Titan

User Guide

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Documentation Notice

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About Titan

A browser delivered client, codenamed “Project Titan”, sets the foundation for all future Perceptive Content client updates. Leveraging Hyland user interface and the reusable components that are part of every Hyland product, Project Titan brings something completely new to the Perceptive Content product family.

Titan delivers enhanced viewer capabilities with support for copying text from documents and then pasting the selected text into other applications. Updates to Views capabilities bring changes that allow you to leverage grouped views results, create and update filters, organize columns, and sort multiple columns within results. Project Titan brings enhanced end user customization that includes dark mode and the ability to create keyboard shortcuts for the most used functional areas also help to increase user productivity to new levels. For enhanced document sharing a new viewer mode is included – Quick Access Viewer – which allows for simplified URL links to documents and folders. Quick Access Viewer mode allows you to create links that initiate a lightweight viewer for users accessing document and folder links. Quick Access Viewer is a great option for users that only need to work with a single document or folder where performance and simplicity is important.

Configure General Settings

To configure general settings, complete the following steps:

1. From the **User** drop-down menu, select **Settings**. The **Settings** pane is displayed.
2. Click **General**. The **General** pane is displayed.
3. Select the language you want to use in the application from the **Language** drop-down list.
4. Select the theme you want to use in the application from the **Theme** drop-down list. The following options are available:

Option	Description
Dark	Displays bright text and interface elements on a darker background.
Light	Displays darker text on a bright background.

View Keyboard Shortcuts

To view a list of keyboard shortcuts, complete the following steps:

1. From the **User** drop-down menu, select **Keyboard Shortcuts**. The **Keyboard Shortcuts** pane is displayed.
2. Optional. To locate a specific keyboard shortcut, type the name of the shortcut you want to locate in the **Search** field.

Configure Keyboard Shortcuts

To configure keyboard shortcuts, complete the following steps:

1. From the **User** drop-down menu, select **Settings**. The **Settings** pane is displayed.
2. Click **Shortcuts**. The **Shortcuts** pane is displayed.
3. To add an annotation shortcut, complete the following substeps.
    1. Under **Annotations**, click **Add Annotations**.
    2. From the list, select the annotation for which you want to create a keyboard shortcut.
    3. In the **Configure Shortcut** dialog box, press the combination of keys that you want to assign to this shortcut.
    4. Click **OK**.
4. To delete an annotation keyboard shortcut key, locate the appropriate shortcut under **Annotations**, and then click the **Delete <Annotation> Shortcut** icon.
5. To edit default keyboard shortcuts, complete the following substeps.
    1. Locate the shortcut under appropriate heading, and click the **Edit Forms Shortcut** icon. The **Configure Shortcut** dialog box is displayed.
    2. Press the combination of keys that you want to assign to this shortcut.
    3. Click **OK**.
6. To clear a keyboard shortcut, locate the appropriate shortcut under **Panes**, and then click the **Clear <Pane> Shortcut** icon.

Configure Default Settings

To configure default settings, complete the following steps:

1. From the **User** drop-down menu, select **Settings**. The **Settings** pane is displayed.
2. Click **Defaults**. The **Defaults** pane is displayed.
3. Under **Views**, from the appropriate **<Item> default view** list, (Document, Folder, Task, or Workflow), select the view you want the application to use when opening the item.

Option	Description
Remember last run view	Displays the last view that was run for the content type.
<Specific view>	Displays the selected user-defined view.

4. Under **Document Viewer Visibility**, from the appropriate **<Item> pane visibility** list, (Forms, Properties, Related Documents, or Thumbnails), select the visibility status you want the application to

use when opening the item.

Option	Description
Remember last	Displays the last visibility status when manually toggled through the user interface.
Show	Displays the pane.
Hide	Hides the pane.

5. Under **Document Viewer Visibility**, from the **Thumbnails pane location** list, select the location you want the application to display the **Thumbnails** pane.

Option	Description
Bottom	Displays the pane horizontally or at the bottom of the screen.
Left	Displays the pane vertically or at the left of the screen.

6. Under **Folder Viewer Visibility**, from the appropriate **<Item> pane visibility** list, (Forms, Properties, or Related Documents), select the visibility status you want the application to use when opening the item.

Option	Description
Remember last	Displays the last visibility status when manually toggled through the user interface.
Show	Displays the pane.
Hide	Hides the pane.

7. Under **Note Date Format**, complete the following substeps.
   1. From the **Date format**list, select the format option you want the application to use for dates in the **Notes** field.
   2. Select **Display time** if you want the application to display the time after the date.

Configure Rendering Settings

To configure rendering settings for displaying PDF files, complete the following steps:

1. From the **User** drop-down menu, select **Settings**. The **Settings** pane is displayed.

2. Click **Rendering**. The **Rendering** pane is displayed.
3. Under **Rendering**, from the **Render PDF files using** list, select the rendering method you want the application to use when displaying PDF files.

Option	Description
Native PDF viewer	If provided, uses the built-in browser PDF viewer to display PDF files.
Hyland Rendering and Conversion Service	Uses the Hyland Rendering and Conversion Service to render the PDF files.

Out of Office

Users can enable Out of Office to indicate when they will be unavailable. Users can delegate tasks to any other active users during the tenure of the event. You can enable an active Out of Office event with the current date or a pending Out of Office event with a future date. You can also update or disable an Out of Office event.

Enable Out of Office Event

To enable an Out of Office event, complete the following steps.

1. From the **User** drop-down menu, select **Settings**. The **Settings** pane is displayed.
2. In the **Settings** pane, click **Out of Office**. The **Out of Office** pane is displayed.
3. In the **Begin Date** box, select the start date of your Out of Office event.

   Note:

   - This is a mandatory field.
   - You cannot select past date from the current date.
   - You can also manually enter the date.
4. Optional. In the **End Date** box, select the end date of your Out of Office event.

   Note:

   - You can manually enter the dates.
   - You cannot select past date from the current date.
5. In the **Reasons** drop box, select the appropriate reason associated with your Out of Office event.

   Note:

- The list of reasons displayed is generated from the Perceptive Content server.
- This is a mandatory field.

6. Optional. In the **Delegate User** drop-down list, select the name of the user whom you want to take over your tasks during the tenure of your Out of Office event.

   Note:
   - The active users are available in the **Delegate User** drop-down list.
   - The name of the logged-on user is not displayed in the list.
   - If the selected user is already Out of Office that partly or completely overlaps with the tenure of Out of Office of the logged-on, user a notification is displayed.

7. Optional. In the **Comments** box, enter a comment associated with your Out of Office event.

   You can enter up to 512 characters in the Comments box.

8. Click **Enable**. A confirmation message is displayed that the Out of Office event is successfully enabled.

   Note:
   - The **Enable** button is available when you have entered data in the mandatory fields.
   - After successfully enabling the Out of Office event, a message is displayed in the **Out of Office** pane with a button to disable the event.

Update Out of Office Event

You can update your Out of Office event by modifying the associated information. To update your Out of Office event, complete the following steps:

1. Log in with your credentials. A message associated with an active Out of Office event is displayed.

   The message is not displayed for pending Out of Office event.

2. Click **No** in the message to modify the information associated with your active Out of Office event.
3. From the **User** drop-down menu, select **Settings**. The **Settings** pane is displayed.
4. In the **Settings** pane, click **Out of Office**. The **Out of Office** pane is displayed.
5. Modify the information associated with your Out of Office event.

   Note:
   - You cannot edit the start date of an active Out of Office event.
   - You can edit the start date and the end date of the pending Out of Office event.

6. Click **Update**. A confirmation message is displayed that the Out of Office event is successfully updated.

Disable Out of Office Event

1. To disable an active Out of Office event, complete the following steps:
    1. Log in with your credentials. A message associated with an active Out of Office event is displayed.
    2. Click **Yes**to confirm that you have returned to office. The current Out of Office event is disabled successfully.
2. To disable a pending Out of Office event complete the following steps:
    1. Log in with your credentials.
    2. From the **User** drop-down menu, select **Settings.** The **Settings** pane is displayed.
    3. In the **Settings** pane, click **Out of Office**. The **Out of Office** pane is displayed.
    4. Click the bin icon displayed in the **Out of Office** pane. A message is displayed.
    5. Click **Yes** to disable the pending Out of Office event. A confirmation message is displayed that the Out of Office event is disabled.

Configure Tasks

To configure for displaying a comment box when returning a task, perform the following steps:

1. From the **User** drop-down menu, select **Settings**. The **Settings** pane is displayed.
2. In the **Settings** pane, click **Tasks**. The **Tasks** pane is displayed.
3. Select the **Prompt for comment when returning tasks** to display the **Return Task** dialog box when an assigned user returns a task from the viewer.

Create a link to a document, folder, or workflow item

From Titan, you can view documents, folders, or worklow items available in Perceptive Content. To access these views and the list of items under each view, you must create a URL. All URLs are relative to the base URL of your application.

Documents

Titan supports the following document URLs:

URL	Description
/documents	Displays the list of document views and filters.
/documents/view/{viewId}	Displays the list of document views and filters and selects the provided view.
/documents/view/{viewId}?constraint={vsl}	Adds a query parameter to filter the search results. For more information on appending URLs with VSL constraint parameters, refer to the UseVSL topic in Manage Content User Help.
/documents/view/{viewId}/document/{documentId}	Displays a document viewer for the provided documentId and properties display using the field labels based on the provided viewId.
/documents/view/{viewId}/document/{documentId}?pageId={pageId}	Displays a document viewer for the provided documentId and opens the specified page based on the provided pageId.

Document Quick Access Viewer

Titan supports the following Document Quick Access Viewer URLs:

URL	Description
/document/{documentId}	Displays a document viewer for the provided documentId.
/document/{documentId}?viewId={viewId}	Displays a document viewer for the provided documentId and properties display using the field labels based on the provided viewId.
/document/{documentId}?pageId={pageId}	Displays a document viewer for the provided documentId and opens the specified page based on the provided pageId.

Workflow

Titan supports the following workflow URLs:

URL	Description
`/workflow`	Displays the list of workflow processes and queues.
`/workflow/view/{viewId}`	Displays a list of queue items for a queue.
`/workflow/view/{viewId}/item/{itemId}`	Opens the workflow item using the URL in the viewer.
`/workflow/view/{viewId}/item/{itemId}?pageId={pageId}`	Opens the workflow item using the URL in the viewer and opens the specified page based on the provided pageId.

Folders

Titan supports the following folder URLs:

URL	Description
`/folders`	Displays the list of folder views and filters.
`/folders/view/{viewId}`	Displays the list of folder views and filters and selects the provided view.
`/folders/view/{viewId}/folder/{folderId}`	Displays a folder viewer for the provided folderId.

Folder Quick Access Viewer

Titan supports the following Folder Quick Access Viewer URLs:

URL	Description
`/folder/{folderId}`	Displays a folder viewer for the provided folderId.

Open an Item from the Grid

To open an item from the Documents, Folders, Tasks, or Workflow grid, complete the following steps.

- Using your mouse, click the row of the item you want to open.
- From you keyboard, tab to the appropriate row of the item you want to open and then hit `Enter`.

Export Grid Search Results

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

1. To select the items you want to export, do one of the following:
   - In the **Documents**, **Folders**, **Tasks**, or **Workflow** grid, select the appropriate rows.
   - In the **Folder Content** or **Workflow Content** grid, select the appropriate rows.
2. Click the **Export Grid** icon. The system exports all rows of the grid, whether the entire list is visible on the screen or not.

About Views

A view is a predefined set of criteria you can use as a basis to search for content.

A view contains just the content you need to work with. Because a view is a subset of all content that is tailored for you, the view can hide dozens, hundreds, or even thousands of results that might otherwise clutter your search results list. Views display only the columns you need to see or work with, including custom property columns. In addition, your view is customized so that the appearance, name, and width of columns fit your needs.

A view displays a set of results that are arranged according to the content you wish to create for your users. Views can include any of the following components:

- A condition forms the part of a view or filter that controls which items, containers, or tasks are returned in a view.
- A filter is an optional component of a view that serves as a saved search which narrows the view results.
- A column layout defines column order, sorting, and appearance for a view or a filter.

The list of views available to you are displayed on the left side of your screen. You can view the available filters for each view by expanding the view.

The following table describes the icons used for views.

Icon	Description
	A manual view allows you to select or create a filter before displaying the results, thus narrowing the range of search and displaying fewer results.
	An automatic view returns a small number of rows, so that it is less important to apply a filter to the results before displaying them.

About Filters

A filter is an optional component of a view that serves as a saved search which narrows the view results. The list of filters available to you are displayed on the left side of your screen under the view you used to create it. You can create a public or private filter. A private filter is saved search criteria that is accessible only to you. A publish filter is saved search criteria that is accessible to all users.

The following table describes the icons used for filters

Icon	Description
	A public filter is a saved search criteria that is accessible to all users with access to that specific view.
	A private filter is saved search criteria that is only accessible to you.

Create a Private Filter

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

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

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

Modify or Rename a Private Filter

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

1. In the **Views** pane, select the view associated with the filter and then select the appropriate filter.
2. In the **Search** field, modify the necessary components of the condition and then click .
3. Optional. In the **Save Filter** dialog box, type a name and an optional description for the filter.
4. Click **Save**.

Delete a Private Filter

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

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

About Column Layouts

A column layout defines column order, sorting, and appearance for a view or filter.

When defining column layout, you can reorder, rename, hide, and show columns within the results grid. You can also add one or more custom property columns and group or sort the search results in the column layout.

Pre-formatting the display of columns is an important advantage of views. This feature saves the user the time and effort required by manually adjusting columns each time the user opens a view or to create private filters.

> **Note:**
> Column layouts can only be saved for views using View Designer and only for filters using View Designer or the desktop client.

What is a Condition?

Conditions form the part of a search, through a view or filter, that controls which results are returned in a view. A condition is analogous to a true-or-false question.

If the answer to the question is true, the result is included in the view. If the result is false, the result does not appear in the view. Conditions are applied one at a time to each result to determine whether the result appears.

When you create conditions at the view level, the condition applies to the view as well as all public and private filters associated with the view. When you create conditions at the filter level, the conditions of the filter and the view apply to the search results. For related views, you can only create conditions at the view level.

Document Search Conditions

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

Fields

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

Any document key

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

Possible values include any alphanumeric value.

Check out comments

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

Possible values include any alphanumeric value.

Checked out

The date the document was checked out in version control.

Checked out by

The user who checked out the document in version control.

Created

The date the document was captured.

Created by

The user who created the document.

Created within (days)

The number of days within which the document was captured.

Possible values include any numeric value.

Current version

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

Possible values include any numeric value.

Digital signature status

The status of the digital signature for the document.

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

Document ID

The unique ID of the document.

Possible values include any alphanumeric value.

Drawer

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

Possible values include all drawers the user can access.

Field1

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

Possible values include any alphanumeric value.

Field2

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

Possible values include any alphanumeric value.

Field3

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

Possible values include any alphanumeric value.

Field4

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

Possible values include any alphanumeric value.

Field5

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

Possible values include any alphanumeric value.

Has hold applied

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

Has physical file reference

Whether the document has a reference to a physical file.

Has shortcut

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

Hold name

The name of the retention hold applied to the document.

Possible values include all retention holds the user can access.

Is checked out

Whether the document is checked out in version control.

Is in workflow

Whether the document is in workflow.

Is private

Whether the document is marked private in version control.

Is version controlled

Whether the document is in version control.

Last viewed

The date a user last viewed the document.

Last viewed by

The user who last viewed the document.

Modified

The date a user last modified the document.

Modified by

The user who last modified the document.

Name

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

Possible values include any alphanumeric value.

Next task due

The nearest date a task is due for the document.

Notes

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

Possible values include any alphanumeric value.

Number of pages

The total number of pages in the document.

Possible values include any numeric value.

Pending approval by

The user assigned to an approval task for the document.

Private by

The user who marked the document private in version control.

Summary task count (active)

The number of active tasks assigned for the document.

Possible values include any numeric value.

Summary task count (inactive)

The number of inactive tasks associated with the document.

Possible values include any numeric value.

Summary task status

The status of the task associated with the document.

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

Type

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

Possible values include all document types the user can access.

Workflow item ID

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

Possible values include any alphanumeric value.

Workflow queue

The workflow queue the document is currently in.

Possible values include all workflow queues the user can access.

Workflow status

The status of the document in workflow.

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

Workflow user

The user who added the item to workflow.

Group Two Conditions

To group two conditions, complete the following steps.

1. In the **Grids** pane, in the **Search** field, select the two that you want to group and then click .
2. Optional. Click the operator to change it from **AND** to **OR**.

Ungroup Conditions

You can remove a grouping between two or more conditions to change the way they are evaluated. To ungroup conditions, complete the following action.

- In the Grids pane, in the Search field, select the grouped constraints you want to ungroup and then click .

Types of Searches

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

Normal constraint search

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

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

Variable constraint search

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

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

Prompted constraint search

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

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

What is a Composite Property?

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

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

Search for an Item

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

1. In the **Grids** pane, select the view you want to use as a basis for your search.
2. To create a normal or variable constraint, complete the following sub-steps.
    1. Click anywhere in the **Search in <View_name>** box located to the left of the **Search** button.
    2. Under **Add Constraint**, in the **Constraint Type** list, select **Normal Constraint** or **Variable Constraint**.
    3. In the **Field** list, select the field to use.
    4. If you selected a composite property from the **Field** list, then select a value from the **Property** list.

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

    See the list below for more search constraint options.

    - Constraints that have not been run are outlined with a dashed border.
    - To edit a constraint, select the constraint and update the necessary parameters.
    - To change from an AND to an OR constraint statement, click **AND**. Click **OR** to change it back to **AND**.
    - To use multiple constraints in a single search, click + and repeat the steps to create a constraint.
    - After you define the search constraints you want to apply, you can group the conditions, reorder the conditions, and save searches performed with the search as a filter. The search evaluates the conditions in the order in which you define them. You can save a multiple condition search as a filter.

About Search Results

Search results refer to the list created by the system in response to your views and filters. These results are displayed in the grid which consists of rows and columns.

A row represents an item, such as a document or folder, that satisfies any or all of the defined conditions within the search.

A column represents a specific property related to the row item. These properties can include the name of the item, whether the item is in workflow, or is version controlled.

The following table lists the columns you can display for each item in the search results grid.

Name	Description
In Workflow	Specifies whether the item is in a workflow queue.
Version Controlled	Specifies whether the item is version controlled.
Signature Status	Specifies whether the item contains a digital signature.
Is Private	Specifies whether the item is private.
Under Policy	Specifies whether the item is under policy.
Is Protected	Specifies whether the item is in a protected phase of a retention policy.
Has Physical File Reference	Specifies whether a physical location, such as a building, shelf, or box, for the item is tracked.
Hold Applied	Specifies whether there is a current hold on the item.
Name	The name of the item.
Drawer	The drawer value associated to the item.
Field1 - Field5	The index value associated to the item.
Type	The type of item.
Pages	The number of pages of the item.
Document ID	The unique ID associated with the item.
Created	The date the item was created
Created By	The user name of the user who created the item.
Modified	The date the item was last modified
Modified By	The user name of the user who last modified the item.
Last Viewed	The date the item was last viewed.

Name	Description
Last Viewed By	The user name of the user who last viewed the item.
Checked Out	The date the item was last checked out.
Checked Out By	The user name of the user who last checked out the item.
Checked Out Comments	Notes added by the user who last checked out the item.
Checked In	The date the item was last checked in.
Checked In By	The user name of the user who last checked in the item.
Current Version	The current version number assigned to the item.
Private By	The user name of the user who marked the item as private.
Notes	Notes written about the item.
Workflow Queue	The workflow queue associated with the item.
Workflow Status	The status of the item in workflow.
Workflow User	The user name of the user who added the item to workflow.
Workflow ID	The unique ID of the workflow item associated with the item.
Summary Task Status	The summary tasks status of the item tasks.
Summary Task Count (Active)	Specifies the number of active tasks associated to the item.
Summary Task Count (Inactive)	Specifies the number of inactive tasks associated to the item.
Next Task Due	The date the next task for the item is due.
File Type	The file type, such as TIF, JPG, or PDF, associated to the item.

Select a Column to Display

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

1. In the **Grid** pane, click the icon. The **Columns** dialog box is displayed.
2. For the column or columns you want to hide, clear the check box. An icon is displayed beside the column.
3. For the column or columns you want to show, select the check box. A check icon is displayed beside the column.
4. If you want to add a new custom property column, click **Add** and then, in the **Custom Property** dialog box, complete the following substeps.
   1. From the **Select a document type** list, select the document type you want to associate to the custom property.
   2. From the **Select a custom property** list, select the custom property you want to associate tot he column.
   3. Click **Add**.
5. If you want to remove an existing custom property column, select the column and click **Remove**.
6. Click **OK**.

Rename a Column

To rename an editable column label, complete the following actions:

1. In the **Grid** pane, click . The system displays the **Columns** dialog box
2. From the list, find the appropriate column and click .
3. In the **Edit label for <item> column** dialog box, type in a new name for the column.
4. Click **OK** to close the dialog box and then click **OK** again.

Reorder and Resize Columns

To reorder columns or resize the width of a column, complete the following actions:

- To reorder the columns in the search results grid, point your mouse over the column header, click and then drag your house to the desired location.
- To resize the width of a column, point your mouse over the edge of the column header until the mouse pointer changes to and then drag and drop your mouse to the desired location to resize the column.

Group 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 search results, complete the following steps.

1. In the **Grid** pane, click . The grouping area is displayed.
2. In the search results grid or view preview grid, select a column heading, and drag it to the appropriate grouping area.

   Groups are initially collapsed when the view or filter runs.
3. Optional. To create a subgroup under the grouped column, select a column heading, and drag it to the appropriate grouping area.

Sort Search Results

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

- To sort by a single column, locate the appropriate column in the search grid, and complete one of the following actions.
  - To sort the column results in ascending order, click .
  - To sort the column results in descending order, click .
- To sort multiple columns, repeat the above step for each column you want to sort. A number in the column, beside each arrow, to indicate the order in which the columns are sorted is displayed.

> **Note:**
> To remove a column from

Restore a View or Filter

There are several ways you can modify the grid, such as showing or hiding columns, adding custom property columns, changing column order or adding search constraint. After making these changes, you can easily restore the current view or filter back to its original server value. To restore the current view or filter, complete the following action.

- In the Grid pane, click .

Find a Value in the Grid

To search for a value within a set of grid results, complete the following steps.

1. In the **Grid** pane, click or press **CTRL+F** on your keyboard to open the find area below the grid.
2. In the **Find** field, type a portion or full name of the value you want to find in the grid. As you type, the system highlights the first result that matches.
3. Click **Previous** or **Next** to find the previous or next result in the grid.
4. Click or press **ESC** on your keyboard to close the find area.

About Document Viewer

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

About Documents and Pages

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

A page represents an image captured by a scanner, normally saved as a TIFF file, or a file imported from your file system.

You can import pages in any file format, and pages in different formats can reside in a single item. For example, your imported item might contain several pages in Microsoft Word format and additional pages in PDF or Microsoft Excel format.

If you delete all of the pages from an item, you can still perform certain actions on it, such as adding new pages, changing its properties, and returning the item in search results.

Document Viewer File Types

By default, Document Viewer uses Hyland Rendering and Conversion Service to create renditions of the file. The following table lists special cases for specific file types.

Format	Extension	Description
Text-based files	Any file type whose rendition contains plain text.	Hyland Rendering and Conversion Service renders the file but the user can also select the text by clicking, dragging and copying it by using CTRL+C.
MPEG-1 Audio Layer 3	.MP3	The viewer displays the file in an audio player.
Waveform Audio File Format	.WAV	The viewer displays the file in an audio player.
MPEG-4	.MP4	The viewer displays the file in a video player.
QuickTime File Format	.MOV	The viewer displays the file in a video player.
WebM	.webm	The viewer displays the file in a video player.
Adobe PDF	.PDF	If the `useNativePdfViewer` setting in the app.config.json configuration file is set to true, the viewer displays the file in the browser's default PDF viewer.

Note:
For more information on Hyland Rendering and Conversion Service and supported file formats, refer to the Hyland Rendering and Conversion Service Online Help.

Create a New Document

You can create a new document to use as placeholder for data, files, and pages and upload it. You can create a document from the following applications:

- Documents
- Tasks
- Folders
- Workflow

To create a new document from any one of the application, complete the following steps.

1. Click the **Add** icon and then click **New Document**. The **New Document** dialog box is displayed, which includes the following sections.
   - **Application Plan**
   - **Document Properties**
   - **Custom Properties**
   - **Document Options**

   Note:
   This icon is available only when a View is selected.

2. Under **Application Plan**, complete the following steps.
   1. In the **Select an application plan** list, select the relevant plan.
   2. To update properties using the application plan, click the **Get Keys** icon.
   3. To automatically run the plan when you create documents, select **Use as default application plan.**

   Note:
   The browser extension application plans require the browser extension to be installed and enabled, and the associated web application open to the page containing the data to be linked.

3. Under **Document Properties**, complete the following steps.
   1. In the **Name** field, enter the name of the document.

      Note:
      If you leave this field blank and create the document, the name of the document is the system generated Document ID of the document.

   2. In the **Drawer** list, select a Drawer for the document.
   3. From **Field1**to **Field5** enter the document keys. You must enter minimum one document key.
   4. In the **Type** list, select the Document Type.

   Note:
   The following lists and fields are mandatory.
   - **Drawer** list
   - Type drop-down list
   - Any one field from **Field1** to **Field5**

4. Under **Custom Properties**, add the relevant information.

   Note:
   The fields associated with **Custom Properties** section are populated based on the Document Type

selected in the **Document Properties** section. This section does not display any fields if the selected document type has no corresponding custom properties.

5. Optional. Under **Document Options**, complete the following steps.
   1. Select the **Add to version control** check box if you want to track the changes associated with the document.

      Note:
      After selecting this check box, the new document is checked in with version 1.

   2. Select the **Send to Workflow Queue** check box if you want to add the new document to Workflow. The associated drop-down list is enabled.
   3. From the list, select the relevant workflow queue.

      Note:

      You must select an option from the enabled drop-down list if you selected the **Send to Workflow Queue** check box.

6. Click **OK**. The document is created displaying the document in the Document Viewer.

   Note:

   The document name and the path name must be different. If there is a conflict because a document already exists with matching keys, the application displays the **Resolve Conflict** window.

Save a Document

To save a document, complete the following action:

1. Open the document.
2. In the viewer, make the appropriate changes and then click the **Save** icon. The system saves the document.

Copy a Document

To copy a document, complete the following actions:

1. To select the document you want to copy, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content**grid, select the appropriate documents.
   - In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Copy Document** icon. The **Copy Document** dialog box is displayed.

3. Under **Document Properties** and **Page Options**, update the appropriate settings.
4. Under **Application Plan**, complete the following substeps.
   1. In the **Select an application plan** list, select the appropriate application plan.
   2. To automatically link when the **Copy Document** dialog box is opened, select **Use as default application plan**.
   3. Update the appropriate settings.

   Note:
   Browser extension application plans require the browser extension to be installed and enabled, and the associated web application open to the page containing the data to be linked.

5. Click **Copy Document**.

Delete a Document

To delete one or more documents, complete the following steps.

Note:
You must have the appropriate privileges to delete a document.

1. In the **Documents**, **Workflow**, or **Folder Content** grid, select the documents you want to delete.
2. Click the **Delete Selected Items** icon. The **Delete Selected Items** dialog box is displayed.
3. Click **Delete** to confirm.

Export to PDF

To export a document to a PDF file, complete the following steps.

1. To select the document, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Export to PDF** icon. The **Export in Progress** window is displayed.

   Note:

   - **This icon is displayed when Save Local Copies privilege is enabled for the user for the selected documents.**
   - **From the Documents or Workflow grid, when multiple documents are**

selected, the Export to PDF icon is not available if the Save Local Copies privilege is not enabled for any of the selected documents.

- **The selected document is saved in PDF format in a zipped file to the default download location in your local drive.**
- **The PDF file names of the documents correspond to the document names displayed in the application.**

Move a Document

To move one or more documents, complete the following steps.

> **Note:**
> You must have the appropriate privileges to move a document.

1. To select the documents you want to move, complete one of the following actions.
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents** or **Workflow** grid, click the appropriate document and open it in the viewer.
2. Click the **Move Content** icon. The **Select Location** dialog box is displayed.
3. Enter the appropriate search parameters in the **Filter by** and **Location starts with** fields and then click **Search**.
4. Under **Available locations**, select the location where you want to move the items and then click **OK**.

Download a Document

To download one or more documents, complete the following actions:

1. To select the documents you want to download, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Download Document** icon. The system downloads the document to your device.

Print a Document

To print one or more documents, complete the following actions:

1. To select the documents you want to print, complete one of the following actions.
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.

- In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.

2. Click the **Print** icon. The **Print Preferences** dialog box is displayed.
3. In the **Printer Size** list, select the size of the paper you want to use for printing.
4. Deselect **Enable Annotations**, if you do not want to include document annotations on the printed output.
5. Deselect **Enable Cover Page**, if you do not want to include a cover page. The cover page includes document properties information.
6. Click **OK**.
7. In your default **<Printer>** dialog box, update any necessary settings and then click **Print**.

Send an Email

You can share one or more links to documents by using the default email client. To send links to documents using email, complete the following steps.

1. To select the document you want to send, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.

   > **Note:**
   > You can add up to ten documents.

2. Click the **Envelope** icon. The email client window is available displaying the email template with the default values. The mail body displays the links of the documents that you have selected.

   > **Note:**
   > You must enable pop-up for Mozilla Firefox as the email client window opens in a new tab for this browser.

3. Add recipients to the **To**, **CC**, and **BCC** fields.

   > **Note:**
   > - **The Send Email icon is displayed when the Send emails privilege is enabled for the user. The action is also available in the Document Viewer.**
   > - **The default recipients for the fields To, CC, and BCC are displayed based on how the values are configured in the app.config.json file. To update the default values, modify the following settings in the JSON**

```
file.
    "exportEmail": { "document": { "to": "to_
    recipient@domain.com",  "cc": "cc_
    recipient@domain.com",  "bcc": "bcc_
    recipient@domain.com",  "subject": "Perceptive Content
    Document", "preBody": "Below are links to the
    documents:", "postBody": "Regards," }
```

4. Click **Send** to send the document links to the recipients.

View Document Properties

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

- In the Document Viewer, click the Show or hide properties icon. The Document Properties, Custom Properties, and Page Properties panes are displayed.

View Thumbnails

To view the thumbnails of a document, complete the following steps.

1. Open the document.
2. In the viewer, click the **Show or hide thumbnails** icon to show or hide thumbnails.

Modify and Save a Form

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

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

View a Form

To view the forms of a document, complete the following steps.

1. Open the document.

2. In the viewer, click the **Show or hide forms** icon to show or hide the forms.

View Related Documents

The viewer enables you to view related documents according to the relationship criteria defined in Titan. To view the related documents, complete the following steps.

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

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

3. Select any related document from the list.

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

Edit Document Properties

To edit the properties of a document, complete the following steps.

1. In the **Document Viewer**, click the **Show or hide properties** icon.
2. Under **Document Properties**, **Custom Properties**, and **Page Properties** update the appropriate properties and then click

Sign a Document

To sign a document, complete the following steps.

1. In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the document you want to sign and open it in the viewer.
2. In the viewer, click the **Digital Signatures** icon, and then select **Digitally Sign Document**. The **Digital Signature Authentication** dialog box is displayed.
3. If this is your first time signing a document, complete the following substeps.
   1. In the **Password** and **Confirm password** fields, enter a password.
   2. Optional. In the **Password hint** field, enter a hint for your password.
   3. If your user information is not saved on the server, enter it in the **Prefix**, **First name**, **Last name**, and **Suffix** fields. Note that **First name** and **Last name** are required fields.

4. If this is not your first time signing a document, in the **Password** field, enter your password. You can click **Hint** if you need help remembering.
5. In the **Reason** list, select the reason you are signing this document and then click **OK**.

View Digital Signatures

To view the current and past digital signatures of a document, complete the following steps.

1. In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the document you want to sign and open it in the viewer.
2. Click the **Digital Signatures** icon, and then select **Digital Signatures**. The **Digital Signatures** dialog box is displayed.
3. Optional. Click the column headers to sort the digital signatures accordingly.

View the Details of a Digital Signature

To view the details of a digital signature of a document, complete the following steps.

1. In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the document you want to sign and open it in the viewer.
2. Click the **Digital Signatures** icon, and then select **Digital Signatures**. The system opens the **Digital Signatures** dialog box.
3. Select the appropriate digital signature and then click **View Details**.
4. To view the details, click the **Details** tab. The details for the selected digital signature are displayed.
5. Optional. To verify the validity of the digital signature, click **Verify**. The **Digital Signature Status** dialog box is displayed.
6. Optional. To void the digital signature, complete the following substeps.
   1. Click **Void**.
   2. In the **Void Digital Signature** dialog box, from the **Select a reason** list, select the reason for voiding the signature.
   3. Click **OK**.

View the History of a Digital Signature

. To view the details and history of a digital signature of a document, complete the following steps.

1. In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the document you want to sign and open it in the viewer.
2. Click the **Digital Signatures** icon, and then select **Digital Signatures**. The **Digital Signatures** dialog box is displayed.

3. Select the appropriate digital signature and then click **View Details**.
4. To view the history, click the **History** tab. The historical information for the selected digital signature is displayed.

What is a Retention Hold?

A retention hold is a retention functionality that you can apply to documents that are under a retention policy to prevent users from modifying, deleting, or transferring the document. You can apply multiple holds to the same document, which remains on hold until all applied holds are removed.

Apply a Retention Hold to a Document

A hold allows your organization to preserve a document so that a user cannot delete or modify the document for a specific period of time or indefinitely. To apply a retention hold, complete the following steps.

> **Note:**
> You must have the appropriate privileges to apply a hold to a document.

1. To select the documents you want to apply a retention hold, complete one of the following actions.
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Retention Holds** icon. The **Retention Holds** dialog box is displayed.
3. Select the holds you want to apply to the selected documents.
4. Click **OK**.

Remove a Retention Hold from a Document

To remove a retention hold, complete the following steps.

1. To select the documents you want to remove a retention hold, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents**, **Workflow**, or **Folder Content** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Retention Holds** icon. The **Retention Holds** dialog box is displayed.
3. Deselect the holds you want to remove from the selected documents.
4. Click **OK**.

Add a Document to Version Control

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

1. To select the documents you want to add to version control, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents** or **Workflow** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Version Control** icon and then select **Add to Version Control**. The **Add to Version Control** dialog box is displayed.
3. In the **Comments** field, add any additional information you want to include about the document.
4. In the **Comments** field, add any additional information you want to include about the document.
5. If the document was previously added to version control and then later removed, leave **Retain previous version history** selected to retain previously preserved version history and signatures.

   > **Note:**
   > You cannot deselect **Retain previous version history** if digital signatures are applied to the item.

6. Click **OK**.

Remove a Document from Version Control

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

1. To select the documents you want to add to version control, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents** or **Workflow** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Version Control** icon and then select **Remove from Version Control**. The **Remove from Version Control** dialog box is displayed.
3. Leave **Retain version history** selected, if the document does not have a digital signature and you want to retain the history on the document but still remove it from version history.
4. Click **Remove**.

View Version Control History

To view a history of the version control of a document, complete the following steps.

1. To select the document for which you want to view the version control, complete one of the following actions.
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents** or **Workflow** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Version Control** icon and then select **View Version Control History**. The **Version Control History** dialog box is displayed.
3. Optional. Click the appropriate column title to sort the results accordingly.
4. Click **Close**.

Check in a Document

When you check in a document, the new version that is created does not inherit any digital signatures from the previous version. To check in a document, complete the following steps.

1. To select the documents you want to check in, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents** or **Workflow** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Version Control** icon and then select **Check In**. The **Check In** dialog box is displayed.
3. Add any comments and then click **OK**.

Check out a Document

When you check out a document, the new version that is created does not inherit any digital signatures from the previous version. To check out a document, complete the following steps.

1. To select the documents you want to check out, do one of the following:
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents** or **Workflow** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Version Control** icon and then select **Check Out**. The **Check Out** dialog box is displayed.
3. Add any comments and then click **Check Out**.

Undo a Document Check Out

To undo a document check out, complete the following steps.

1. To select the documents for which you want to undo a check out, complete one of the following actions.
   - In the **Documents**, **Workflow**, or **Folder Content** grid, select the appropriate documents.
   - In the **Documents** or **Workflow** grid or in the **Folder** tree, click the appropriate document and open it in the viewer.
2. Click the **Version Control** icon and then select **Undo Check Out**. The **Undo Check Out** dialog box is displayed.
3. Click **OK**.

Add Page

You can manage pages in a document by adding a new page in an empty document or a document with existing pages. You can also replace an existing page from a document.

Add a Page to an Empty Document from your Local Drive

To add a page in an empty document from your local drive, complete the following steps.

1. In the **Documents grid**, click the empty document to which you want to add a page and open it in the viewer.
2. In the toolbar, click the **Add Page** icon. The **Select a capture source** dialog box is displayed.

   Note:
   The icon is not displayed when:
   - The **Create/Append** privilege is disabled for the user.
   - The selected document is under the version control.
   - The current user has not checked out the document under the version control.
3. In **Select a Capture Source** box, click **File**.
4. Click **OK**. The **Select Files** dialog box is displayed.
5. Click **Browse** to navigate to the file path and select the file that you want to add to the document.
   You can also drag and drop files in the **Select Files** dialog box.
6. Click **OK**. The selected file is added as a page in the document.

Scan and Add a Page to an Empty Document using a Scanner

Prerequisite

- You must install the driver of the scanner connected with your workstation in the local drive.
- You must install Perceptive Experience Web Scan plugin in your workstation to scan.

To scan and add a page in an empty document using a scanner, complete the following steps.

1. In the **Documents grid**, click the empty document to which you want to add a page and open it in the viewer.
2. In the toolbar, click the **Add Page** + icon. The **Select a capture source** dialog box is displayed.

   > **Note:**
   > The icon is not displayed when:
   > - The **Create/Append** privilege is disabled for the user.
   > - The selected document is under the version control.
   > - The current user has not checked out the document under the version control.

3. In **Select a Capture Source** box, click **Scanner**.
4. Click **OK**. The **Choose Scanner** box is displayed, including the list of available scanners.
5. Select the appropriate scanner and then click **OK**. The document is scanned and added as a page in the document.

   > **Note:**
   > The **Choose Scanner** box is displayed only once for each new session.

Add a Page Before a Page from your Local Drive

To add a page before a page in a document from your local drive, complete the following steps.

1. In the **Documents grid**, click the document to which you want to add a page and open it in the viewer.
2. Select the page in the document.
3. In the toolbar, click the **Add Page** + icon. Click the **Add before Page** option to add a page before the selected page in the document.

> **Note:**
> - The **Add Page** icon is not displayed if the selected document is checked in and the current user has not checked out the document.
> - The option **Add before Page** is displayed when **Page Reorder** privilege is enabled for the user. If the user does not have the **Page Reorder** privilege the page is added at the end of all other pages in the document by default.
> - If a page in a document is a Form, you can only add pages after the form.
> - You cannot delete a Form from a document.

4. In **Select a capture source** box, click **File**.
5. Click **OK**. The **Select Files** dialog box is displayed.
6. Click **Browse** to navigate to the file path and select the file that you want to add with the existing page in the document.

> **Note:**
> You can also drag and drop files in the **Select Files** dialog box.

7. Click **OK**. The selected file is added before the selected page in the document.

Scan and Add a Page Before a Page using a Scanner

Prerequisite

- You must install the driver of the scanner connected with your workstation in the local drive.
- You must install Perceptive Experience Web Scan plugin in your workstation to scan.

To scan and add a page before a page using a scanner, complete the following steps.

1. In the **Documents grid**, click the document to which you want to add a page and open it in the viewer.
2. Select the page.
3. In the toolbar, click the **Add Page** + icon. The **Select a capture source** dialog box is displayed.

> **Note:**
> - The **Add Page** icon is not displayed if the selected document is checked in and the current user has not checked out the document.
> - The option **Add before Page** is displayed when **Page Reorder** privilege is enabled for the user. If the user does not have the **Page Reorder** privilege the page is added at the end of all other pages

in the document by default.

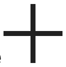
- If the page in a document is a From, you can only add pages after the form.
- You cannot delete a form from the document.

4. In **Select a Capture Source** box, click **Scanner**.
5. Click **OK**. The **Choose Scanner** box is displayed, including the list of available scanners.
6. Select the appropriate scanner and then click **OK**. The document is scanned and added as a page before the selected page in the document

Note:
The **Choose Scanner** box is displayed only once for each new session.

Add a Page After a Page from your Local Drive

To add a page after a page in a document from your local drive, complete the following steps.

1. In the **Documents grid**, click the document for which you want to add a page and open it in the viewer.
2. Select the page.
3. In the toolbar, click the **Add Page**  icon. Click the **Add after Page** option to add a page following the selected page in the document.

Note:

- The **Add Page** icon is not displayed if the current user has not checked out the document.
- The option **Add after Page** is displayed when **Page Reorder** privilege is enabled for the user. If the user does not have the **Page Reorder** privilege the page is added at the end of all other pages in the document by default.

4. In **Select a capture source** box click **File**.
5. Click **OK**. The **Select Files** dialog box is displayed.
6. Click **Browse** to navigate to the file path and select the file that you want to add with the existing page in the document.

   You can also drag and drop files in the **Select Files** dialog box.
7. Click **OK**. The selected file is added after the selected page in the document.

Scan and Add a Page After a Page using a Scanner

Prerequisite

- You must install the driver of the scanner connected with your workstation in the local drive.
- You must install Perceptive Experience Web Scan plugin in your workstation to scan.

To scan and add a page after a page using a scanner, complete the following steps.

1. In the **Documents grid**, click the document to which you want to add a page and open it in the viewer.
2. Select a page in the document.
3. In the toolbar, click the **Add Page** + icon. The **Select a capture source** dialog box is displayed.

   Note:

   - The **Add Page** icon is not displayed if the current user has not checked out the document.
   - The option **Add after Page** is displayed when **Page Reorder** privilege is enabled for the user. If the user does not have the **Page Reorder** privilege the page is added at the end of all other pages in the document by default.

4. In **Select a Capture Source** box, click **Scanner**.
5. Click **OK**. The **Choose Scanner** box is displayed, including the list of available scanners.
6. Select the appropriate scanner and then click **OK**. The document is scanned and added as a page after the selected page in the document.

   Note:
   The **Choose Scanner** box is displayed only once for each new session.

Replace a Page from your Local Drive

To replace a page with a new page in a document from your local drive complete the following steps.

1. In the **Documents grid**, click the document for which you want to replace a page and open it in the viewer.
2. Select the page in the document.
3. In the toolbar, click the **Add Page** + icon. Click the **Replace Page** option to replace the selected page with a new page in the document.

Note:

- The **Add Page** icon is not displayed if the selected document is checked in and the current user has not checked out the document.
- The **Replace Page** option is displayed when the Page Delete privilege is enabled for the user.
- For pages with annotations, users can apply the existing annotations on the new page from **Keep existing annotations** dialog box.

4. In **Select a capture source** box, click **File**.
5. Click **OK**. The **Select Files** dialog box is displayed.
6. Click **Browse** to navigate to the file path and select the file that you want to replace with the existing page in the document.

Note:

You can also drag and drop files in the **Select Files** dialog box.

7. Click **OK**. The selected file is replaced with the new file in the document.

Replace a Page using a Scanner

Prerequisite

- You must install the driver of the scanner connected with your workstation in the local drive.
- You must install Perceptive Experience Web Scan plugin in your workstation to scan.

1. In the **Documents grid**, click the document for which you want to replace a page and open it in the viewer.
2. Select the page in the document.
3. In the toolbar, click the **Add Page** + icon. Click the **Replace Page** option to replace the selected page with a new page in the document.

Note:

- The **Add Page** icon is not displayed if the selected document is checked in and the current user has not checked out the document.
- The **Replace Page** option is displayed when the **Page Delete** privilege is enabled for the user.
- For pages with annotations, users can apply the existing annotations on the new page from **Keep existing annotations** dialog box.

4. In **Select a capture source box**, click **Scanner**.
5. Click **OK**. The **Choose Scanner** box is displayed, including the list of available scanners.
6. Select the appropriate scanner and then click **OK**. The document is scanned, and the selected file is

replaced with a new file in the document.

Note:
The **Choose Scanner** box is displayed only once for each new session.

About Annotations

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

Hide Annotations

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

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

- To hide an annotation, in the viewer, click the Annotate Page icon and select Hide Annotations. The document displays without annotations.

Add an Arrow Annotation

The Arrow annotation lets you place an arrow on an item image. To add an arrow annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Arrow**, and then select an arrow annotation from the list.
3. Click and hold the mouse button on the item image where you want to place the end of the arrow.
4. While holding the mouse button, draw a line towards the area of the item to which you want the arrow to point.
5. Release the mouse button.
6. To ensure the annotation is saved to the item, click .

Add a Check Annotation

The Check button annotation lets you place a check mark on an item image. To add a check annotation, complete the following steps.

1. Open an item.

2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Check**, and then select a check annotation from the list.
3. Click the item image where you want the check mark to be placed.
4. To ensure the annotation is saved to the item, click the **Save** icon.

Add a Highlight Annotation

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

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Highlight**, and then select a highlight annotation from the list.
3. Click and hold the mouse button on the item image where you want to start highlighting.
4. While holding the mouse button, drag the mouse to select the area you want to highlight and then release the mouse button.
5. To ensure the annotation is saved to the item, click the **Save** icon.

Add a Line Annotation

The Line annotation lets you place a line on an item image. To add a line annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Line**, and then select a line annotation from the list.
3. Click and hold the mouse button on the item image where you want to start the line and, while holding the mouse button, draw a line, and then release the mouse button.
4. To ensure the annotation is saved to the item, click the **Save** icon.

Add an Oval Annotation

The Oval annotation lets you place an oval on an item image. The oval annotation can appear hollow or filled, depending on the appearance defined in the annotation template. To create an oval annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Oval**, and then select an arrow annotation from the list.

3. Click and hold the mouse button on the item image where you want to start the oval and, while holding the mouse button, draw the oval.
4. Release the mouse button.
5. To ensure the annotation is saved to the item, click .

Add a Pen Annotation

The Pen annotation enables you to draw on an item image. To add a pen annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Pen**, and then select a pen annotation from the list.
3. Click the mouse button on the item image where you want to start the pen image and, while holding the mouse button, move the mouse to create the drawing.
4. Release the mouse button when you are finished.
5. To ensure the annotation is saved to the item, click the **Save** icon.

Add a Picture Stamp Annotation

The Picture Stamp annotation lets you stamp predefined or custom pictures on item images. To add a picture stamp annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Picture Stamp**, and then select a picture stamp annotation from the list.
3. Click the item image where you want the picture stamp to appear.
4. To ensure the annotation is saved to the item, click the **Save** icon.

Add a Rectangle Annotation

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

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Rectangle**, and then select a rectangle annotation from the list.

3. Click and hold the mouse button on the item image where you want to start the rectangle and, while holding the mouse button, draw the rectangle.
4. Release the mouse button at the endpoint of the rectangle.
5. To ensure the annotation is saved to the item, click the **Save** icon.

Add a Sticky Note Annotation

The Sticky button annotation lets you add small notes to item images. To add a sticky note annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Sticky Note**, and then select a sticky note annotation from the list.
3. Click the item image where you want the sticky note to appear.
4. In the **Sticky Note** dialog box, in the **Add Comment** field, type the comment you want to add and then click +. The system adds the comment to bottom of the sticky note.

   Note:
   After you add text, you cannot change the sticky note text.

5. Click X to close the dialog box.
6. To ensure the annotation is saved to the item, click .

Add a Text Annotation

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

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Text**, and then select a text annotation from the list.
3. Click the item image where you want the text to be placed.
4. In the **Add Text** dialog box, complete the following substeps.
   1. In the **Text** field, type your message.
   2. In the **Font**, **Font Color**, and **Font Size** fields, select the type, color and size of the font you want to use for the text.
   3. Under **Alignment**, select **Left**, **Center**, or **Right** to align the text.
   4. Under **Style**, select **B** or **I** to bold or italicize the text.
   5. Click **OK**.

5. To ensure the annotation is saved to the item, click .

Add a Text Stamp Annotation

The Text Stamp annotation lets you stamp predefined (Approved, Confidential, Rejected) or custom messages on item images. To add a text stamp annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Text Stamp**, and then select a text stamp annotation from the list.
3. Click the item image where you want the text stamp to appear.
4. Click

Add a URL Annotation

The URL button annotation lets you place a link to a URL address on an item image. To add a URL annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | URL**, and then select a URL annotation from the list.
3. In the **URL** dialog box, complete the following substeps.
   1. In **Address**, type the web address.
   2. In **Text** field, type the text you want to appear on the item image.
   3. In the **Font**, **Font Color**, and **Font Size** fields, select the type, color and size of the font you want to use for the text.
   4. Under **Alignment**, select **Left**, **Center**, or **Right** to align the text.
   5. Click **OK**.
4. To ensure the annotation is saved to the item, click

Add a Recently Used Annotation

To add a recently used annotation, complete the following steps.

1. Open an item.
2. In the viewer, click the **Annotate Page** icon, select **Create Annotation | Recently Used**, and then the appropriate annotation from the list.
3. Click the mouse button on the item image where you want to place the annotation and add it like you

normally would. For more information, refer to the specific topic for adding that annotation.

4. To ensure the annotation is saved to the item, click .

Edit an Arrow Annotation

To edit an arrow annotation, complete the following steps.

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

Edit a Check Annotation

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

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

Edit a Highlight Annotation

To edit a highlight annotation, complete the following steps.

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

Edit a Line Annotation

To edit a line annotation, complete the following steps.

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

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

Edit an Oval Annotation

To edit an oval annotation, complete the following steps.

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

Edit a Pen Annotation

To edit a pen annotation, complete the following steps.

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

Edit a Rectangle Annotation

To edit a rectangle annotation, complete the following steps.

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

Edit a Sticky Note Annotation

To edit a sticky note annotation, complete the following steps.

1. Select the annotation you want to edit.
2. Click the **Edit** icon.
3. In the **Sticky Note** dialog box, in the **Add Comment** field, type the comment you want to add and then click +. The system adds the comment to bottom of the sticky note.

Note:
After you add text, you cannot change the sticky note text.

4. Click ✕ to close the dialog box.
5. To ensure the annotation is saved to the item, click the **Save** icon.

Edit a Text Annotation

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

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

Edit a Text Stamp Annotation

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

1. Select the annotation you want to edit.
2. Click the **Edit** icon.
3. In the **Text Stamp** dialog box, complete the following substeps.
   1. In the **Text** field, update the existing message.
   2. In the **Font**, **Font Color**, and **Font Size** fields, select the type, color and size of the font you want to use for the text.
   3. Under **Alignment**, select **Left**, **Center**, or **Right** to align the text.
   4. Under **Style**, select **B** or **I** to bold or italicize the text.
   5. From the **Frame Style** list, select the appropriate style for the text stamp frame.
   6. From the **Frame Roundness** list, select the value to adjust the shape of the frame corners.
   7. From the **Frame Margin** list, select the appropriate value to adjust the margin between the frame and text.
   8. From the **Line Weight** list, select the appropriate value to adjust the weight of the frame line.
   9. In the **Line Color** field, select the color you want to use for the frame line.
   10. Deselect **No Fill** if you want to add color to the text stamp shape and then from the **Fill Color** field, pick the appropriate color.
   11. Click **OK**.
4. To ensure the annotation is saved to the item, click the **Save** icon.

Edit a URL Annotation

To edit a URL annotation, complete the following steps.

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

Move an Annotation

To move an annotation, complete the following steps.

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

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

Resize an Annotation

To resize an annotation, complete the following steps.

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

1. Select the annotation you want to resize.
2. Drag the edges or corners to resize the annotation to the desired size.
3. To ensure the annotation is resized, click .

View Annotation Properties

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

1. Select the annotation for which you want to view its properties.
2. Click . The system displays the properties for that annotation.

Delete an Annotation

To delete an annotation, complete the following steps.

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

1. Select an annotation.
2. Click the **Delete** icon.
3. To ensure the annotation is saved to the item, click the **Save** icon.

Navigate Document Pages

To navigate between the pages of a document, complete one or more of the following actions:

- To go to the next page in the document, click the Next icon.
- To go to the previous page in the document, click the Previous icon.
- To go directly to a page, enter the page number in the current page field and hit **Enter**.

Reorder Pages

To reorder the pages of a document, complete the following action.

- In the thumbnails pane, select the page you want to move and then drag and drop it to the appropriate location. Repeat for each page you want to move.

Adjust the Size of a Page

To adjust the size of a page, complete one or more of the following actions:

- To zoom in on or out of a page, click the Zoom In or Zoom Out icons until you reach the size you want.
- To adjust the page to fill the space available in the window, click the Fit Content icon.
- To adjust the page to fit the height of the window, click the Fit Height icon.
- To adjust the page to fit the width of the window, click the Fit Width icon.
- To adjust the page to its actual size, click the Actual Size icon.

Rotate a Page

While viewing a document in Document Viewer you can rotate the currently selected page or all pages. If you save the document after a rotation and the document type is TIFF, TIF, or G42, the system saves the rotation to the server. To rotate a page, complete one or more of the following actions:

- To rotate all the pages in the document right, click and then select Rotate All Right.
- To rotate all the pages in the document left, click and then select Rotate All Left.
- To rotate the current page right, click and then select Rotate Right.
- To rotate the current page left, click the and then select Rotate Left.

View Pages in Full Screen

In Full Screen mode, you can hide all the toolbars and task panes to maximize the viewing area on your screen. To enter or exit Full Screen mode, complete the following actions:

- To enter Full Screen mode, click the Full Screen icon.
- To exit Full Screen mode, click the Exit Full Screen icon.

Download a Page

To download a page, complete the following actions:

- To download a page in the document, select the appropriate page, and then click the Download Page icon. The system downloads the page to your device.

Delete a Page

To delete a page, complete the following actions:

1. To delete a page in the document, select the appropriate page, and then click the **Delete** icon. The **Delete Page** dialog box is displayed.
2. Click **Delete** to confirm.

Edit a Page Label

To edit a page label, complete the following steps.

1. In the **Folder** tree, expand the necessary folder and document to locate the page you want to relabel.

2. Select the page and click the **Edit page label** icon.
3. In the **Edit page label** dialog box, type the new page label into the field and then click **OK**.

About Folders

A folder groups documents and other folders together according to a logic that you and the administrator define.

A folder can contain subfolders, documents, and shortcuts. Each folder is assigned a folder type that allows you to easily identify its purpose. Based on your organization's business needs, you administrator can restrict the type of documents and folders you can store in a folder.

Create a Folder

To create a folder, perform the following steps:

1. In any grid view, (folder, tasks, document, or workflow) click **New** icon and then select **New Folder**. The **New Folder** dialog box is displayed which includes the following sections.
   - **Folder Properties**
   - **Custom Properties**
   - **Advanced**

   Note:
   - The mandatory fields are marked in asterisk.
   - The **New** icon is displayed when the **Create** privilege is enabled for the logged-on user.
   - You cannot create a folder from the Capture feature.

2. Under **Application Plan**, complete the following steps.
   1. In the **Select an application plan** list, select the relevant plan.
   2. To update properties using the application plan, click the **Get Keys** icon.
   3. To automatically run the plan when you create documents, select **Use as default application plan.**

   Note:
   The browser extension application plans require the browser extension to be installed and enabled, and the associated web application open to the page containing the data to be linked.

3. Under **Folder Properties**, complete the following steps.
   1. In the **Name** field, enter the name of the folder.
   2. Optional. In the **Path** field, click the **Select Path**

 icon. The **Select Location** dialog box is displayed.

> **Note:**

A folder is created in the default folder location if the Path field is not defined by the logged-on user.
When a new folder is created in another folder, the location of the parent folder is generated in the Path box. You can modify the location of the new folder. However, you cannot leave the Path box empty.

3. In the **Filter by:** drop down list, select the location with which you want to associate the folder.
4. In the **Location starts with:** box, enter the location, and then click **Search**. The list of location is displayed in the **Available locations:** field.

> **Note:**
> The list of **Locations starts with:** box displays the options based on the location selected in the **Filter by:**box.

5. From the **Available locations:** field, select the option and then click **OK**. The selected location is displayed in **Path** field.

> **Note:** The list of **Available locations:** field displays the option based on the location selected in the **Location starts with:** box.

6. In the **Type** list, select the type that you want to associate with the folder.

4. Under **Custom Properties**, enter the relevant information in the fields that are displayed based on the selected Folder type.

> **Note:** If the selected Folder type has no associated custom properties the **Custom Properties** section is displayed without any fields.

5. Optional. In the **Advanced**, check **Send to workflow queue** if you want to send the folder to a workflow queue.
6. From the drop-down list select the relevant queue for the folder from the option.

> **Note:** You must select an option from the drop-down list if you have selected **Send to workflow queue**.

7. Click **OK**. The folder is created, and the folder details is displayed in quick access view.

View the Contents of a Folder

When a folder is opened in the Folder viewer, the system displays the contents of the folder in a grid. A Folder tree is also available to quickly navigate through the content of multiple levels of folders without opening each item. The Folder tree displays all the content of the top-most folder, while the Folder Content grid only displays the content of the currently selected folder. When a document is selected, the Folder Content grid is replaced by the Document Viewer.

To view and open the contents of a folder, complete the following steps.

- In the Folder tree, complete any of the following actions.
  - To view the contents of a subfolder, click the Expand icon next to the appropriate Folder or folder Shortcut .
  - To open a subfolder in the Folder viewer, click the appropriate Folder icon or folder Shortcut icon.
  - To view the pages of a document, click the Expand icon next to the appropriate Document or document Shortcut .
  - To open a document in the Folder viewer, click the appropriate Document icon or document Shortcut icon.
  - To open a page in the Folder viewer, click the appropriate Page icon.
- In the Folder Content grid, complete any of the following actions.
  - To open a subfolder in the Folder viewer, click the appropriate Folder icon or folder Shortcut icon.
  - To open a document in the Folder viewer, click the appropriate Document icon or document Shortcut icon.
  - To search for a folder item, create a normal or variable constraint and then click Search. For detailed information on how to do this, see Search for an Item.
  - To sort the search results, by single column or multiple columns, click the Ascending icon or the Descending icon. For detailed information on how to do this, see Sort Search Results

- To change the order in which columns display, add or remove columns, or resize columns, click the Columns icon and make the appropriate updates. For detailed information on how to do this, see Reorder and Resize Columns or Select a Column to Display.

View Folder Properties

Folder properties define information that is specific to a folder. A folder can have folder properties and custom properties. To view the properties of a folder, complete the following action.

- In the Folder Viewer, click the Show or Hide Folder Properties icon. The Folder Properties and Custom Properties panes are displayed.

Edit Folder Properties

To change a folder property value for a folder, complete the following steps.

1. In the **Folder Viewer**, click the **Show or Hide Folder Properties** icon.
2. Under **Folders Properties**, update the appropriate properties.
3. Under **Custom Properties**, complete any of the following actions.
   - To add a custom property, locate the appropriate one, click **Add**, and then update the appropriate properties.
   - To remove a custom property, click the appropriate one, and then click **Remove**.
4. To ensure the properties are saved to the item, click the **Save** icon.

View Folder Shortcut Locations

To view and open the location of a folder shortcut, complete the following steps.

1. In the **Folder** tree or **Folder Content** grid, click the folder **Shortcut** icon.
2. In the toolbar, click the **View Location** icon. The appropriate folder location is displayed.

   The**View Location** icon will not display if the folder is a root level folder or multiple items are selected.

View Related Folders

The viewer enables you to view related folders according to the relationship criteria defined in the Perceptive Content Management Console. To view the related folders, complete the following steps.

1. In the **Folder Viewer,** click the **Show or Hide Related Folders** icon.
2. In the **Related Folders** pane, select the relationship you want to view.

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

3. Select any related folder from the list.

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

View a Form

To view the forms of a folder, complete the following steps.

1. To display a list of available folders, select a folder view.
2. In the **Grids** pane, select the folder you want to open. The folder is displayed in the folder viewer.
3. Click the **Show or hide forms** icon to show or hide the forms.

Open an Folder in Workflow

To open a folder in workflow, complete the following steps.

1. In the **Folder Content** grid, select the appropriate folder.
2. In the **Folder** viewer, click the **Workflow** icon, and then select **Open in Workflow**.

Modify and Save a Form

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

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

Move a Folder

To move one or more folders, complete the following steps.

Note:
You must have the appropriate privileges to move a folder.

1. To select the folders you want to move, complete one of the following actions.
   - In the **Folders** grid, select the appropriate folders.
   - In the **Folders** grid, click the appropriate folder row, and then in the **Folder Content** grid, select the appropriate folders.

   You can also move documents from the **Folder Content** grid.
2. Click the **Move Content** icon. The **Select Location** dialog box is displayed.
3. Enter the appropriate search parameters in the **Filter by** and**Location starts with** fields and then click **Search**.
4. Under **Available locations**, select the location where you want to move the folder and then click **OK**.

Delete a Folder

To delete a folder and its contents, complete the following steps.

Note:
You must have the appropriate privileges to delete a folder.

1. In the **Folders**, **Folders Content**, or **Workflow** grid, select the appropriate folders.
2. In the toolbar, click the **Delete Selected Items** icon. The **Delete Selected Items** dialog box is displayed.
3. Click **Yes** to verify.

Open an Item from Workflow

There are several statuses that can affect your ability to open an item from workflow. Depending on the status of the item, the system may prompt you to open the item in Preview Mode. Preview Mode allows you to view the item and make limited changes but prevents you from routing or performing workflow actions on the item.

Note:

- A workflow item can only be opened by one user at a time, and each user can only open one workflow item at a time.
- If you already have a workflow item open, the system asks you to choose which item to open and what action to take on the previously opened item.

To open an item from workflow, perform the following action.

- In the Grids pane, click the row of the item you want to open.

Result

- If the status allows it, the system opens the item.
- If the status is set to **Completed**, the system asks if you want to open the completed item. If you click Yes, the system opens the item.
- If the status is set to **Working** or **Waiting**, the system asks if you want to open the item in **Preview Mode**. If you click **Yes**, the system opens the item in **Preview Mode**.

View Next Item

To view the next item in the queue, complete the following steps.

1. In the **Workflow** viewer, click **Workflow** and then select **View Next Item**. The **View Next Item.** dialog box is displayed.
2. Complete one of the following actions.
   - Click **Put on Hold** to put the current item on hold and open the next item.
   - Click **Return to Queue** to open the next item without placing the current item on hold.
   - Click **Cancel** to stay on the current item.

Add an Item to Workflow

To add an item to workflow, complete the following steps.

1. To select the items you want to add to workflow, complete one of the following actions.
   - In the **Documents**, **Folders**, or **Workflow** grid, select the appropriate items.

- In the **Documents**, **Folders**, or **Workflow** grid, click the appropriate item and open it in the viewer.

2. Click the **Workflow** icon.
3. In the **Add to Workflow** dialog box, select the appropriate workflow process, queue, and priority for the item.
4. Click **OK**.

Set Item Status

You can set the status of an item to **Idle**, **On Hold** or **Pending**. To set a status of an item in workflow, complete the following steps.

1. To select the item, do one of the following.
   - In the **Workflow** grid, select the items for which you want to set the status.
   - In the **Workflow** grid, click the appropriate item and open it in the viewer.
2. In the toolbar, click the **Workflow** icon. The drop-down list is displayed.
3. Point to **Set Item Status** and then select the relevant option. A confirmation message associated with the selected status is displayed.

> **Note:**
> - The options associated with **Set Item Status** are available when **Process** privilege is enabled for the user.
> - For **On Hold** status, you must set the date in **Hold Until** box to specify the duration of the item to be on hold.
> - From the **Workflow** grid, users can set **On Hold** status if all the selected items are in the same workflow queue. However, this status is not available in the **Workflow** grid if any of the selected items already has **On Hold** status.
> - When the item is opened in the viewer the current status of the item is not displayed in **Set Item Status**.
> - When an item is opened in the viewer the status is displayed as **Working** in the **Workflow** grid. After the item is closed in the viewer the status of the item is displayed as **Idle** in the grid view.

Set Item Priority

You can set the priority of an item to **High**, **Normal** or **Low**. To set the priority of an item in workflow, complete the following steps.

1. To select the item, do one of the following.
   - In the **Workflow** grid, select the items for which you want to set the priority.

- In the **Workflow** grid, click the appropriate item and open it in the viewer.

2. In the toolbar, click the **Workflow** icon. The drop-down list is displayed.
3. Point to **Set Item Priority** and then select the relevant priority. A confirmation message associated with the selected priority is displayed.

> **Note:**
> - The options associated with **Set Item Priority** are available when the **Change Priority** privilege is enabled for the user.
> - When the item is opened in the viewer, the current priority of the item is not displayed in **Set Item Priority**.

Route an Item in Workflow

To route an item from one workflow queue to another, complete the following steps.

1. To select the documents you want to route, do one of the following:
   - In the **Workflow** grid, select the appropriate items.
   - In the **Workflow** grid, click the appropriate item and open it in the viewer.
2. Click the **Workflow** icon and then do one of the following:
   - To send the item to the next queue in the workflow process flow, select **Route Forward**. When only a single route is defined for the queue, the **Route Forward** dialog box does not appear and the item is automatically routed.
   - To send the item back to any queue from which it came previously, select **Route Upstream**.
   - To send the item back to the previous queue, select **Route Back**.
   - To select a queue in the workflow process to which to send the item, select **Route Anywhere**.
   - To send the item to multiple queues in parallel, select **Route Forward** and, in the **Route Forward** dialog box, under **Automatic**, select a parallel route.
   - To send the item to another sub queue within a super queue, select **Route Forward** and, in the **Route Forward** dialog box, under **Peer Routes**, select the sub queue.

Remove an Item from Workflow

To remove an item from workflow, complete the following steps.

1. To select the items you want to remove from workflow, complete one of the following actions.
   - In the **Documents**, **Folders**, or **Workflow** grid, select the appropriate items.
   - In the **Documents**, **Folders**, or **Workflow** grid, click the appropriate item and open it in the viewer.

> **Note:**
> You can only remove a hundred items or less from workflow at a time.

2. Click the **Workflow** icon and then select **Remove from Workflow**.
3. In the **Remove from Workflow** dialog box, click **Yes** to confirm.

View Workflow History

To view the workflow history of an item, complete the following steps.

1. To select the item for which you want to view the workflow history, do one of the following:
   - In the **Documents**, **Folders**, or **Workflow** grid, select the appropriate items.
   - In the **Documents**, **Folders** or **Workflow** grid, click the appropriate item and open it in the viewer.
2. Click the **Workflow** icon, and then complete one of the following actions.
   - Select **View Workflow History** if the item is in a workflow.
   - Select **Check for Workflow History** if the item is not in a workflow.

> **Note:**
> If the item has never been in a workflow, the system displays the message 'No workflow history for this item.'.

3. In the **Workflow History** dialog box, complete the following substeps.
   1. From the list, select the appropriate item. The current workflow item, <process name>:<queue name>, is listed under **Workflow**. If the item has previously been in workflow and archived, the workflow history is listed under **Workflow Archive**.
   2. To view workflow information, click the **Details** tab.
   3. To view all events related to this item for the selected queue, click the **History** tab.
4. Click **Close**.

View or Recall Recently Routed Items

To view or recall workflow items recently routed to another queue, complete the following steps.

1. In the **Workflow** grid or **Workflow** viewer, click **Workflow** and then select **View Recently Routed Items**. A list of items that were recently routed from the current queue are displayed in the **Recently Routed Items** dialog box.
2. Under **Item Location**, do one of the following:
   - To open a recently routed item in a viewer, select the item and then click **View**.

- To recall recently routed items to make changes or reprocess, select the items and then click **Recall**. Note that the recall option is not available if the recall time has expired.

Archive an Item

To archive an item in workflow, complete the following steps.

1. To archive an item from workflow, complete one of the following actions.
   - In the **Workflow** grid, select the appropriate documents.
   - In the **Workflow** grid, click the appropriate document and open it in the viewer.
2. Click the **Workflow** icon and then select **Archive**.
3. In the **Archive Workflow Items** dialog box, click **Archive**.

Tasks

Overview of Tasks

The Tasks feature is used to assign work associated with any document or folder. To create a task, users must be in folder viewer, task viewer or document viewer. The three types of tasks are Document Deficiency, Pointer and Signature Required. Users can choose the type of task that best matches with the work to move the task to the next business process or complete the business process.

Types of Tasks

Users can create and assign three types of tasks.

Document deficiency

Document deficiency is a type of task where a document is missing or is incomplete in the document or folder.

Pointer

Pointer is a type of task that points to a particular section of the document to draw the attention of the assigned user to perform the appropriate action and then move the task to the next business process. Users can create this type of task from Document Viewer and Folder Viewer.

Signature required

Signature required is a type of task where the assigned user needs a digital signature to move the task to the next business process.

Note:
This task type is not available in Task Type list when user is creating a task from:

- Document which is a Form
- Folder

Approval Tasks

Retention Policy Designer generates approval tasks for approvers in a retention policy. An approver is a user or a group member who must approve the disposition action that is set in a policy before that action can occur. As the approval task is a system generated task, users cannot create or assign this task type. This type of task is generated for document and folders.

To create a task, complete the following steps.

1. In any grid view, (folder, tasks, document) click the document for which you want to create a task and then open it in the respective viewer.
2. Click **Create Task** icon. The **New Task** window is displayed.

   Note:
   - The mandatory fields are marked in asterisk.

- The **Create Task** icon is displayed when the **Create** privilege is enabled for the user on any task template.

3. The **Create Task** icon is displayed when the **Create** privilege is enabled for the user on any task template.
4. From the **Task template** drop-down list, select the template that you want to associate with the task.

Note:
From the **Task template** drop-down list, select the template that you want to associate with the task.

5. From the **Users or group** drop-down list, select the user or the group to whom you want to assign the task.

Note:
- The options available in **Users or group** is based on the selected task template.
- Users can either assign a task to one group or one user or multiple users.

6. From the **Location** drop down list, select the location of the task.

Note:
- The options available in the Location drop-down list are based on the selected task template and the type of item for which the task is being created. For example, page with annotation is only displayed for document pages that are raster file format.
- The options **Document**, **Page** and **Page with an annotation** are available when a user creates a task in a document.
- The **Folder** option is available when a user creates a task from folder.

7. In the **Start Date** box, select the start date of the task.

Note: The present date is auto generated.

8. Optional. In the **Due Date** box, select the due date for the task.

Note:
- You cannot select the due date for the task prior to the start of the task.
- Users can customize the due date.
- System Administrator can configure the due date in the task template in the following four ways:
- No due date, where the **Due Date** box is displayed blank.
- Present date, where the present date is displayed in the box.
- Definite days, where the due date is calculated based on the date of creating the task.
- Definite days, where users can edit the start date and the due date is calculated accordingly to be displayed in the box.

9. Optional. In the **Expedite** button, select **Yes**, if you want to let the user know that this task has precedence over other tasks.
10. Optional. In the **Instructions** box, enter the instructions associated with the task.

    Note:

    - If configured, editable or read only text can be generated in the **Instructions** box, based on the task template.
    - You can enter up to 512 characters.

11. Optional. In the **Comments** box, enter the comments associated with the task.

    Note: You can enter up to 512 characters.

12. Click **OK**. A confirmation message is displayed stating that the task is created.

    Note: If **Location** is selected as **Page with Annotation**, a visual indicator is created in the page at the top left corner. Users are required to drag the visual indicator to the required section in the document.

Perform Actions on Task

You can perform appropriate actions on the tasks assigned to you. You can view a task, skip a task, return a task, complete a task, and delete a task.

View a Task

To view a task, perform the following steps:

1. From the home page of Titan, click **Tasks**. The Task application opens, and a list of views is displayed.
2. You can filter the list of tasks using the following lists if you have the **View** privilege.
   - **All Tasks**: This list displays the tasks for which the user has the **View** privilege.
   - **My Assigned**: This list displays the tasks assigned to the logged-on user.
   - **To Review**: This list displays the tasks that the logged-on user needs to review.
   - **Returned to Me**: This list displays the tasks that are returned to the logged-on user.
   - **Complete Pending Review**: This list displays the tasks that are completed, and the logged-on user needs to review.
   - **Returned by Me**: This list displays the tasks returned by the logged-on user.
   - **Complete**: This list displays tasks with the status marked as **Complete**.
   - **Cancelled**: This list displays tasks with the status marked as **Cancelled**.
   - **Invalid**: This list displays tasks with status marked as **Invalid**.

- **Tip**: You can configure the default list view from the **Task** application by navigating to **Settings > Defaults > Views > Task default view** and then selecting the appropriate view from the drop-down list.

3. To open and view the task details, click the document for which you want to view tasks and then open it in the respective viewer.
4. The following metadata is displayed by default in the left section of task details:
   - **Due Date**

     Note: The due date is marked in red color when the task is overdue

   - **Expedite**
   - **Skipped**
   - Task created on the previous version of the document.
   - Instructions

     Note: Additional metadata is displayed in the first three columns without the icons. The display of the metadata is based on the task view as defined in Perceptive Content for the default view. After the first three columns, the system displays the metadata that are not selected for the default view. The task details pane displays the item (document or folder) for which the task was created.

View Related Task

To view related task, perform the following steps:

1. In any grid view, (folder, tasks, or document) click the document for which you want to view the related tasks and then open it in the respective viewer.

   Note: Documents with tasks marked as expedited are displayed with **Is Expedited** icon in the Task grid view.

2. Click **Show or hide related tasks** icon. The **Task View** section is displayed with the list of associated tasks.
3. To view a task from the list, click on any task. The task details are displayed in the viewer along with the visual indicator (if any).

   Note:
   - In smartphone the task details are displayed in a new tab in the browser.
   - You can filter the task view from grid view and the respective viewer.

Skip a Task

To skip a task, perform the following steps.

1. In the task grid view, click the task which you want to skip and then open the task details.
2. Click **Skip**. The task is skipped, and the next task is displayed to the user to perform required action.

Return a Task

To return a task to the previous queue, perform the following steps.

1. In the task grid view, click the task which you want to return to the previous queue and then open the task details.
2. If the prompt for entering comment when returning a task is enabled from the **Settings** pane perform the following steps.
   1. Click **Return**. The **Return Task** dialog box opens.
   2. Select an appropriate reason to return the task.
   3. Optional. In the **Comments** box, enter the comments associated with returning the task.
   4. Check **Do not show this message in future** box if you do not want the **Comments** box to be displayed when returning the task.

      Note: You can enable the **Do not show this message in future** box by navigating to **Settings > Tasks**

   5. Click **OK**. The task is returned, and the next task is displayed from the grid.
3. If the prompt for entering a comment when returning a task is disabled from the **Settings** pane, perform the following steps.
   1. Click **Return**. The return reason list is displayed.
   2. Select an appropriate reason to return the task.
   3. In the text box, enter the associated comments. The task is returned, and the next task is displayed from the grid.

Complete a Task

To complete a task, perform the following steps:

1. In the task grid view, click the task that you want to complete.
2. Click **Complete**. The list of reason associated with the completion of the task is displayed.

   Note:

   - The list of reasons displayed is configured from the Task Template.

- For signature required task, the user must click the Sign button to complete the task.
- The **Complete** or **Sign** button is enabled if the task is assigned to the logged-on user.

3. Select a reason. The task is marked as complete, and the next task is displayed from the grid.

Delete a Task

To delete a task, perform the following steps:

1. In any grid view, (folder, tasks, workflow, or document) click the document or folder for which you want to delete tasks to open it in the respective viewer.
2. Click **Show or hide related tasks** . The Task View section is displayed with the list of tasks associated with the document.
3. From the **Task View**, select the task that you want to delete.
4. Click **Delete** . A confirmation message is displayed.

   Note: The **Delete** icon is displayed when the **Delete** privilege is enabled for the user.

5. Click **Delete**. A confirmation message is displayed that the selected task is deleted successfully.

What is Document Capture?

Titan allows you to capture items, such as pages and files, and review them before you save them as documents in Titan for further processing.

Single Document Capture

With single document capture, all items in a capture set become a single document in Titan with the same item properties. URL integration allows you to link application plan dictionary values and populate item properties during the capture process. You can modify item properties as needed before saving if allowed by your application plan.

To use the application, you must have a defined External User type application plan, External Scanner type source profile, and External Scanner type capture profile in Titan.

You select default scanner settings in the External Scanner type source profile in Titan. However, you can also select and change the scanner and scanner settings from within the application.

As you review captured items, you can adjust their width, height, and size for optimal viewing. You can rotate scanned pages left or right. You can change the order or delete items before saving them as a single document in Titan.

Multiple Document Capture

When enabled, multiple document capture functions similarly as single document capture but allows you to index pages or groups as different documents. The documents are broken into groups, and each group can have a different set of keys and properties.

You must configure Titan to enable multiple document capture. Specifically, you can configure the groupSeparation section, in the apps.config.json file, to create a new group for each page scanned or captured, anytime a blank page is scanned, or each time capture or scan is performed. Groups can also be created when a barcode is matched in the barcode separation mapping section.

When capturing groups, any selected capture profile using an application plan with source Unique Id, that key will have a unique value, even across groups. If you select a thumbnail in a different group, the keys for the current group are stored, and then change to the new group. You an move pages between groups by dragging the page or pages to a different group.

When saving pages in groups, the save validates the keys for each group. The keys must be valid for all groups, except for empty groups, before the save completes. If any of the keys are missing or invalid, the group is selected, and an error message is displayed indicating which keys are invalid, allowing you to correct the key.

Note:
For more information on configuring multiple document capture, see the Titan Installation Guide.

Capture Files

You can capture files and review them before you save them as a document in Titan for further processing. To capture a file, complete the following steps.

Prerequisite

- You must have a defined External User application plan, External Scanner source profile, and External Scanner capture profile in Titan.

1. In the toolbar, select a capture profile from the list and then click **Capture**.
2. In the **Select a capture source** dialog box, click **File** and then click **OK**.
3. In the **Select Files** dialog box, select **Browse** and navigate to the desired files, or drag and drop the desired files into the dialog box.
4. Optional. To view a detailed list of the files selected for capture or to remove ones you no longer want to upload, click **View Details** and then in the **File Upload** dialog box, complete the following substeps.
    1. In the list, verify all the appropriate files are listed for upload.
    2. If you want to remove an item from the list, click Delete next to the appropriate item.
    3. Click **Close**.
5. Click **OK** to upload the files.

6. Optional. To add additional files to the capture set before saving, click **Capture** and repeat the capture process.
7. Optional. To remove all captured content, in the tool bar, click **Reset**. The document properties update with the values from the capture profile and its associated application plan. Any modified values will change.
8. Click **Save** to complete the capture process.

Scan a Page

You can scan pages and review them before you save the pages as a document in Titan for further processing. To scan a page, complete the following steps.

Prerequisite You must have a defined External User application plan, External Scanner source profile, and External Scanner capture profile in Titan.

1. In the toolbar, select a capture profile from the list and then click **Capture**.
2. In the **Select a capture source** dialog box, click **Scanner** and then click **OK**.
3. In the **Select Scanner** dialog box, select the scanner you want to use and select **OK**.
4. In the **Choose scanner** dialog box, select a scanner from the list and then click **OK**.

   Note:
   The last scanner used is the default scanner.

5. Click **Save** to complete the capture process.

   To add additional pages to the scan set before saving, add more pages to the scanner, select **Capture** in the toolbar, and repeat the scan process.

   Note: To remove all captured content, in the tool bar, click **Reset**. The document properties update with the values from the capture profile and its associated application plan. Any modified values will change.

Reorder Captured Items

You can reorder captured items before you save them as a document. To change the order of the captured items, complete the following steps.

1. In the thumbnail pane, click the item’s thumbnail and drag it to a new position.
2. Click **Save** to complete the capture process.

Delete a Captured Item

To delete a captured item before it is saved as part of a document, complete the following steps.

Prerequisite The document properties update with the values from the capture profile and its associated application plan; any modified values will change. To reset a capture, complete the following steps.

1. Select the appropriate item in the thumbnail pane.
2. Click Delete .

   Note: To remove all captured content, in the tool bar, select **Reset**. The document properties update with the values from the capture profile and its associated application plan. Any modified values will change.

3. Click **Save** to complete the capture process.

Review a Captured Item

You can review a captured item before you save it as a document. To review an item, complete the following steps.

1. Select the thumbnail of the item you want to review, or scroll through the items with the **Previous Page** and **Next Page** controls.

   Note: If you do not see the Thumbnails pane, click **Show or Hide Thumbnails**.

2. Complete any of the following options.
   - To zoom in or out on an item, click Zoom Out or Zoom In .
   - To adjust the item to fill the space available in the window, click **Fit Content** .
   - To adjust the item to fit the height of the window, click **Fit Height** .
   - To adjust the item to fit the width of the window, click **Fit Width** .
   - To adjust the item to its actual size, click **Actual Size** .
   - To adjust the item in full screen, click **Full Screen** .
3. Click **Save** to complete the capture process.

   Note: Adjustments to the size of the item are not saved.

Select Scanner Settings

To select or modify scanner settings from within Titan, or to change to a different scanner, complete the following steps.

1. Click **Settings** . The system displays the **Scanner Settings**dialog box.
2. To select a different scanner, click **Select Scanner**, select the scanner you want to use and then click **OK**.
3. In the listed fields, choose settings as necessary according to the options available with your scanner.
4. Optional. To display additional settings for your scanner when you scan, select **Display property dialog at scan time**.
5. Optional. To enable source profile filters when you scan, select **Enable source profile filters**.
6. Click **OK**.

URL Integration Formatting

URL integration for capture allows you to select a capture profile, link application plan dictionary values, and populate document properties during the capture process.

http://<host>:<port>/capture?autocapture&captureprofile=<capture profile name>&<dictionary label>=<value>&<dictionary label>=<value>

Required parameters

Use the following required parameters for URL integration.

Note: Do not use parameter names such as *autocapture* and *captureprofile* as values in the application plan associated with the capture profile.

capture

The name of the Titan application.

dictionary label

A dictionary label defined in the External User application plan associated with the capture profile. You can use as many dictionary labels and corresponding values as necessary.

dictionary value

The dictionary value desired. You can use as many dictionary values and corresponding labels as necessary.

host

The server where the URL application resides.

port

The port of the server where the URL application resides.

Optional parameters

Optional parameters can be added to the URL by using a query string. The ? character denotes the beginning of the query string and the & character denotes the separation of query parameters.

autocapture

Automatically starts the capture.

Note: Depending on the configuration and the selected capture profile, enabling this setting may result in automatic scanning, the display of capture sources, or the display of the browse file dialog box.

captureprofile

Selects a capture profile.

enablePageReorder

Allows a user to reorder thumbnails. The default setting is TRUE.

showCaptureButton

Displays or hides the Capture button on the toolbar and the Scan button in the center pane. The default setting is TRUE.

showCaptureProfileList

Displays or hides the capture profile drop-down menu on the toolbar. The default setting is TRUE.

showDeleteButton

Displays or hides the Delete button. The default setting is TRUE.

showDocPropertiesToggleButton

Displays or hides the Show or hide document properties toggle button. The default setting is TRUE.

showInsertButtons

Displays or hides the Insert Above and Insert Below menu options in the Capture dropdown on the toobar. The default setting is TRUE.

showLinkingbutton

Displays or hides the Link Document

button on the toolbar. The default is TRUE.

showProperties

Displays or hides the Properties pane. The default setting is TRUE.

Example:*http://localhost:8080/capture?Customer Name=John Doe&showproperties=true*

Example:*http://localhost:8080/capture?showthumbnails=false&showproperties=false*

showReplaceButton

Displays or hides the Replace menu option in the Capture dropdown on the toolbar. The default setting is TRUE

showResetButton

Displays or hides the Reset button on the toolbar. The default setting is TRUE.

showRotateButtons

Displays or hides the rotate buttons. The default setting is TRUE.

showSaveButton

Displays or hides the Save button. The default setting is TRUE.

showSourceSettingsButton

Displays or hides the Settings button. The default setting is TRUE.

showThumbnails

Displays or hides the Thumbnails pane. The default setting is TRUE.

showThumbnailsToggleButton

Displays or hides the Show or hide thumbnails toggle button. The default setting is TRUE.

zoomvalue

Sets the zoom level for an item during the capture process. Values include FitToHeight, FitToWidth, FitToWindow, or any positive integer 1 to 500. The default value is FitToWindow.

Application Plan Linking

You can use Browser Extension application plans configured in Perceptive Content to link against web pages external to Titan. This linking process automatically takes place when selecting a Browser Extension capture profile. You can also manually re-link documents using the Link Document toolbar action.

Prerequisite

- You must have defined a Browser Extension application plan, Browser Extension source profile and Browser Extension capture profile in Perceptive Content, as well as installed the Perceptive Content LearnMode browser extension.

1. To link using a Browser Extension capture profile, complete the following substeps.
   1. In a separate browser window, open the web application you want to link to.
   2. In the **Capture Profile** list, select the appropriate browser extension capture profile.
2. To link using a Browser Extension capture profile, complete the following substeps.
   1. In a separate browser window, open the web application you want to re-link to.
   2. With the appropriate browser extension capture profile selected, click the **Link Document** button.

> **Note:**
> Errors that occur during linking are displayed in a banner under the toolbar.