Views pane under Records.

Modifiable conditions

View name

View privileges

View conditions

- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

Users with view access can run a record view.

Record Folder

A record folder view returns a set of record folders and record categories. Record Folders views appear in ImageNowExplorer, in the Views pane under Record Folders.

Modifiable conditions

- View name
- View privileges
- View conditions
- Public filters
- Private filters
- Column layout
- View statistics
- Sorting and grouping

Security considerations

Users with view access can run a record folder view.

Record Folder Content

When the user opens a record folder, Record Folder Viewer displays a secondary grid that lists the folder s contents. This secondary grid is called a record folder content view. Because record folder shortcuts can belong to any number of record folders, the same record folder might appear as a representation in Record Folder Viewer with different grid layouts, depending on the type of record folder the user opens. Changes you make apply to all record folders associated with the modified record folder type.

Modifiable conditions

- Column layout
- View statistics

Sorting and grouping

Security considerations

Users with record folder management privileges can modify components of the record folder content view in Management Console.

Recycled documents and document folders

When the user deletes a document or folder, Perceptive Content moves the item to a system view called My Recycled Documents or My Recycled Folders.

Items remain in the recycled view for the number of days that you specify in the *inserverFS.ini* file.

Modifiable conditions

Private filters

Security considerations

If the user is a Department Manager, two additional views appear. These views, All Recycled Documents and All Recycled Folders, display all items deleted by all users. As long as the user can see a recycled document or folder, the user can restore it to its previous state, at which time the document or folder keeps the attributes it had before deletion, if possible.

Related

Related views appear in the Related Documents pane of the document viewer and in the Related Folders pane of the folder viewer. A related view applies the relationship selected in the list to the current document or folder. The view displays a list of all documents or folders that satisfy the conditions of the relationship.

Modifiable conditions

Relationship name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with document view management privileges can create and modify document relationships in Management Console. Users with folder view management privileges can create and modify folder relationships in Management Console.

Task

A task view returns a list of tasks assigned to the user according to the type of task, such as My Assigned or To Review. Task views appear in the Views pane under Tasks.

Modifiable conditions

Public filters

Private filters

View statistics

Column layout

Sorting and grouping

Workflow process

A workflow process view returns a list of items (representing documents or folders) when the user accesses a workflow process, which appears in the Views pane under Workflow.

Modifiable conditions

Private filters

Security considerations

Workflow process views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Security considerations

Users with view access can run a folder view.

Workflow queue

A workflow queue view returns a list of items (representing documents or folders) when the user accesses a workflow queue, which appears in the Views pane under Workflow.

Modifiable conditions

Column layout

View statistics

Private filters

Grouping and sorting

Security considerations

Workflow queue views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Supported file formats for Perceptive Content

The following tables list the file formats that ImageNowViewer support.

Archive file formats

Format	Version	Extension
7-Zip	4.57	7Z
BinHex	N/A	HQX
GZIP	2	GZ
Java Archive	N/A	JAR
Microsoft Cabinet Format	1.3	CAB
Microsoft Compressed Folder	N/A	LZH, LHA
PKZIP	Through 9.0	ZIP
RAR Archive	2.0 through 3.5	RAR
Tape Archive	N/A	TAR
Unix Compress	N/A	Z
UUEncoding	All versions	UUE
WinZip	Through 10	ZIP

Binary file formats

Format	Version	Extension
Executable	N/A	EXE

Format	Version	Extension
Link Library	N/A	DLL

Database file formats

Format	Version	Extension
Microsoft Access	95, 97, 2000, 2002, 2003	MDB

Display file formats

Format	Version	Extension
Adobe PDF	Through 9	PDF

Graphic file formats

Format	Version	Extension
Computer Graphics Metafile	N/A	CGM
CorelDRAW	Through 9.0	CDR
DCX Fax System	N/A	DCX
Digital Imaging and Communications in Medicine	N/A	DCM
Encapsulated PostScript (raster)	TIFF header	EPS
Enhanced Metafile	N/A	EMF
GIF	87, 89	GIF
JPEG	N/A	JPEG, JPG
Lotus AMIDraw Graphics	N/A	SDW

Format	Version	Extension
Lotus Pic	N/A	PIC
Macintosh Raster	2	PIC, PCT
MacPaint	N/A	PNTG
Microsoft Office Drawing	N/A	MSO
PC PaintBrush	3	PCX
Portable Network Graphics	N/A	PNG
Sun Raster Image	N/A	RS
Tagged Image File	Through 6.0.3	TIFF
Truevision Targa	2	TGA
Windows Animated Cursor	N/A	ANI
Windows Bitmap	N/A	BMP
Windows Icon Cursor	N/A	ICO
Windows Metafile	3	WMF
WordPerfect Graphics 1	1	WPG
WordPerfect Graphics 2	2, 7	WPG

Mail file formats

Format	Version	Extension
Lotus Notes database	4, 5, 6.0, 6.5	NSF
Microsoft Outlook	97, 2000, 2002, 2003	MSG
Microsoft Outlook Personal Folder	97, 2000, 2002, 2003	PST

Multimedia file formats

Any audio or movie format supported by Apple QuickTime or Windows Media Player. For specific formats supported by these players, refer to the respective Apple or Microsoft websites. Depending on your hardware and network, large movie files (over 100 MB) may slow performance.

Presentation file formats

Format	Version	Extension
Applix Presents	4.0, 4.2, 4.3, 4.4	AG
Corel Presentations	6, 7, 8, 9, 10, 11, 12, X3	SHW
Lotus Freelance Graphics 2	2	PRE
Lotus Freelance Graphics	96, 97, 98, R9, 9.8	PRZ
Microsoft PowerPoint Macintosh	98, 2001, 2004	PPT, PPS, POT
Microsoft PowerPoint PC	4	PPT, PPS, POT, PPTX, PPTM, POTX, POTM, PPSX, PPSM
Microsoft PowerPoint Windows	95, 97, 2000, 2002, 2003, 2007	PPT, PPTM, PPTX

Spreadsheet file formats

Format	Version	Extension
Applix Spreadsheets	4.2, 4.3, 4.4	AS
Comma Separated Values	N/A	CSV
Corel Quattro Pro	5, 6, 7, 8	WB2, WB3
Lotus 1-2-3	96, 97, R9, 9.8	123
Lotus 1-2-3	2, 3, 4, 5	WK4
Lotus 1-2-3 Charts	2, 3, 4, 5	123
Microsoft Excel Charts	2, 3, 4, 5, 6, 7	XLS

Format	Version	Extension
Microsoft Excel Windows	2.2 through 2007	XLS, XLSM, XLSX, XLW, XLT, XLA, XLTX, XLTM, XLAM
Microsoft Excel Macintosh	98, 2001, v.X, 2004	XLS
Microsoft Works Spreadsheet	1, 2, 3, 4	S30, S40
OASIS Open Document Format	1, 2	ODS, SXC, STC
OpenOffice Calc	1, 1.1	SXC, ODS, OTS
StarOffice Calc	6, 7	SXC, ODS

Text and Markup file formats

Format	Version	Extension
ANSI	N/A	TXT
ASCII	N/A	TXT
HTML	3, 4	HTM
Microsoft Excel Windows XML	2003	XML
Microsoft Word Windows XML	2003	XML
Rich Text Format	1 through 1.7	RTF
Unicode Text **Note:** Specific support is only applicable to the Unicode version.	3, 4	TXT
UTF-8	N/A	TXT
UTF-8 - No Byte Order Mark (BOM)	N/A	TXT

Format	Version	Extension
UTF-16 Little Endian (UTF-16LE) **Note:** A BOM is required for the UTF-16LE format to be read correctly.	N/A	TXT
XHTML	1	HTM, XHTML
XML	1.0	XML

Word processing file formats

Format	Version	Extension
Adobe FrameMaker Interchange Format	5, 5.5, 6, 7	MIF
Applix Words	3.11, 4, 4.1, 4.2, 4.3, 4.4	AW
Corel WordPerfect Linux	6.0, 8.1	WPS
Corel WordPerfect Macintosh	1.02, 2, 2.1, 2.2, 3, 3.1	WPS
Corel WordPerfect Windows	5, 5.1	WO, WPS
Corel WordPerfect Windows	6, 7, 8, 9, 10, 11, 12, X3	WPD
DisplayWrite	4	IP
Folio Flat File	3.1	FFF
Fujitsu Oasys	7	OA2
IBM DCA/RFT (Revisable Form Text)	SC23-0758 -1	DC
JustSystems Ichitaro	8 through 2005	JTD
Lotus AMI Pro	2, 3	SAM

Format	Version	Extension
Lotus AMI Professional Write Plus	2.1	AMI
Lotus Word Pro	96, 97, R9	LWP
Lotus SmartMaster	96, 97	MWP
Microsoft Word PC	4, 5, 5.5, 6	DOC
Microsoft Word Windows	1.0, 2.0, 6, 7, 8, 95, 97, 2000, 2002, 2003, 2007	DOC, DOCX, DOCM, DOT, DOTX, DOTM
Microsoft Word Macintosh	4, 5, 6, 98, 2001, v.X, 2004	DOC, DOT
Microsoft Works	1, 2, 3, 4, 6, 2000	WPS
Microsoft Windows Write	1, 2, 3	WRI
OASIS Open Document Format	1, 2	ODT, SXW, STW
Wordpad	Through 2003	RTF
XyWrite	4.12	XY4

Work with Views

Create a view

To create a new view, complete the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, click the appropriate tab, and then click **New**.
3. In the **New View** dialog box, define a name and description for this view and click **OK**.

Next Modify the view in View DesignerManagement Console to define conditions, column layout, filters, and view security.

Create a related view

To create a relationship view for an item, perform the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, on the **Related** tab, click **New**.

3. In the **New Relationship** dialog box, type a name and an optional description of the view that appears in the Tool Tip for the view, and then click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Copy a view

You can copy a view to create a new view with the same conditions, filters, column layout, and security settings. To copy a view, perform the following steps.

You cannot copy a task view.

1. In **Management Console**, in the left pane, click **Views**.
2. On the appropriate tab, select the view definition and click **Copy**.

   To view records functionality, you must install a Records Manager license.
3. In the **Copy View** dialog box, type a name and optional description for the new view.
4. Optional. To copy public filters associated with the original view definition, select the **All public filters** check box.
5. Optional. To copy users and the view privileges associated with the original view definition, select the **All users and their privileges** check box.
6. Optional. If you included users and you also want to copy any private filters created by those users, select the **Private filter for users** check box.
7. Click **OK**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Copy a related view

To copy a relationship view for an item, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.
3. Select the relationship and click **Copy**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Delete a view

To delete a view, perform the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. On the **Document**, **Folder**, **Record**, or **Record Folder** tab, select the view and click **Delete**.

   To view records functionality, you must install a Records Manager license.
3. In the confirmation dialog, click **Yes**.

Result Users will not see the view removed until they log out and log in again.

Delete a related view

To delete a relationship view for a document, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.
3. Select the relationship and click **Delete**.
4. In the confirmation dialog box, click **Yes**.

Rename a view

To rename a view, complete the following steps.

You can also rename a view by editing its properties in View Designer. You cannot rename a task view.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the appropriate tab, select the view you want to rename and click **Rename**.
3. In the **Rename View** dialog box, type the new view name and an optional description.
4. Click **OK**.

Rename a related view

To rename a relationship view for documents or folders, complete the following steps.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related Documents** or **Related Folders** tab.
3. Select the relationship and click **Rename**.
4. In the **Rename Relationship** dialog box, type the new name of the relationship in the **Name** box.

Modify a view

To modify components of a view, complete the following steps.

Prerequisite It is recommended that you perform view modifications when no users are signed in to Perceptive Content.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the appropriate tab, select the view you want to change and click **Modify**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Modify a related view

To modify a relationship view for an item, complete the following steps.

Prerequisite It is recommended that you perform view modifications when no users are signed in to Perceptive Content.

1. In **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, click the **Related** tab.

3. Select the relationship and click **Modify**.

Next Modify the view in View Designer to define conditions, column layout, filters, and view security.

Version control status indicators

Any document added to version control, either in its current version or in a previous version, is accompanied by a status indicator in the document search results grid, in the Version Controlled column. If your view does not show this column, you can temporarily display it or you can add the column in a private filter.

None

The document is not version controlled.

Checked In

The document is version controlled but not currently checked out to any users.

Checked Out

This document is version controlled and currently checked out by another user.

Checked Out by You

This document is version controlled and currently checked out by you.

If a document is checked in, but marked private by another user, the Is Private icon  appears in the Is Private column in the document search results grid.

Configure recycle bin views

You can determine the amount of time an item appears in the recycle bin views in ImageNowExplorer before permanently deleting it. To configure recycle bin views, complete the following steps.

The following recycle bin views are available to configure: My Recycled Documents, My Recycled Folders, All Recycled Documents, and All Recycled Folders.

1. Open the *[drive:]***\inserver\etc***\inserverFS.ini* file with a text editor.
2. To determine the number of days you want items to remain in the recycled views before they are permanently removed from **ImageNow Server**, under **[General]**, perform one of the following actions for the *destruction.wait.time* setting.
   - To immediately delete items from the recycle bin, enter `0`.
   - To delete items from the recycle bin after a specific number of days, enter the number of days.

> **Note:** You cannot enter a negative integer. The maximum number of days you can retain items in a recycle bin view is 2,147,483,647.

3. Save and close the *inserverFS.ini* file.
4. Restart the **File System Agent** service.

Set the system default view

You can set the system-wide default view to use a link that does not specify which view to use, and the user does not have a default view configured. To set the system default view, complete the following steps. You must be a department manager to set the default system view.

You can also set the default view on a per-user basis in Management Console.

1. In **Management Console**, in the left pane, under **Select Department**, select a department from the list.
2. In the left pane, select **Views**.
3. In the right pane, select the **System Defaults** tab.
4. In the **Document view** list, select a default document view.
5. In the confirmation prompt, click **Yes**.

> **Note:** Select **None** from the list to remove the default document view.

6. In the **Folder view** list, select a default folder view.
7. In the confirmation prompt, click **Yes**.

> **Note:** Select **None** from the list to remove the default folder view.

Folder content search conditions

When you display the Search pane on the Content tab of Folder Viewer, several conditions are available. The Add Condition dialog box allows you to build a search using a combination of constraints, fields, operators, and values described in the following table.

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.

Composite property

The Composite property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank is one of, is not one of, is between, and is not between.

The composite properties, which can contain all possible values, are defined by your administrator.

You can select a composite property is the Composite list, or you can select a custom property in the Field list.

Custom property

The Custom property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between, is equal to, is not equal to

Constraint	Operators	Field	Field Description	Possible Values
Composite property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Composite list, select a composite property. In the Field list, select a custom property.	Composite properties are defined by your administrator.	All defined composite properties
Content property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not	Content type	The type of content in the folder.	• Document • Document Shortcut Folder • Folder Shortcut

Constraint	Operators	Field	Field Description	Possible Values
	between			
Added to folder within (days)	The number of days within which the document, folder, or shortcut was added or moved to the folder.	Type any positive integer.		
Created within (days)	The number of days within which the document, folder, shortcut was created.	Type any positive integer.		
Name	The name value of the document, folder, or shortcut.	Type any alphanumeric value.		
Drawer	The drawer value associated with the document, folder, or item referenced by a shortcut.	Type any alphanumeric value.		
Document ID	The unique ID of the document.	Type any alphanumeric value.		
Field1	The Field1 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field2	The Field2 value associated with the document or document referenced by a	Type any alphanumeric value.		

Constraint	Operators	Field	Field Description	Possible Values
	shortcut.			
Field3	The Field3 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field4	The Field4 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field5	The Field5 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Document type	The document type associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Folder ID	The unique ID of the folder.	Type any alphanumeric value.		
Folder type	The folder type associated with the folder or folder referenced by a shortcut.	Type any alphanumeric value.		
Custom property	is equal to, is not equal to, is less	Select a custom property.	Custom properties are defined by your administrator.	All defined custom properties

Constraint	Operators	Field	Field Description	Possible Values
	than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between			
Date	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, is one of, is not one of, is between, is not between	Added to folder	The date the content was added or moved to the folder.	Type or select a date value.
Checked out	The date the document or document referenced by a shortcut was checked out in version control.	Type or select a date value.		
Created	The date the document, folder, or shortcut was created.	Type or select a date value.		
Last viewed	The date the content was last viewed by a user.	Type or select a date value.		

Constraint	Operators	Field	Field Description	Possible Values
Modified	The date the document, folder, or shortcut was last modified.	Type or select a date value.		
Status changed	The date the folder's active or inactive status changed.	Type or select a date value.		
Document Status	is equal to, is not equal to	Digital signature status	The status of the version controlled digital signature of the document.	Valid, Invalid, Void, Not Signed
Has hold applied	Whether the document has a direct or inherited retention hold applied.	Yes, No		
Has physical reference	Whether the document had a physical file reference.	Yes, No		
Is private	Whether the document is marked private in version control.	Yes, No		
Is version controlled	Whether the document is added to version control.	Yes, No		
Folder Status	is equal to, is not equal to	Folder status	The active or inactive status of the folder.	Active, Inactive
Has required documents	Whether the folder has required document types.	Yes, No		

Constraint	Operators	Field	Field Description	Possible Values
Physical property	is equal to is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Template list, select a physical file template. In the Field list, select a physical property.	Physical file templates and physical properties are defined by your administrator.	Template: All physical file templates the user can access, Field: All physical properties associated with the template
User	is equal to, is not equal to, starts with, does not start with, ends with, is blank, is not blank, is one of, is not one of	Checked out by	The user who has the document checked out in version control.	Type an alphanumeric value. Any valid user name.
Created by	The user who created the document, folder, or shortcut.			
Last viewed by	The user who last viewed the document, folder, or item referenced by a shortcut.			
Modified by	The user who last modified the document, folder, or shortcut.			
Private by	The user who			

Constraint	Operators	Field	Field Description	Possible Values
	marked the document private in version control.			
Status changed by	The user who last changed the folder status.			
Workflow item property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	Is in workflow	Whether the document or folder is added to workflow.	Yes, No
Workflow queue	The workflow queue associated with the document, folder, or item referenced by a shortcut.	Type an alphanumeric value.		
Workflow item user	The user who added the document, folder, or item referenced by a shortcut to workflow.	Type an alphanumeric value. Any valid user name.		
Workflow item status	The status of the document, folder, or item referenced by a shortcut in workflow.	Idle, Working, On hold, Pending, Waiting for routing, Waiting for inbound action		

Sort view or search results

You can sort the rows in the results grid for a view or public filter. To sort view results, complete the following steps.

1. In the view preview or search results grid, to sort by a single column, right-click the column heading and then do one of the following:
   - To sort the results in ascending order, select **Sort Ascending**.
   - To sort the results in descending order, select **Sort Descending**.
2. To sort by additional columns, hold the `SHIFT` key and click the column heading once to sort the results in ascending order or twice to sort the results in descending order.

   Note: To sort on multiple columns, you must group the results.
3. Optional. To remove all sorting, right-click a column heading and select **Reset sort order**.
4. Save the view or filter to preserve the sort order.

Select columns to display

To show or hide columns in a view or public filter, complete the following steps.

1. In **View Designer**, in the **Preview** pane, click the **Columns** button.
2. In the **Columns** dialog box, do the following substeps:
   1. For the column or columns you want to hide, clear the check box. To hide all columns, right-click anywhere in the dialog box and then click **Clear All**.
   2. For the column or columns you want to show, select the check box. To show all columns, right-click anywhere inside the dialog box and then click **Select All**.
   3. Click **OK**.
3. In the **Designer** toolbar, click the **Save** button.

Group view or search results

You can group the results of a view, filter, or search by one or more columns into groups you can expand and collapse. To group view results, complete the following steps.

1. In the search results grid or view preview grid, right-click a column heading, and then click **Group by this Column**.

   Groups are initially collapsed when the view or filter runs.
2. Optional. To create a subgroup under the grouped column, right-click a column heading, and then click **Group by this Column**.
3. Optional. To expand the grouped results, right-click a column headings, and then click **Expand All Groups**.
4. Save the view or filter to preserve the column grouping.

About viewing batches by batch user

A user can view batches captured by batch users, and can be limited to viewing batches captured only by specific batch users.

Users can capture batches with the **Global > Capture > Batch Mode** privilege and then view those batches.

If you want a user to view batches captured by any other batch users, you must give the user the **Drawer > Batch (Proposed Key) > Process** privilege for each drawer.

If you want to limit a user to viewing batches captured only by specific batch users, you must also enable filtering by batch user. When you enable filtering by batch user, you create a list of only those batch users whose batches you want the user to view.

Add a custom property column

To add columns to display custom property values for content, complete the following steps.

1. Access the view using one of the following methods:

Situation	Steps
Add a custom property column for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. In **Workflow Designer**, open the desired queue. 3. In the **Queue Properties** dialog box, click **Appearance**. 4. In the right pane, click **Preview**.
Add a custom property column for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Add a custom property column for a folder content view	1. In **Management Console**, in the left pane, click **Folder Types**. 2. In the right pane, on the **Folder Types** tab, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click **Preview**.

2. In the **View Preview** window, click the **Columns** button.
3. In the **Columns** dialog box, click **Add**.
4. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on item type, select **Document Types**.

- To display a custom property based on folder type, select **Folder Types**.
- To display all custom properties, select **All Custom Properties**.

5. In the **Type** list, select a custom property.

   The **Type** list options change based on the **Filter by** option selected.
6. Select a custom property and click **Add**.
7. Click **OK**.

Enable filtering by batch user for a group

A group can view batches captured by batch users if granted the appropriate drawer privileges for the drawers for which the batches are targeted. To further limit groups to viewing only batches captured by specific batch users, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select **Cross Department Settings** from the list.
2. In the left pane, click **Groups.**
3. In the right pane, select the group you want and click **Modify**.
4. In the **Modify Group Profile** dialog box, in the left pane, click **Batch Users**.
5. Select **Enable filtering by batch user**.
6. To add batch users to the list, complete the following substeps.
   1. Click **Add**.
   2. In the **Select Users** dialog box, under **Available Users**, select a user and click **Add**.
   3. Click **OK** when you finish adding batch users.
7. Optional. To remove batch users from the list, complete the following substeps.
   1. Click the batch user.
   2. Click **Remove**.

Enable filtering by batch user for a user

A user can view batches captured by batch users if granted the appropriate drawer privileges for the drawers for which the batches are targeted. To further limit users to viewing only batches captured by specific batch users, complete the following steps.

1. In **Management Console**, in the left pane, under **Select Department**, select **Cross Department Settings** from the list.
2. In the left pane, click **Users.**
3. In the right pane, select the user you want and click **Modify**.
4. In the **Modify User Profile** dialog box, in the left pane, click **Batch Users**.
5. Select **Enable filtering by batch user**.
6. To add batch users to the list, complete the following substeps.
   1. Click **Add**.
   2. In the **Select Users** dialog box, under **Search**, select a user and click **Add**.

3. Click **OK** when you finish adding batch users.
7. Optional. To remove batch users from the list, complete the following substeps.
    1. Click the batch user.
    2. Click **Remove**.

Add a custom property column for records

To add a custom property column for a record content view, complete the following steps.

1. In **Management Console**, in the left pane, click **Records** and select **Record Folder Types** or **Record Category Types**.
2. In the right pane, on the **Record Folder Types** or **Record Category Types** tab, select the folder type and click **Modify**.
3. In the dialog box, on the **Appearance** tab, click **Preview**.
4. In the **View Preview** window, click the **Columns** button.
5. In the **Columns** dialog box, click **Add**.
6. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
    - To display a custom property based on record type, select **Record Types**.
    - To display a custom property based on record folder type, select **Record Folder Types**.
    - To display all custom properties, select **All Custom Properties**.
7. In the **Type** list, select a record or record folder type.

    The **Type** list options change based on the **Filter by** option selected.
8. Select a custom property and click **Add**.
9. Click **OK**.

Statistics

What are statistics?

Statistics are calculations such as the maximum, minimum, and average of all the values in a specific column that appear in the search results for the view.

You can define statistics for any document view, folder view, task view, record view, or record folder view for which you have management privileges. You cannot define statistics for a public filter or a related view.

For any folder type for which you have management privileges, you can create a view that determines the appearance of the folder content results in Folder Viewer. You can also create a statistic for a workflow view, which defines the appearance when viewing the contents of a workflow queue. When you define a set of statistics for a folder content or workflow view, the statistics appear in a pane below the search results grid. In the statistics pane, you can view the statistics, highlight the search results in the grid that apply to the statistic, and, if only one document or folder matches the statistic value, open the document or folder.

The following examples demonstrate some ways you can use view statistics.

Accounts Payable: Theresa is an Accounts Payable administrator who wants to quickly view the total of all the invoices in her "OpenInvoices" view. This view contains a custom property column which stores the invoice amount for each document. Because it is a numeric custom property, Theresa adds a Sum statistic on this custom property column named "Total open amount". Every time she runs a search using this view, she sees the total invoice amount of all the documents returned by the search in the statistics pane.

Admissions: Sam is an Admissions director who wants to view the average ACT score of the students who applied to his university in the current academic year. His student folder view contains a custom property column which stores the ACT score for each student and a date range that spans the current academic year. Because the view uses a numeric custom property, Sam adds an Average statistic on this custom property column named "Average ACT."

Healthcare: Dr. Lovelace wants to quickly view the next task he is responsible for in his folder view that lists all his patients with document deficiencies. His view administrator adds a Next statistic to the task due date column in the view. When Dr. Lovelace logs in, he can quickly see the date the next task is due, highlight the document associated with the task, and open it in ImageNowViewer.

To view records functionality, you must install a Records Manager license.

Data types for statistical functions

The statistical functions you can define depend on the data type of the column values. To add a statistic for a custom property column, you must first add the custom property column to the view. The following statistics are available for the specified data types.

Statistical functions

Average

This function calculates the average of the column values.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Count

This function counts the number of values in the search results grid that match the selected variable (you must select a variable for this statistical function).

Column value data type

String, list, flag

Sample columns

Folder Name

In Workflow

<List custom property>

<String custom property>

<Flag custom property>

Count Future

This function counts the number of the column's date values that occur in the future.

Column value data type

Date

Sample columns

Next Task Due

Due Date

<Date custom property>

Count Past

This function counts the number of the column's date values that occur in the past.

Column value data type

Date

Sample columns

Created

Last Viewed

<Date custom property>

First

This function distinguishes the earliest date in the column's search results.

Column value data type

Date

Sample columns

Modified

Checked Out

<Date custom property>

Last

This function distinguishes the latest date in the column's search results.

Column value data type

Date

Sample columns

Checked In

Assigned

<Date custom property>

Maximum

This function distinguishes the largest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<Number custom property>

Median

The function distinguishes the middle value in the column's search results.

Column value data type

Sample columns

Current Version

<Number custom property>

Minimum

This function distinguishes the smallest numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Days Until Due

<Number custom property>

Mode

This function distinguishes the most frequently occurring numeric value in the column's search results.

Column value data type

Numeric

Sample columns

Summary Task Count

<Number custom property>

Next

This function distinguishes the next sequential date value in the column's search results.

Column value data type

Date

Sample columns

Status Changed

<Date custom property>

Previous

This function distinguishes the previous sequential date value in the column's search results.

Column value data type

Date

Sample columns

Completed

<Date custom property>

Sum

This function calculates the total of the values in the column's search results.

Column value data type

Numeric

Sample columns

Pages

<Number custom property>

Add view statistics overview

The configuration of a view statistic differs based on the data value type you select. You can create statistics for document, folder, folder content, record, task, and workflow views. To create a statistic for a view, complete any of the following procedures.

- Add a statistic for a date value.
- Add a statistic for a flag value.
- Add a statistic for a list value.
- Add a statistic for a numeric value.
- Add a statistic for a string value.

Add a statistic for a date value

You can display the newest, oldest, or next date value in a list of search results, or display the total number of dates in the past or dates in the future. To add a statistic for a date value, complete the following steps.

Prerequisite Before you can add a statistic for a date custom property value, you must first add the custom property column to the view.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**.

Situation	Steps
	2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to view the next task due date, type `Next task due`.
5. Under **Column**, select the view column with the date values.
6. Under **Function**, select one of the following options depending on the display variable you want to show:

Situation	Steps
Total number of dates in the future	• Select **Count Future**.
Total number of dates in the past	• Select **Count past**.
Oldest date value	• Select **First**.
Newest date value	• Select **Last**.
The next future date	• Select **Next**.
The most recent date	• Select **Previous**.

7. Optional. Under **Caption**, select the value to display when the statistic only applies to one search result.

Example If a **Previous** statistic shows the last viewed item, and you want to quickly display the user name of the user who viewed the item, you can use the **Caption** column to select the **Last Viewed By** user.

8. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
9. Click **OK**.

   The statistic appears below the grid in the **Preview** pane.
10. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a flag value

You can add a statistic that distinguishes the number of search results that have a true or false (boolean) value. To add a statistic for a flag value, complete the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to count the number of documents or records assigned to a retention policy, type `Documents in Retention` or `Records in Retention`.

5. Under **Column**, select the view column with the flag values.
6. Under **Function**, select **Count**.
7. Under **Variable**, select whether you want to count the results that meet the TRUE condition or the FALSE condition.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If there is one version-controlled item in your search results, and you want to quickly display the user who marked the item private, you can use the **Caption** column to select the **Private By** user.

9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**.

    The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a list value

You can add a Count statistic that distinguishes a unique value of a list custom property. To add a statistic for a list value, complete the following steps.

Prerequisite Before you can add a statistic for a list value, you must first add the list custom property column to the view.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.

Situation	Steps
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If you have a list custom property to select the fiscal quarter associated with an invoice and you want to add a statistic to show fourth quarter invoices, type `Invoices in Q4`.
5. Under **Column**, select the list custom property.
6. Under **Function**, select **Count**.

   Note: Count is the only statistical function for list values.
7. In the **Variable** list, select an item from the list to use for the statistic.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If there is only one item added to workflow during the month of January, and you want to quickly display the user who added the item to workflow, you can use the **Caption** column to select the workflow user.
9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**.

    The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a numeric value

You can display the average, sum, median, or mode statistic that distinguishes numeric values, such as the number of tasks or a custom property that stores an amount value. To add a statistic for a numeric value, perform the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to view the average amount of invoices, type `Average invoice amount`.

5. Under **Column**, select the view column with the flag values.

6. Under **Function**, select the display variable you want to show.
7. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If a **Maximum** statistic displays the invoice with the highest amount, and you want to quickly display the user name of the user who last viewed the invoice, you can use the **Caption** column to select the **Last Viewed By** user.
8. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
9. Click **OK**.

   The statistic appears below the grid in the **Preview** pane.
10. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Add a statistic for a string value

You can add a non-case sensitive Count statistic that distinguishes string values, such as a task template or drawer name. To add a statistic for a string value, which you can add at the view or filter level, perform the following steps.

Prerequisite Before you can add a statistic for a flag custom property value, you must add the flag custom property column to the view.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.

Situation	Steps
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click **Add**.
4. Under **Label**, type a label that describes the statistical function to appear in the search results grid.

   Example If adding a statistic to count the number of items scanned by the department manager, type `Scanned by Manager`.
5. Under **Column**, select the view column with the string values.
6. Under **Function**, select Count.

   Note: Count is the only statistical function for string values.
7. Under **Variable**, type the value for the statistic, such as the drawer name or task template name.
8. Optional. Under **Caption**, select the value to display when the statistic applies to only one search result.

   Example If there is only one items for a specific vendor in your workflow process, and you want to quickly determine if it is an invoice or a purchase order, you can use the **Caption** column to show the **Document Type**.
9. Optional. To reorder the statistic, click the **Move Up** or **Move Down** button until the statistic reaches the desired position.
10. Click **OK**. The statistic appears below the grid in the **Preview** pane.
11. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Modify a statistic

To modify the components of a statistic defined for a view, complete the following steps.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.

Situation	Steps
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button and then, in the **Statistics** dialog box, click the row of the statistic you want to change.
3. Do one of the following actions.
   - To change the statistic definition, highlight the statistic row and then modify the components you want to change.
   - To reposition the statistic, click **Move Up** to move it ahead of the preceding statistic, or click **Move Down** to move it after the following statistic.
4. Click **OK**.
5. In the **Preview** pane, click the **Run** button to test the statistic's performance.

Remove a statistic

To remove a statistic from a view, complete the following steps.

1. Access the view preview using one of the following methods.

Situation	Steps
Create a date statistic for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Create a date statistic for a container content view	1. In **Management Console**, in the left pane, select **Folder Types**. 2. In the right pane, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click the **Preview** button.
Create a date statistic for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. Double-click the queue to open the **Queue Properties** window. 3. In the **Queue Properties** window, in the left pane, select **Appearance**. 4. In the right pane, click **Preview**.
Create a date statistic for a workflow process view	1. Open the workflow process in **Workflow Designer**. 2. Click **File > Properties**. 3. In the **Process Properties** dialog box, under **Appearance**, click **Preview**.

2. In the **Preview** pane, click the **Statistics** button.
3. In the **Statistics** dialog box, click the row of the statistic you want to remove and click **Remove**.
4. Click **Yes** in the confirmation prompt and then, in the **Statistics** dialog box, click **OK**.

Result Removing a statistic does not remove the column from the view.