WebDocs User Getting Started Guide

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Introduction to WebDocs

What is WebDocs?

This lesson provides information about WebDocs is a web-based office automation management solution that allows you to secure, manage, and distribute all of your business documents and information assets regardless of the format, or the source of the documents.

The source of information assets can be in the form of physical paper files, archival box storage, computer generated digital files, scanned documents, e-forms, Extensible Markup Language (XML) data sets, and many other formats. WebDocs is designed to accept and combine this disparate content, organize it, store it, distribute it through workflow, and provide secured access to users anywhere, anytime.

WebDocs can be outsourced as a hosted On-Demand solution or licensed to operate from your organization's internal Information Technology (IT) infrastructure with an On-Site solution. It can also be dynamically synchronized between an On-Demand solution and an organization's own IT infrastructure to create a backup hot site.

WebDocs Basic Concepts

What is a File?

This lesson provides information about WebDocs files.

WebDocs is designed on the basis of a real life scenario where physical files (or folders) are used to store and organize related documents within a filing cabinet. Similar organization is represented in WebDocs where "file" means just a searchable container for various types of related documents; it must not be confused with a computer "file".

For example, suppose you have a filing cabinet for storing and organizing loan files of customers. Imagine that you have put a sticker on the cabinet bearing the name "Loan Files". The filing cabinet contains several plastic files or folders containing paper documents on loan records. Among several other files, suppose you have stored a file that belongs to "Keith Adams". When you open this file, it may contain several paper documents with one or more pages.

You can represent a similar scenario in WebDocs. You will need to scan the documents first to make the documents available in WebDocs in digital format. You can create a project, name it "Loan Files", and add a file for "Keith Adams". You can store all the documents belonging to Keith in his file.

WebDocs allows you to create index fields for files in a project. You can search for the file based on any combination of index values. For example, if you have added the index field "Name" to the "loan files" project then you can find Keith's file easily by specifying "Keith" as a search parameter. However, note that the result will return file records of all customers with "Keith" as their name.

Suppose you add another index field "Loan Amount" to the project. Now you can enter a loan amount as a search parameter. You can also set a range for the loan amount, depending on how you have set up the index field.

Now, if you set the search criteria to "Keith" for Name and 5000 to 10000 for Loan Amount then the result will return the file records for all customers having "Keith" as their name and a loan amount between 5000 to 10000 (both figures inclusive).

What is a Document?

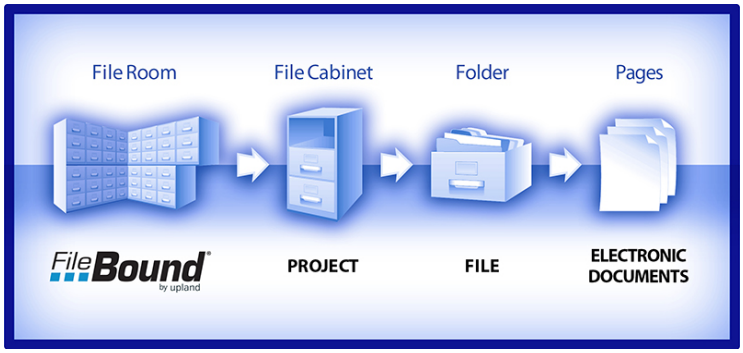
This lesson provides information about WebDocs documents.

WebDocs allows you to work with a wide range of document types. You can scan and save documents directly into a specific location in a file or import documents into a specific location in a file within a project. WebDocs provides a viewer tools to view and work with documents.

What is a Project?

This lesson provides information about WebDocs projects.

A WebDocs project is the highest level and broadest level of organization that can be created within WebDocs is designed on the basis of real life traditional methods by which files and paper documents are organized physically in a filing cabinet.



Imagine an office having separate cabinets for its various departments or business processes in a file room. Each cabinet holding one or more files containing documents related to a specific department or a business process. For example, let us imagine there is a cabinet dedicated to the Human Resources department. Another cabinet is dedicated to the loans business process, which contains files of all customers with loan information.

WebDocs provides you the same functionality by storing files and documents, (converted into digital format), in a "project" instead of a cabinet. A WebDocs project represents its real life counterpart, the cabinet. WebDocs represents the file-room.

You must create and set up a project first, if you are getting ready to work with WebDocs for the first time. WebDocs comes with some useful project templates that can be installed readily.

What is a Divider?

This lesson provides information about dividers in WebDocs

The documents stored within a project file can be grouped logically according to dividers. You can set up dividers while setting up a project or enter a divider name when adding content to the system. Dividers set up for a project are available to all the files in the project. Once you have a divider in place, you can scan or add a document to the divider. You can also copy and paste documents from other dividers.

For example, Keith Adam's file may contain documents that deal with general correspondence about a loan application and the loan application received from him. You can set up two dividers 'General Correspondence' and 'Loan Applications'. Once the dividers are added, you can scan or add documents to the appropriate divider so that the documents are grouped meaningfully for easy retrieval.

You can search for a file by selecting a divider name as a search parameter using the advanced search options.

Dividers also allow you to add an optional master sheet to a file. You can use a master sheet to keep an updated summary of the file. You cannot delete a master sheet.

WebDocs displays a divider within a file, if it has at least one document attached to it. When you add or scan a document to a file without specifying a divider or a separator, WebDocs inserts a default divider named '<<NO DIVIDER>>'.

You can also turn on divider security that limits a group of users by providing access to specific dividers only.

What is a Separator?

This lesson provides information about separators in WebDocs provides you with separators that can be used to group dividers logically in a file according to the business requirement. You must enable separators in WebDocs if you want to use the separator feature. You can set up separators while setting up a project or at a later time. Separators set up for a project are available to all the files in the project. You can also copy and paste documents from other dividers or separators.

For example, you can group your dividers according to certain dates. You can create separators named according to specific dates. Once the separators are in place, you can add dividers to the separator. Now, the documents in the file are grouped into dividers, and the dividers are grouped into separators for specific dates.

You can search for a file by selecting a separator name as a search parameter using the advanced search options.

WebDocs displays a separator within a file if it has at least one divider attached to it. When you add or scan a document to a file without specifying a separator, WebDocs inserts a default separator named '<<NO SEPARATOR>>'. WebDocs will not display any separators if it is not enabled.

You can also turn on separator security that limits a group of users, access to specific separators only.

What is a User?

This lesson provides information about WebDocs users.

A WebDocs user can log into WebDocs using a user name and password to perform operations for which the user has the proper rights. WebDocs allows an unlimited number of users to be created within the system. Users can be set up in WebDocs who can log on to WebDocs with specific rights according to grouping requirements. Operations that a user will be allowed to perform in WebDocs also depends on the group the user belongs to.

To start working in WebDocs one must have a valid user name and password. Apart from the general users, System Administrator, Project Administrator, and Access Administrator are three other types of users in WebDocs.

When a user is set up, the startup screen or startup page for the user can be customized. A user can set the time-zone for the location that the user is located within.

What is a System Administrator?

This lesson provides information about System Administrators in WebDocs.

A user with system administration rights has complete access to WebDocs and is usually referred as a System Administrator. A System Administrator can create, configure, and manage users, groups, projects, and vendors. System Administrator rights can be assigned to one or more WebDocs users.

A System Administrator can set several global options in WebDocs. The System Administrator uses the WebDocs Central Administration window to perform most of the administrative tasks. The WebDocs Central Administration window is also available to Project Administrators and Access Administrators, but with limited functionality. General users do not have access to the WebDocs Central Administration console.

What is an Access Administrator?

This lesson provides information about Access Administrators in WebDocs.

A user with Access Administrator rights can manage users and groups from the WebDocs Central Administration console. The Access Administrator has no access to projects or other system configurations.

What is a Project Administrator?

This lesson provides information about Project Administrators in WebDocs.

A WebDocs Project Administrator is a user who belongs to a group having project administration rights. A Project Administrator can configure and manage projects assigned to the group the Project Administrator belongs to. However, unlike the System Administrator, the Project Administrator cannot create or delete a project from WebDocs. The Project Administrator does not have rights to create and manage users, groups, and vendors. There can be more than one Project Administrators in WebDocs.

What is a Group?

This lesson provides information about groups in WebDocs allows creation of different user groups on the basis of roles in the project. For example, you can create a group of users that perform data entry only, while another group of users takes care of project administration. WebDocs allows users to be assigned to one or more such groups. The same user can be assigned to one or more groups. Just like users, one or more projects are assigned to a group. The same project can be assigned to more than one group. When groups are created, a system administrator can create an unlimited number of users.

You can assign various rights related to files, documents, annotations, and workflow to a group. You can set various file and filed level security options for a group. You can assign dividers and separators to a group. You can configure WebDocs for a group, so that, when new files are added, the files will be available on the clipboard.

The System Administrator can create a special group for the Project Administrators. Users assigned to the Project Administrator group can manage the projects assigned to this group.

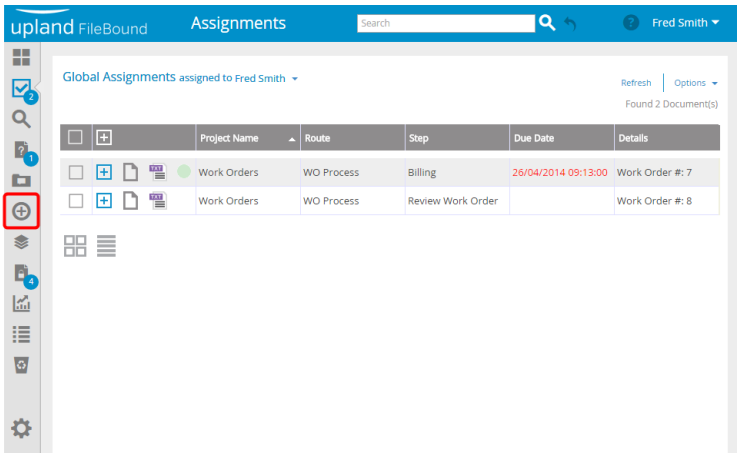
Working With WebDocs

How do I make an entry for a file?

This lesson shows you how to make an entry for a file.

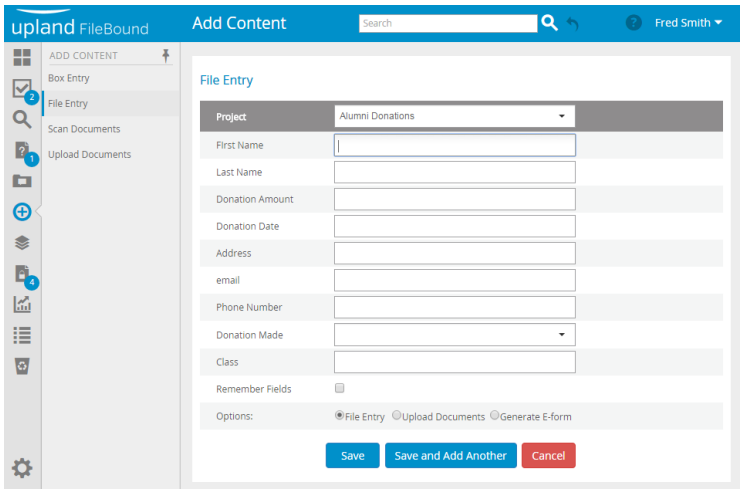
1. Open the File Entry Page

1. Click the add content icon on the navigation pane.
   The **ADD CONTENT** menu appears.
2. Click **File Entry**.
   The **File Entry** page appears.



2. Specify Details

1. Select a project from the **Project** list.
   The index fields for the project are displayed.
2. Specify values for the index fields.
3. You can select the **Remember Fields** check box, to make the system to remember values for the next entry.
   Note: This feature works when you click **Save and Add Another**.
4. Select an option for **Options**.
   Following options are available:
   - **File Entry**: This option creates a new file without any document in it.
   - **Upload Documents**: This option displays document upload options.
   - **Generate E-form**: This option generates an e-form with the values specified for the index fields.
5. Click **Save**.

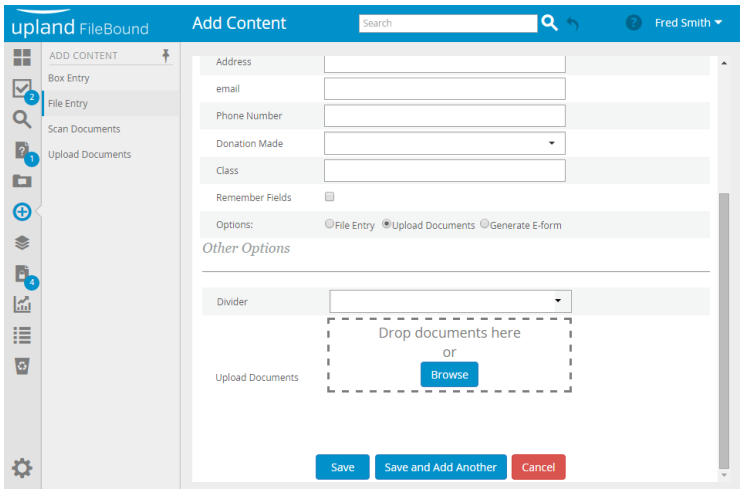


Or,

Click **Save and Add Another**, to save the box entry and add another entry.

2.1 Upload Documents

The **Other Options** section is displayed if you have selected **Upload Documents** option.



1. You can select a divider you want to place the uploaded document in from the **Divider** list.
2. You can drag and drop documents within the drop documents section, to upload the documents.

   Or,

   You can click the **Browse** icon, to open the **Open** dialog box.
   Select the documents you want to upload, and then click **Open**.

What is the Clipboard used for?

This lesson provides information about the uses of the Clipboard.

The WebDocs clipboard is an area, where you can compile, gather, and place files of similar interest. Each WebDocs user have their own clipboard for each project. Files added to your clipboard are simply pointers to the original file. Hence, one file can be on the clipboard of more than one user. You cannot add documents to the clipboard.

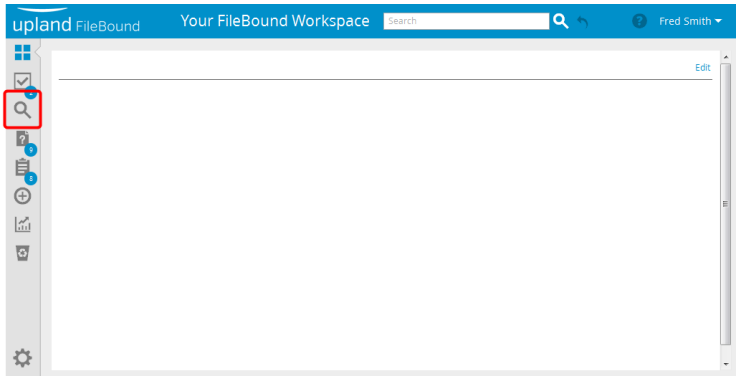
You can add more than one file to the clipboard at the same time. There is no limit on the number of files you can add to the clipboard. You can view, edit, and export files from the clipboard. Additionally, you can delete files from the clipboard, assign files to the other users, and search for files within clipboard.

How do I add a file to the clipboard?

This lesson shows you how to add a file to the clipboard.

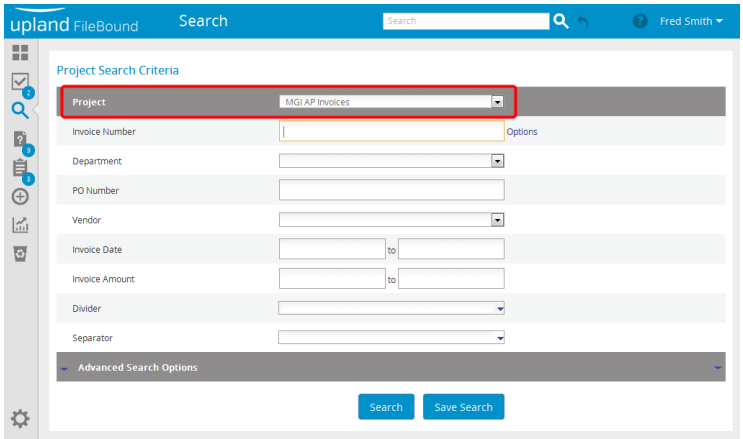
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



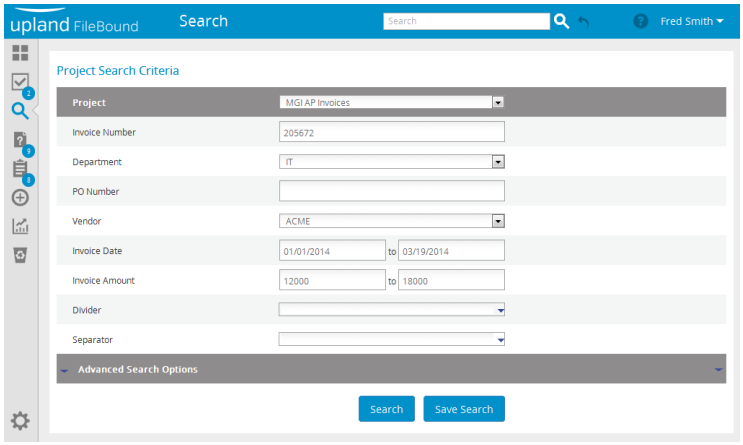
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



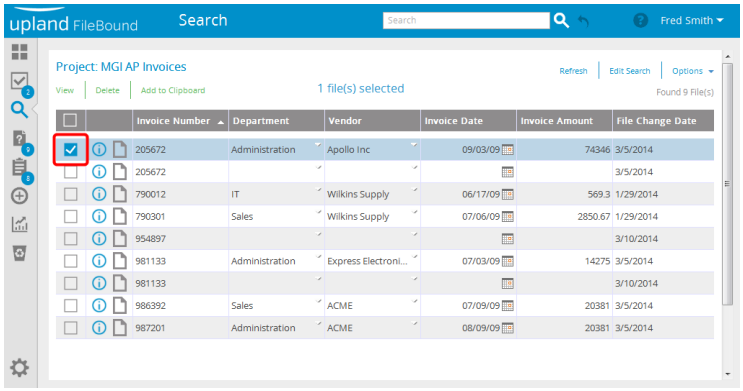
Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

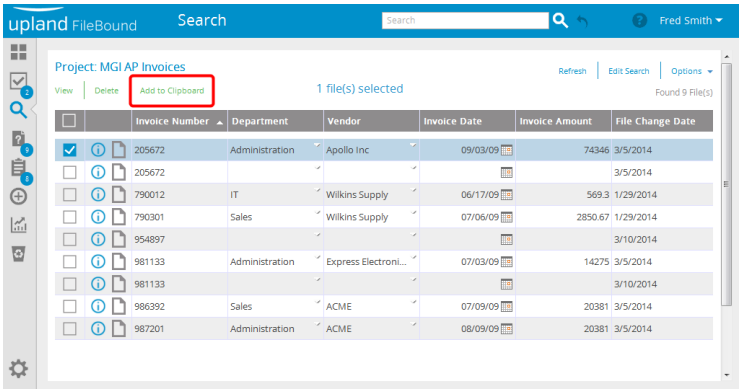
4. Select a File

- Select the check box adjacent to the file you want to add to the **Clipboard**.



5. Add File to Clipboard (Copy)

- Click **Add to Clipboard**, to add the selected file to the **Clipboard**.

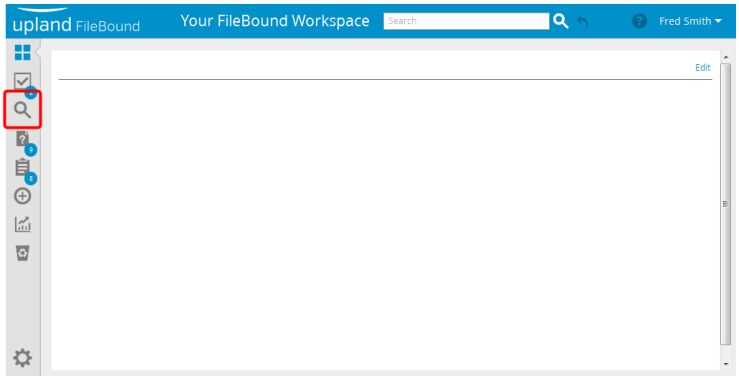


How do I add a file to the clipboard from the Web Viewer?

This lesson shows you how to add a file to the clipboard from the **Web Viewer**.

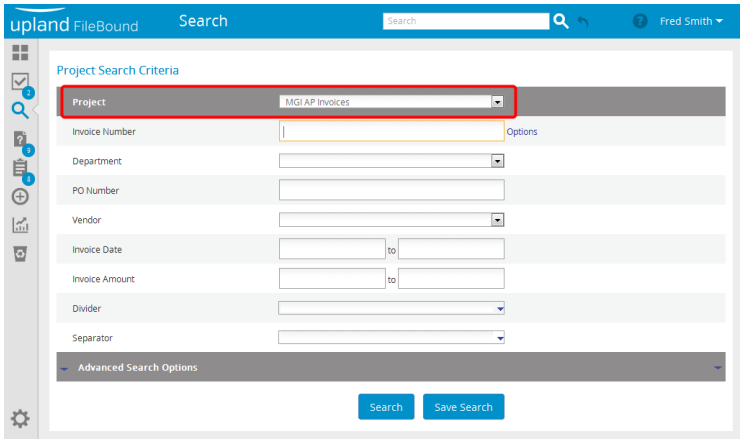
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.

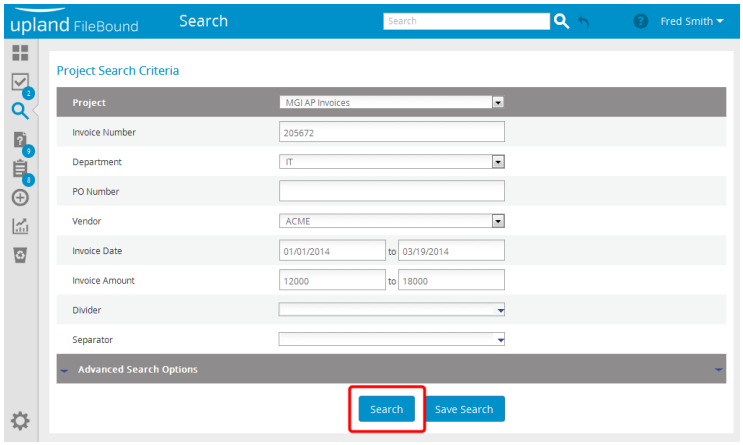


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



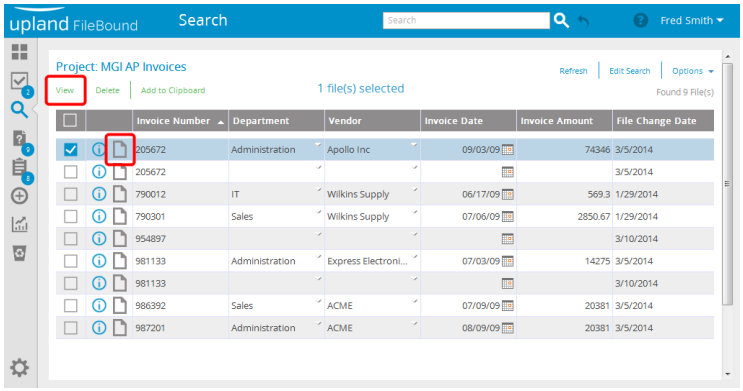
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

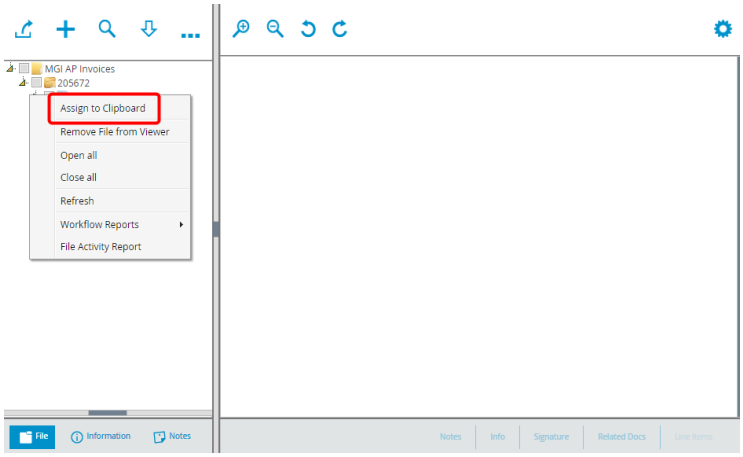
   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Web Viewer**.

Note: The **Web Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Add File to the Clipboard

1. Right-click the file you want to add to the clipboard.
2. Select **Assign to Clipboard** from the menu.

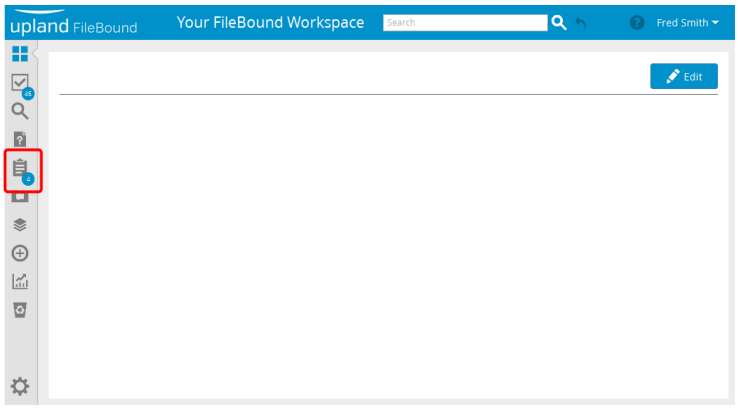


How do I view items that are on the clipboard?

This lesson shows you how to view items that are on the **Clipboard**.

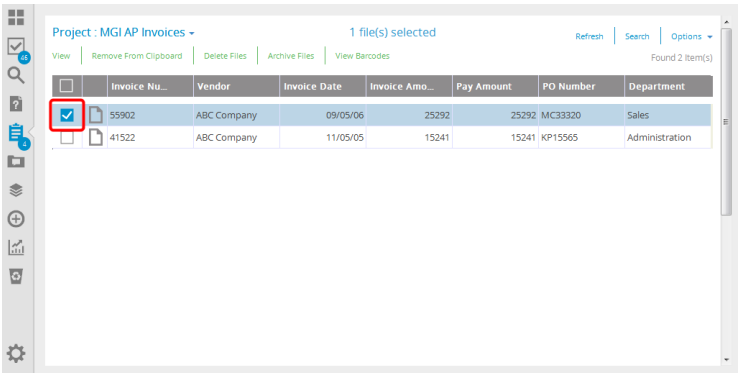
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane. The **Clipboard** page opens.



2. Select a File

- Select the check box adjacent to the file you want to view.

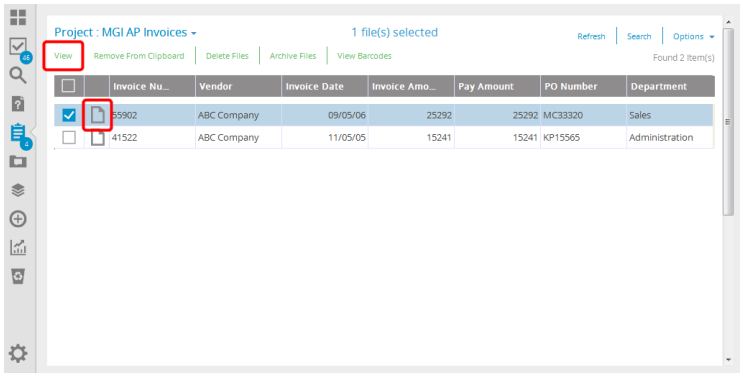


3. View the File

- Click the view icon on any one of the files that you want to view.

  Or,

1. Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.



Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

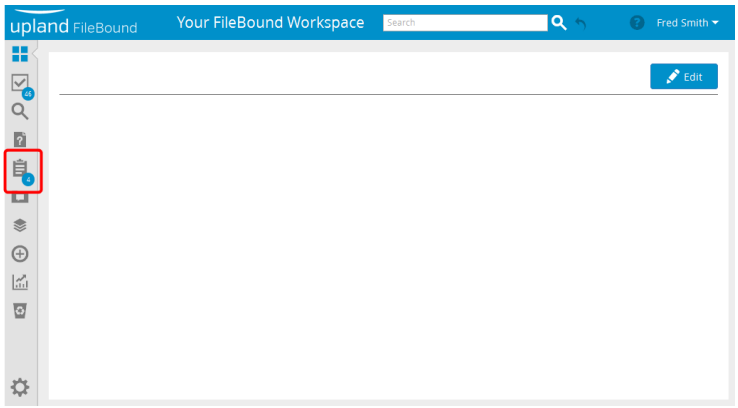
How do I remove a file from the clipboard?

You can remove all files from the clipboard. Removing a file from the clipboard only removes the reference to the file from the clipboard. However, the file remains in the WebDocs project and is not deleted.

This lesson shows you how to remove a file from the clipboard.

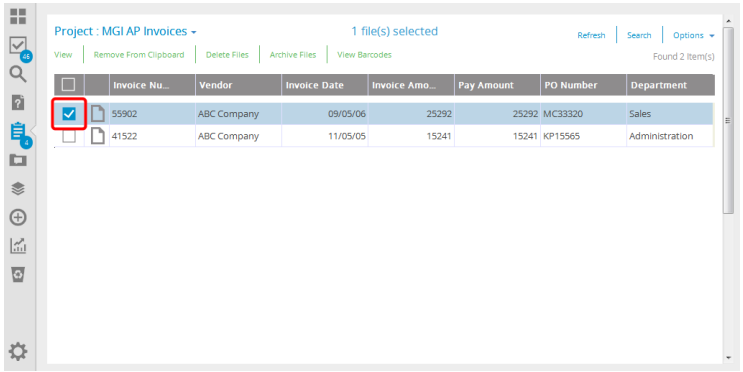
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane. The **Clipboard** page opens.



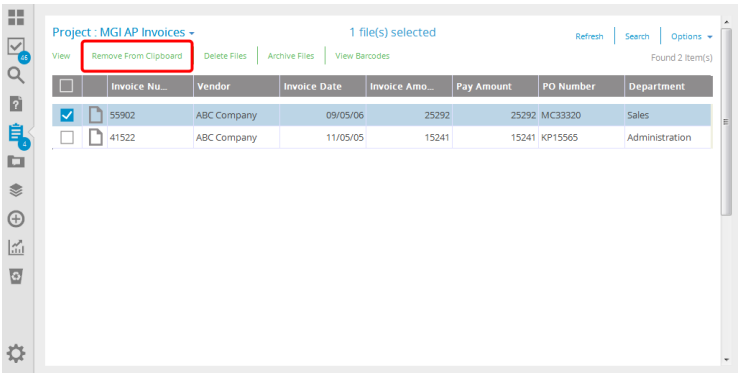
2. Select a File

- Select the check box adjacent to the file you want to remove from the **Clipboard**.



3. Remove the File

- Click **Remove From Clipboard**, to remove the file from the **Clipboard**.

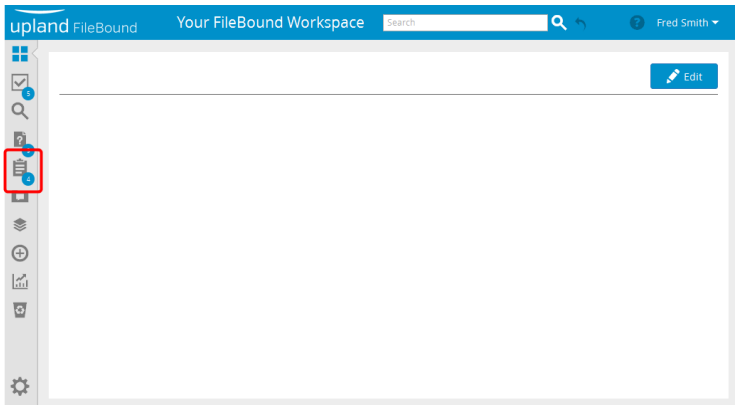


How do I assign all items on the clipboard to a different user?

You can add files from your clipboard to the clipboard of another user. This lesson shows you how to assign all items on your clipboard to a different user's clipboard.

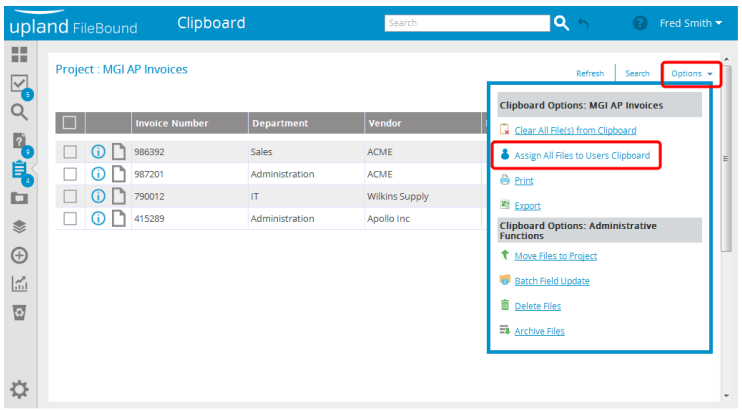
1. Open the Clipboard Page

- Click the clipboard icon on the navigation pane. The **Clipboard** page opens.



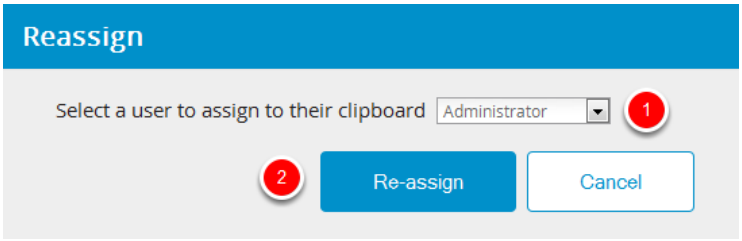
2. Open Reassign Dialog Box

- Click **Assign All Files to Users Clipboard** from the **Options** menu within the **Clipboard** page. The **Reassign** dialog box opens.



3. Select a User

1. Select a user from the **Select a user to assign to their clipboard** list.
2. Click **Re-assign**.

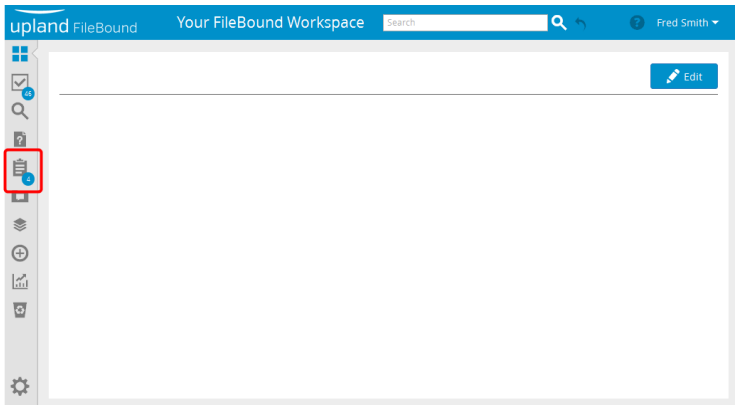


How do I create a barcode break sheet?

You can print barcodes for the index fields specified, or only the key fields, or all the index fields of the selected files. This lesson shows you how to create a barcode break sheet.

1. Open the Clipboard Page

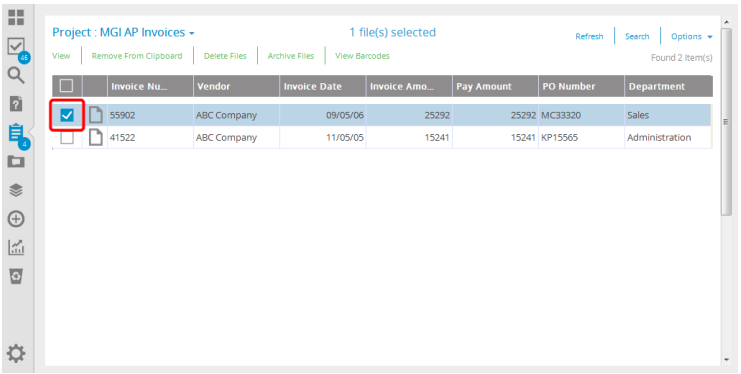
- Click the clipboard icon on the navigation pane. The **Clipboard** page opens.



2. Select a File

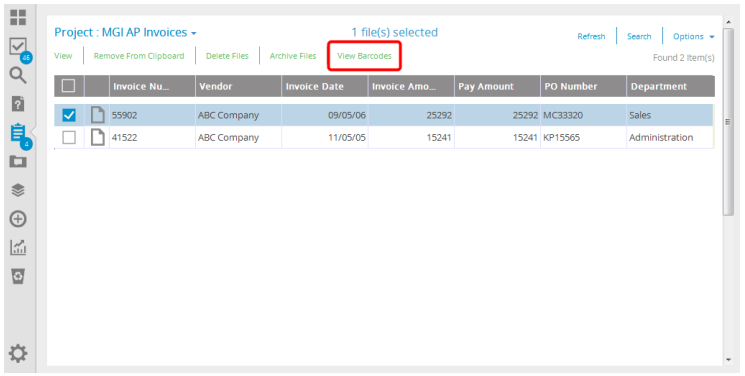
- Select the check box adjacent to the file for which you want to print the barcode.

Note: You can select the check boxes for multiple files, to print barcode for more than one file.



3. Click View Barcodes

- Click **View Barcodes**.
  The **Print Barcode** window opens.



4. Select Fields

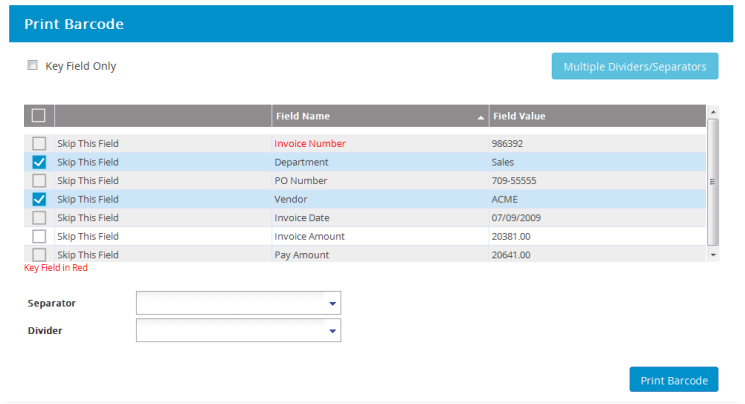
- You can select the fields for which you want to print the barcodes.
  - Select the check box in the header row to select all the fields.

    Or,

    Select the check box of the field you want to skip from printing barcode.

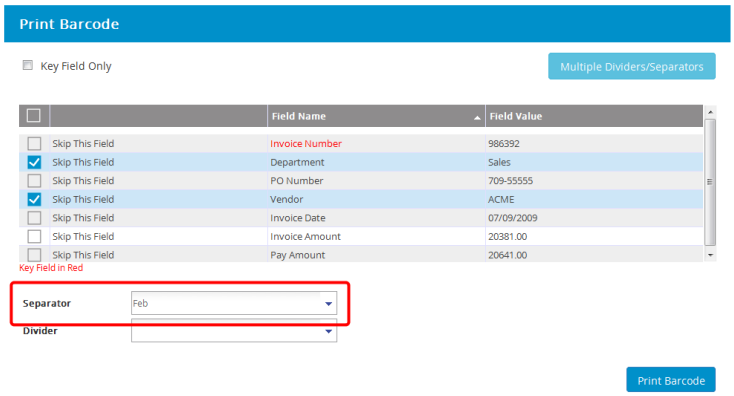
    Or,

    Select the **Key Field Only** check box on the top right to print the barcode for the key fields only.



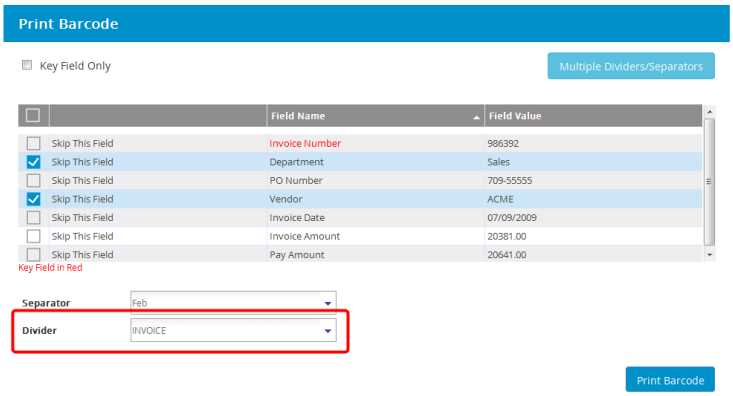
5. Select a Separator

- You can select a separator from the **Separator** list.



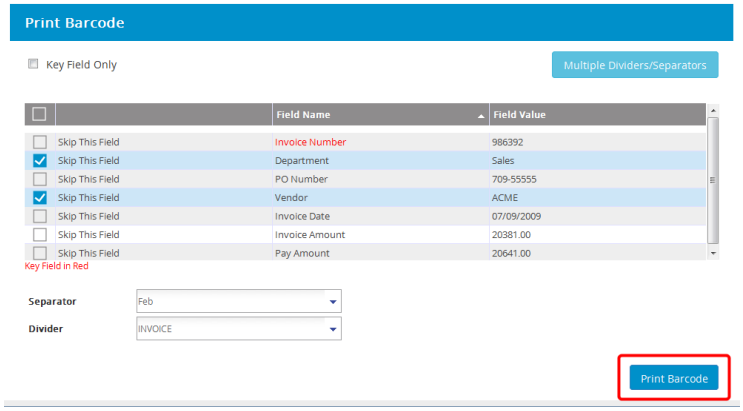
6. Select a Divider

- You can select a divider from the **Divider** list.



7. Print Barcodes

- Click **Print Barcode**.

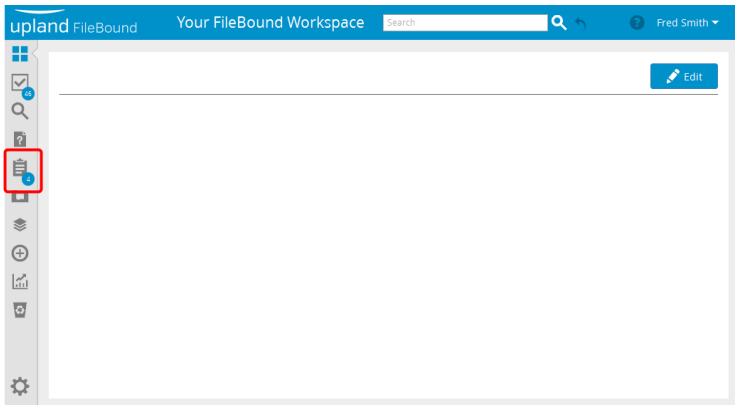


How do I create break sheets for multiple dividers?

You can print barcode for single or multiple separator/divider that can be used while scanning new files to the WebDocs. This lesson shows you how to create break sheets for multiple dividers.

1. Open the Clipboard Page

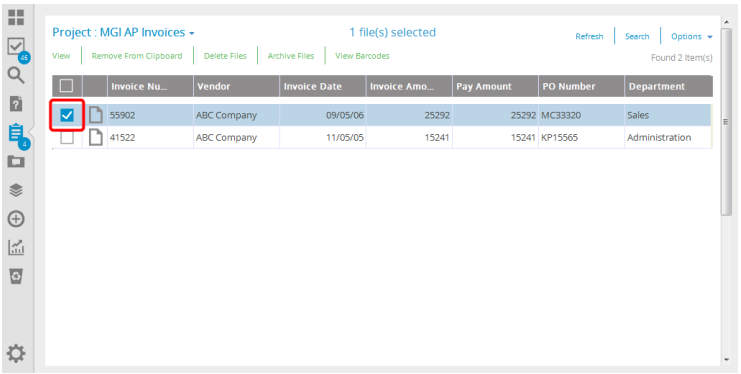
- Click the clipboard icon on the navigation pane. The **Clipboard** page opens.



2. Select a File

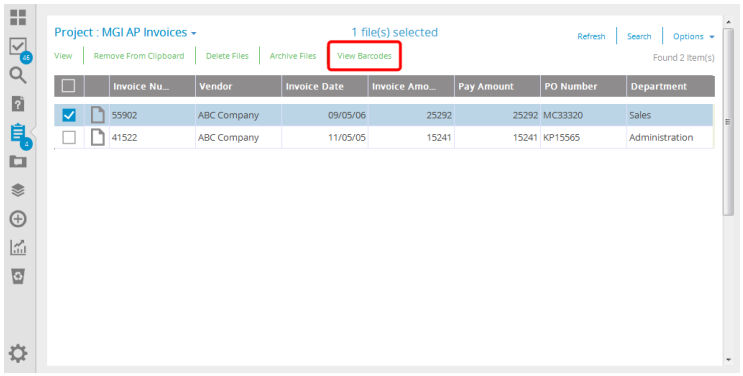
- Select the check box adjacent to the file for which you want to print the barcode.

Note: You can select the check boxes for multiple files, to print barcode for more than one file.



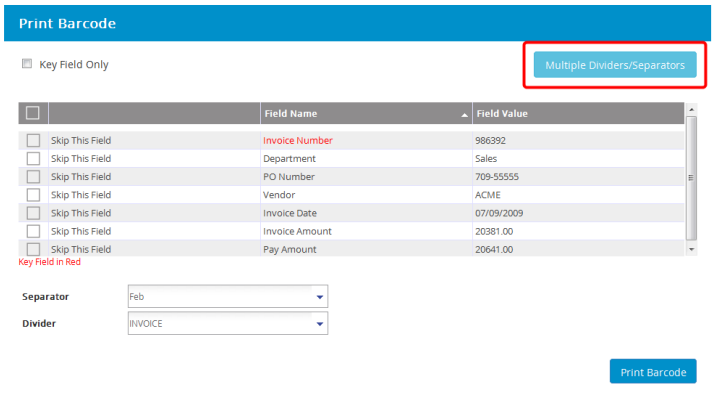
3. Click View Barcodes

- Click **View Barcodes**.
  The **Print Barcode** window opens.



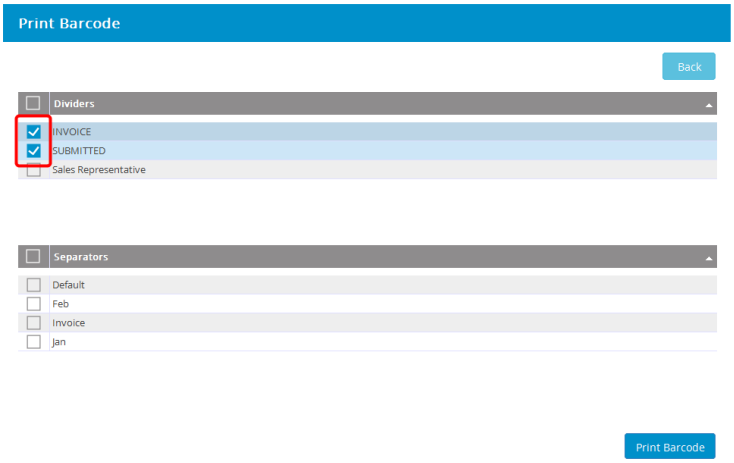
4. Click Multiple Dividers/Separators

- Click **Multiple Dividers/Separators** within the **Print Barcode** window.



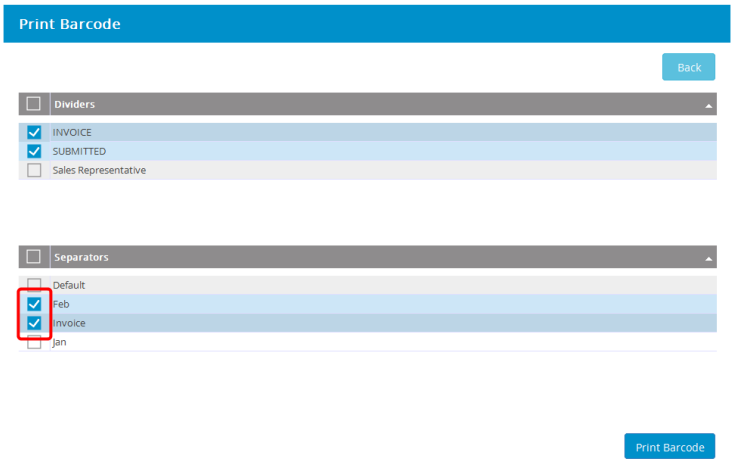
5. Select Dividers

- You can select the check boxes adjacent to the dividers from the **Divider** list, to print barcodes for the selected dividers.



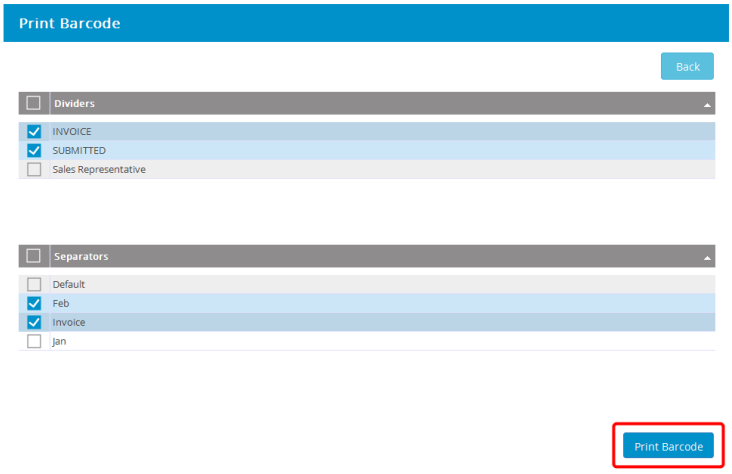
6. Select Separators

- You can select the check boxes adjacent to the separators from the **Separator** list, to print barcodes for the selected separators.



7. Print Barcodes

- Click **Print Barcode**.



Using the Viewer

How do I install the WebDocs Viewer Launcher?

The **WebDocs Viewer Launcher** must be installed on the computer that you are using, to access the **Viewer**. If the **WebDocs Viewer Launcher** is not installed, then a dialog box displays relevant messages when you try to view a document for a file. You will need to have the proper rights to install a .exe file on the computer that you are using. If the installation fails please contact a network system administrator.

The first time you click a link to launch the document viewer to view a document you will be prompted to install the **WebDocs Viewer Launcher**. Once the **WebDocs Viewer Launcher** is installed you will not be prompted again when trying to view a document.

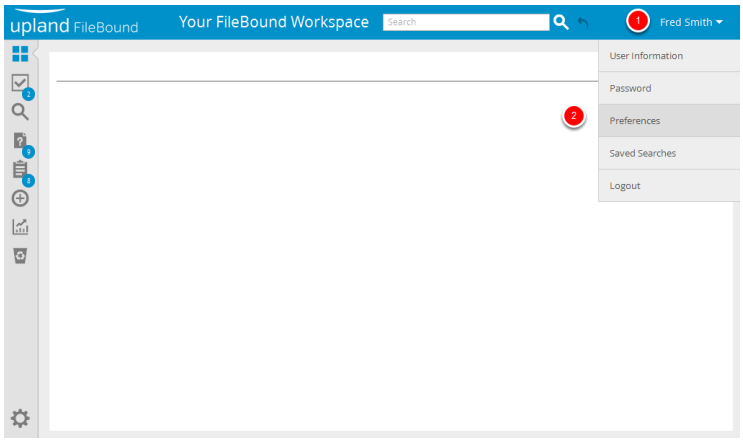
Note: If you are a System Administrator you will also be prompted to install the **Viewer Launcher** when you try to launch the **WebDocs Central Administration** console for the first time before trying to view a document in the Viewer.

This lesson shows you how to install the **WebDocs Viewer Launcher**.

1. Open the Preferences Page

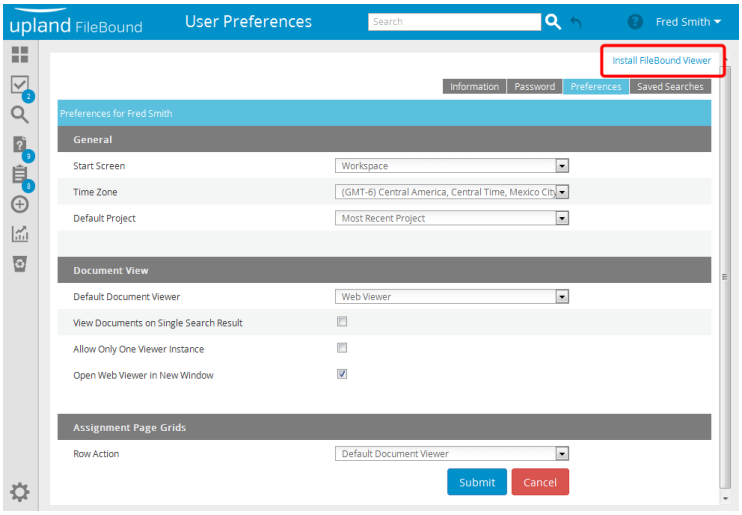
1. Hover the mouse pointer over the user name on the toolbar.
2. Click **Preferences** from the menu.
   The **Preferences** tab opens within the **User Preferences** page.

Note: You can also click **User Information**, **Password**, or **Saved Searches** from the menu.



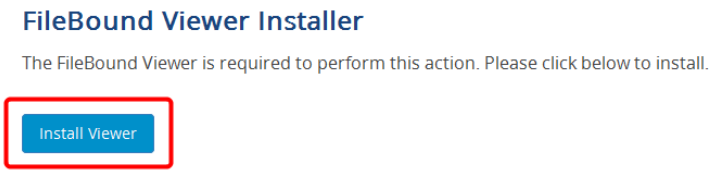
2. **Open the** WebDocs **Viewer Installer Dialog Box**

- Click the **Install WebDocs Viewer** link. The **WebDocs Viewer Installer** dialog box opens.



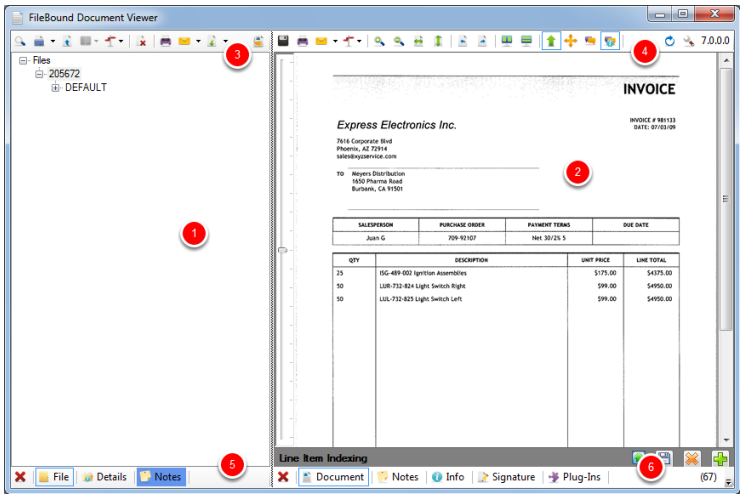
3. **Click Install Viewer**

- Click **Install Viewer** within the **WebDocs Viewer Installer** dialog box, to install the viewer.



What are the components of the Windows Viewer?

The **Windows Viewer** has many components that provide various functions for files and documents. This lesson provides information about the various components of the **Windows Viewer**.



1. The **File Content** pane displays a tree structure consisting of all the files and master-sheets selected for viewing in the **Windows Viewer**. The files in the tree view are placed under the divider they belong to.
2. The **Content** pane displays the document page that is selected in the **File Content** pane.
3. The **File Toolbar** contains functions mostly related to files and it is displayed above the **File Content** pane.
4. The **Content Toolbar** contains functions mostly related to the selected document page and it is displayed above the **Content** pane.
   Note: Click the refresh button on the **Content Toolbar** to refresh the content displayed within the **Windows Viewer** window and see the latest information.
5. The **File Taskbar** for functions related to the selected file is displayed below the **File Content** pane.
6. The **Content Taskbar** for functions related to the selected document is displayed below the **Content** pane.
   Note: The **Document ID** for the selected document is displayed on the **Content Taskbar**.

How do I view a document listed in the Search Results?

The **Search Results** page displays a list of files as search result. As a default operation, when two or more files are found using the given search criteria, the **Search Result** page will be displayed. If there is only one record matching the search criteria, the **File Detail** page for that file will be displayed.

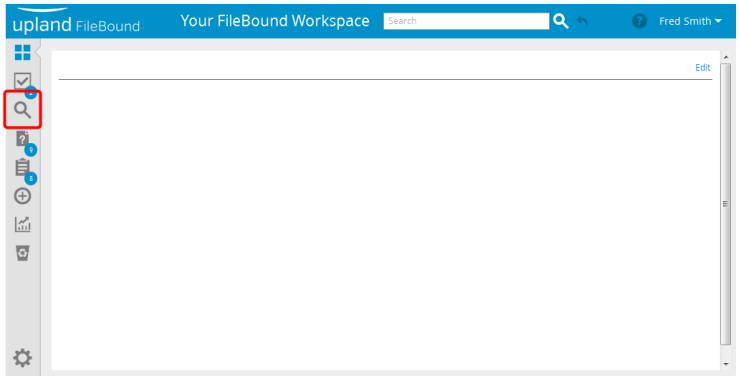
Note: The **File Details** page is available, if it is enabled by the System Administrator. However, if the **View Documents on Single Search Result** option is selected within the **User Preferences**, the documents for the single file is displayed using the default document viewer.

For each file, index field values are displayed. For any WebDocs project, an administrator can configure which index field values to be displayed on the **Search Result** page.

This lesson shows you how to view a document listed in the **Search Results** page.

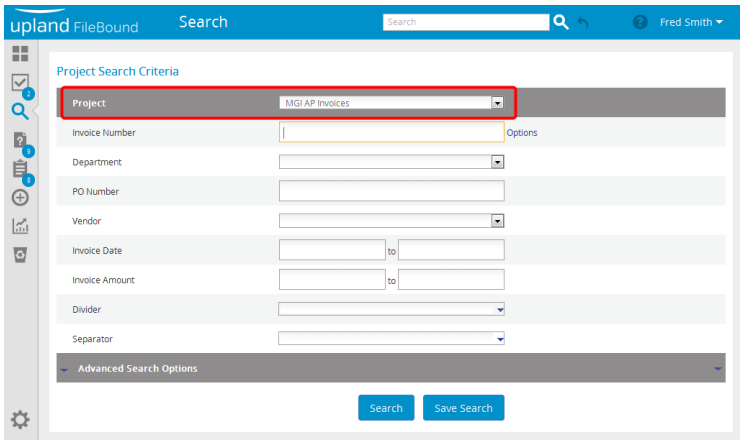
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



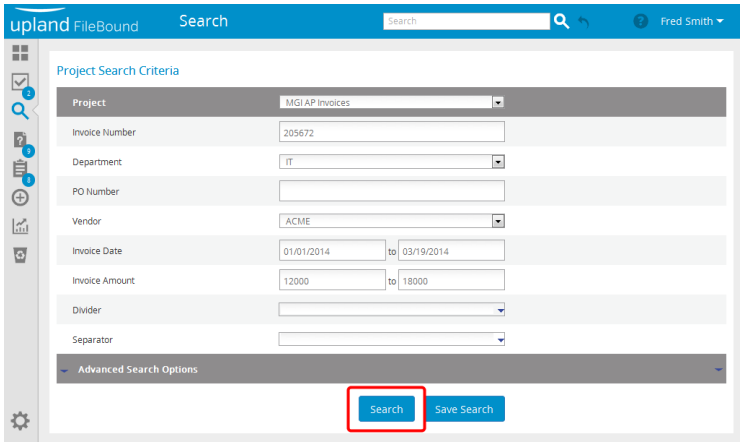
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

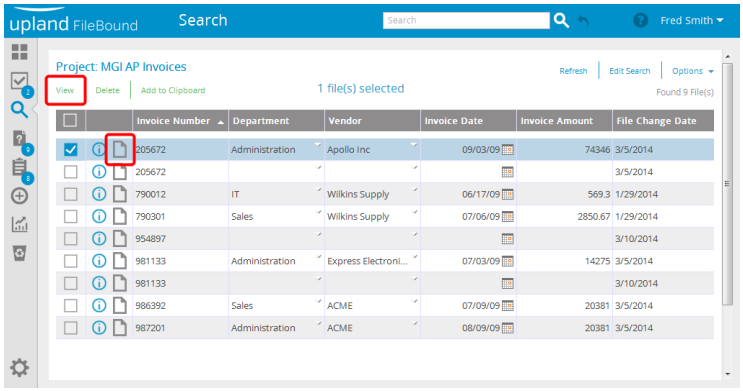
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. View the Document

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**.
   The selected file opens in the default viewer. For more information on Setting Default Document Viewer, click here.



Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

How do I search for files within the Viewer?

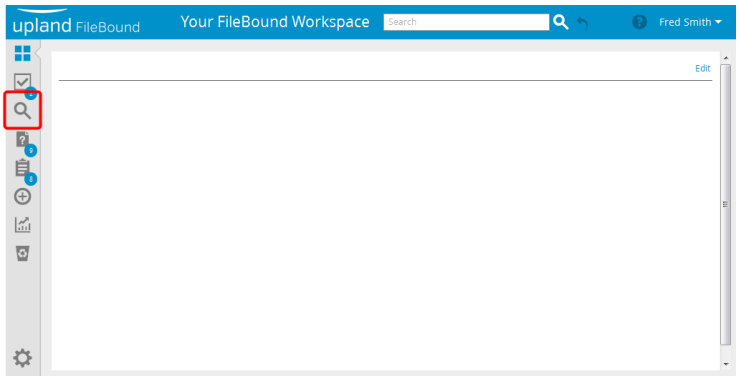
You can search for one or more files from the **Viewer** window. You can add one or more files from the search results in the **File Contents** pane in the **Viewer** window.

Note: As a prerequisite, file searching must be enabled by the System Administrator.

This lesson shows you how to search for files within the **Viewer**.

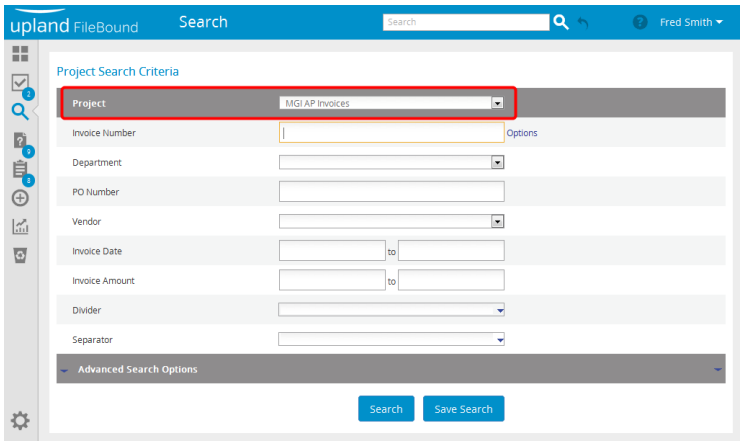
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.

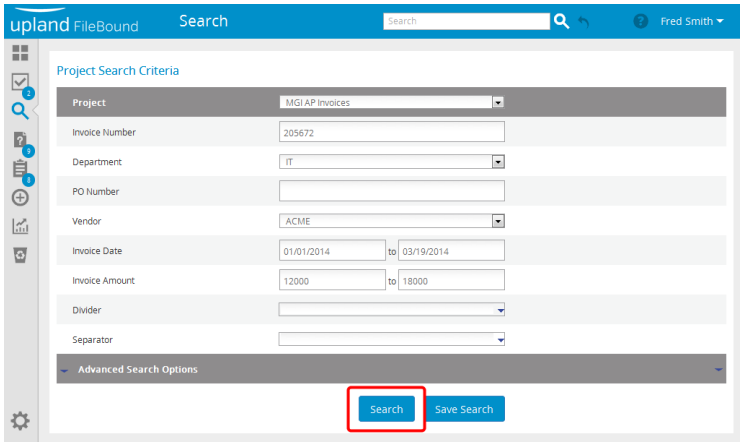


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



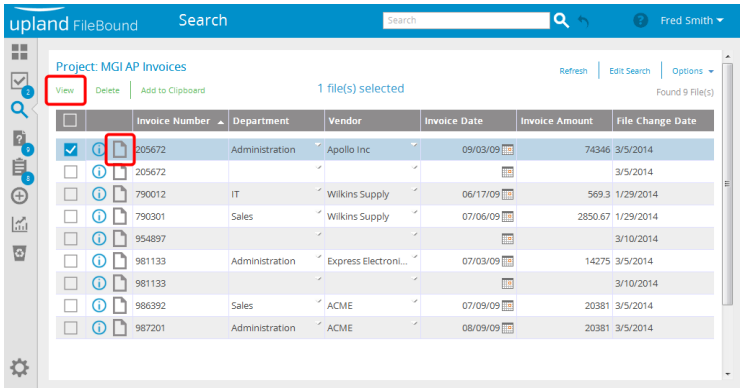
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

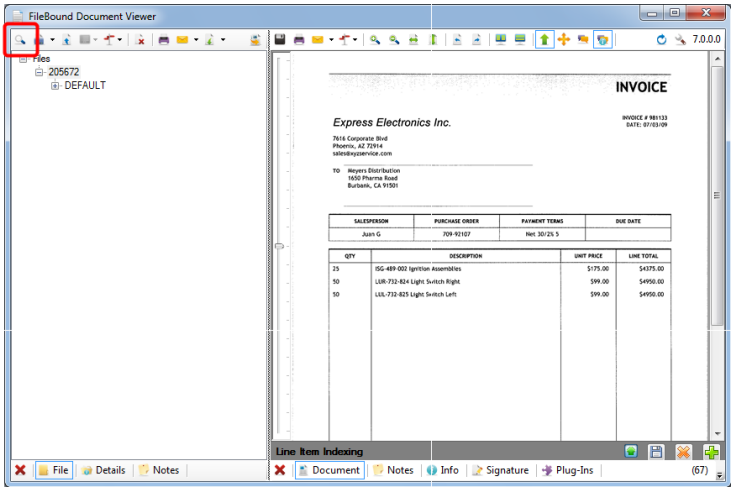
   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

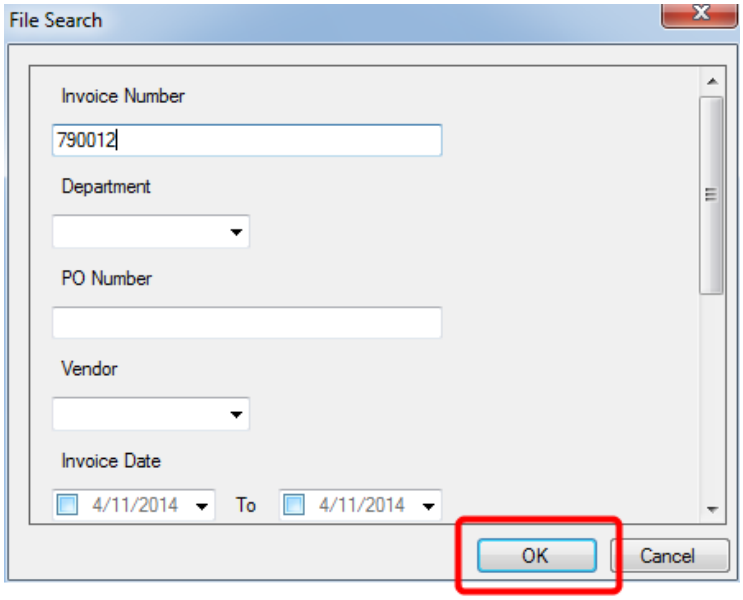
5. Open the File Search Dialog Box

- Click the search icon on the **File Content** toolbar.
  The **File Search** dialog box opens.



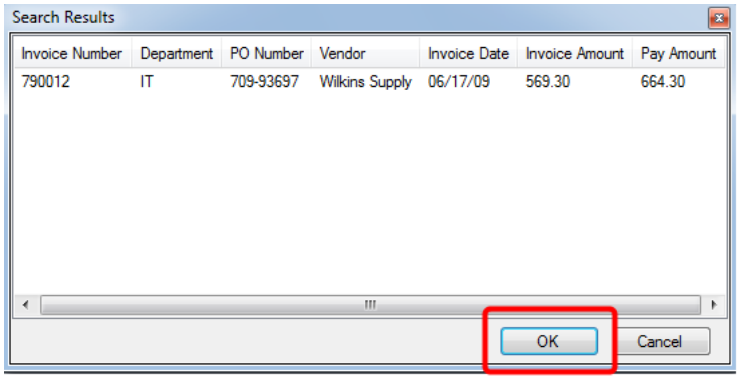
6. Specify the Search Criteria

- Specify the search criteria using the project's index fields, and then click **OK**.
  The files matching the search criteria are displayed in the **Search Results** dialog box.
  Note: You can also search for files based on text specified in the **Full Text**, **File Notes**, and **Document Notes** boxes in the **File Search** dialog box.



7. Add Files to the File Content Pane

- Select one or more files from the **Search Results** dialog box, and then click **OK**.
  Selected files from the **Search Results** dialog box are added into the **File Content** pane.



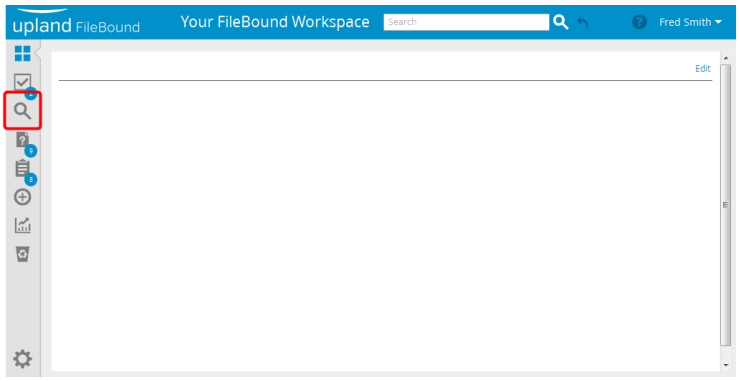
How do I scan pages into the Viewer with scanning dialog?

You can scan pages into the **Viewer** if you have a scanner installed. The **Scan With Dialog** option allows you to scan pages with the dialog option to configure the scanner settings.

This lesson shows you how to scan pages into the **Viewer** with scanning dialog.

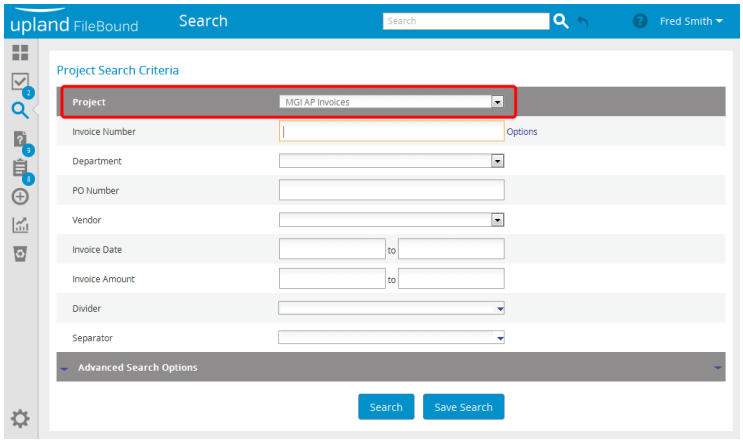
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.

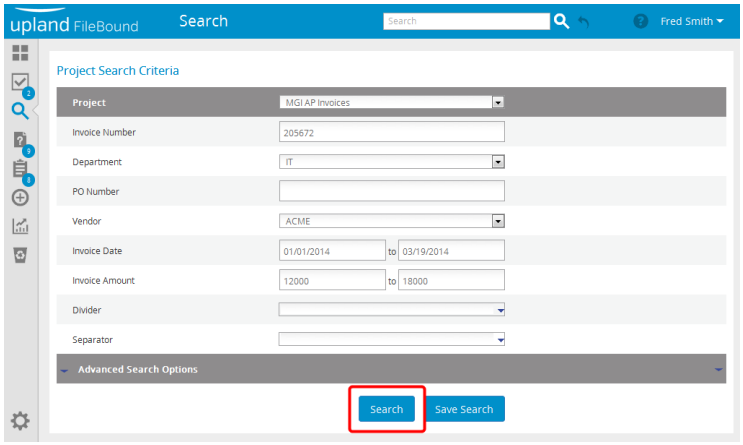


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



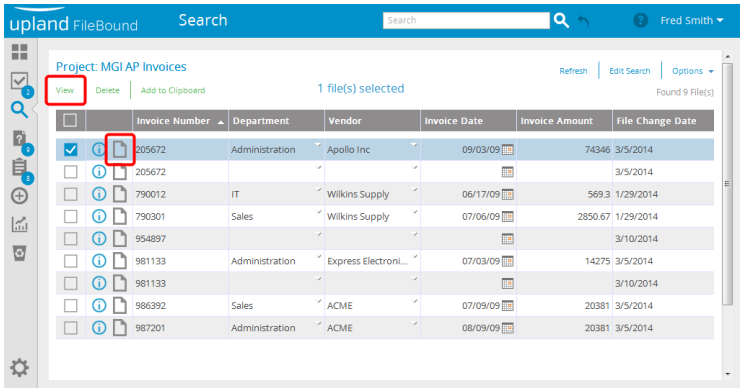
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

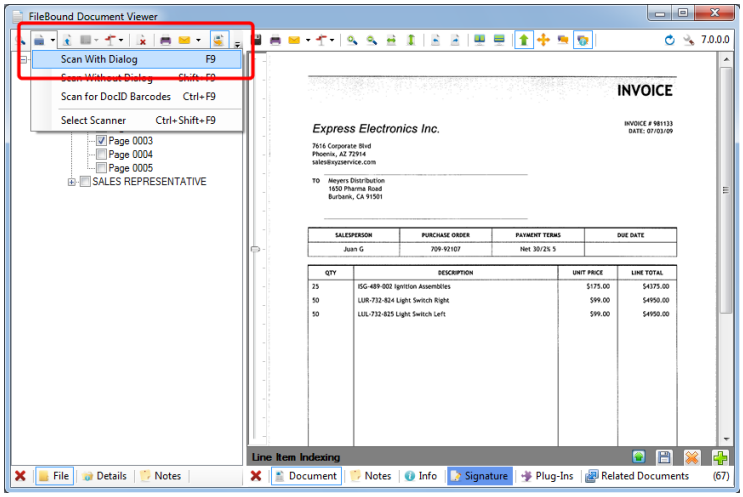
Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Open the Document Properties Dialog Box

1. Click the scan button on the **File Toolbar** within the **Viewer**.
2. Select the **Scan With Dialog** option from the menu.

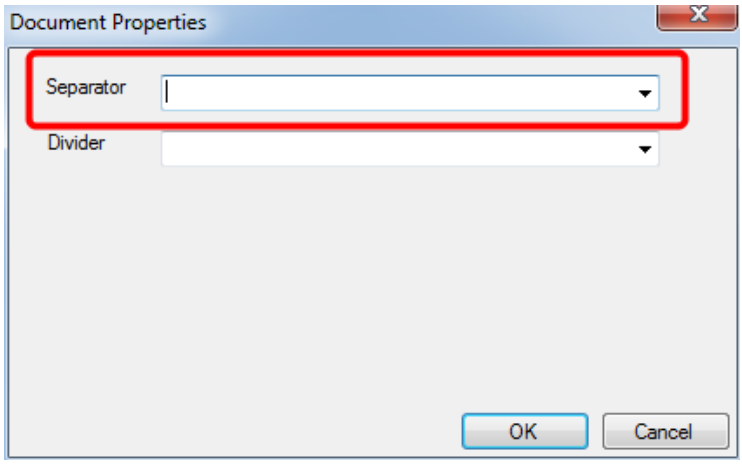
   Or,

   Press the **F9** shortcut key.
   The **Document Properties** dialog box opens.



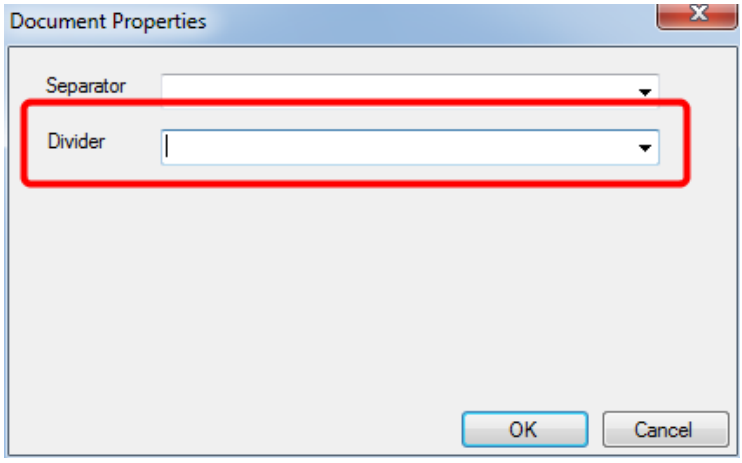
6. Select a Separator

You can select a separator from the **Separator** list to store the scanned pages within the separator.
Note: This is only available if separators have been enabled for the project.



7. Select a Divider

1. You can select a divider from the **Divider** list to store the scanned pages within the divider.
2. Click **OK** to confirm.
   The dialog box for setting configuration of the scanner opens.
3. Make required changes to the scanner settings in the scanner settings dialog box.
4. Click **OK** to scan pages.

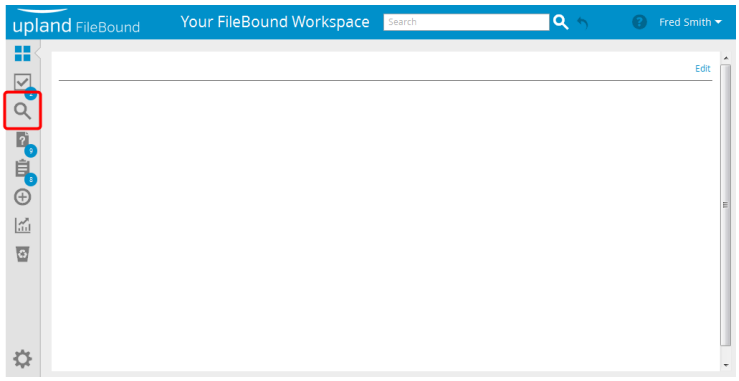


How do I scan pages into the Viewer without scanning dialog?

You can scan pages without a scanning dialog. This allows you to scan with the existing scanner settings. This lesson shows you how to scan pages into the **Viewer** without scanning dialog.

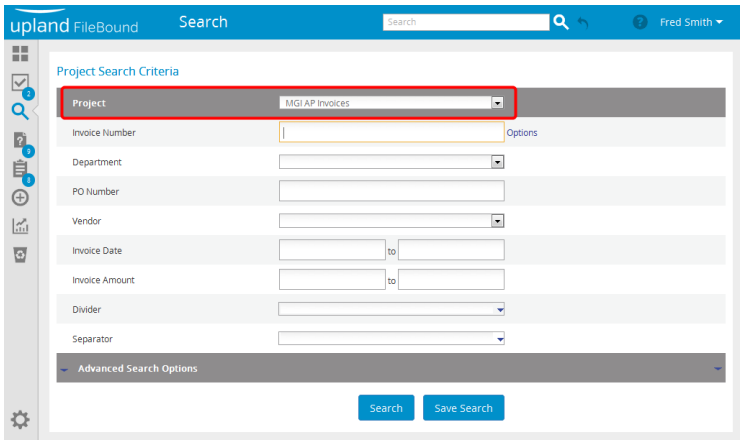
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.

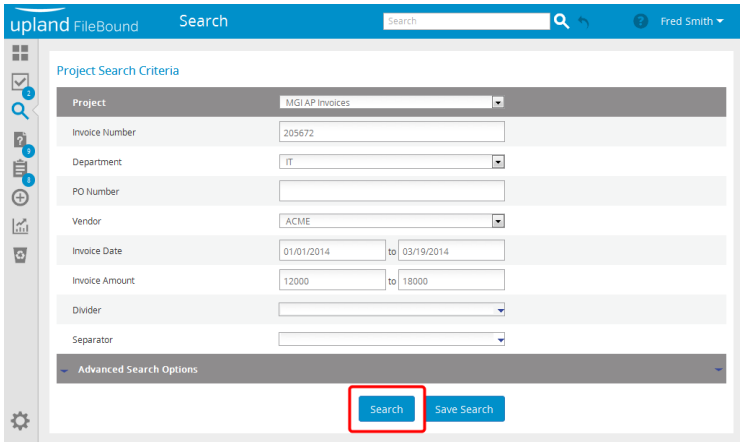


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



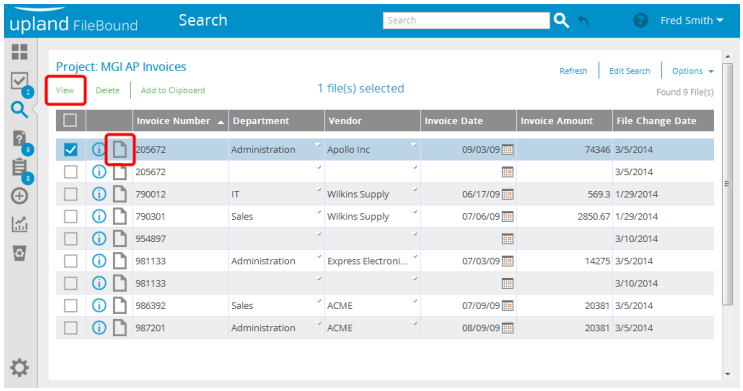
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

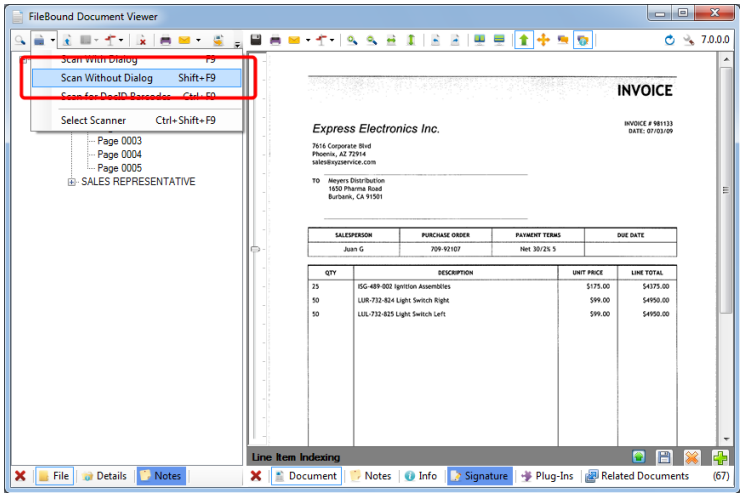
Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Open the Document Properties Dialog Box

1. Click the scan button on the **File Toolbar** within the **Viewer**.
2. Select the **Scan Without Dialog** option from the menu.

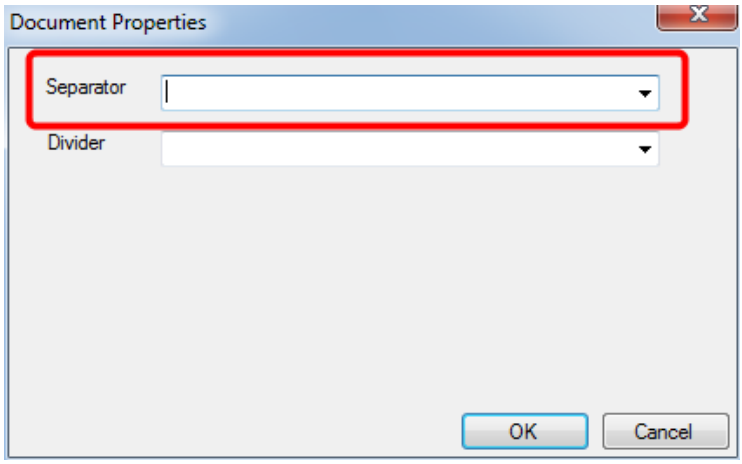
   Or,

   Press the **F9** shortcut key.
   The **Document Properties** dialog box opens.



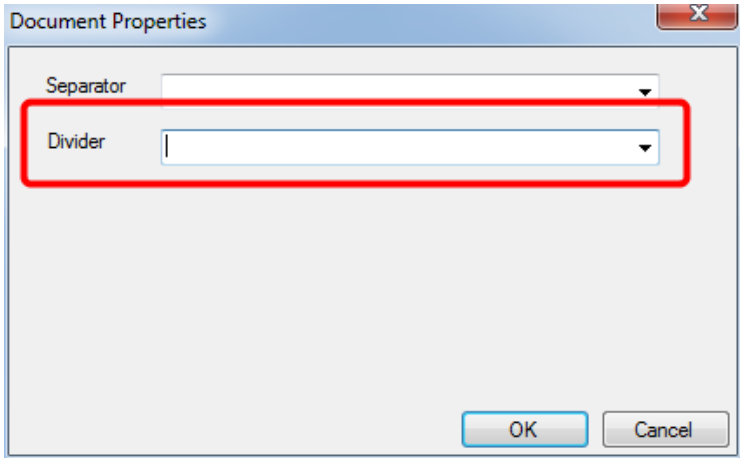
6. Select a Separator

You can select a separator from the **Separator** list to store the scanned pages within the separator.
Note: This is only available if separators have been enabled for the project.



7. Select a Divider

1. You can select a divider from the **Divider** list to store the scanned pages within the divider.
2. Click **OK** to confirm and scan pages.

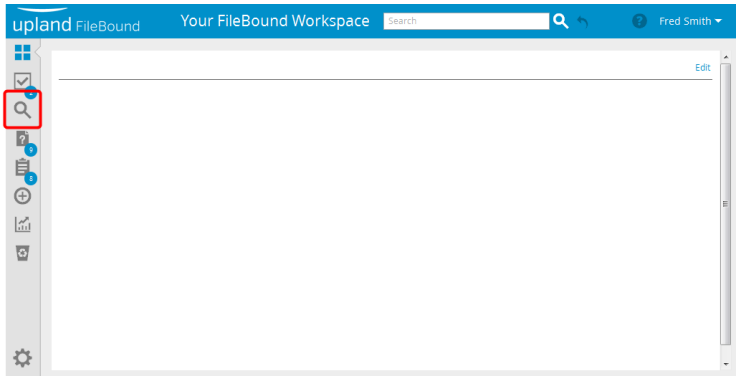


How do I scan for Document ID barcodes within the Viewer?

This lesson shows you how to scan for Document ID barcodes within the **Viewer**.

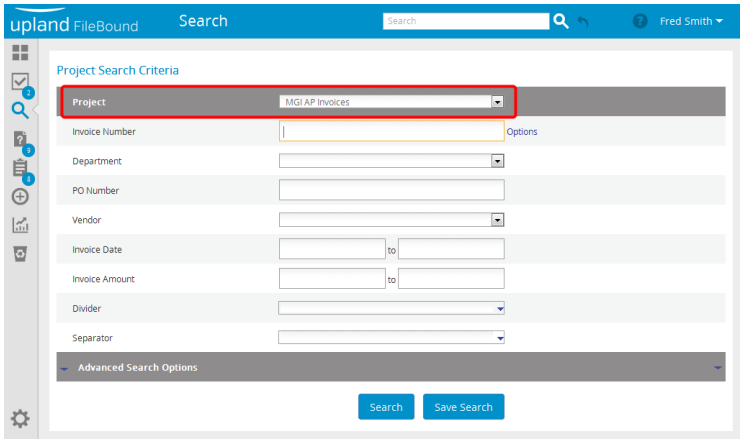
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.

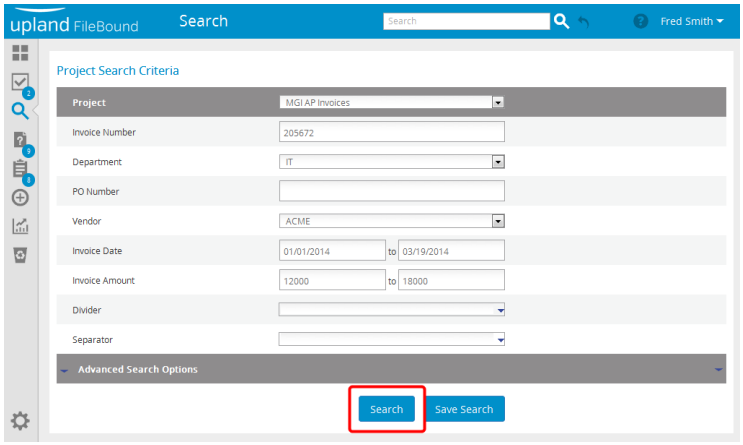


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



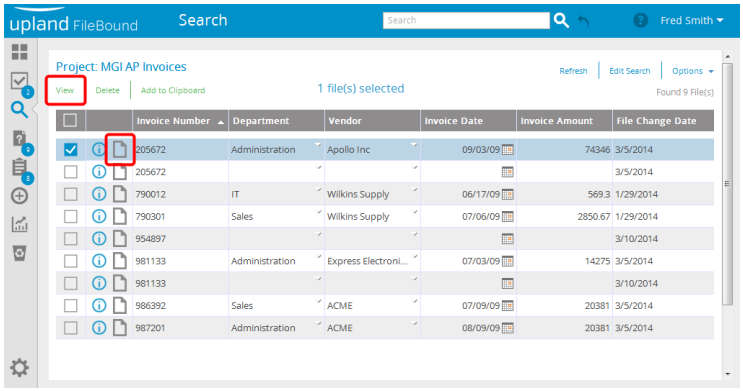
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

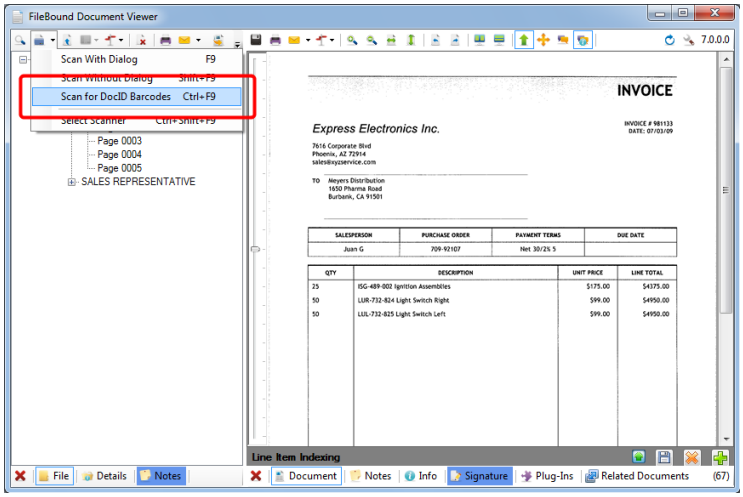
Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Scan for Document ID Barcodes

1. Click the scan button on the **File Toolbar** within the **Viewer**.
2. Select the **Scan for DocID Barcodes** option from the menu.

   Or,

   Press the **Ctrl** + **F9** shortcut key, to scan the E-form ID barcode printed on a document.

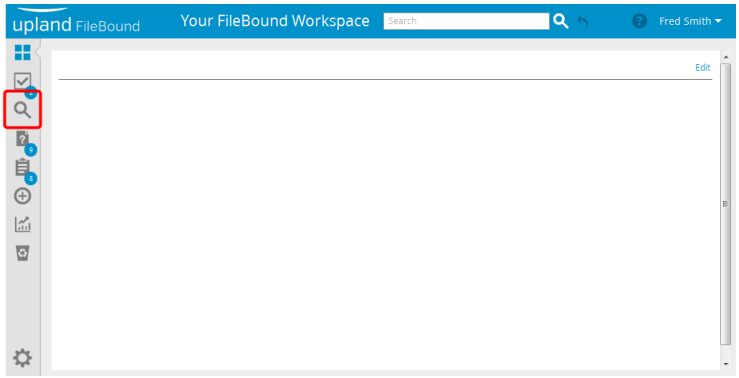


How do I select a scanner?

You can select a scanner from the list of installed scanners. This lesson shows you how to select a scanner.

1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



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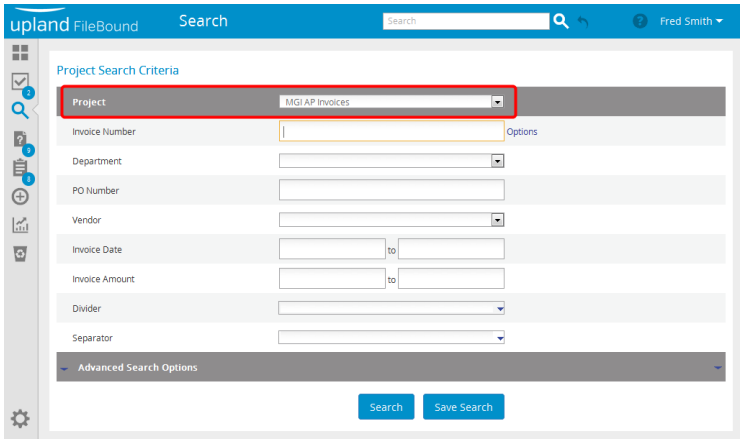
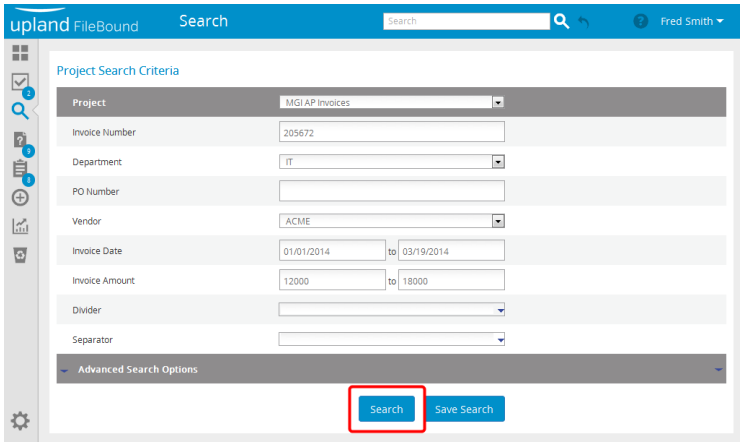


3. Specify the Search Criteria



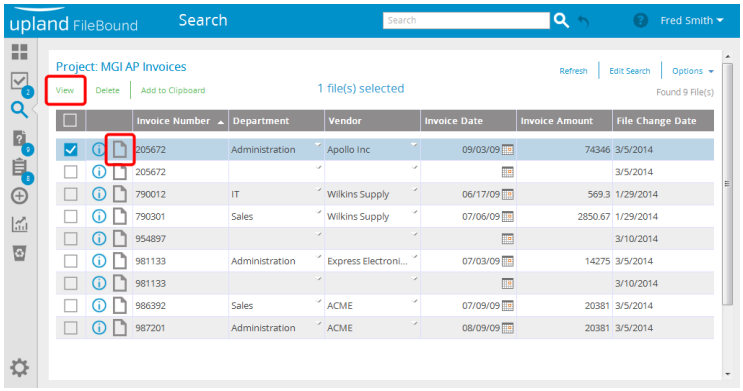
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

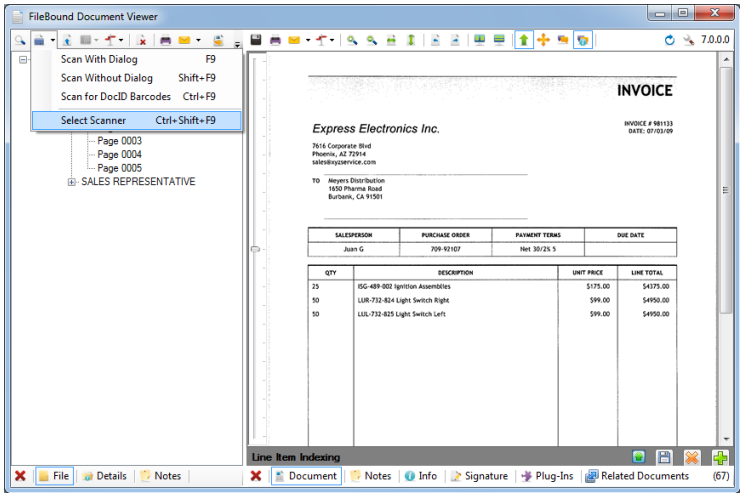
Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Select a Scanner

1. Click the scan button on the **File Toolbar** within the **Viewer**.
2. Select the **Select Scanner** option from the menu.

   Or,

   Press the **Ctrl** + **Shift** + **F9** shortcut key, to select a scanner from the list of installed scanners.

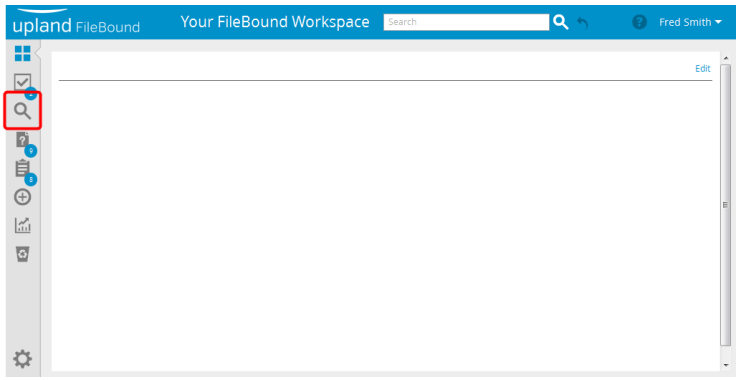


How do I import documents into the Viewer?

You can import one or more documents that are saved on your machine or other network drive into **Viewer**. This lesson shows you how to import documents into the **Viewer**.

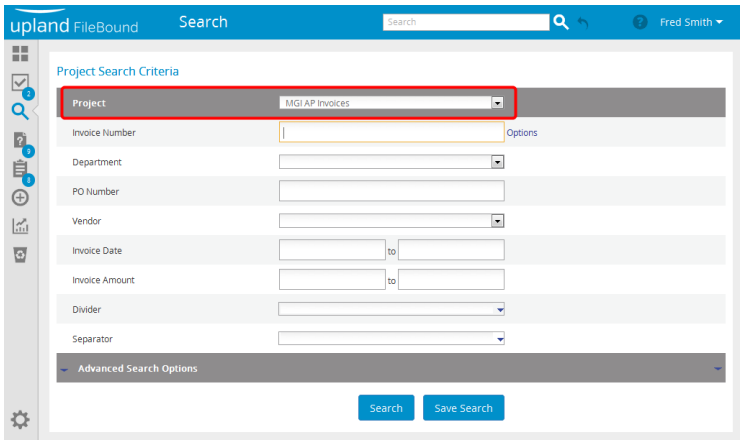
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



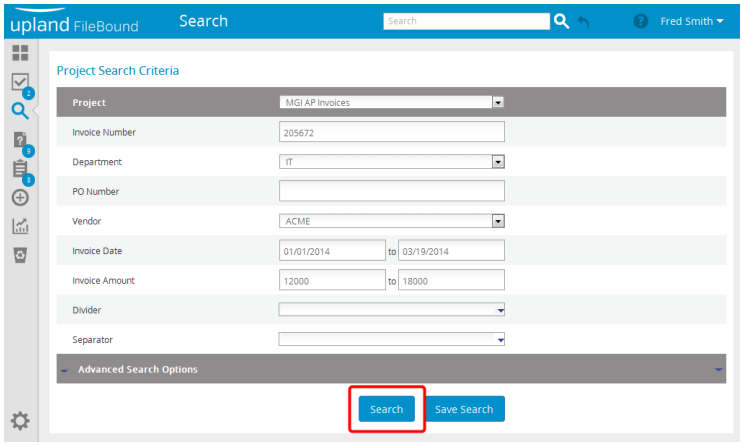
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

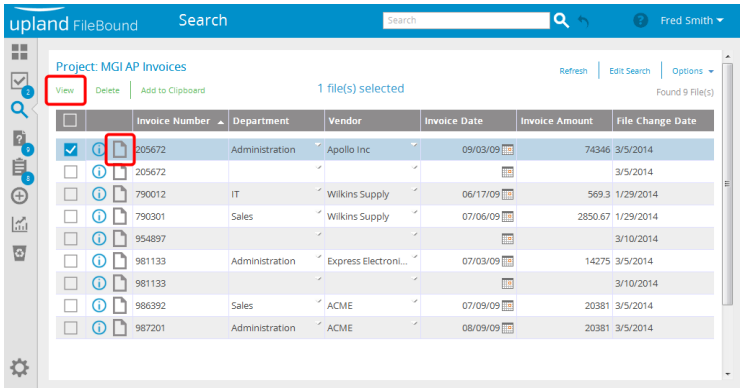
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

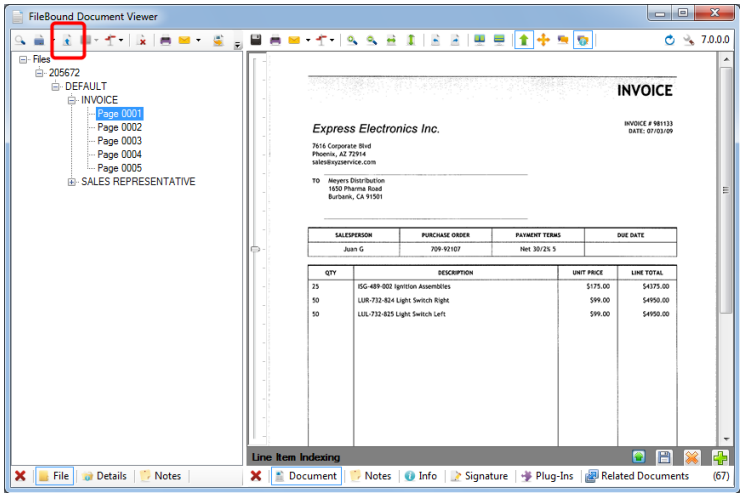


Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

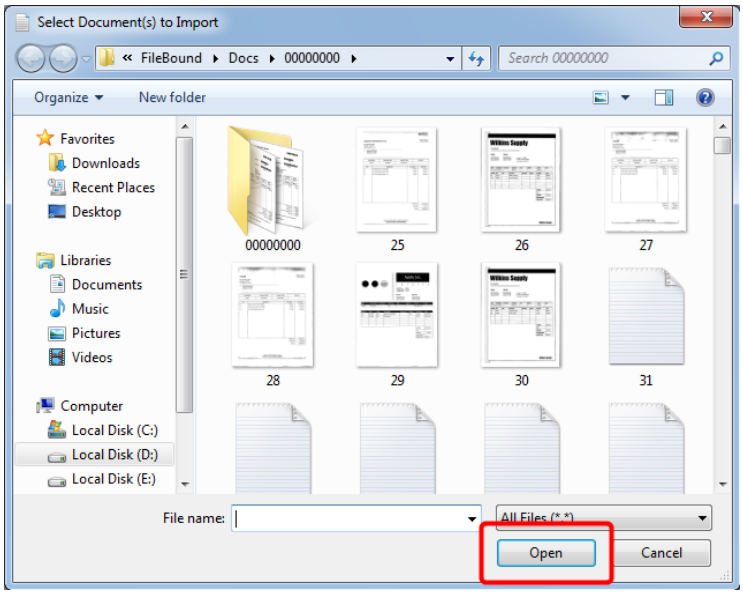
5. Open the Select Documents to Import Dialog Box

- Click the import button on the **File Toolbar** within the **Viewer**.
  The **Select Document(s) to Import** dialog box opens.



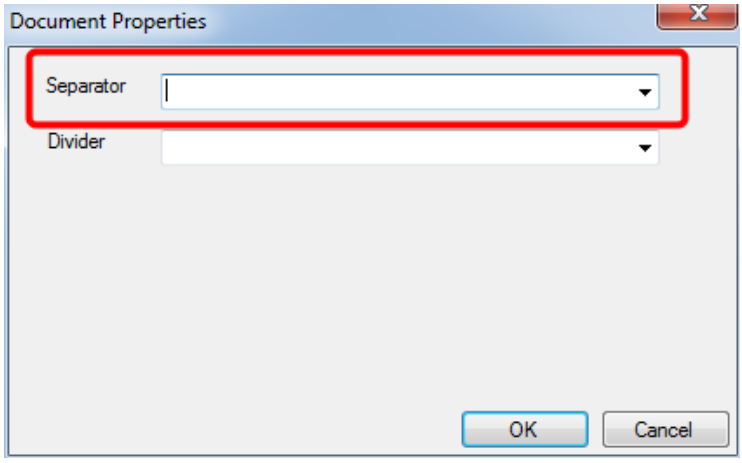
6. Select the Documents to Import

1. Select the documents to import.
   Note: You can select multiple documents by holding down the **Ctrl** key while selecting the files.
2. Click **Open** to confirm file selection.
   The **Document Properties** dialog box opens.



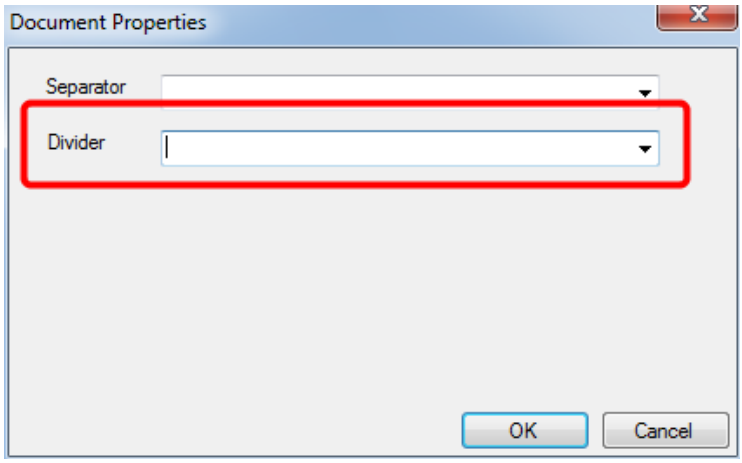
7. Select a Separator

- You can select a separator from the **Separator** list to store the scanned pages within the separator.
  Note: This is only available if separators have been enabled for the project.



8. Select a Divider

1. You can select a divider from the **Divider** list to store the scanned pages within the divider.
2. Click **OK** to confirm.

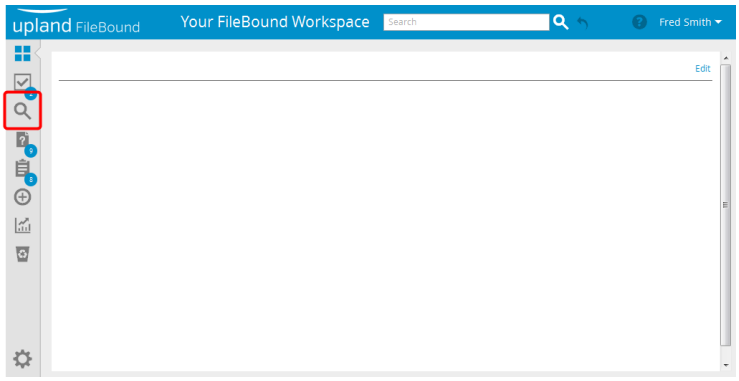


How do I route a document to a predefined workflow route?

You can assign a document to a workflow route from a list of predefined workflow routes. A message is displayed if predefined workflow routes are not available. This lesson shows you how to route a document to a predefined workflow route.

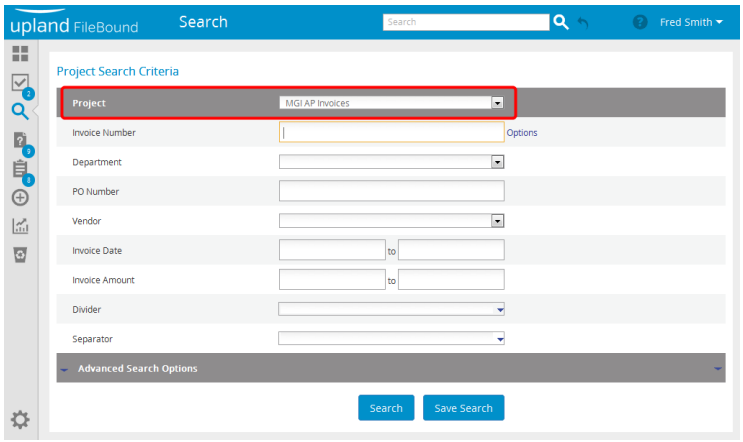
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



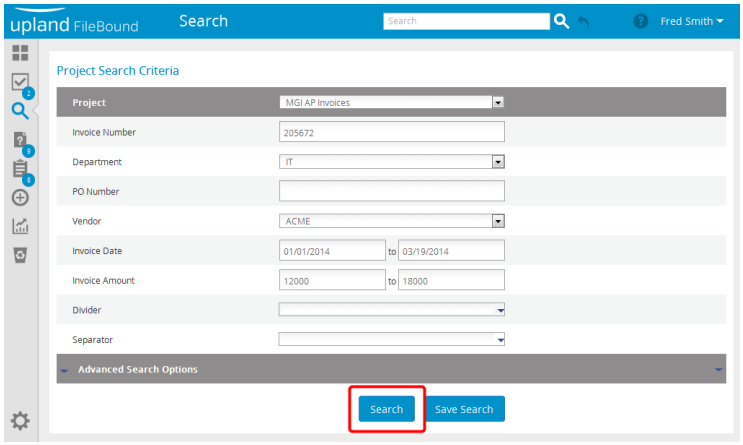
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

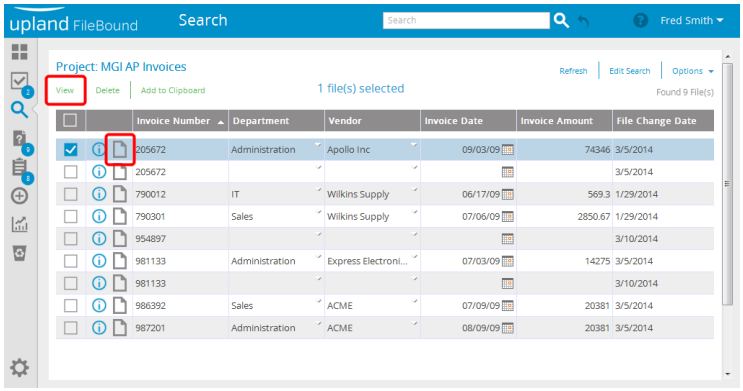
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.



Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

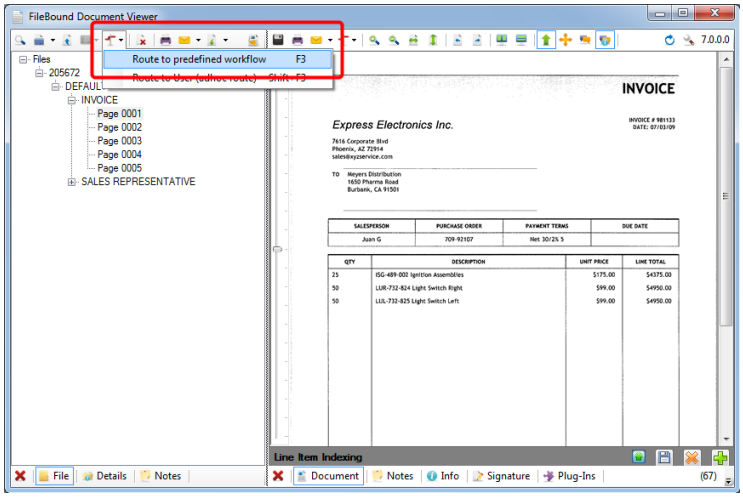
Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Open the List of Predefined Workflow

1. Click the route button on the **File Toolbar** within the **Viewer**.
2. Select the **Route to predefined workflow** option from the menu.

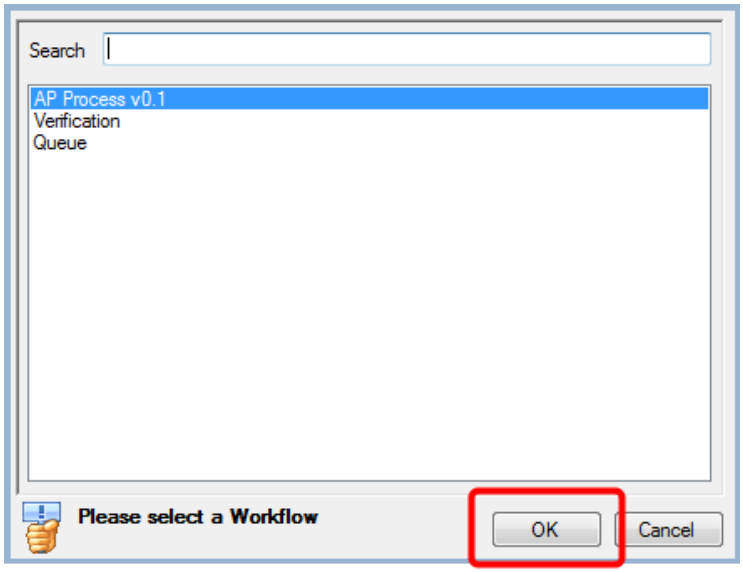
   Or,

   Press the **F3** shortcut key, to open the list of predefined workflow in a dialog box.
   If you have selected more than one document then a confirmation dialog box prompts you to confirm that you want to route multiple documents.



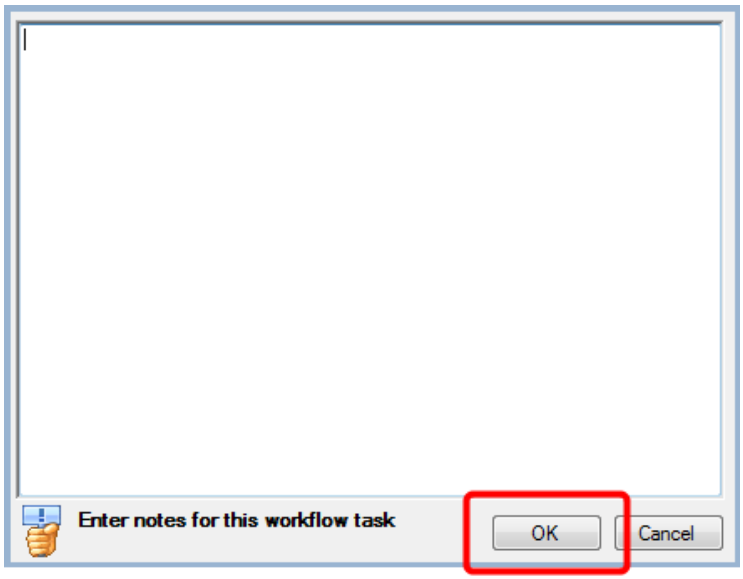
6. Select a Workflow Route

1. Select a workflow route from the list.
2. Click **OK** to confirm.
   A dialog box opens where you can specify a note for the workflow route. The note will be available to the user assigned to the first step in the selected workflow route.



7. Specify a Note

1. Specify the note.
2. Click **OK** to continue.
   Note: Specifying a note is not mandatory.
   You are prompted that the document is routed successfully.
3. Click **OK** to complete the operation.

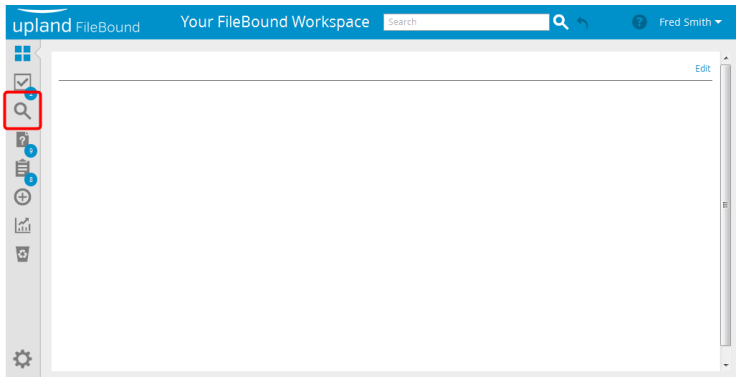


How do I route a document to a user?

You can route a document to a specific user from a list of available users. This lesson shows you how to route a document to a user.

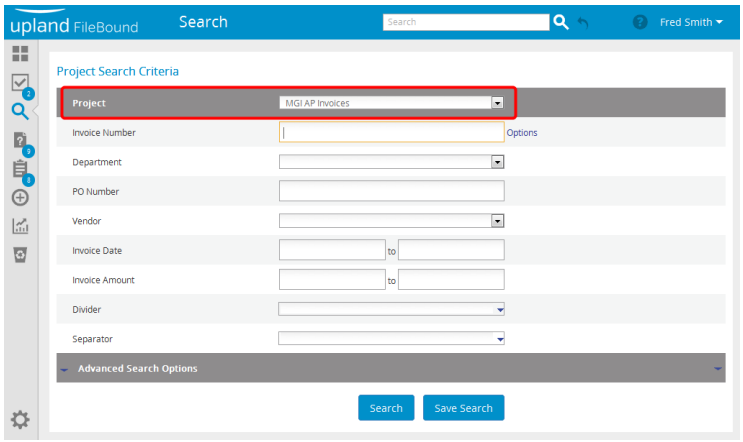
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



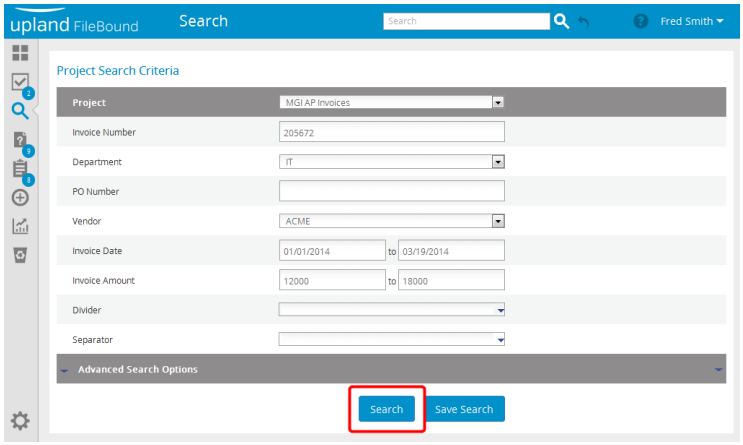
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

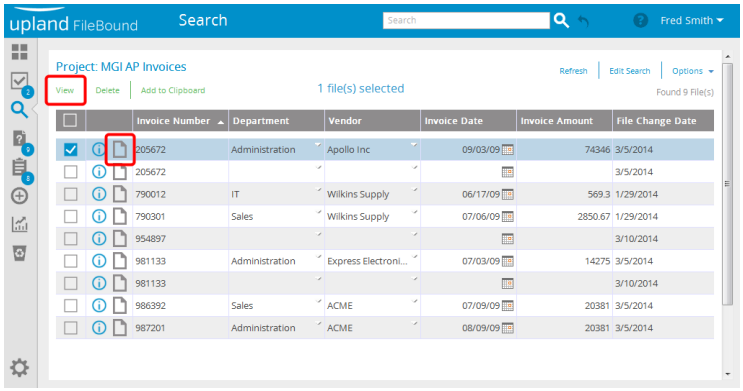
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.



Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

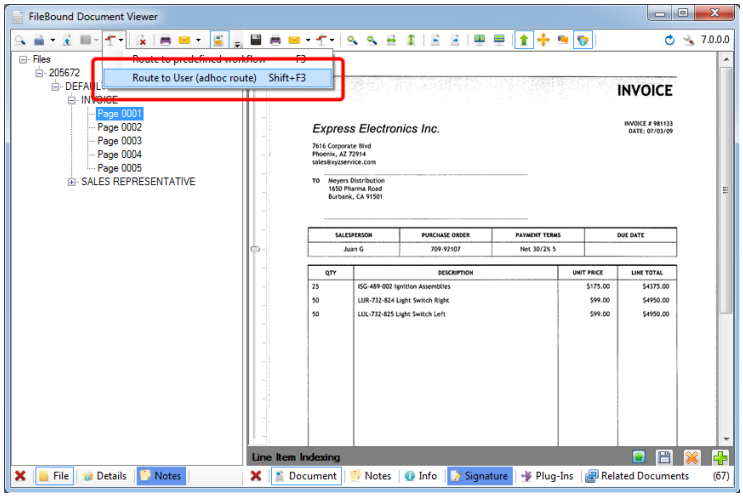
Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Open the List of Available Users

1. Click the route button on the **File Toolbar** within the **Viewer**.
2. Select the **Route to User (adhoc-route)** option from the menu.

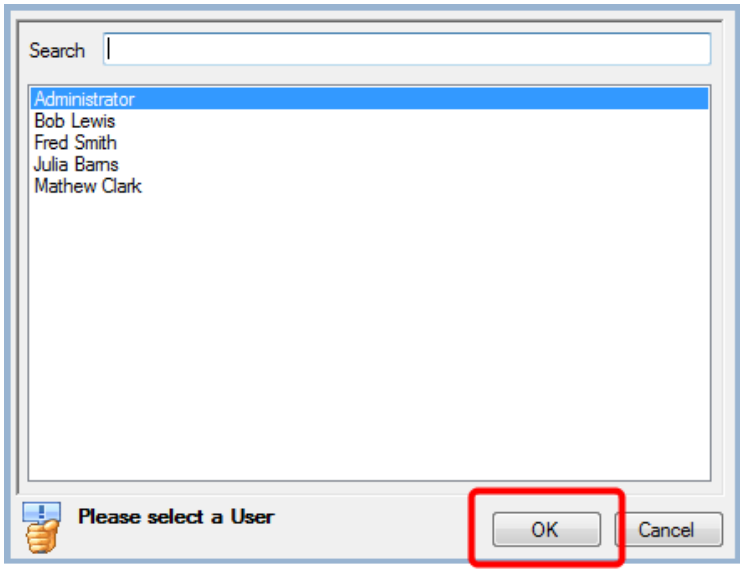
   Or,

   Press the **Shift** + **F3** shortcut key, to open the list of users in a dialog box.
   If you have selected more than one document then a confirmation dialog box prompts you to confirm that you want to route multiple documents.



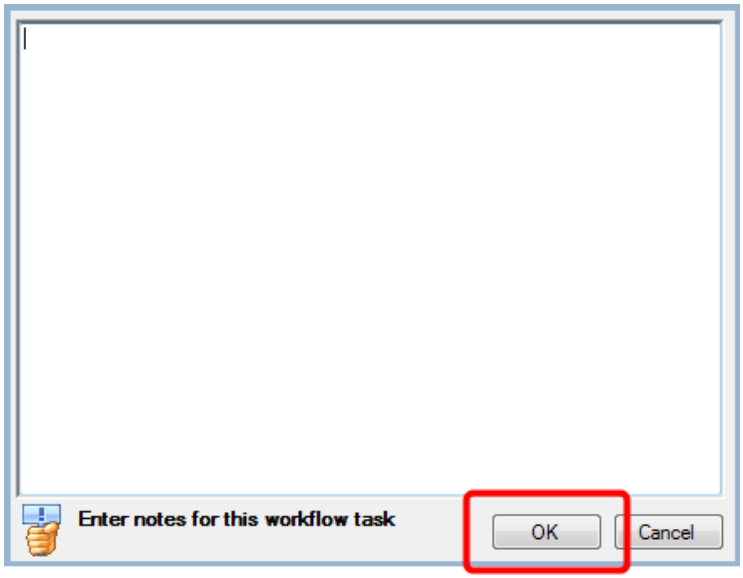
6. Select a User

1. Select a user from the list.
2. Click **OK** to confirm.
   A dialog box opens where you can specify a note for the ad-hoc workflow route.



7. Specify a Note

1. Specify the note.
2. Click **OK** to continue.
   Note: Specifying a note is not mandatory.
   You are prompted that the document is routed successfully.
3. Click **OK** to complete the operation.



How do I delete a page in a file within the Viewer?

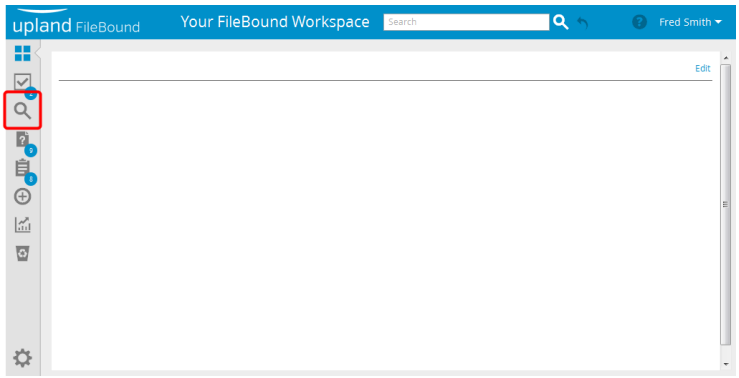
You can delete one or more pages from a file in the **File Contents** pane of the **Viewer**.

Note: As a prerequisite, you must belong to a group that has the document deleting group right enabled by the System Administrator.

This lesson shows you how to delete a page in a file within the **Viewer**.

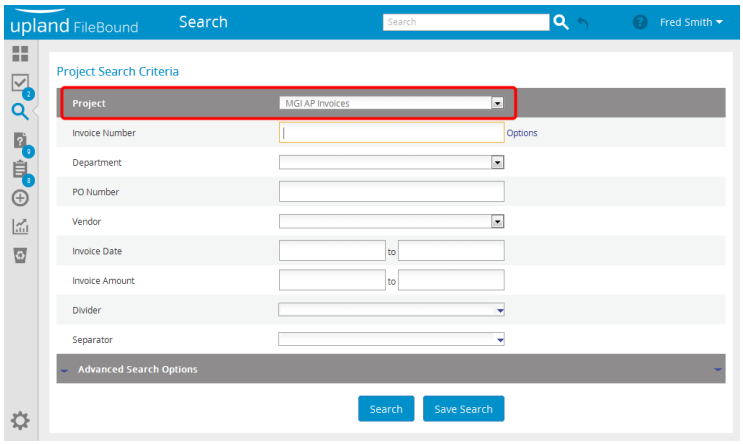
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



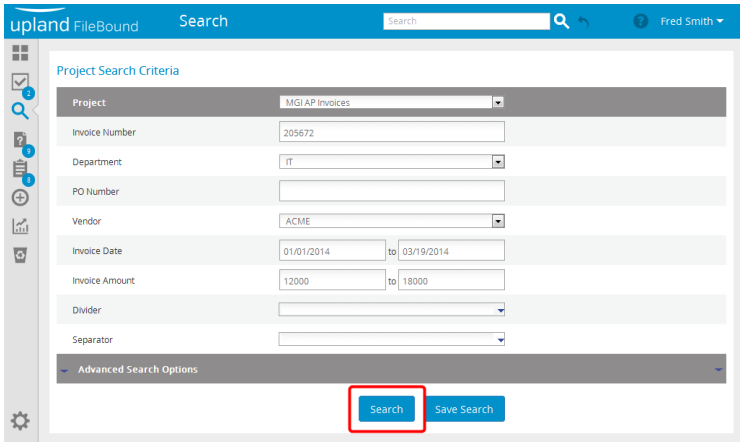
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

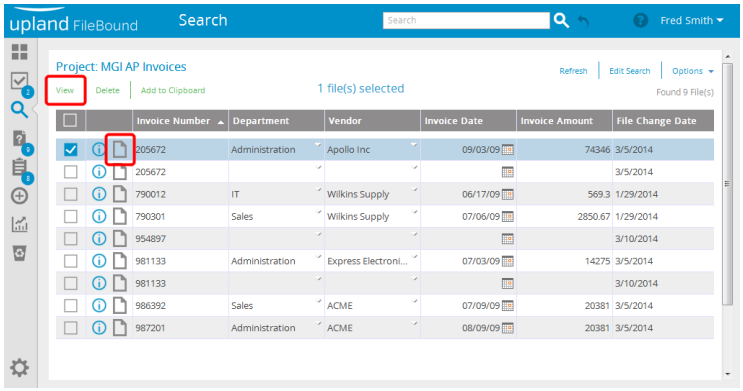
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

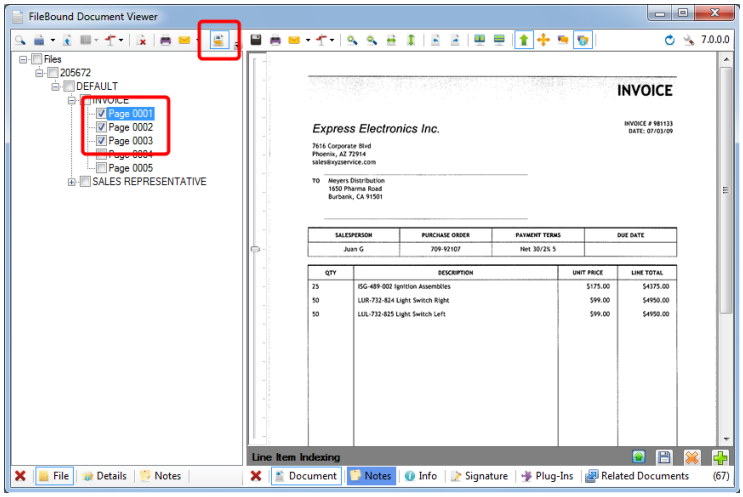


Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Select the Pages

1. Click the toggle icon to use the **Toggle Multi-Select Option** feature.
2. Select the check boxes adjacent to the pages you want to delete.

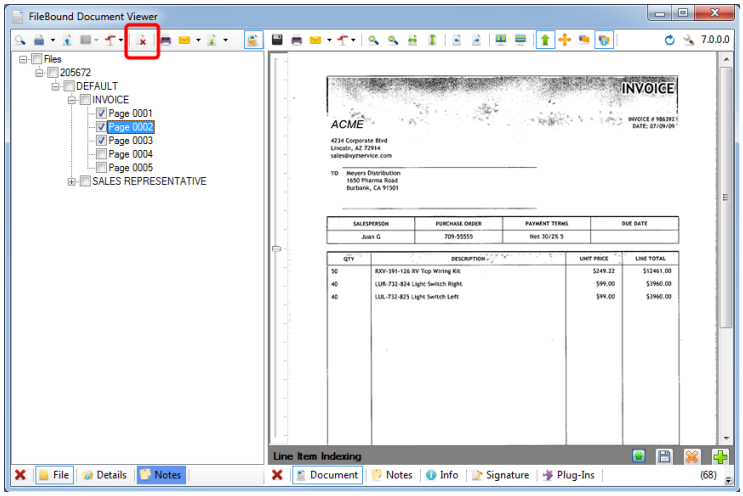


6. Delete the Pages

- Click the delete button on the **File Toolbar**.

  Or,

1. Right-click the selected page node.
2. Select **Delete Document(s)** from the menu. The pages are deleted after confirmation.

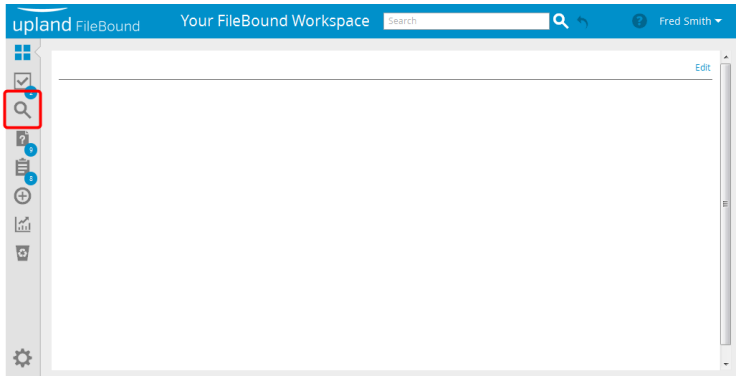


How do I display the file details within the Viewer?This

lesson shows you how to display the file details within the **Viewer**.

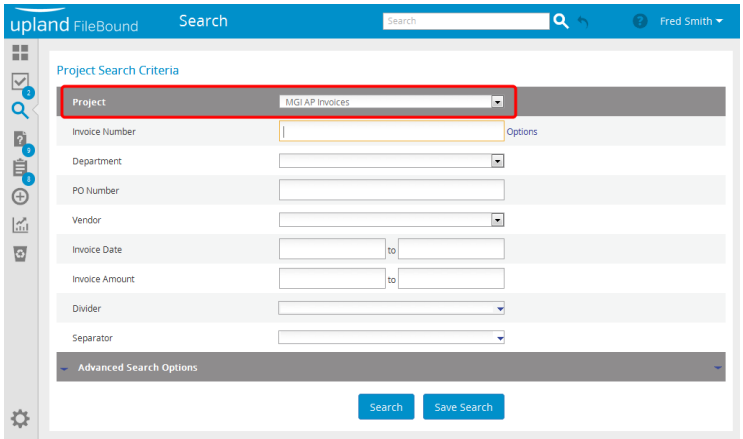
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



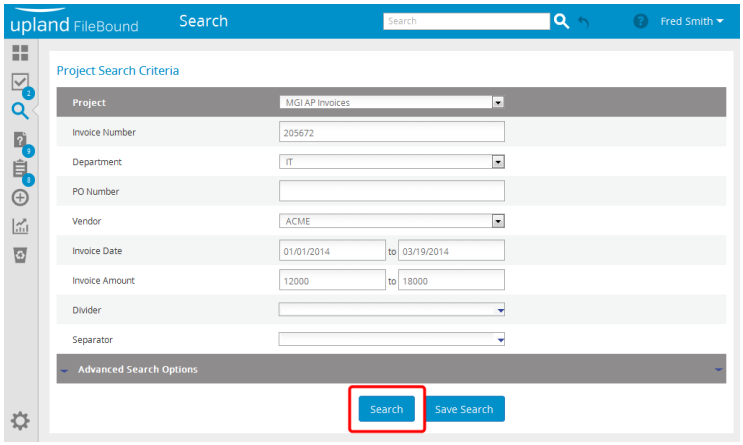
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

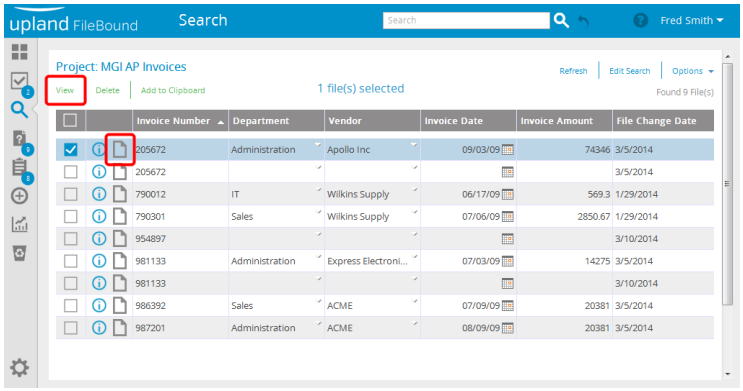
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

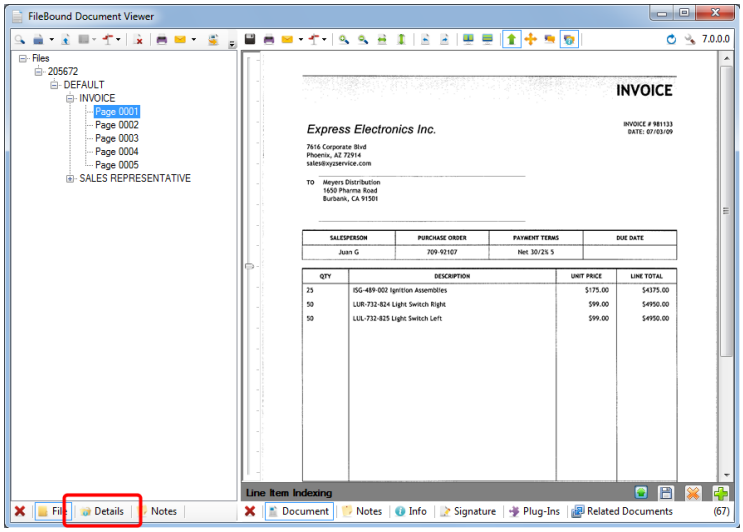


Note: The **Windows Viewer** must set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Display the File Details

- Click **Details** on the **File Content** taskbar, to display the **File Details** pane.



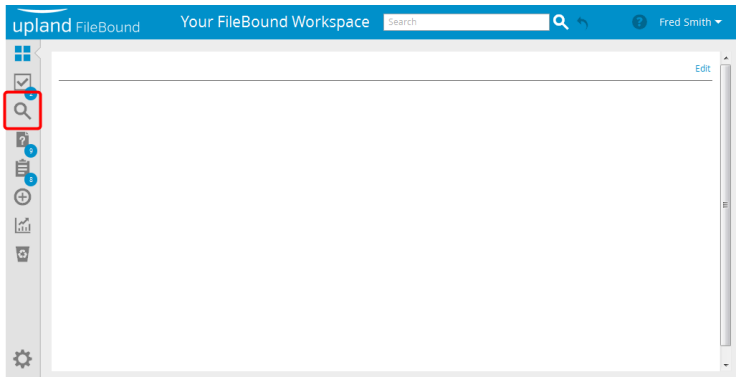
How do I display the file notes for a file within the Viewer?

You can specify a note within a file to provide additional information about the file when viewing it. These notes can also aid in retrieving the file when it is searched for.

This lesson shows you how to display the file notes for a file within the **Viewer**.

1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



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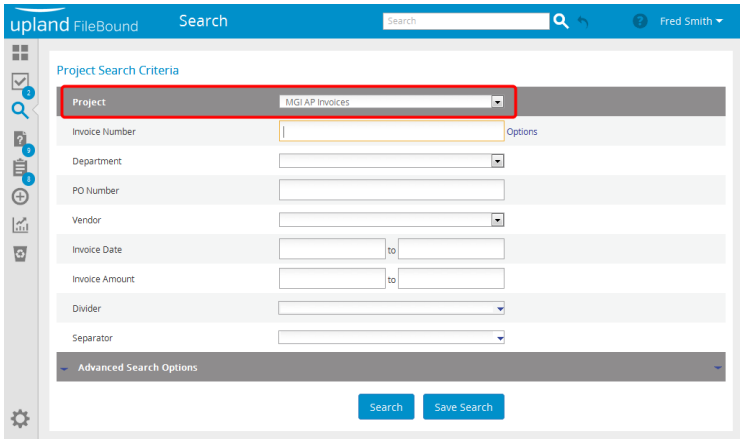
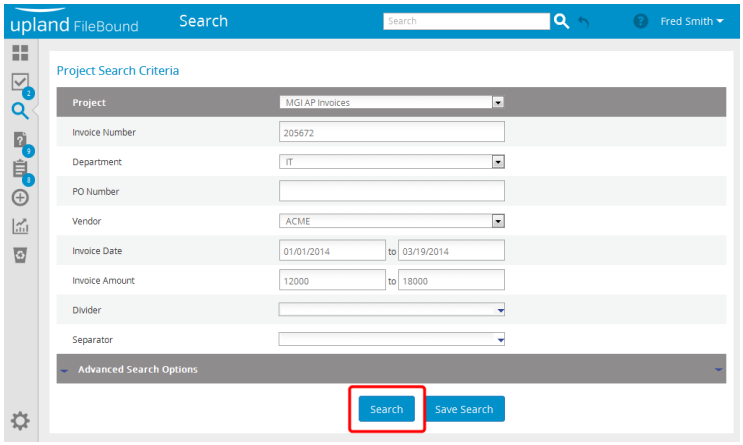
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
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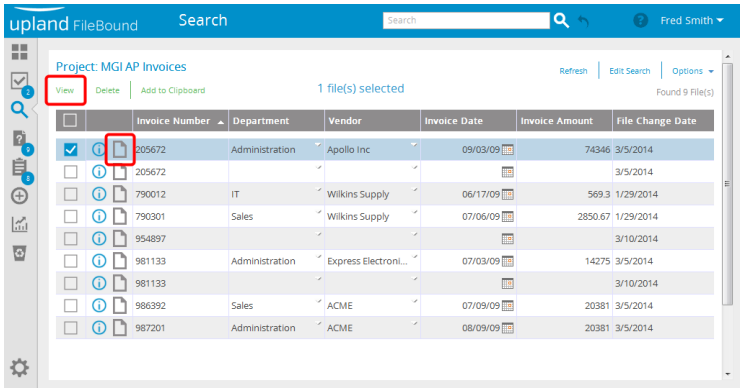


1. Click the view icon on any one of the files that you want to view.

   Or,

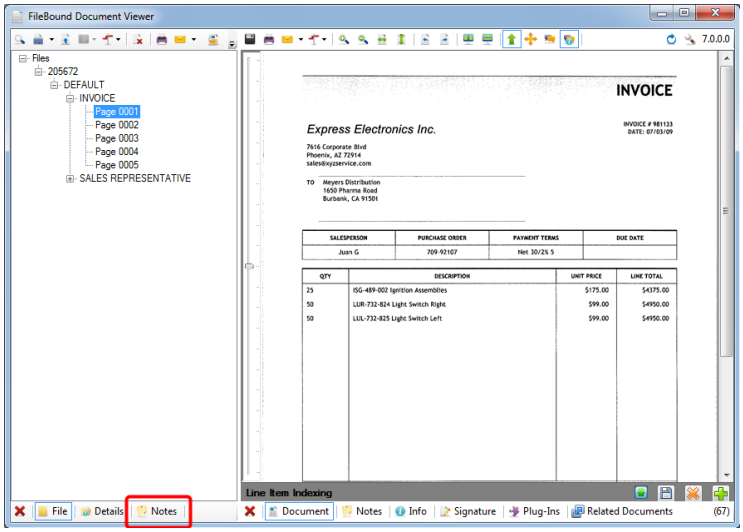
   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Display the File Notes

- Click **Notes** on the taskbar, to display the **File Notes** pane.



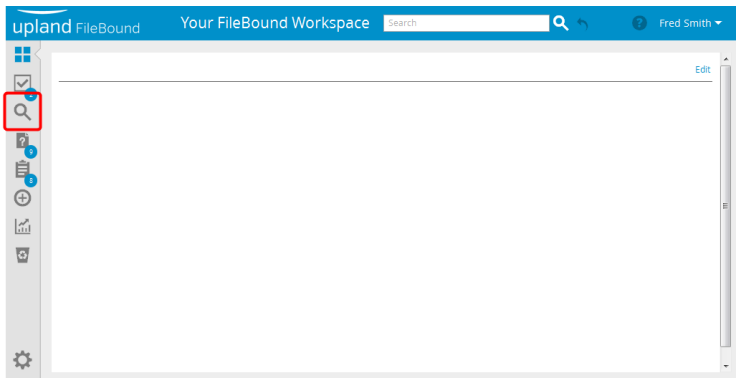
How do I display the document notes for a page within the Viewer?

You can specify a note within a document to provide additional information about the document when viewing it. These notes can also aid in retrieving the document when it is searched for.

This lesson shows how to display the document notes for a page within the **Viewer**.

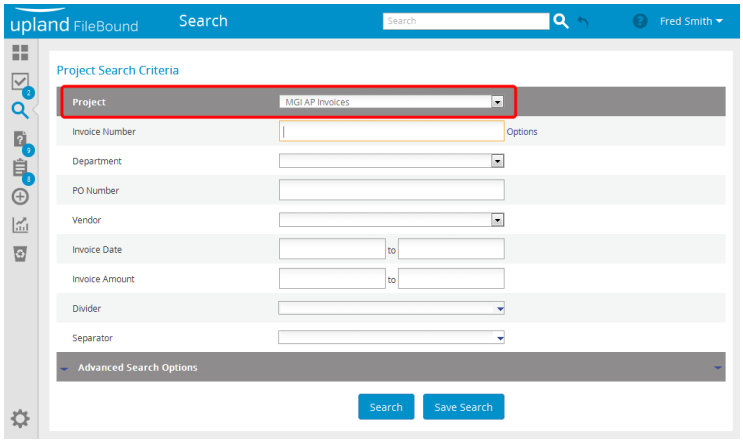
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.

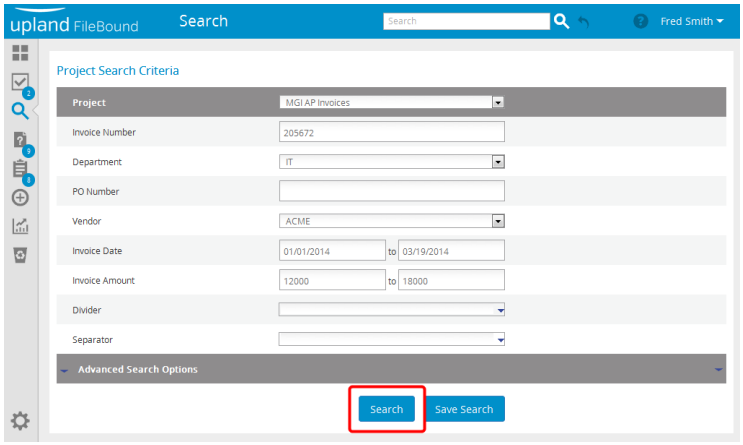


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
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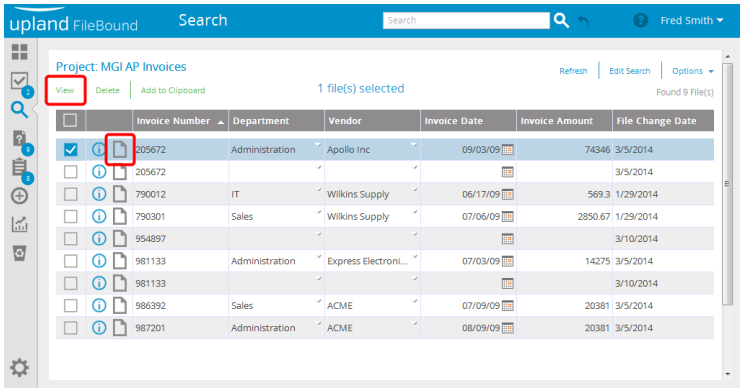

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   Select the check box next to the file that you want to view.
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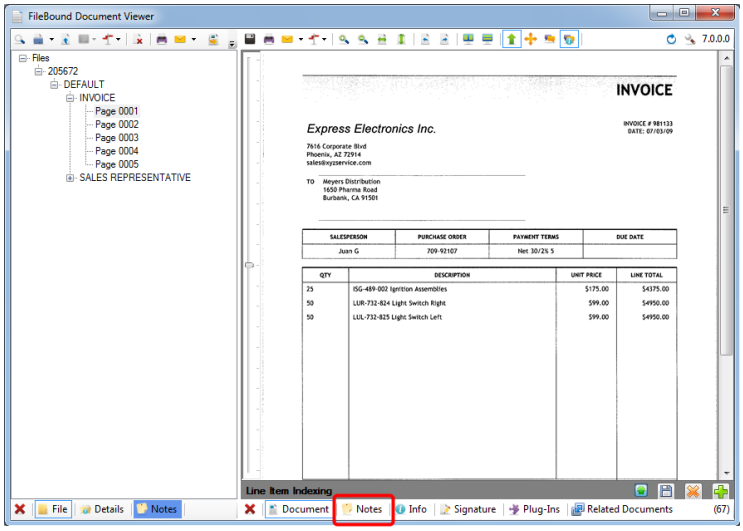
Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

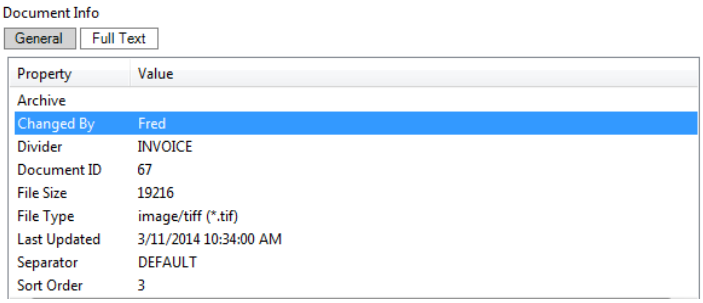
5. Display the Document Notes

- Click **Notes** on the taskbar, to display the **Document Notes** pane.



What are the document properties that are displayed within the Viewer?

This lesson provides the information of the document properties that are displayed within the Viewer.



Archive: Displays the time when the archive was created and last updated.

Changed By: Displays the name of the user that last made changes to the document.

Divider: Displays the name of the divider that contains the document.

Document ID: Displays the document identification number of the document.

File Size: Displays the size of the document.

File Type: Displays the format of the document.

Last Updated: Displays the date and time when the document was last updated.

Separator: Displays the name of the separator that contains the document.

Sort Order: Displays the sort order of the document.

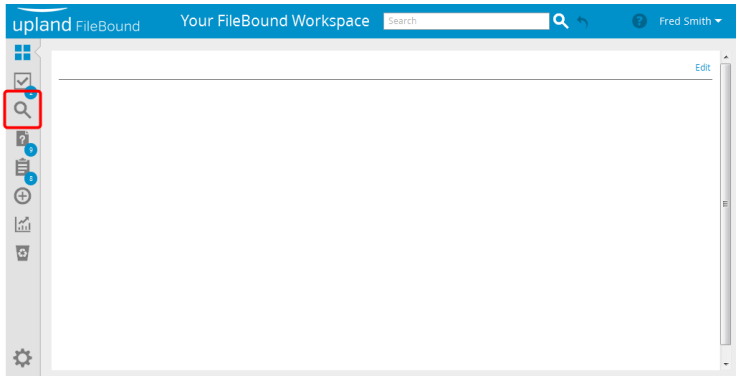
How can I see the full text information stored for a document within the Viewer?

When a document is scanned or imported into WebDocs Optical Character Recognition (OCR) can be performed on the document and stored. You can also specify full text information for a document or image that is displayed within the **Viewer**. A user can then use this information to search for the document on the **Search** screen and within the **Viewer**.

This lesson shows you how to view the full text information stored for a document within the **Viewer**.

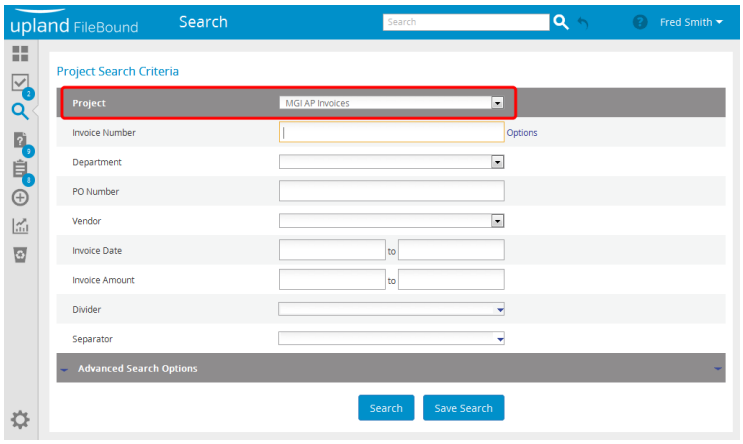
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



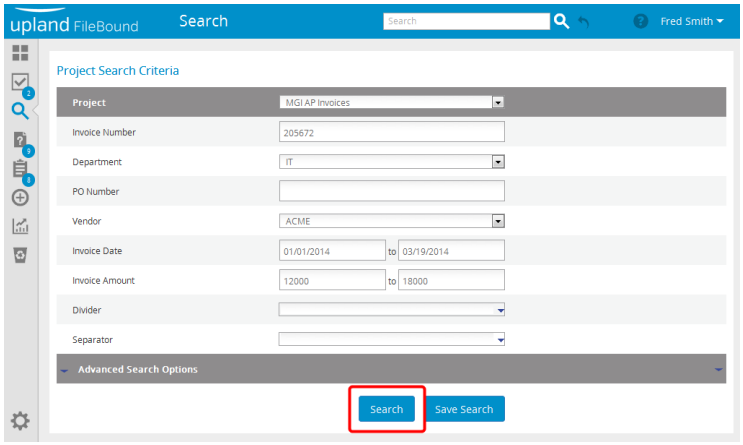
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all of the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

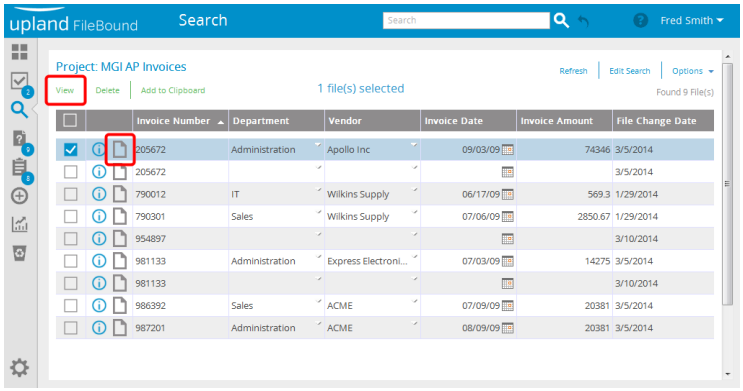
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

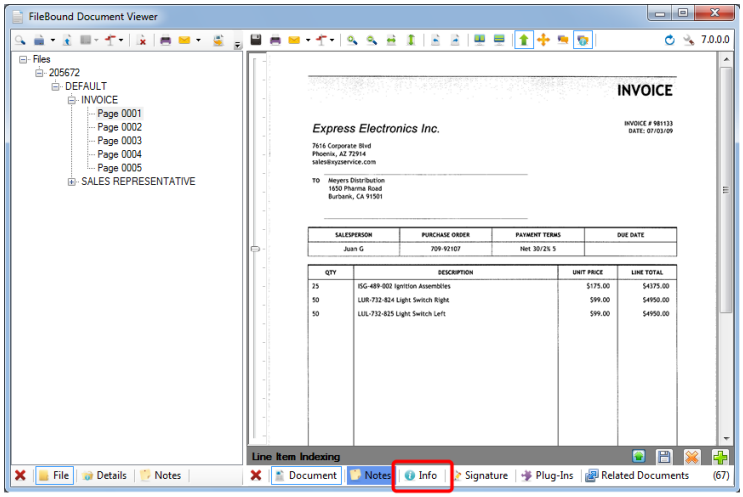


Note: The **Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

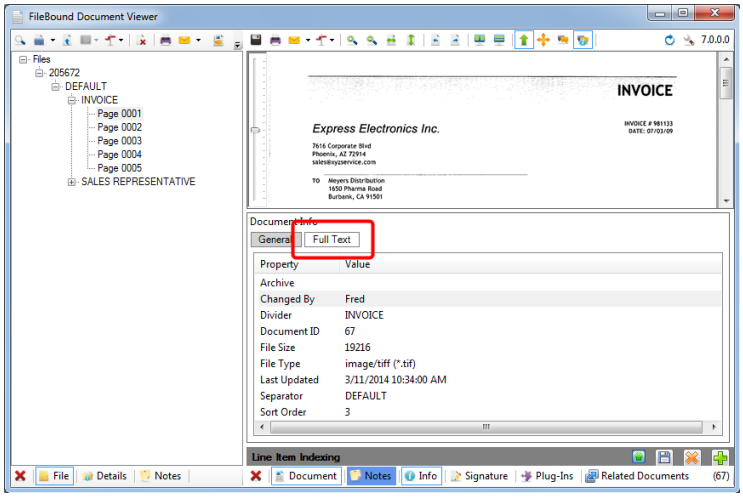
5. Display the Document Information

- Click **Info** on the taskbar, to display the **Document Info** pane.



6. Display the Full Text Information

- Click **Full Text** tab within the **Document Info** pane.

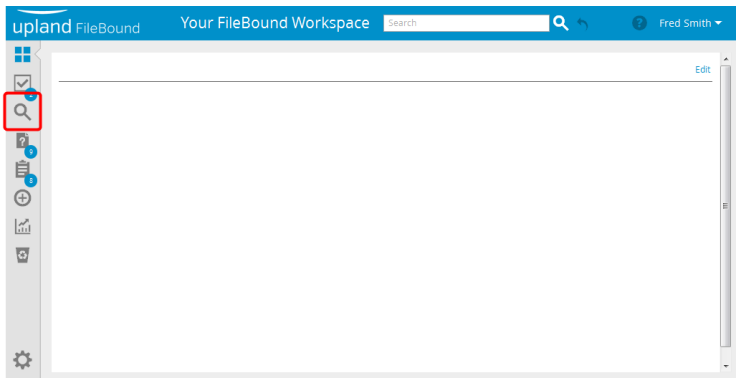


How can I edit the full text information that is stored for a document within the Viewer?

This lesson shows you how to edit the full text information that is stored for a document within the **Viewer**.

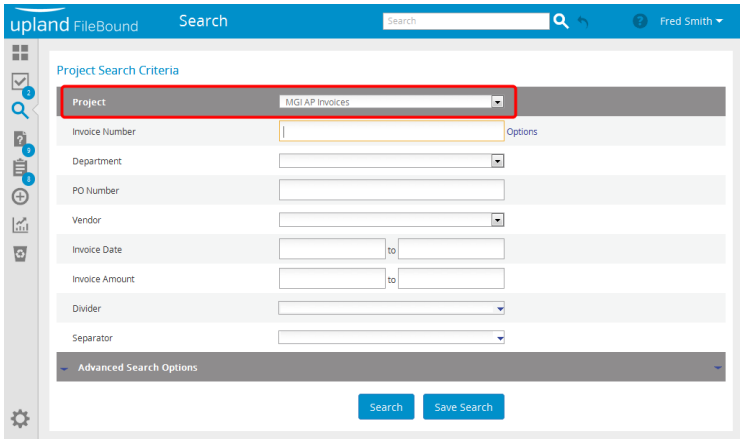
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.

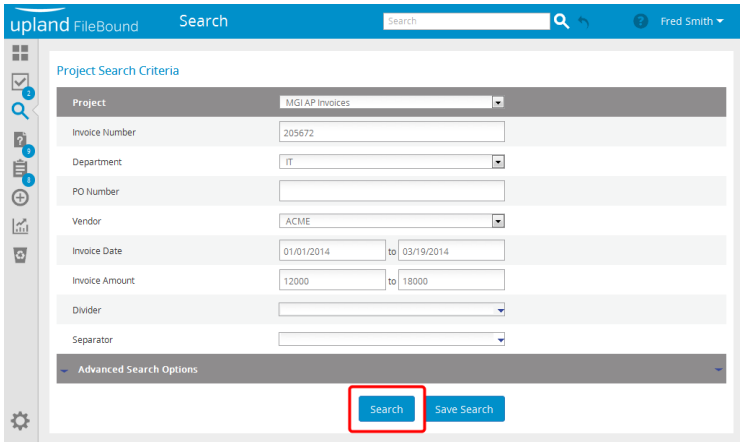


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



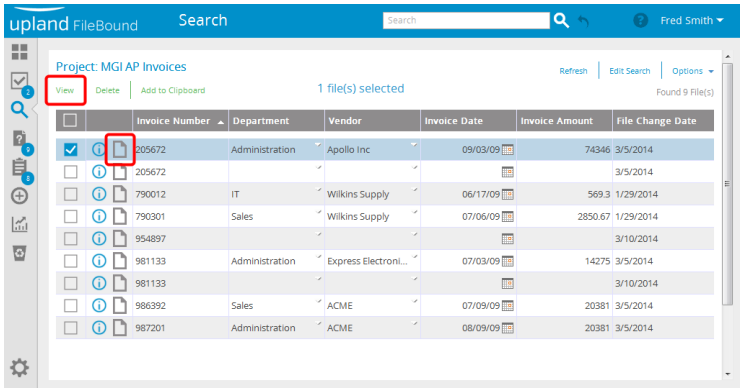
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

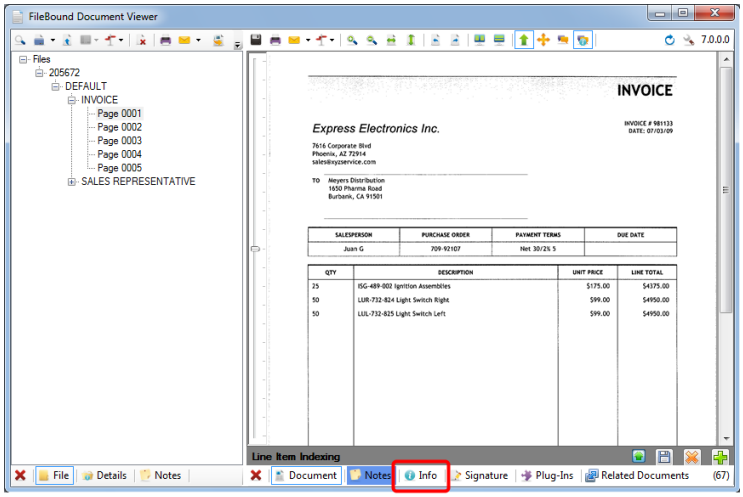
   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

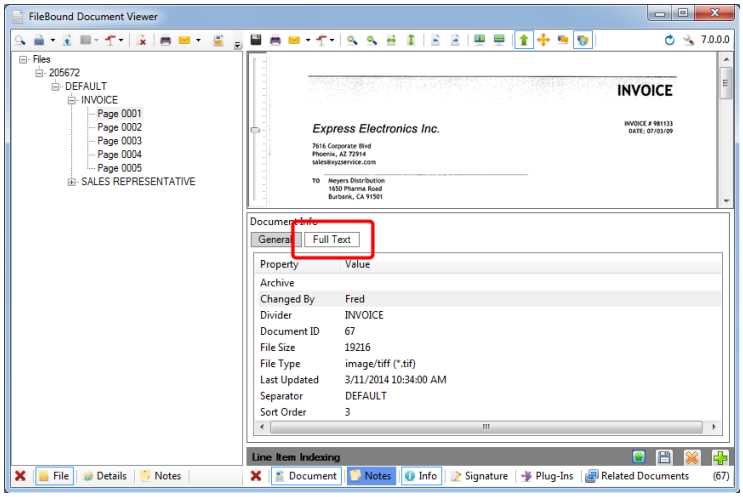
5. Display the Document Information

- Click **Info** on the taskbar, to display the **Document Info** pane.



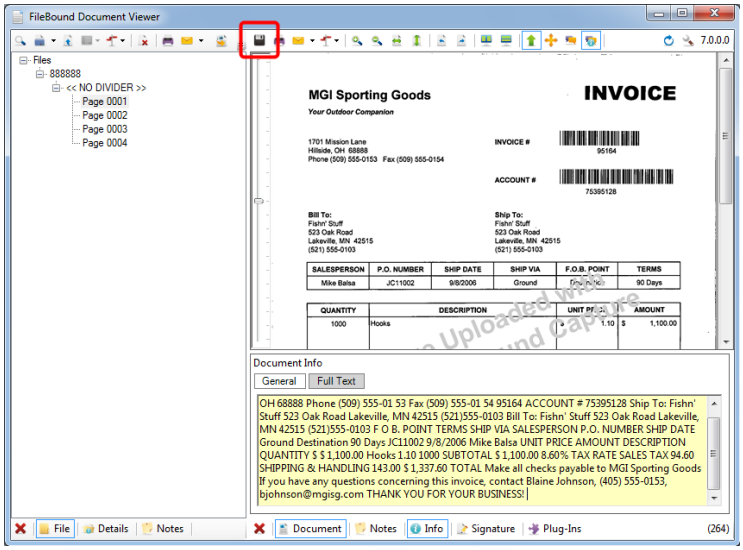
6. Display the Full Text Information

- Click **Full Text** tab within the **Document Info** pane.



7. Edit the Full Text Information

1. Edit the full text information displayed within the **Full Text** tab.
2. Click the save button on the document toolbar.

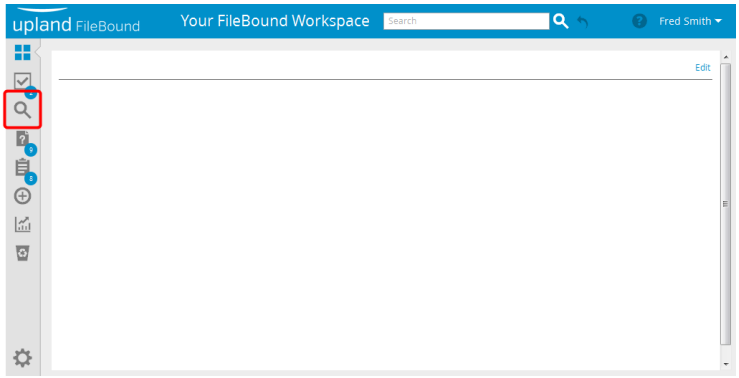


How do I take action on a routed document within the Viewer?

This lesson shows you how to take action on a routed document within the **Viewer**.

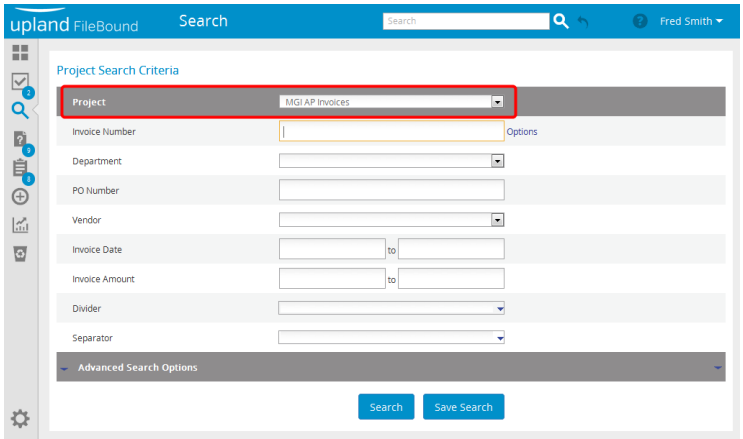
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



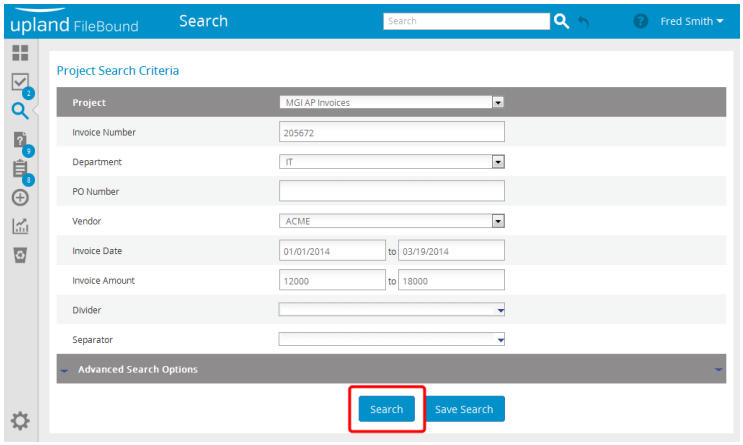
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

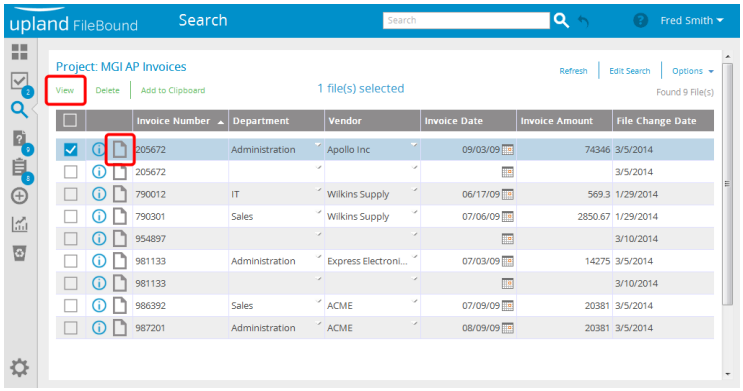
Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer

1. Click the view icon on any one of the files that you want to view.

   Or,

   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in **Viewer**.
   The document opens in the Viewer with the workflow pane displaying the task options.

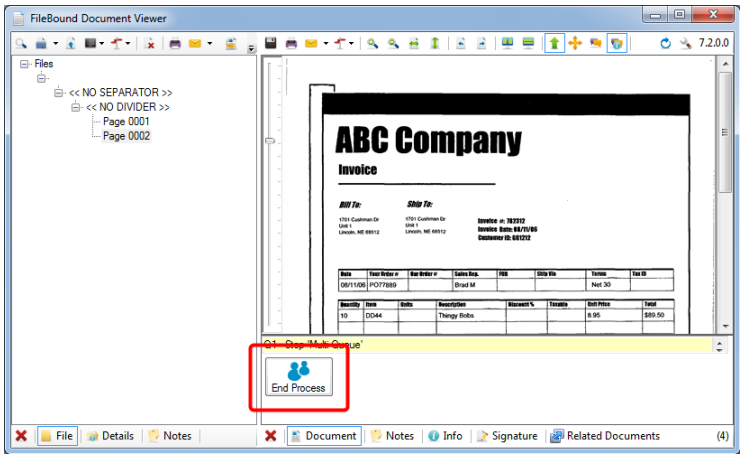


Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Take an Action

- Click a task button to take the action associated to that button.



What is a Workflow Map?

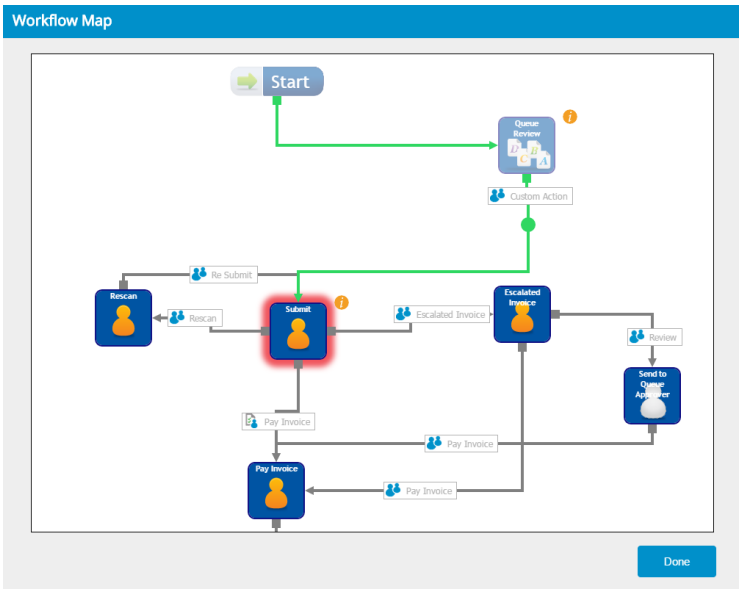
This lesson provides information about the workflow map.

Workflow Map

Workflow map allow users to view the step the routed document is currently at within a workflow process. Users can view the entire workflow process, the route the document has passed through, and the next step the document will be routed to. You can click on the information icon adjacent to a step to display the step details.

Note: The information icon is available only for the steps the document has been routed from.

For example, in the above image, the document is currently at **Submit** step. The current step of the document is highlighted. The green line from **Start** to the **Submit** step indicated the path the document has followed in the workflow process.

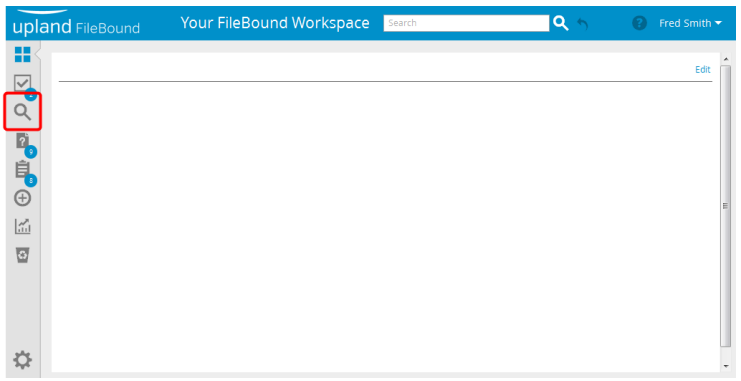


How do I view workflow map for a routed document in the Viewer?

This lesson shows you how to view workflow map for a routed document in the **Viewer**.

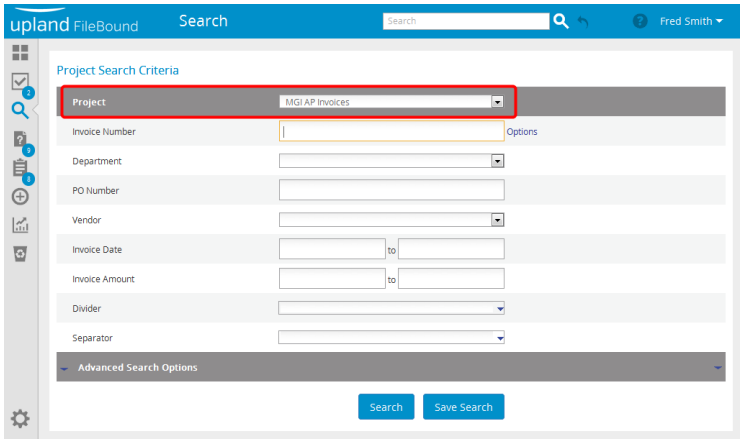
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.

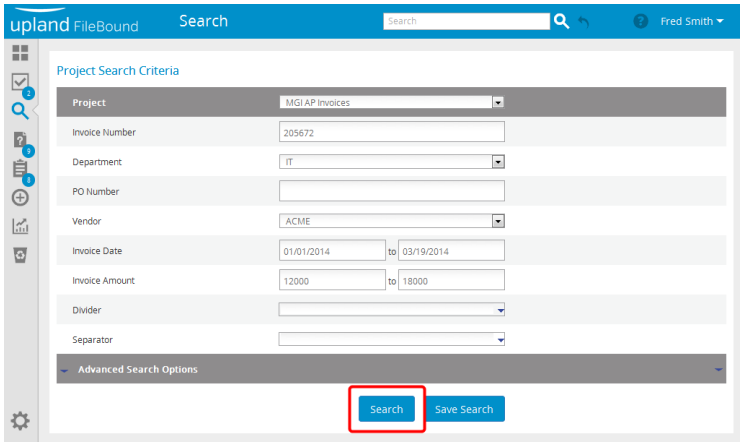


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



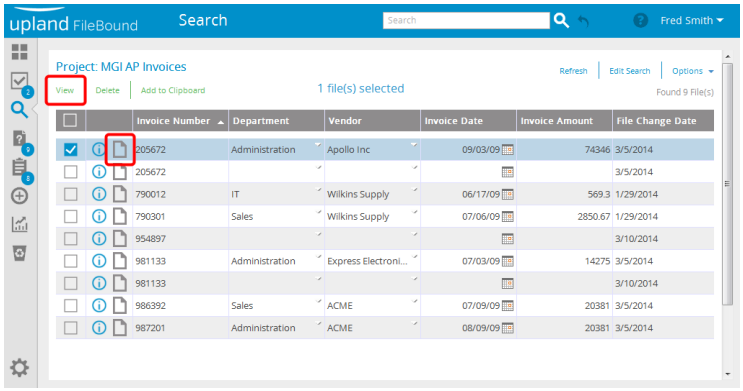
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

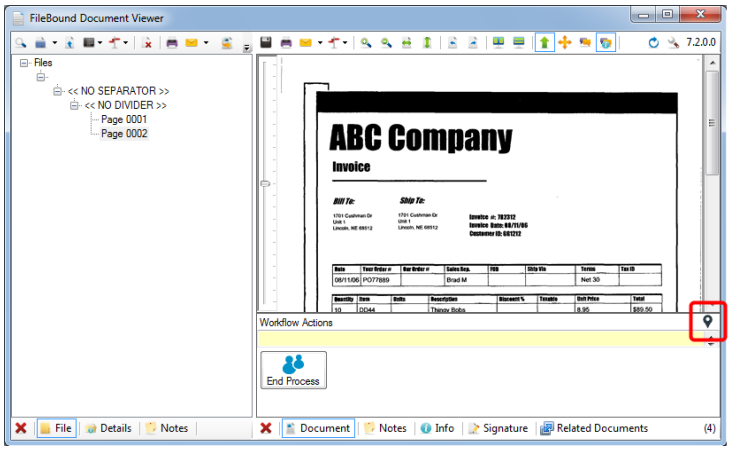
   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in **Viewer**.
   The document opens in the Viewer with the workflow pane displaying the task options.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Open the Workflow Map Dialog Box

- Click the map icon within the **Workflow Actions** pane.
  The **Workflow Map** dialog box opens.



How can I apply a document signature within the Viewer?

You can specify a signature for a document to mark the document as authorized and therefore not editable by any user until the signature is removed. A document signature is an electronic signature that a user applies by entering their WebDocs password.

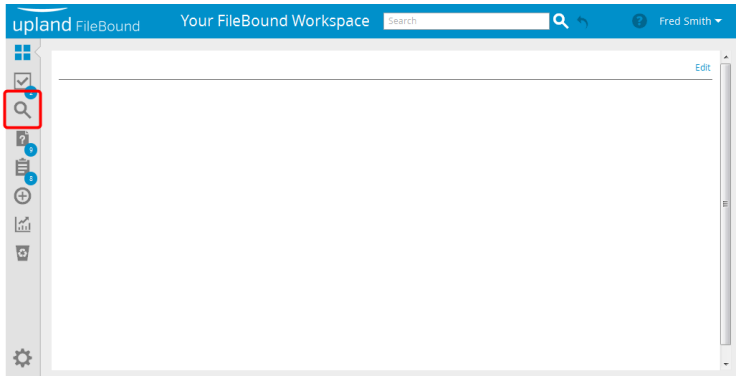
The signature consists of the document signature identification number, user name of the person who applied the signature, and the date and time when the signature is added.

Note: The user that is applying the signature must have the 'Document Editing' group right enabled for the group that they belong to by the System Administrator.

This lesson shows you how to apply a document signature within the **Viewer**.

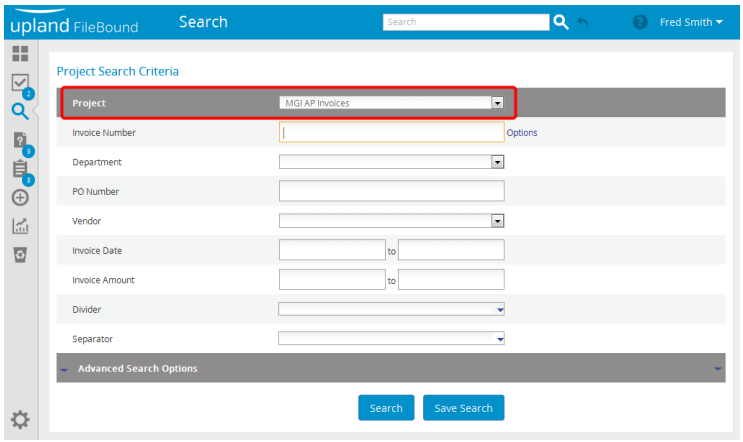
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
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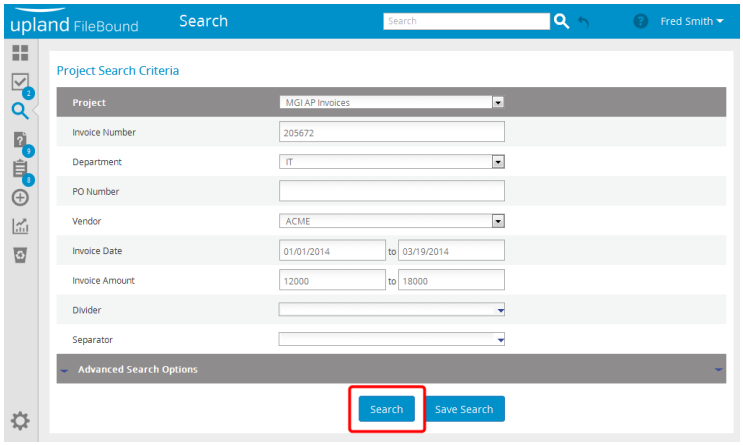

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

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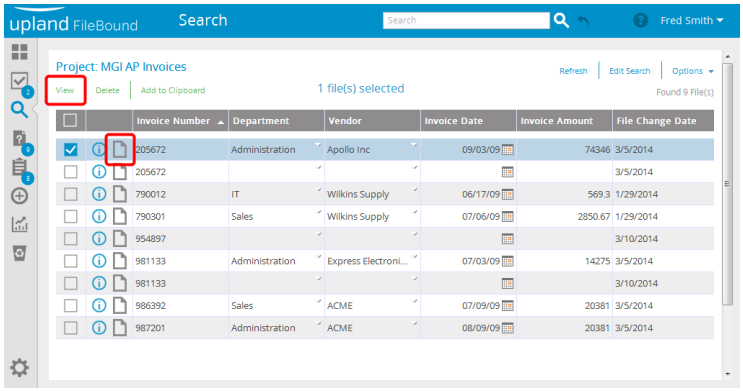
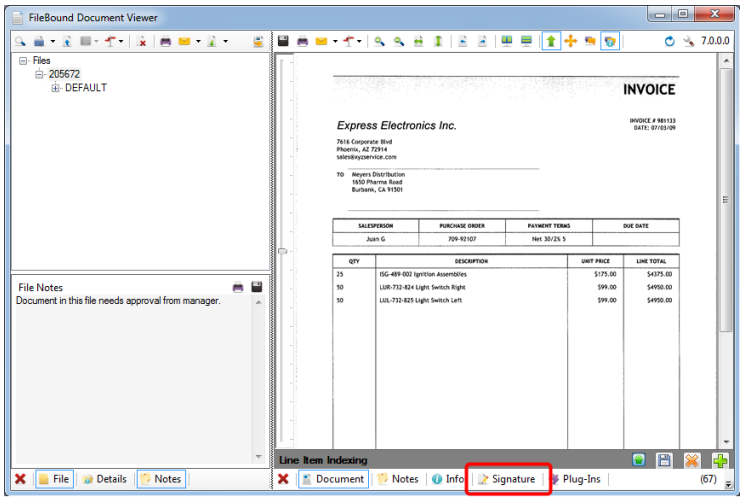


Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Display the Document Signature Pane

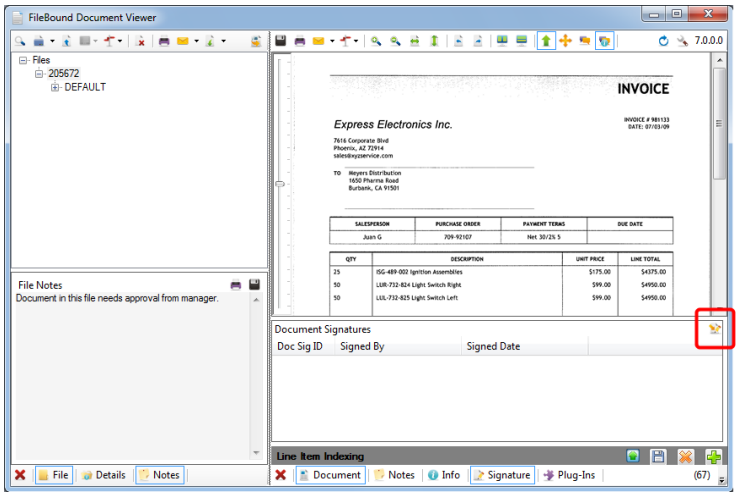
- Click **Signature** on the taskbar, to display the **Document Signatures** pane.



6. Sign the Document

1. Click the sign document icon in the **Document Signatures** pane.
   A dialog box opens.
2. Specify the password for the currently logged in user within the dialog box, and then click **Save**.

Note: A document can contain only one signature.

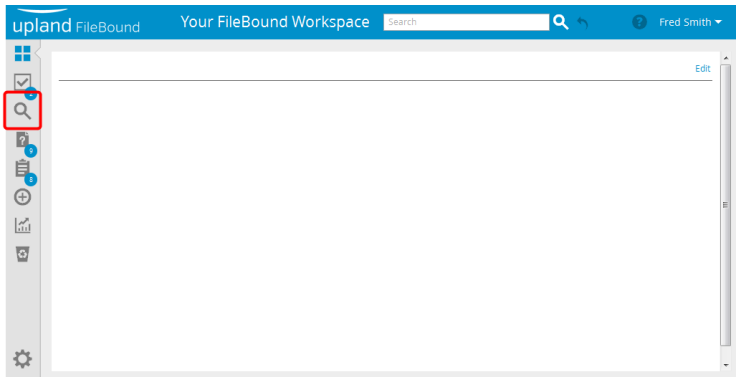


How do I remove a document signature within the Viewer?

You can remove the signature from a document when you do not want to keep the signature any more or when you want to edit the document. This lesson shows you how to remove a document signature within the **Viewer**.

1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
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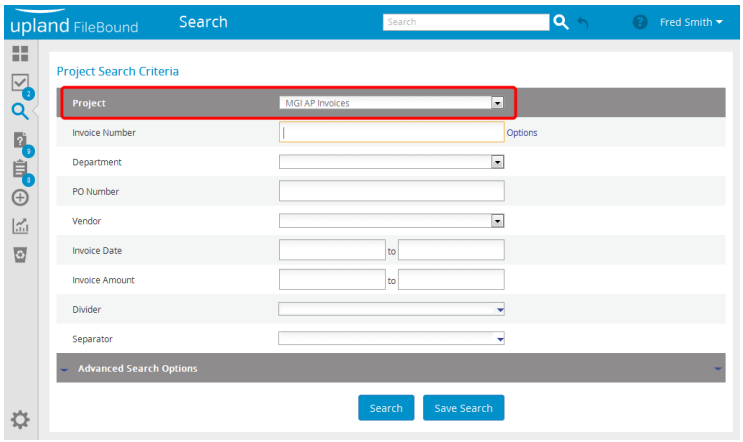
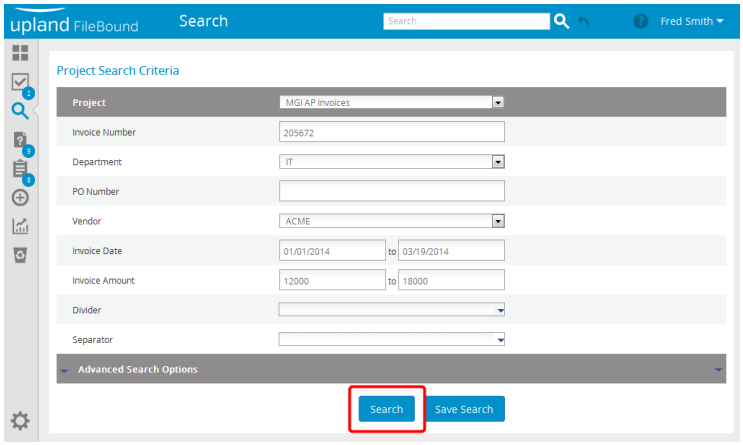


3. Specify the Search Criteria



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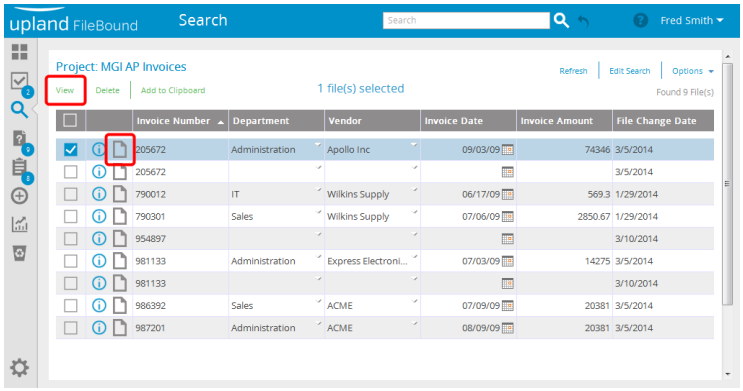
As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

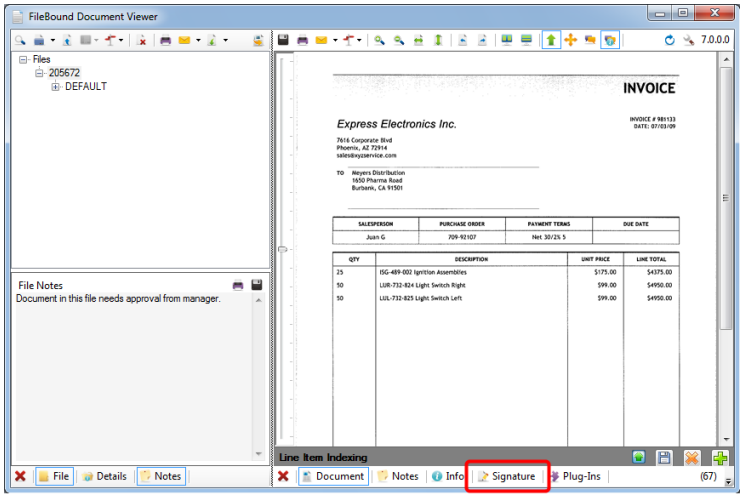
   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

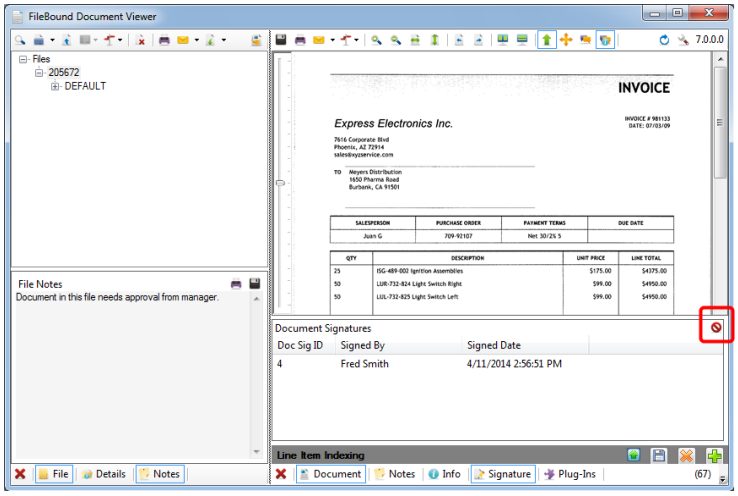
5. Display the Document Signature Pane

- Click **Signature** on the content taskbar, to display the **Document Signatures** pane.



6. Remove the Document Signature

- Click the delete button within the **Document Signatures** pane.

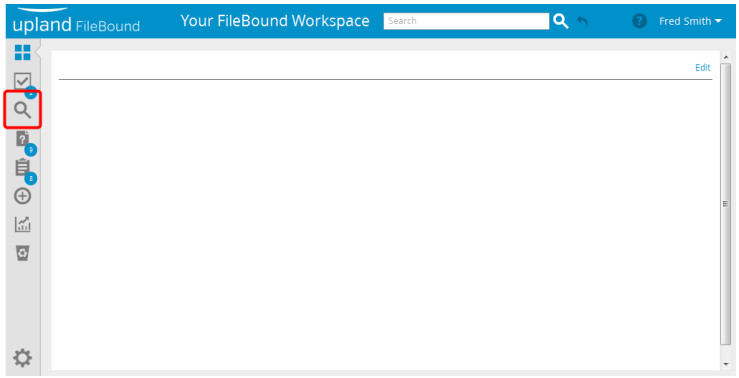


How do I see who has signed a document within the Viewer?

This lesson shows you how to see who has signed a document within the **Viewer**.

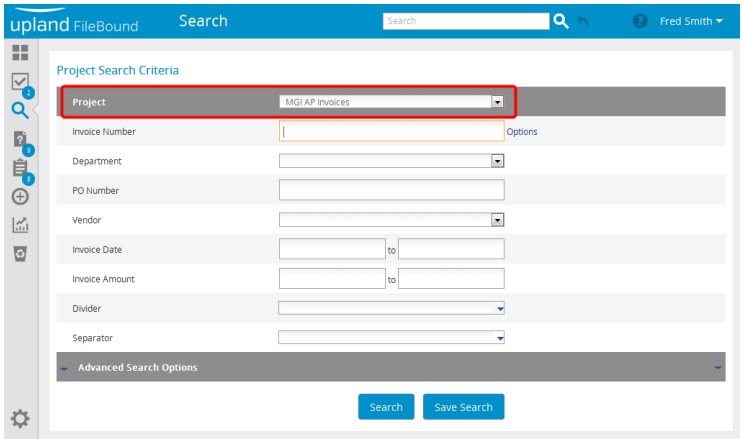
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.

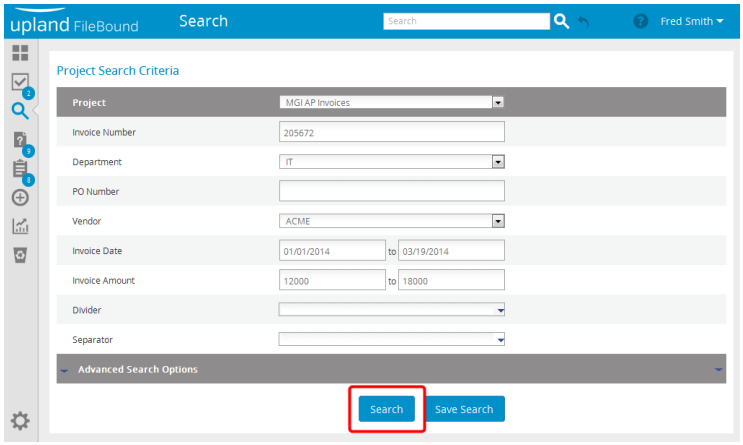


2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria



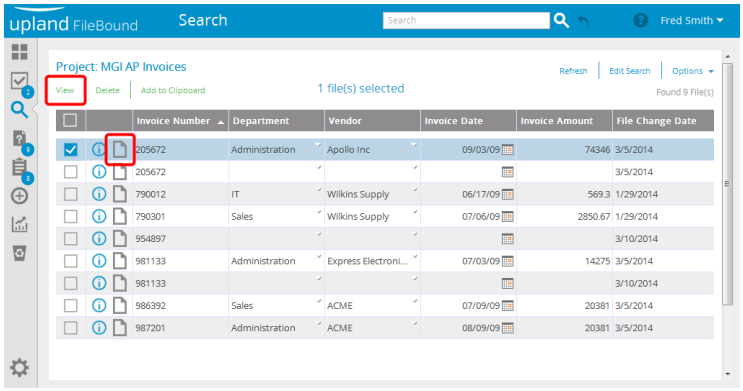
1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open the Viewer



1. Click the view icon on any one of the files that you want to view.

   Or,

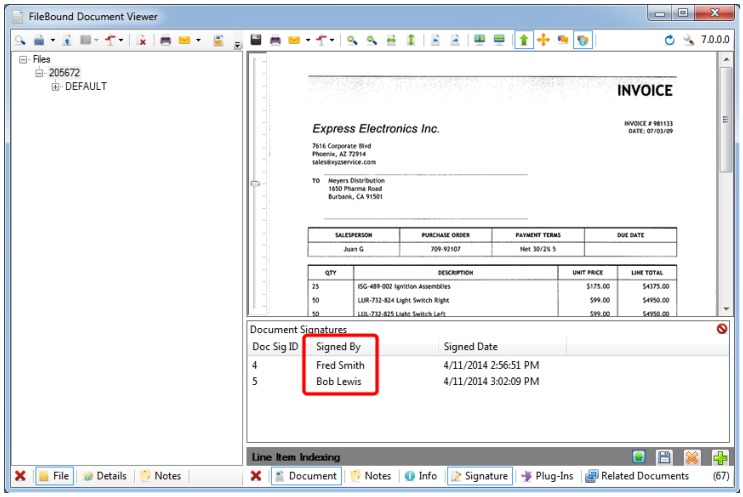
   Select the check box next to the file that you want to view.
2. Click **View**, to open the file in the **Viewer**.

Note: The **Windows Viewer** must be set as the default viewer from the **User Preferences**. For more information on setting default viewer, click here.

Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

5. Display the Document Signature Pane

- Click **Signature** on the content taskbar, to display the **Document Signatures** pane. The name of the user that signed the document last is displayed in the **Signed By** column. Note the latest date and time displayed in the **Signed Date** column.

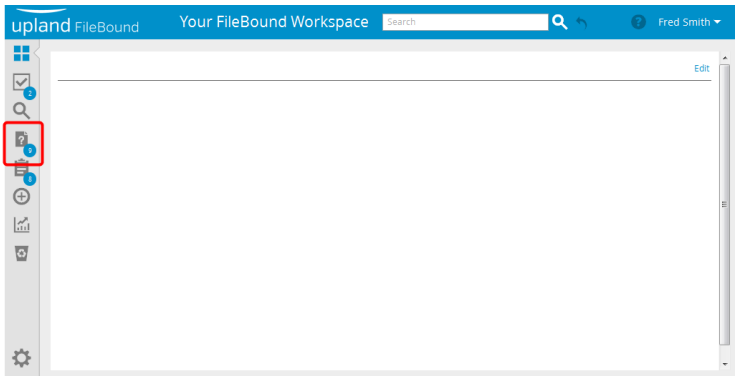


Working With the Indexing Queue

How do I add documents in the Indexing Queue?

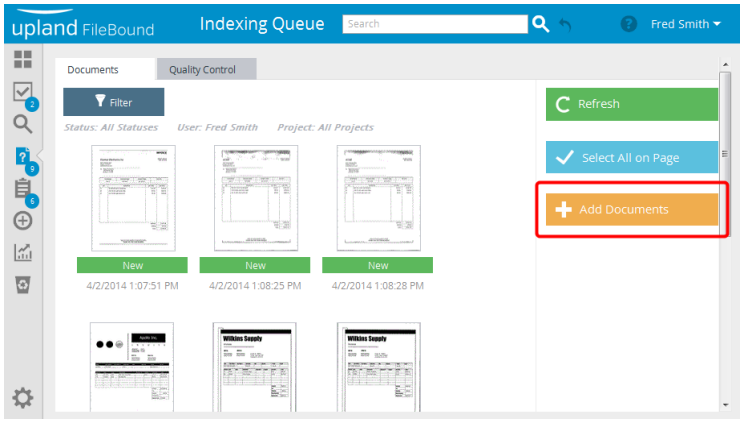
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



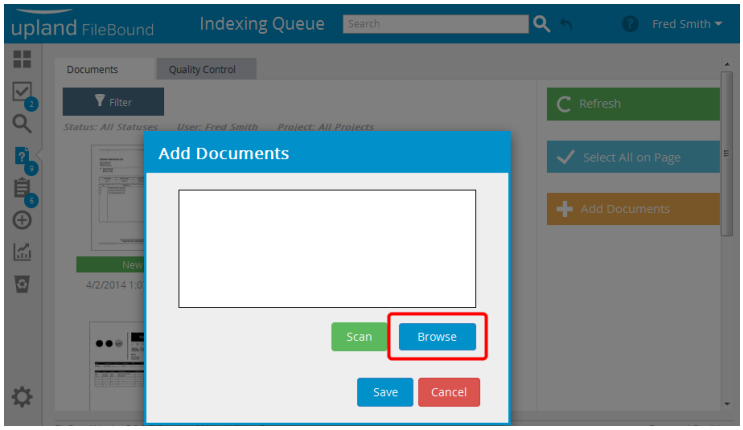
2. Open the Add Documents Dialog Box

- Click **Add Documents** within the **Indexing Queue** page.
  The **Add Documents** dialog box opens.



3. Add Documents

1. Click **Browse** within the **Add Documents** dialog box.
   The **File Upload** dialog box opens.
2. Select the documents you want to add.
3. Click **Open**.



Note: You can click **Scan** to add documents in indexing queue using a scanning device.

What documents can I see in the Indexing Queue?

This lesson provides information about the documents that are available in the **Indexing Queue**.

The **Indexing Queue** provides an area for uploaded documents that have not been indexed or associated with an existing file to be temporarily stored until indexing is completed. This is useful when, multi-function copiers and other similar scanning devices are used to digitize the document that do not have any method to index the document.

The document enters in the **Indexing Queue** when the user knows the project that the documents will be added to, but does not have indexing information. The project is assigned during scanning or importing documents. Documents that are uploaded to WebDocs and are not associated with any project also enter the **Indexing Queue.** The documents in the **Indexing Queue** are filtered based on the project they are associated to, their status, and the user who uploaded the documents.

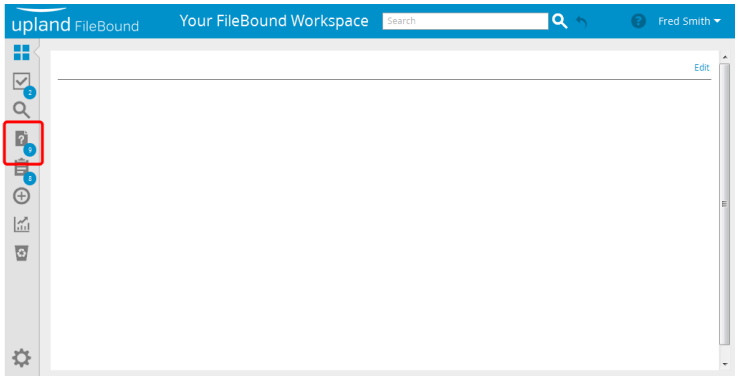
Documents uploaded by all users is visible to a user if the Global Indexing User is not configured. A user can see the document is uploaded by themselves and the Global Indexing User, if the Global Indexing User is configured by System Administrator.

How do I select all documents in the Indexing Queue?

This lesson shows you how to select all documents in the **Indexing Queue**.

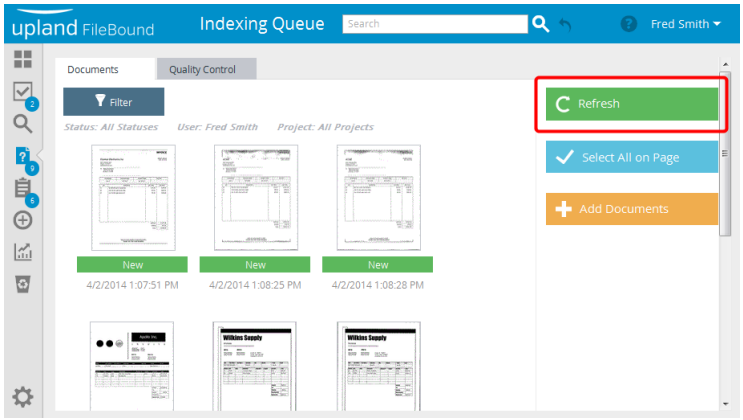
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



2. Select all Documents

- Click **Select All on Page**, to select all documents within the **Indexing Queue** page.

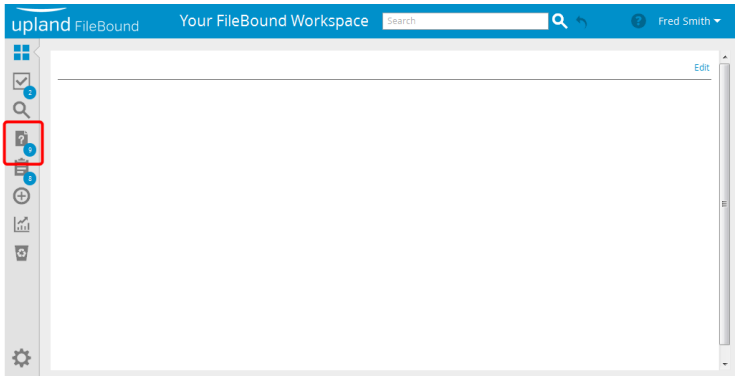


How do I select a document to index in the Indexing Queue?This

lesson shows you how to select a document to index in the **Indexing Queue**.

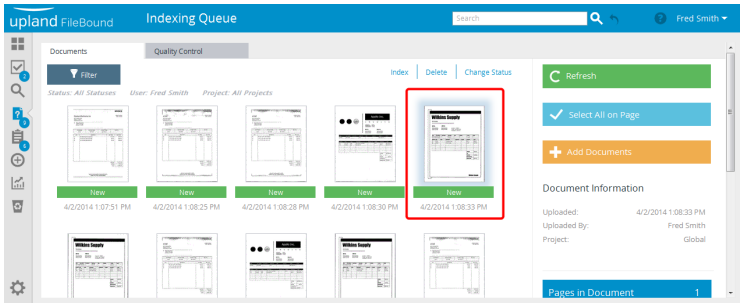
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.

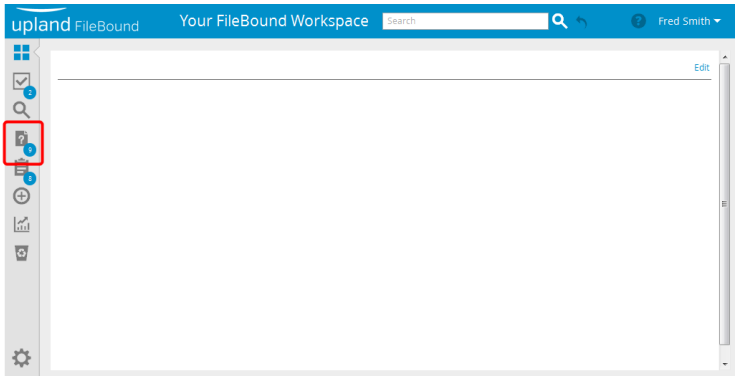


How do I select multiple documents within the Indexing Queue?

This lesson shows you how to select multiple document within the **Indexing Queue**.

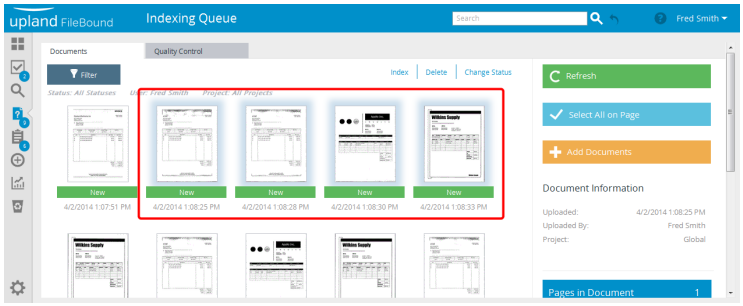
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



2. Select Multiple Documents

- Press the **Ctrl** key, and then click the documents you want to select.

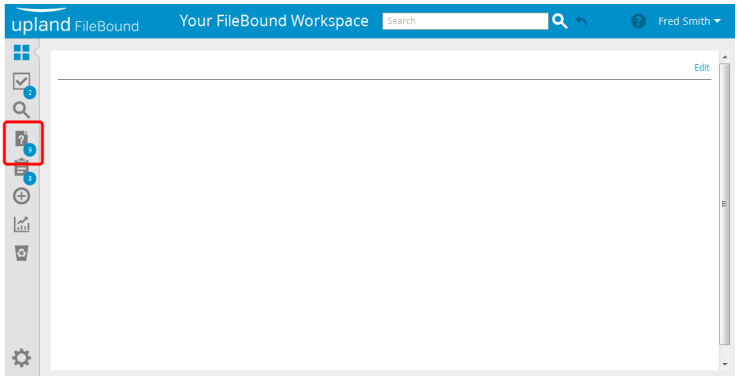


How do I deselect a document in the Indexing Queue?

This lesson shows how to deselect a document in the **Indexing Queue**.

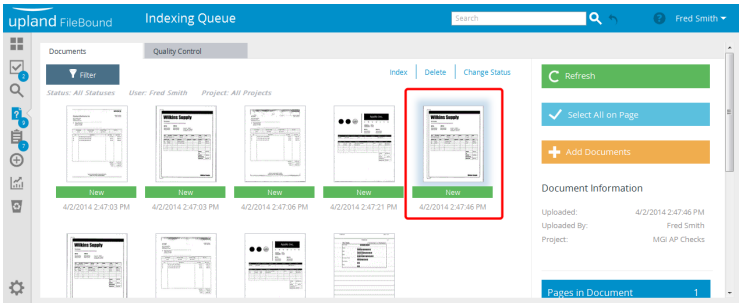
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



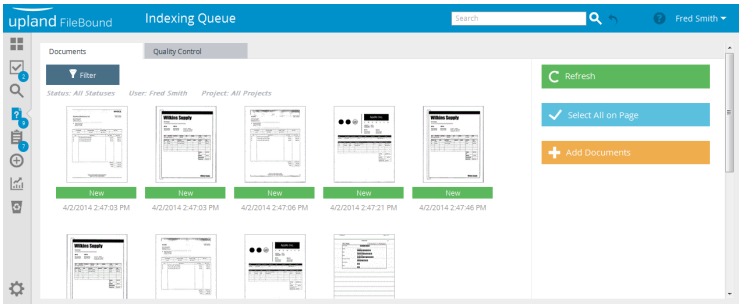
2. Select a Document

- Click the document to select that document within the **Indexing Queue** page.



3. Deselect a Document

- Click the selected document to deselect that document.

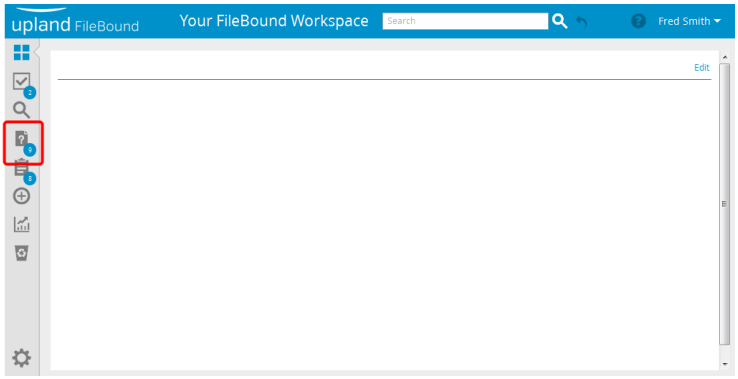


How do I filter the list of documents in the Indexing Queue based on status?

This lesson shows you how to filter the list of documents in the **Indexing Queue** based on status.

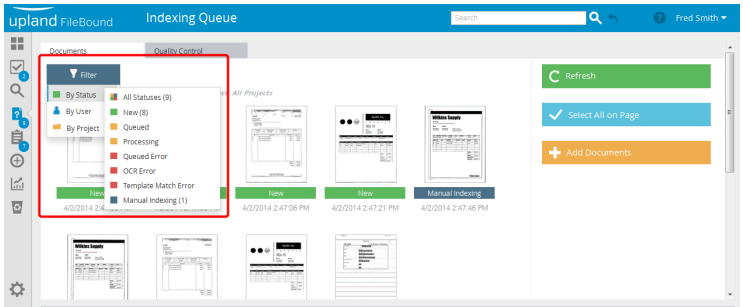
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



2. Filter the List of Documents

1. From the **Filter** menu, select **By Status**.
   The following options are available:
   - **All Statuses**: The documents with any status are displayed within the indexing queue.
   - **New**: The documents that are uploaded or scanned into the indexing queue are displayed.
   - **Queued**: The documents that have been queued for an operation by an automation process are displayed.



   - **Processing**: The documents that are being processed by an automation process are displayed.
   - **Queued Error**: The documents that could not be properly processed by an automation process are displayed. These documents need to be indexed manually.
   - **OCR Error**: The documents that could not be properly OCR'd during an automation process are displayed. These documents need to be indexed manually.

- **Template Match Error**: The documents that could not be matched to a template during an automation process are displayed. These documents need to be indexed manually.
- **Manual Indexing**: The documents that have been opened within the **Indexing Queue** indexing window are displayed. Documents opened within the **Indexing Queue** indexing window for manual indexing will not be queued to be handled by an automation process.

2. Select a status to display the documents with that status.

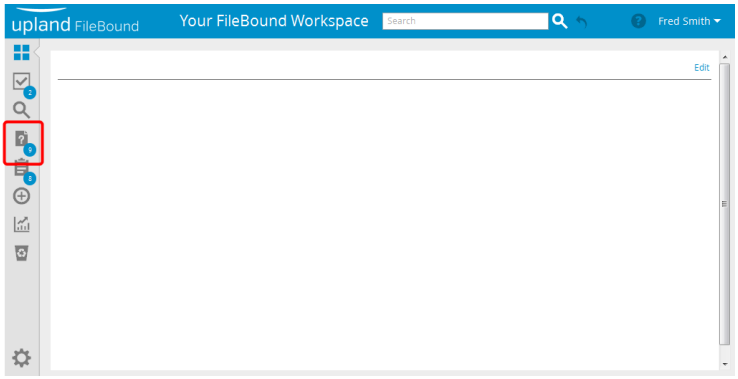
Note: Next to each status the number of documents with that status are displayed within parenthesis.

How do I filter the list of documents in the Indexing Queue based on the user that uploaded the document?

This lesson shows you how to filter the list of documents in the **Indexing Queue** based on the user that uploaded the document.

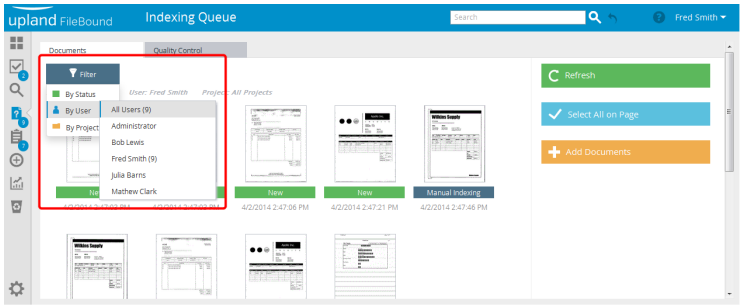
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



2. Filter the List of Documents

1. From the **Filter** menu, select **By User**.
   The following options are available:
   - **All Users**: The documents uploaded by any user are displayed within the indexing queue.
   - **User Name**: The name of all WebDocs users with access to the indexing queue are displayed.



2. Select a user name to display the documents uploaded by that user.

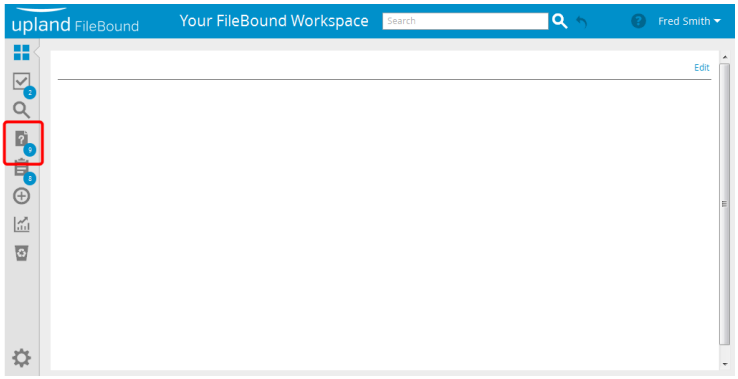
Note: Next to each user name the number of documents that are uploaded by that user are displayed within parenthesis.

How do I filter the list of documents in the Indexing Queue based on the project that they are associated with?

This lesson shows you how to filter the list of documents in the **Indexing Queue** based on the project that they are associated with.

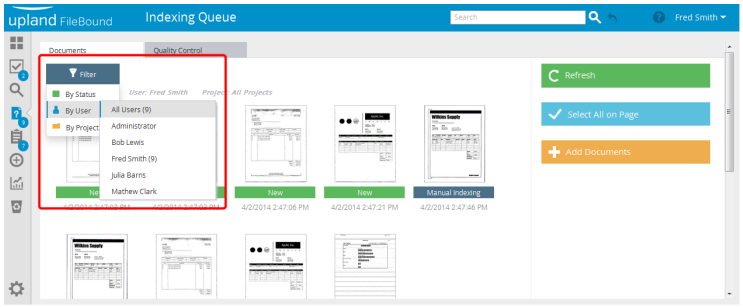
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



2. Filter the List of Documents

1. From the **Filter** menu, select **By Project**.
   The following options are available:
   - **All Projects**: The documents located with any project are displayed within the indexing queue.
   - **Global**: The documents that are not associated with any project are displayed within the indexing queue.
   - **Project Name**: The documents associated with the selected project are displayed within the indexing queue.



2. Select a project to display the documents associated with that project.

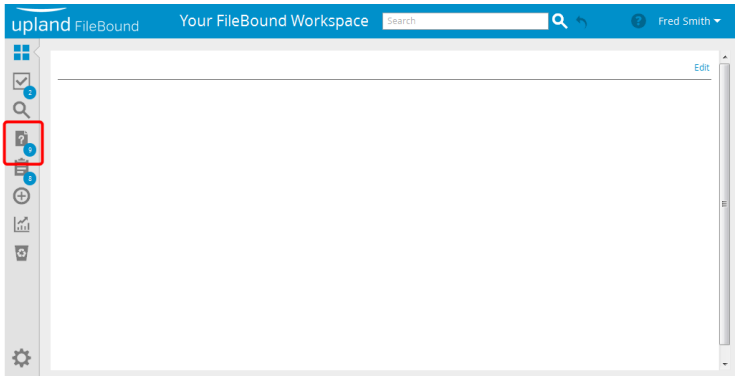
Note: Next to each project the number of documents associated with that project are displayed within parenthesis.

How do I delete a document from the Indexing Queue?

This lesson shows you how to delete a document from the **Indexing Queue**.

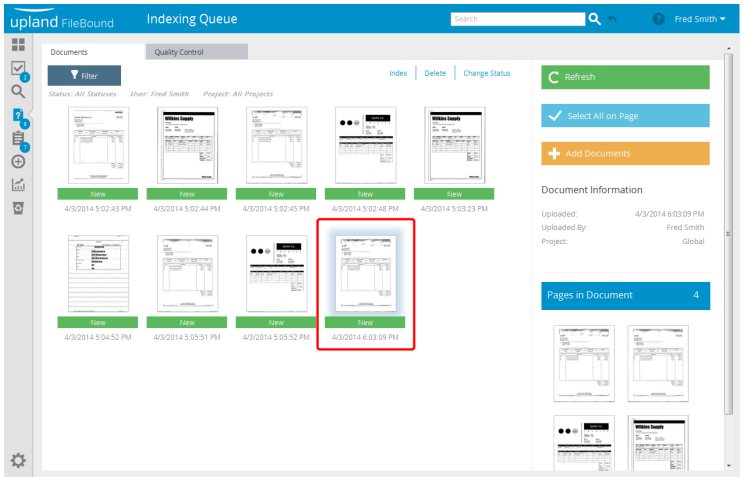
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



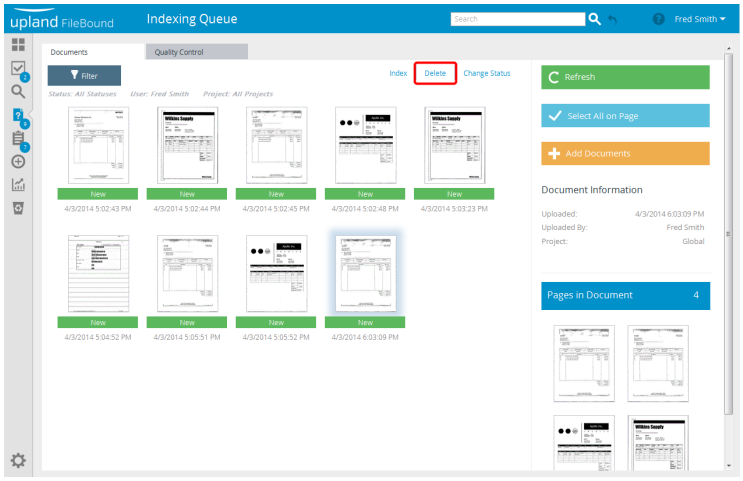
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



3. Delete the Document

- Click **Delete** on the top-right of the **Indexing Queue** page.
  The selected document is deleted after confirmation.

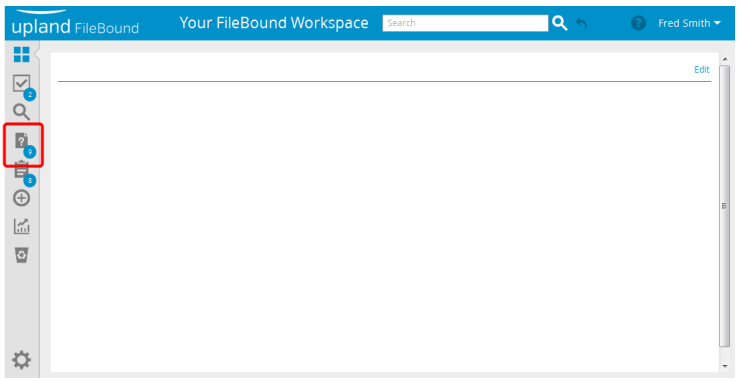


How do I change the status of a document in the Indexing Queue?

This lesson shows you how to change the status of a document in the **Indexing Queue**.

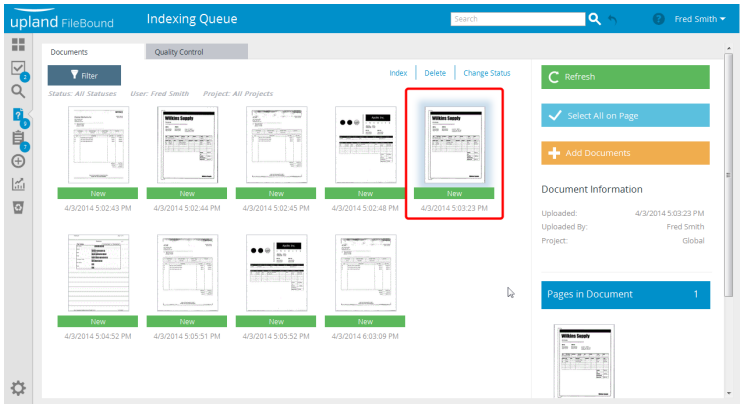
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



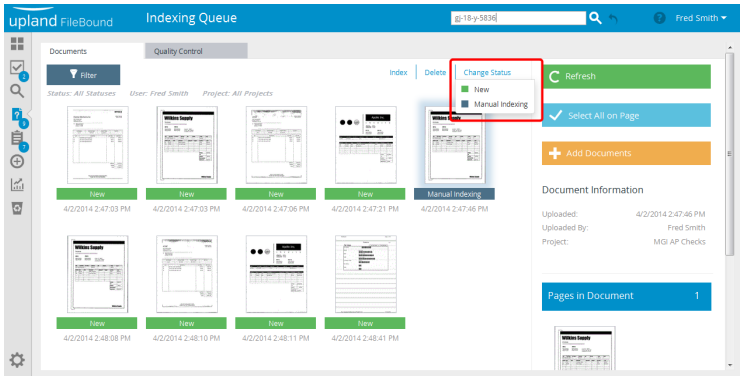
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



3. Change the Status

- Click **Change Status**, and then select an option from the list.
  The following options are available:
  - **New**: The documents that are uploaded or scanned into the indexing queue are displayed.
  - **Manual**: The documents that have been opened within the **Indexing Queue** indexing window are displayed. Documents opened within the **Indexing Queue** indexing window for manual indexing will not be queued to be handled by an automation process.



What are the different statuses for documents in the Indexing Queue?

This lesson provides information about the different statuses for documents in the **Indexing Queue**.

Status:

New: The documents that are uploaded or scanned into the indexing queue are displayed.

Queued: The documents that have been queued for an operation by an automation process are displayed.

Processing: The documents that are being processed by an automation process are displayed.

Queued Error: The documents that could not be properly processed by an automation process are displayed. These documents need to be indexed manually.

OCR Error: The documents that could not be properly OCR'd during an automation process are displayed. These documents need to be indexed manually.

Template Match Error: The documents that could not be matched to a template during an automation process are displayed. These documents need to be indexed manually.

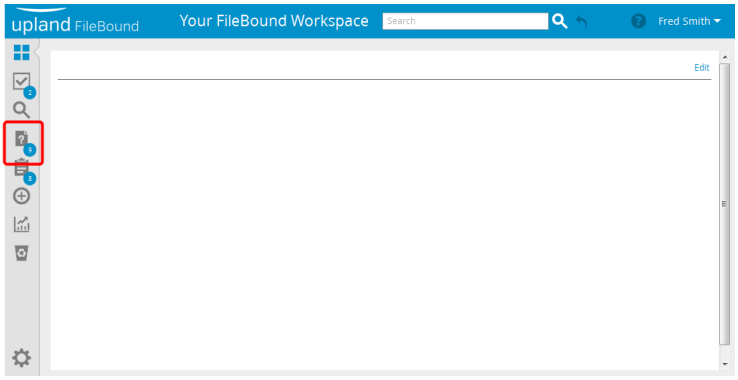
Manual Indexing: The documents that have been opened within the **Indexing Queue** indexing window are displayed. Documents opened within the **Indexing Queue** indexing window for manual indexing will not be queued to be handled by an automation process.

How do I combine documents in the Indexing Queue?

This article shows you how to combine documents in the **Indexing Queue**.

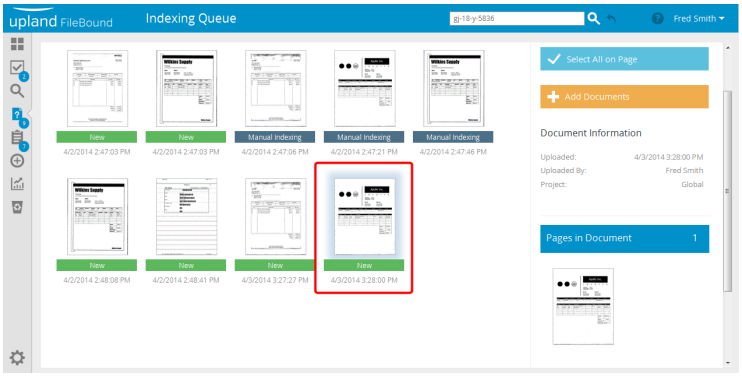
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



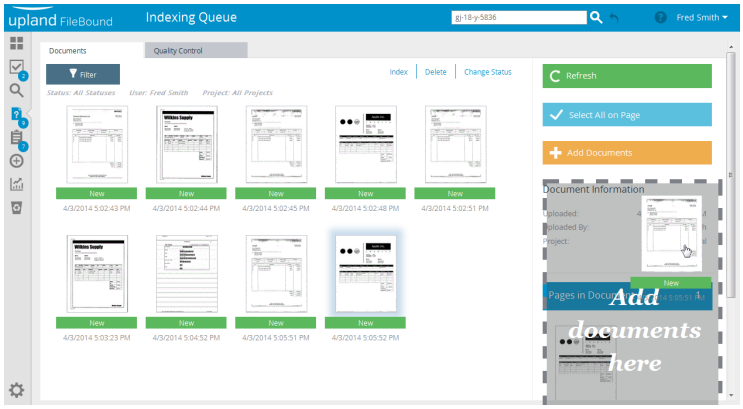
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



3. Combine the Documents

- Click the document you want to combine, and then drag the document over the **Document Information** section.
  The dragged document is now combined with the selected document.

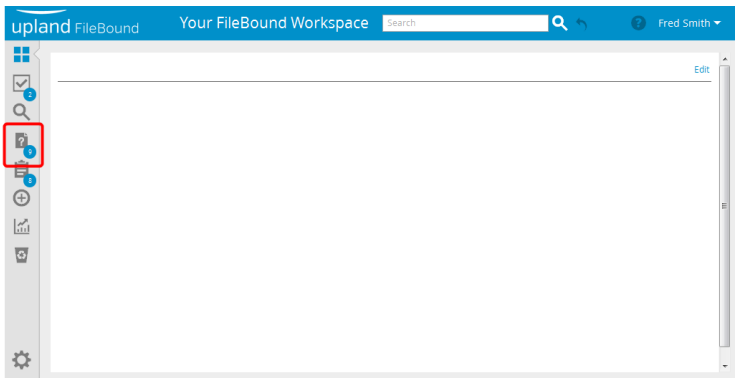


How do I split a page from a document to a new file in the Indexing Queue?

This lesson shows you how to split a page from a document to a new file in the **Indexing Queue**.

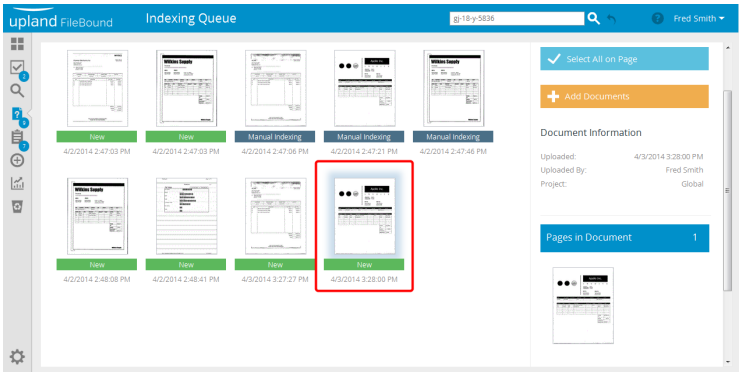
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



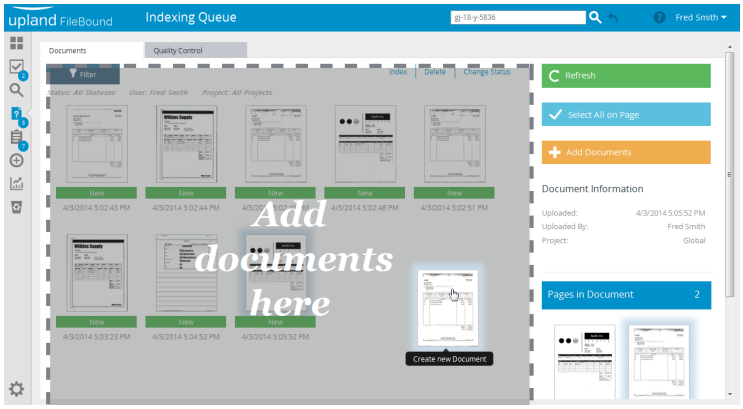
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



3. Split a Page

1. Click the thumbnail image of the page you want to split within the **Document Information** section.
2. Drag the image within the empty space in the **Indexing Queue** page.
   The page is removed from the document and a new file is created within the **Indexing Queue**.

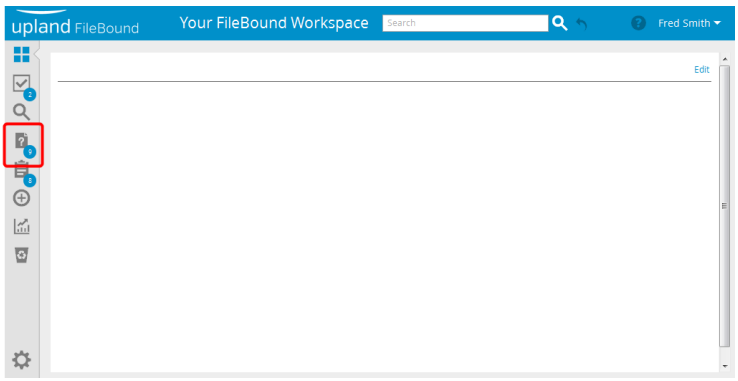


How do I move a page from one document to another document in the Indexing Queue?

This lesson shows you how to move a page from one document to another document in the **Indexing Queue**.

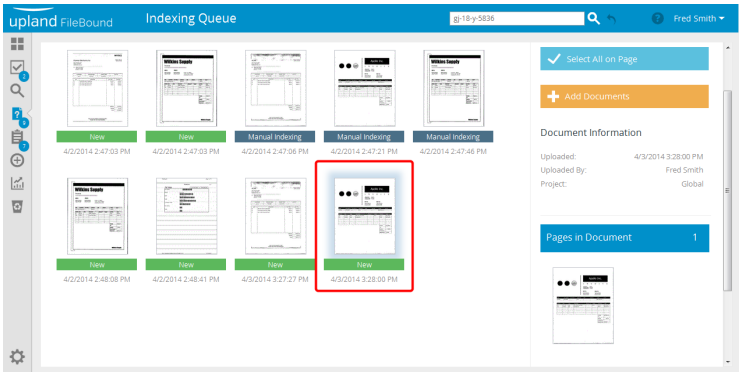
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



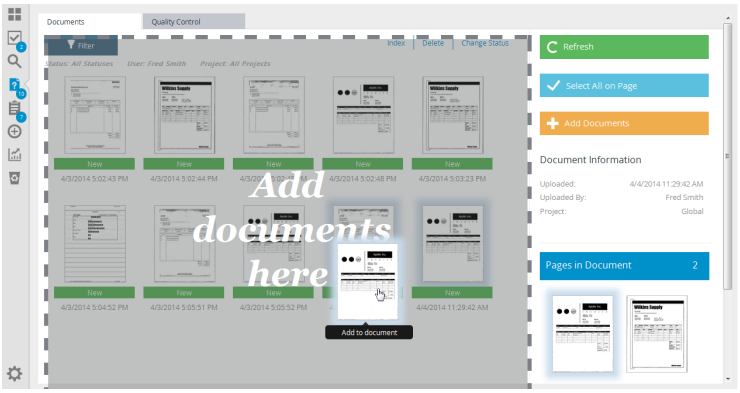
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



3. Move a Page

1. Click the thumbnail image of the page you want to move within the **Document Information** section.
2. Drag the image over another document in the **Indexing Queue** page.



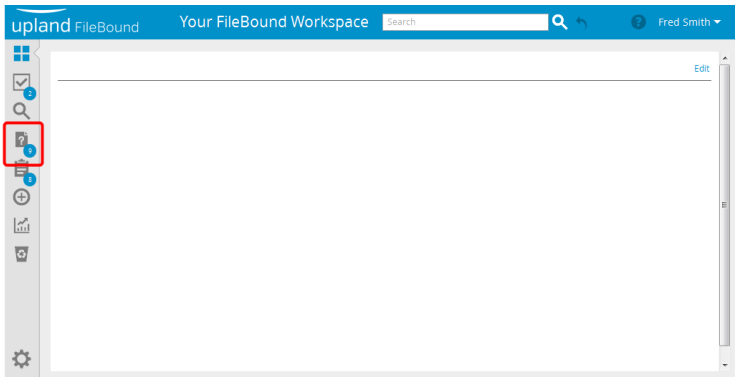
How do I delete a page from a document?

WebDocs does not allow you to delete a page from a document. However, you can split a page to create a new file within the **Indexing Queue**, and then delete that file.

This lesson shows you how to delete a page from a document.

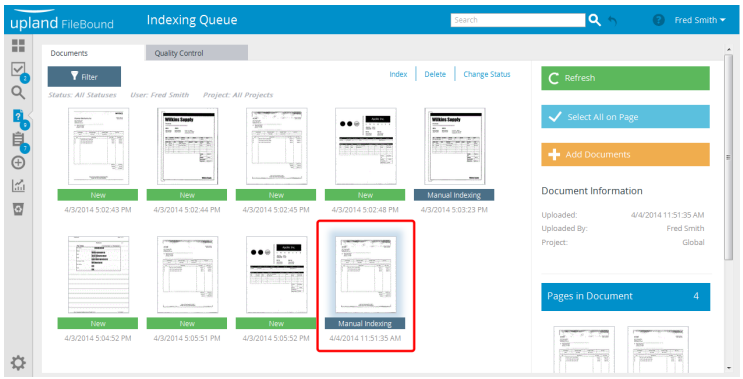
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



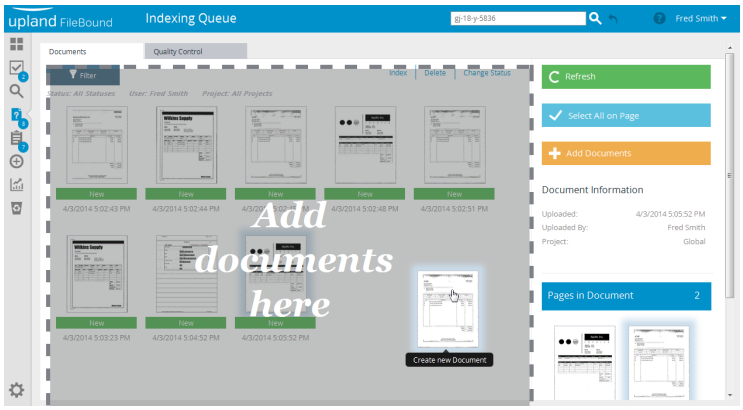
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



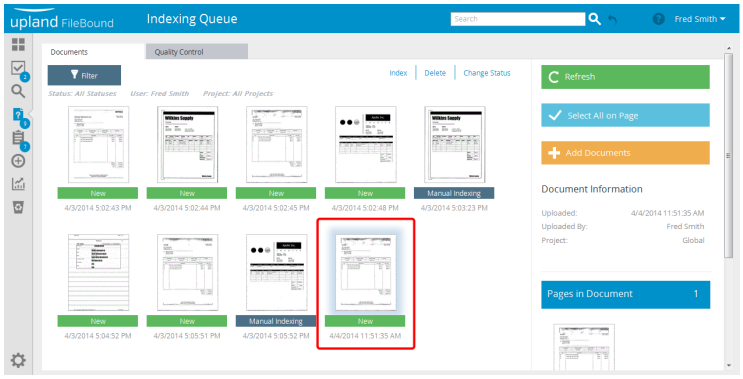
3. Split a Page

1. Click the thumbnail image of the page you want to split within the **Document Information** section.
2. Drag the image to the empty space in the **Indexing Queue** page.
   The page is removed from the document and a new file is created in the **Indexing Queue**.



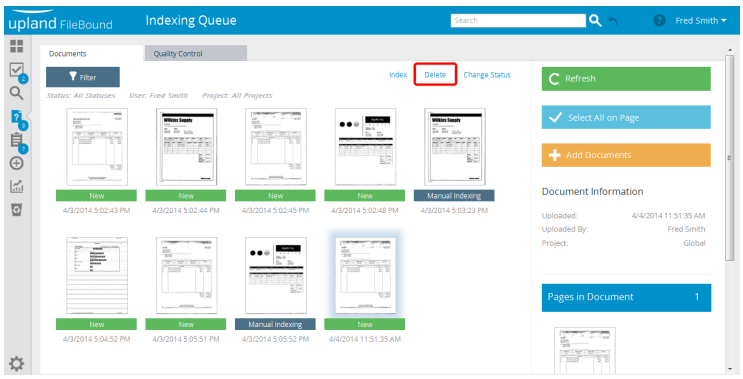
4. Select the Document

- Click the newly created document, to select that document within the **Indexing Queue** page.



5. Delete the Document

- Click **Delete** on the top-right of the **Indexing Queue** page.
  The selected document is deleted after confirmation.

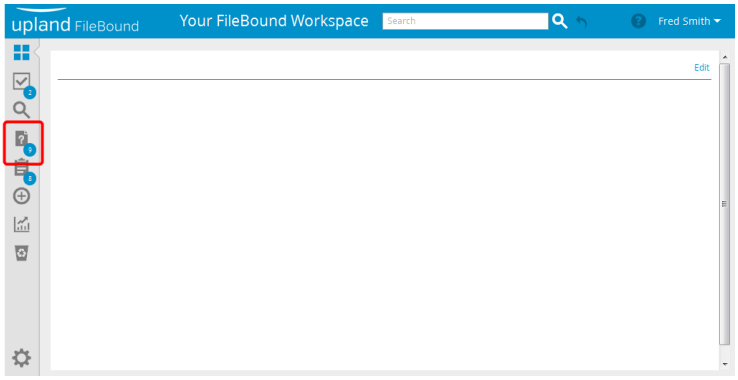


How do I index a document in the Indexing Queue?

This lesson shows you how to index a document in the **Indexing Queue**.

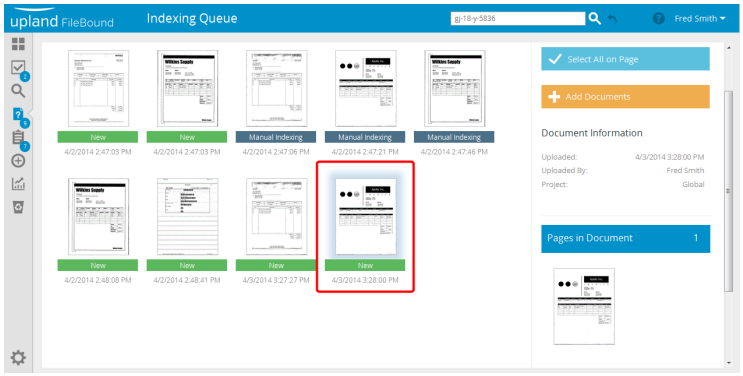
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



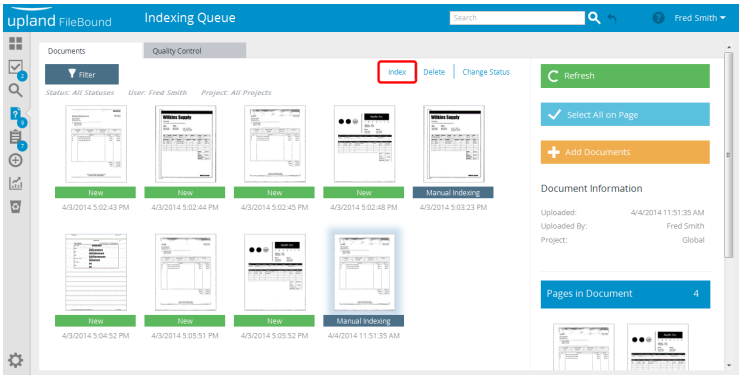
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



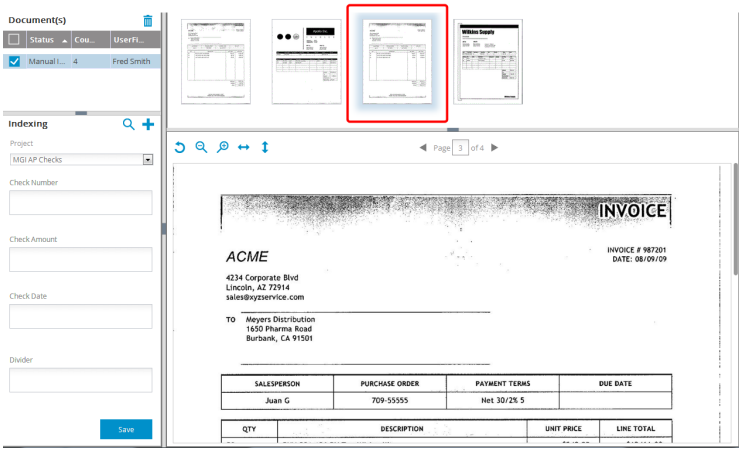
3. Open the Indexing Queue Viewer

- Click **Index** on the top-right of the **Indexing Queue** page.
  The indexing queue viewer opens.



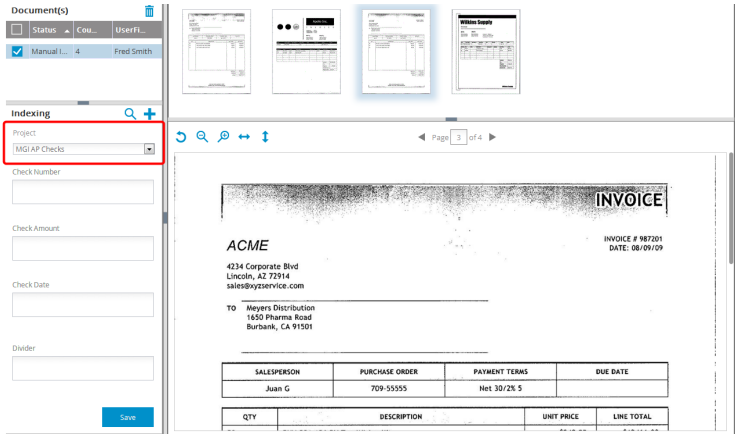
4. Select a Page

- Select the page to be indexed.



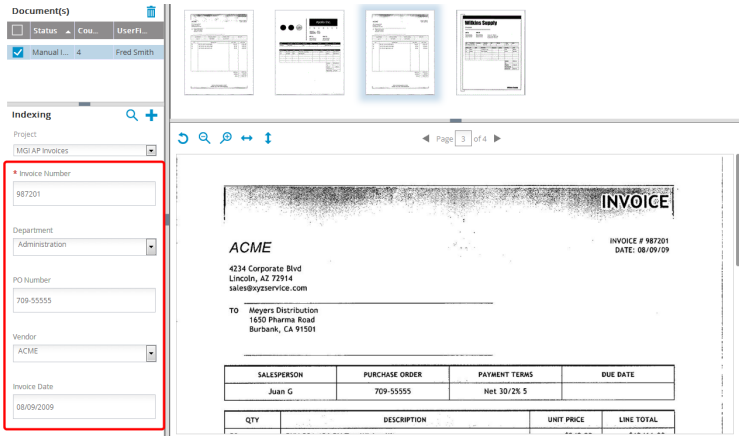
5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.



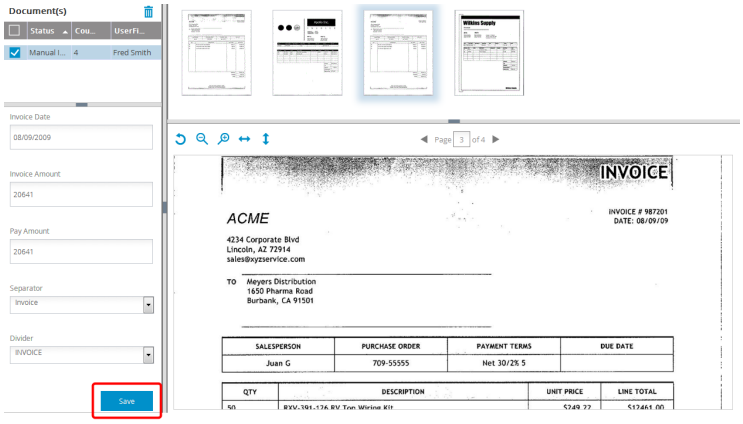
6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.



7. Click Save

- Click the **Save** icon within the **Indexing** pane. The new file will now be saved and the selected pages will be associated with that file and removed from the **Indexing Queue**.

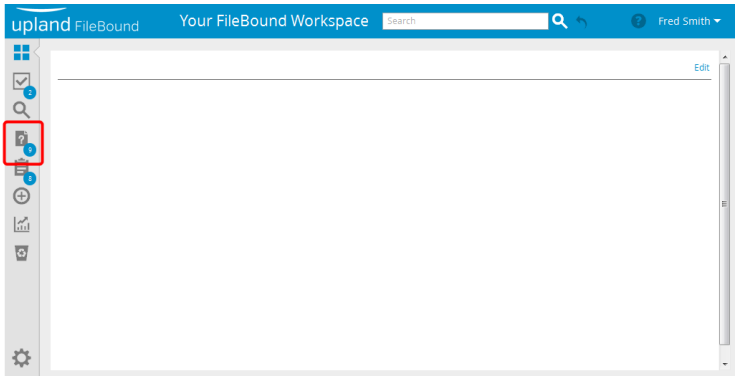


How do I index multiple documents to the same file and the same divider at the same time within the Indexinq Queue?

This lesson shows you how to index multiple documents to the same file and the same divider at the same time within the **Indexing Queue**.

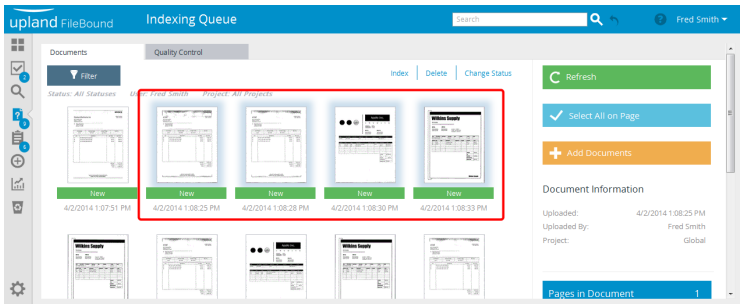
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



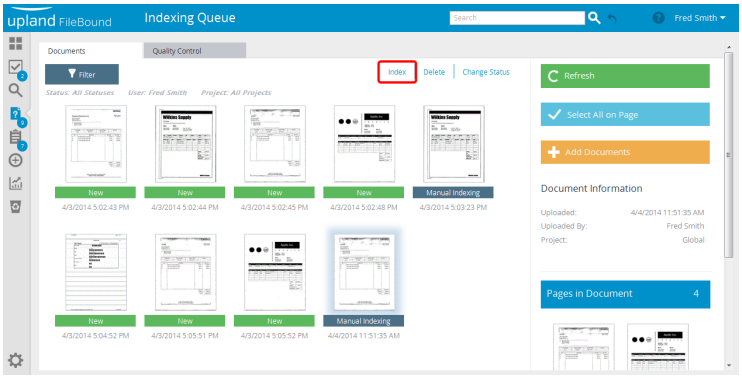
2. Select Multiple Documents

- Press the **Ctrl** key, and then click the documents you want to select.



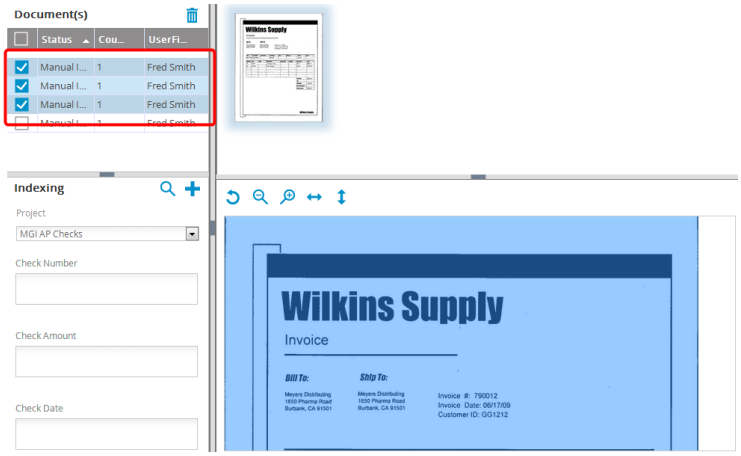
3. Open the Indexing Queue Viewer

- Click **Index** on the top-right of the **Indexing Queue** page.
  The indexing queue viewer opens.



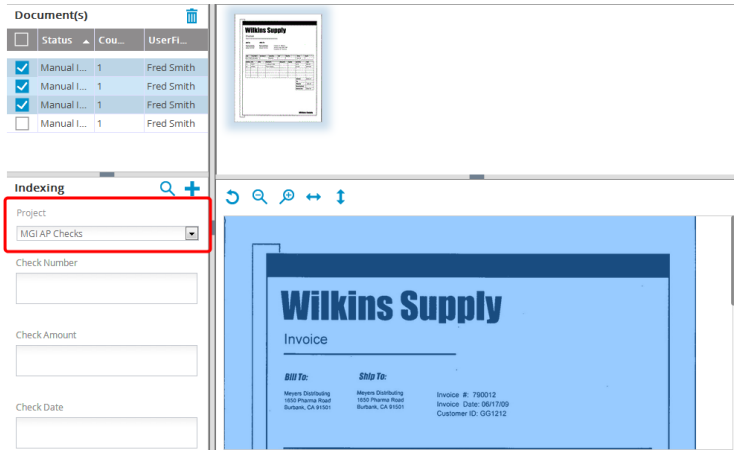
4. Select Multiple Document

- Select the check boxes adjacent to the documents within the **Document** pane.



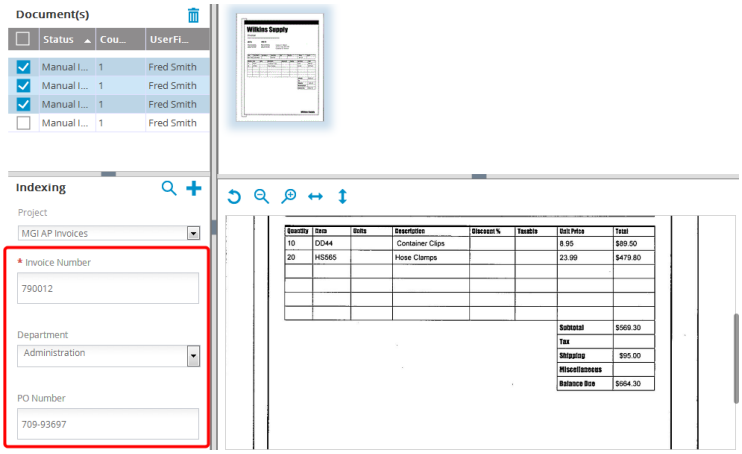
5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.



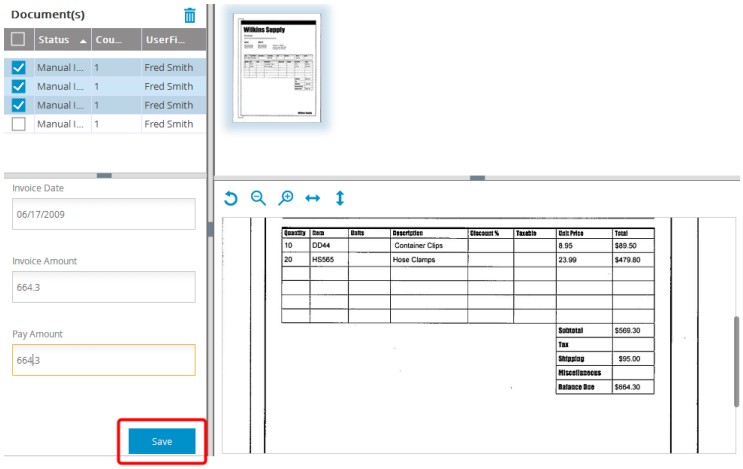
6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.



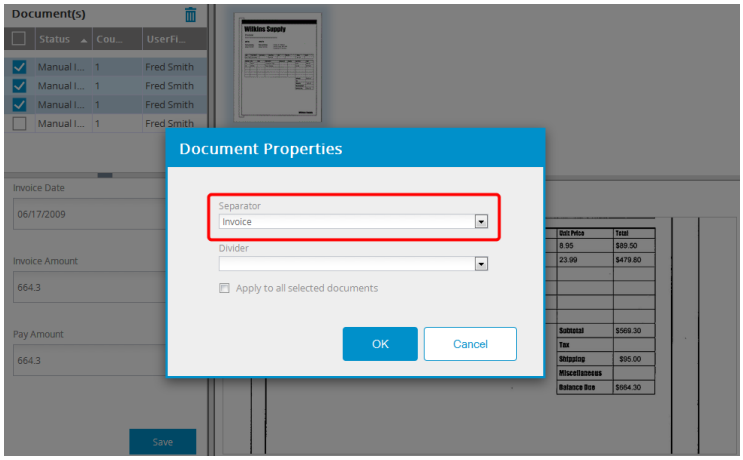
7. Click Save

- Click the **Save** icon within the **Indexing** pane. The **Document Properties** dialog box opens.



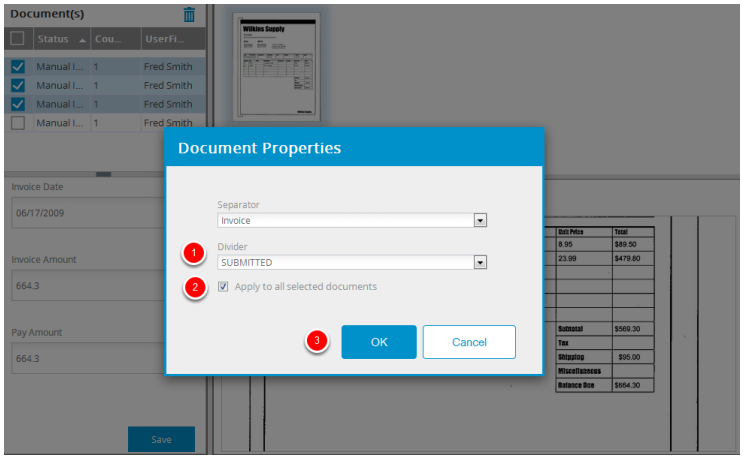
8. Select a Separator

- You can select a separator from the **Separator** list.



9. Select a Divider

1. Select a divider from the **Divider** list.
2. Select the **Apply to all selected documents** check box, to index the files to the same separator and divider.
3. Click **OK** to complete the operation.
   The documents selected in the **Document** pane are indexed to the same file within the same separator and divider.

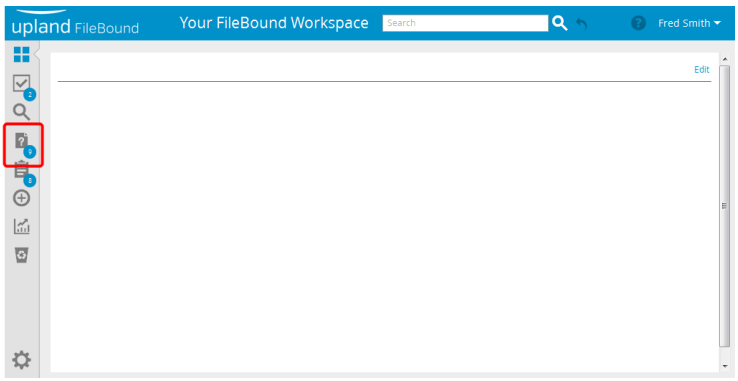


How do I index multiple documents to the same file but different dividers within the Indexing Queue?

This article shows how to index multiple documents to the same file but different dividers within the **Indexing Queue**.

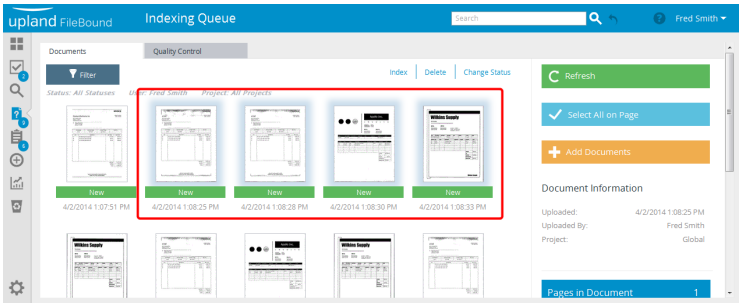
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



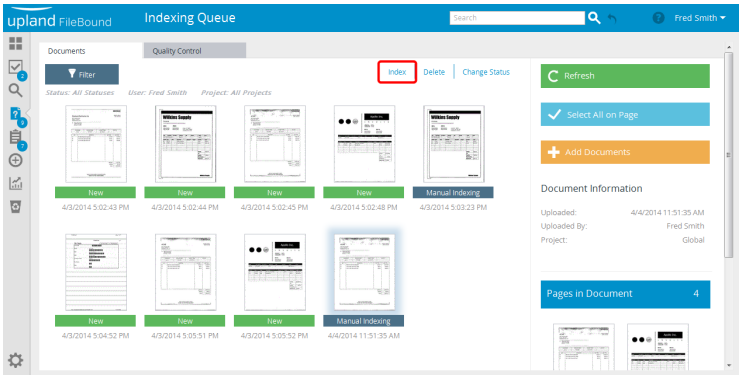
2. Select Multiple Documents

- Press the **Ctrl** key, and then click the documents you want to select.



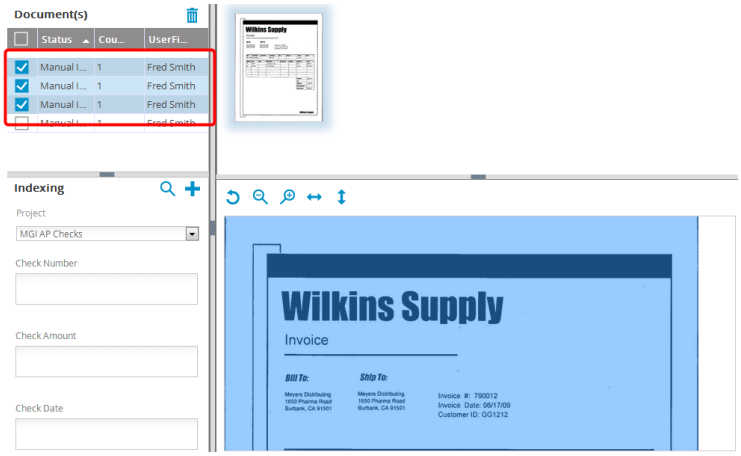
3. Open the Indexing Queue Viewer

- Click **Index** on the top-right of the **Indexing Queue** page.
  The indexing queue viewer opens.



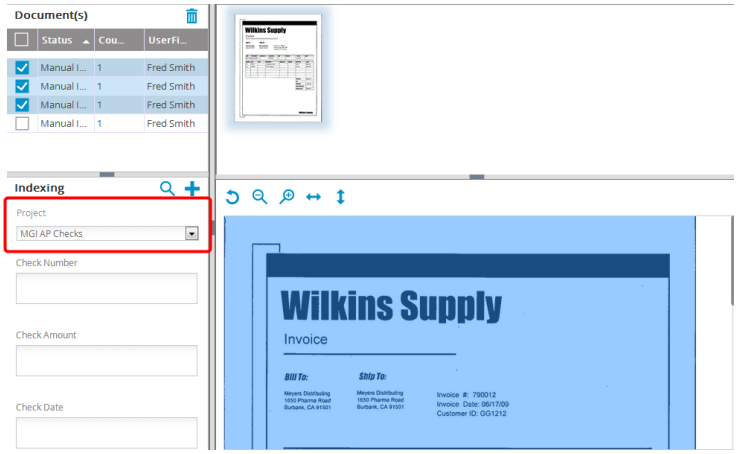
4. Select Multiple Document

- Select the check boxes adjacent to the documents within the **Document** pane.



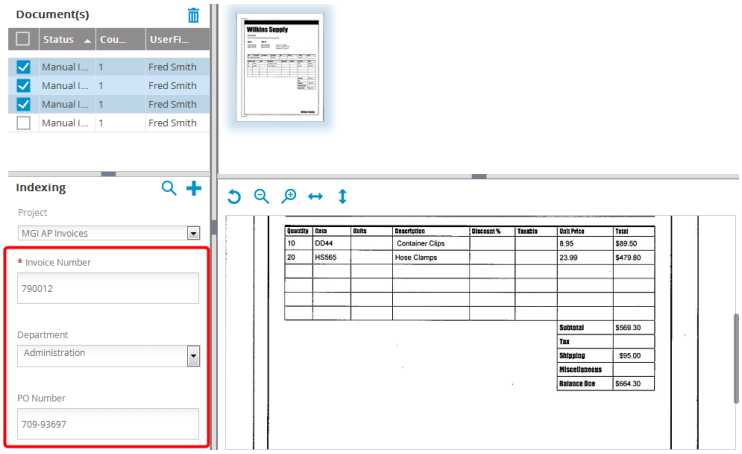
5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.



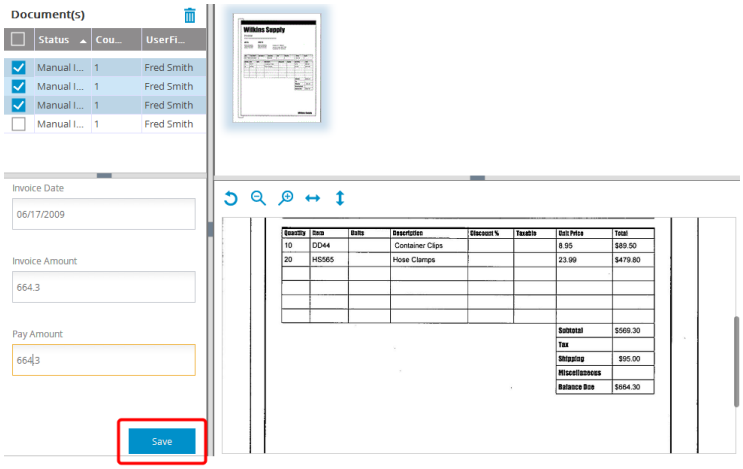
6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.



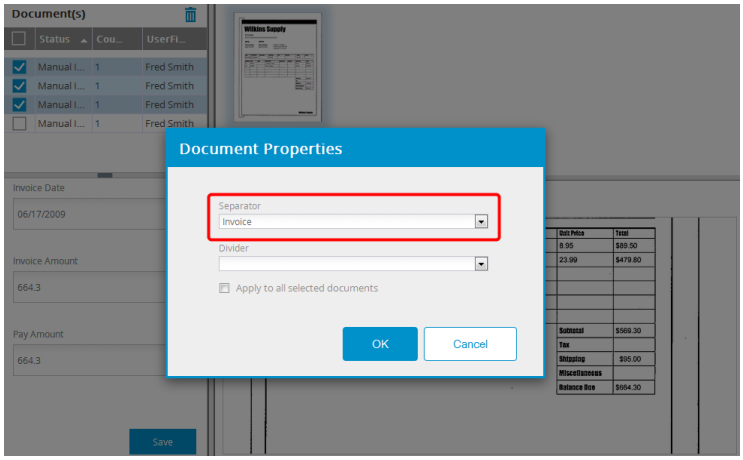
7. Click Save

- Click the **Save** icon within the **Indexing** pane. The **Document Properties** dialog box opens.



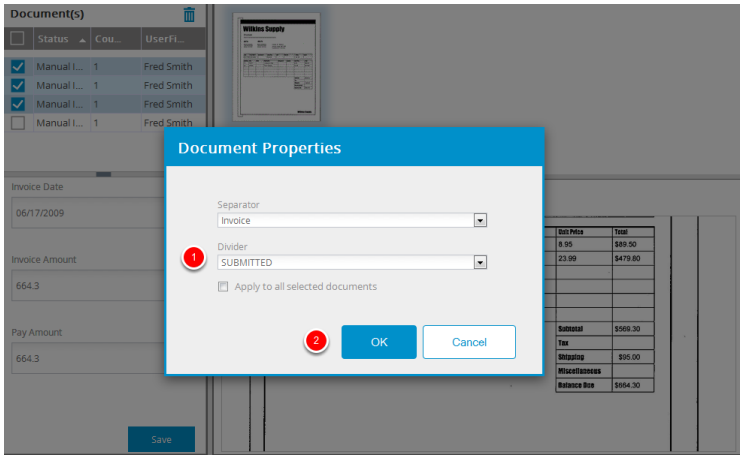
8. Select a Separator

- You can select a separator from the **Separator** list.



9. Select a Divider

1. Select a divider from the **Divider** list.
2. Click **OK** to complete the operation.
   The **Document Properties** dialog box opens again.



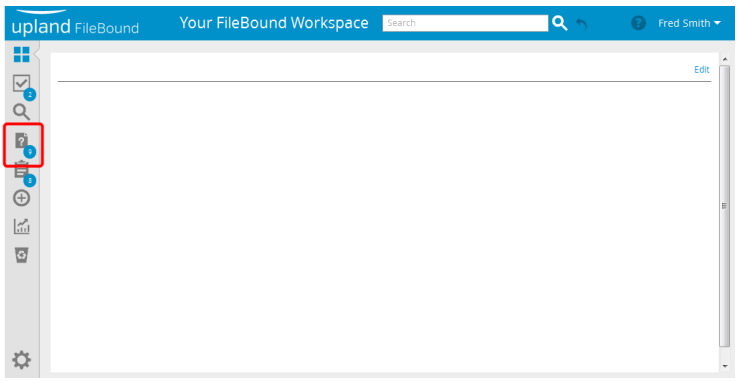
The **Document Properties** dialog box will open repeatedly to allow you to select different separator and divider for each document you have selected in the **Document** pane.

How do I add a document in the Indexing Queue to an existing file?

This lesson shows you how to add a document in the **Indexing Queue** to an existing file.

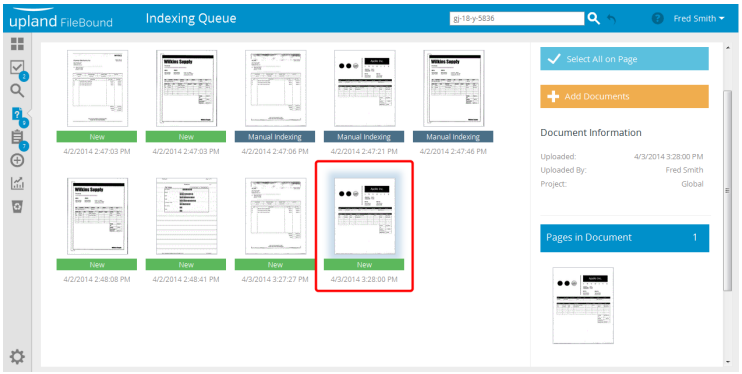
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



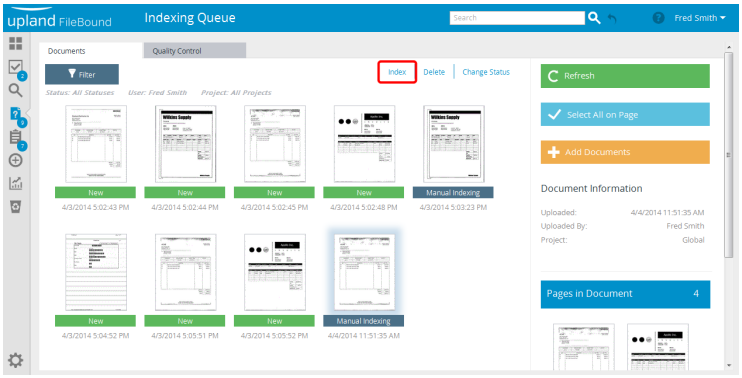
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



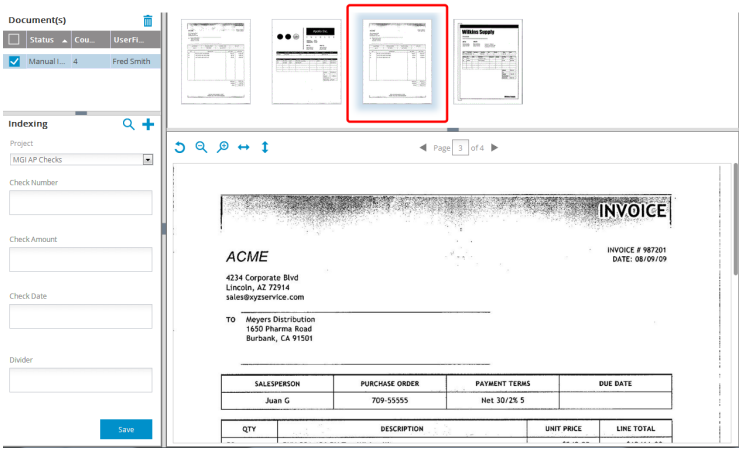
3. Open the Indexing Queue Viewer

- Click **Index** on the top-right of the **Indexing Queue** page.
  The indexing queue viewer opens.



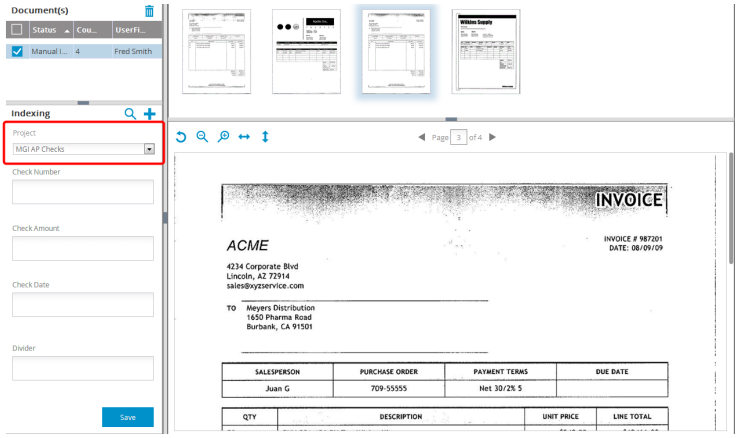
4. Select a Page

- Select the page to be indexed.



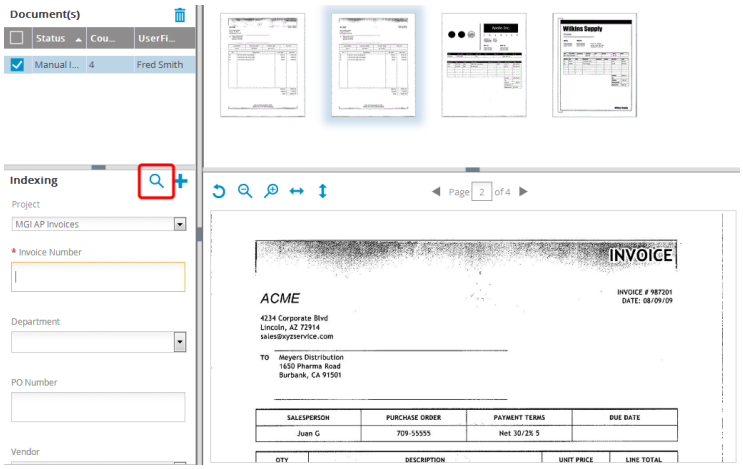
5. Select a Project

Select a project from the **Project** list within the **Indexing** pane.



6. Open the Search Dialog Box

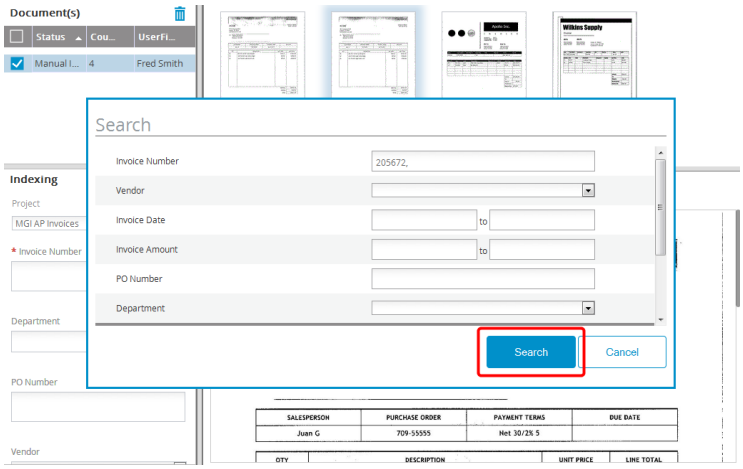
- Click the file search icon on the top right side of the **Indexing** pane.
  The **Search** dialog box opens.



7. Type the Search Criteria

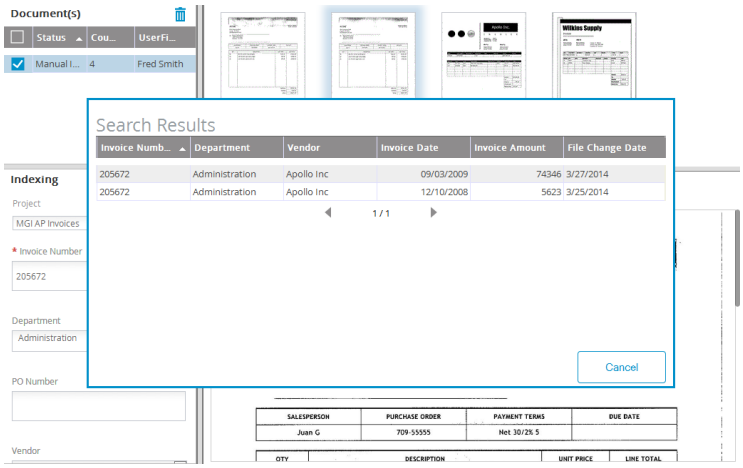
- Type a search criteria to find the file, and then click **Search**.

Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.



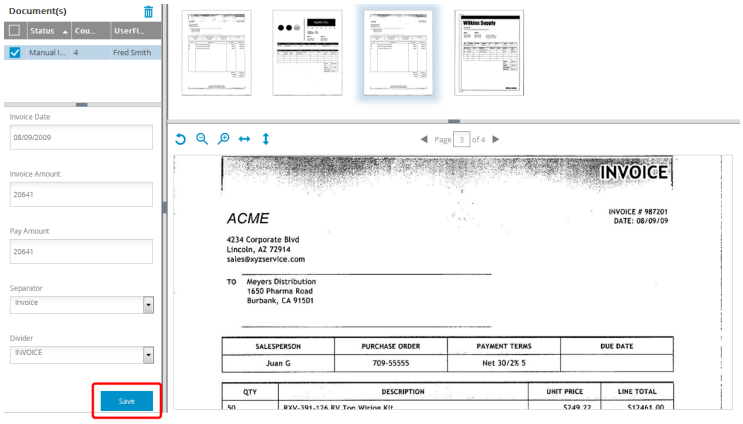
8. Select a File

- If multiple results are returned, click the appropriate file.
  The index fields are populated based on the file selected.



9. Click Save

- Click the **Save** icon within the **Indexing** pane.

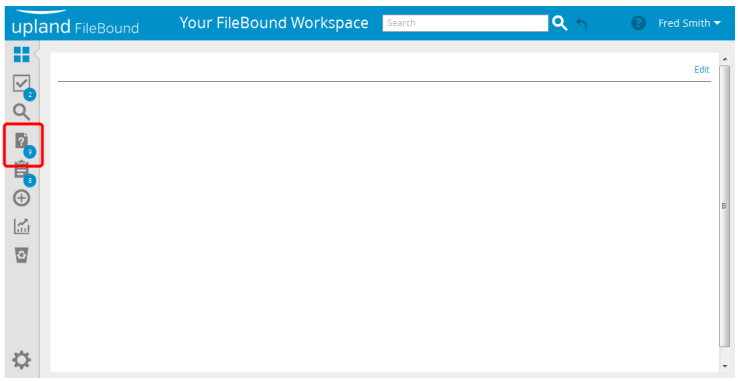


How do I display document pages in the Indexing Queue indexing window?

This lesson shows you how to display document pages in the Indexing Queue indexing window.

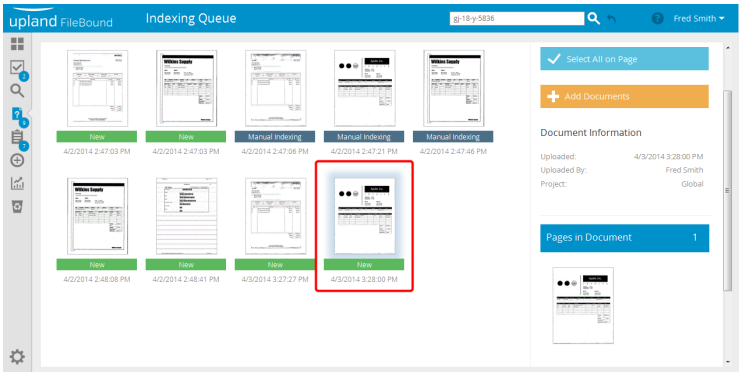
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



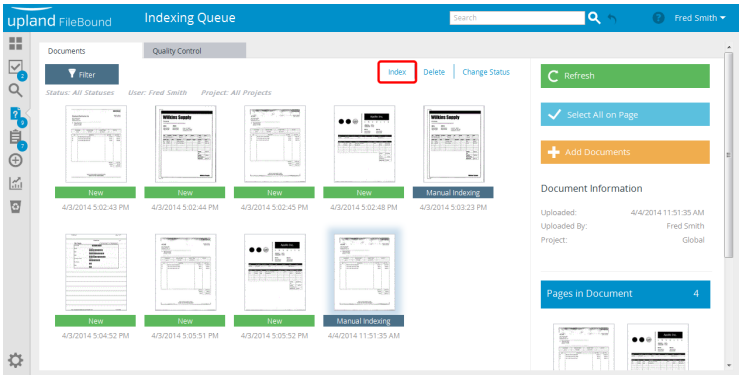
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



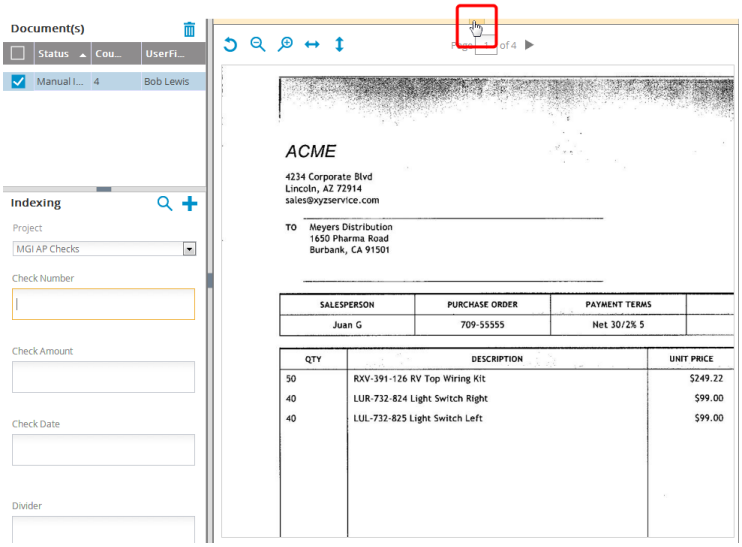
3. Open the Indexing Queue Viewer

- Click **Index** on the top right side of the **Indexing Queue** page.
  The indexing queue viewer opens.



4. Click the Slid Bar

- Click the slide bar on top of the **Content** pane, to display the document pages in the **Indexing Queue** indexing window.
  The document's pages are displayed within the **Page** pane.



How do I point and click index a document within the Indexing Queue?

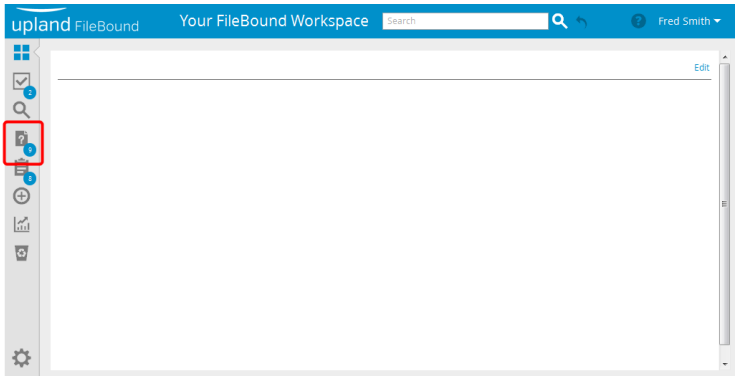
You can use the mouse to point and select values on a scanned page to use that values to be used for index values. This allows you to quickly index files and prevent you from keying incorrect index information.

Note: The document need to have OCR performed to be able to use point and click index feature.

This lesson shows you how to point and click index a document within the **Indexing Queue**.

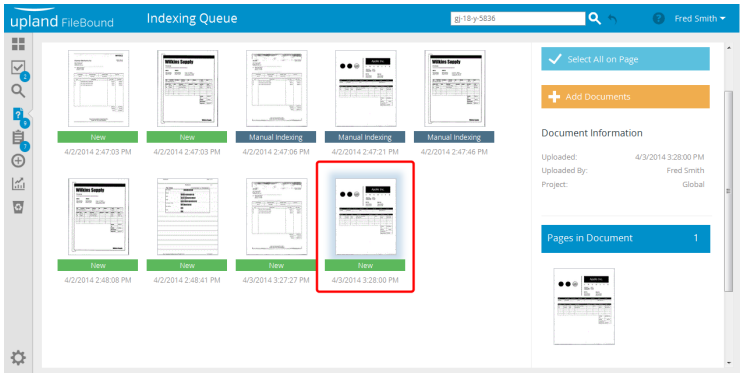
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



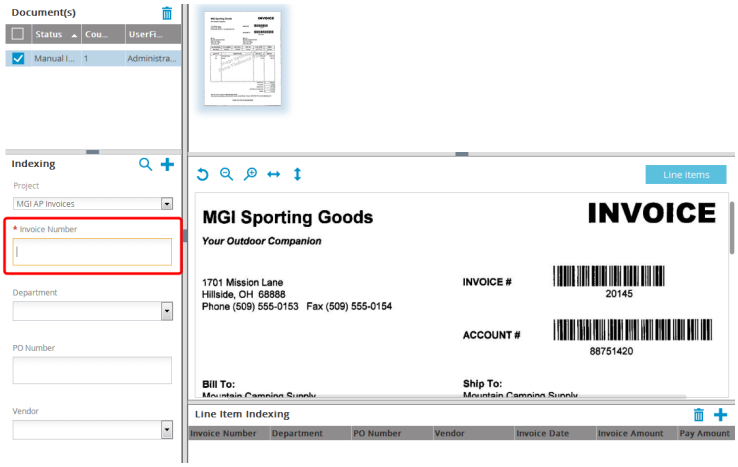
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



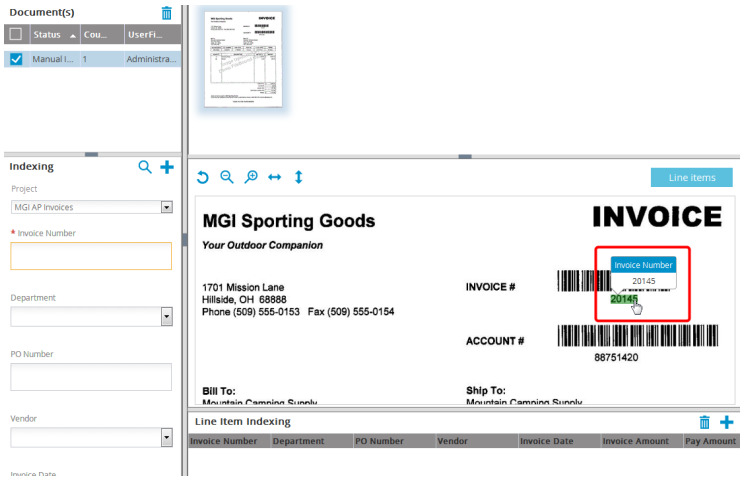
3. Select the Index Field

- Click the index field within the Indexing pane, to select the index field to be indexed.



4. Select the Index Value

- Move the mouse pointer over the word or value, found on the scanned page to be used for the index field. The word will be highlighted with a green highlight, when WebDocs recognizes the word or value.
  Note: Holding down the left mouse button and drawing a rectangle over multiple words, will build a string of words that will be placed in the selected index field, when the mouse button is released.



What is Quality Control?

Quality Control provides users an area to review content that has been added and indexed within the Indexing queue. This allows users to review the indexing that was applied during an Auto-Index template automation process. Users are able to verify the data, which will add the file to the system so it can be found in a search. Users are also able to reject the file and send it back into the Indexing Queue. Users are able to fix and add index values within the Quality Control area as well.

How does a file enter Quality Control in the Indexing Queue?

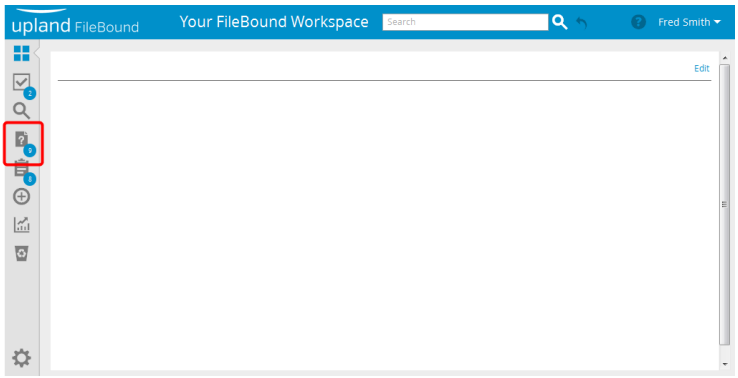
A file enters **Quality Control** after it is indexed. The quality control option needs to be enabled from the **WebDocs Central Administration** window.

Note: **Quality Control** is only available to the users with System Administrator rights.

This lesson shows you how does a file enter **Quality Control** in the Indexing Queue.

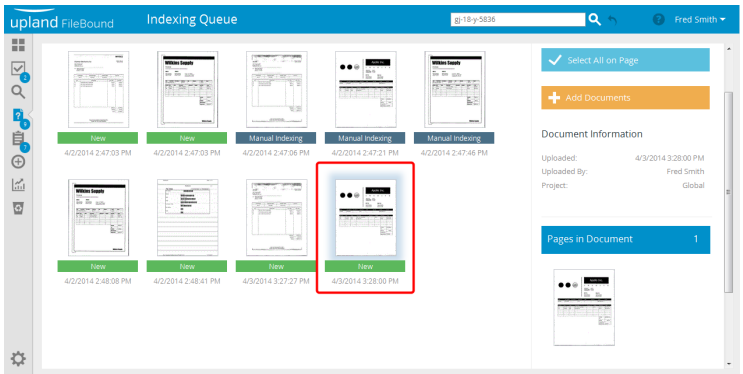
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



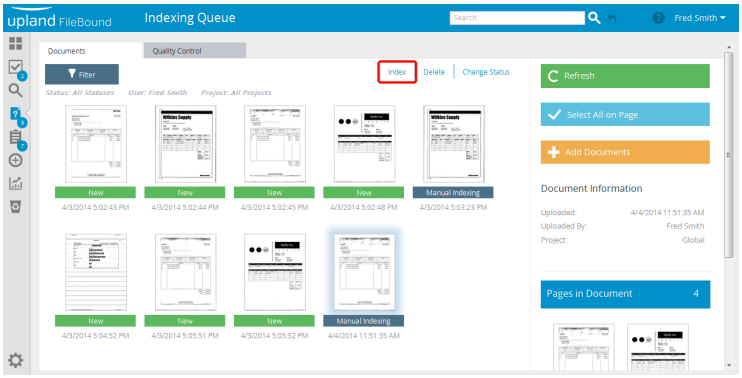
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



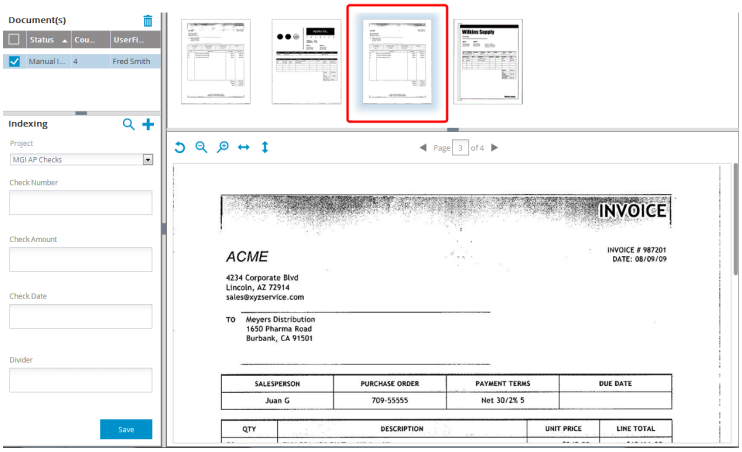
3. Open the Indexing Queue Viewer

- Click **Index** on the top-right of the **Indexing Queue** page.
  The indexing queue viewer opens.



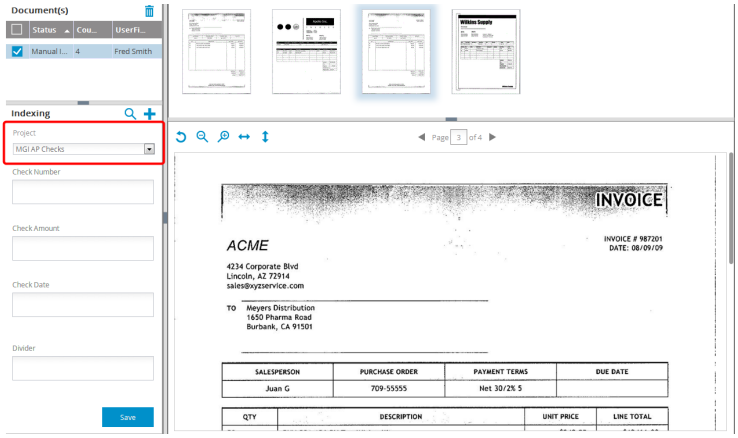
4. Select a Page

- Select the page to be indexed.



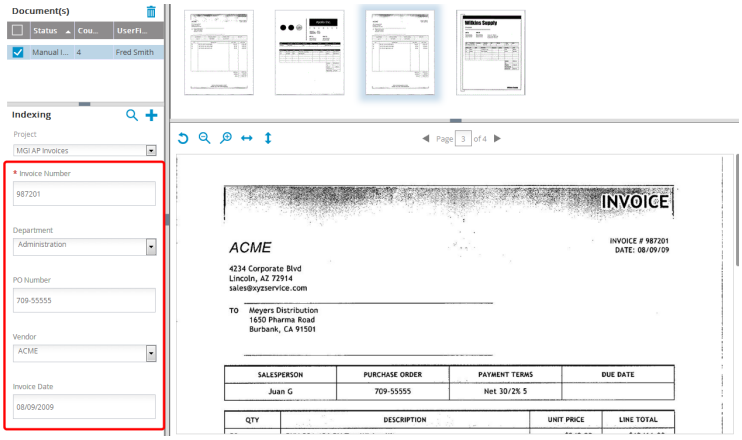
5. Select a Project

- Select a project from the **Project** list within the **Indexing** pane.



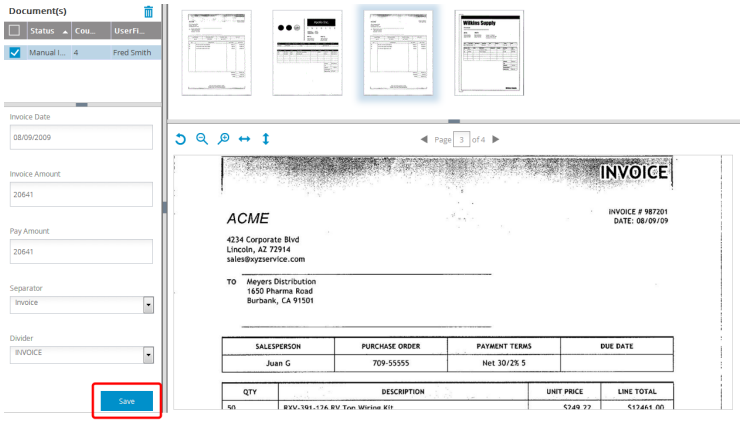
6. Type the Index Field Values

- Type the index values for the index fields within the **Indexing** pane.



7. Click Save

- Click the **Save** icon within the **Indexing** pane. The new file will now enter quality control and is displayed under the **Quality Control** tab within the **Indexing Queue** page.



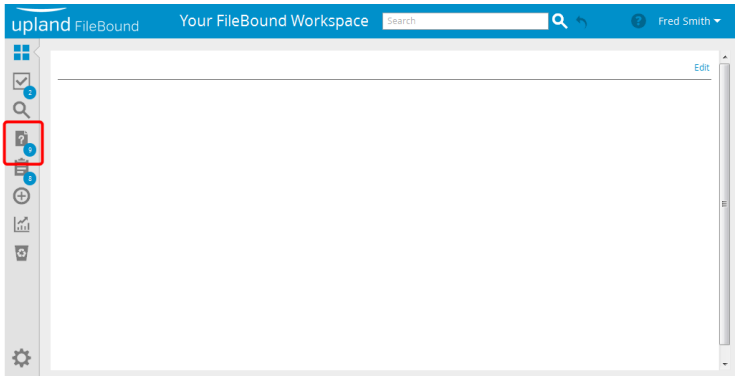
How do I change the project in Quality Control?

This lesson shows you how to change the project in Quality Control.

Note: **Quality Control** is only available to the users with System Administrator rights.

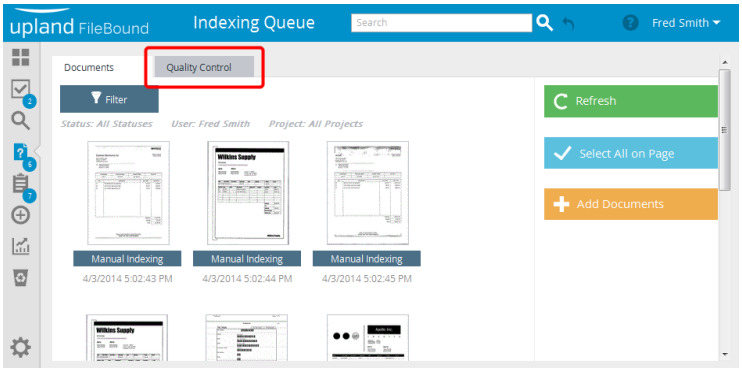
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



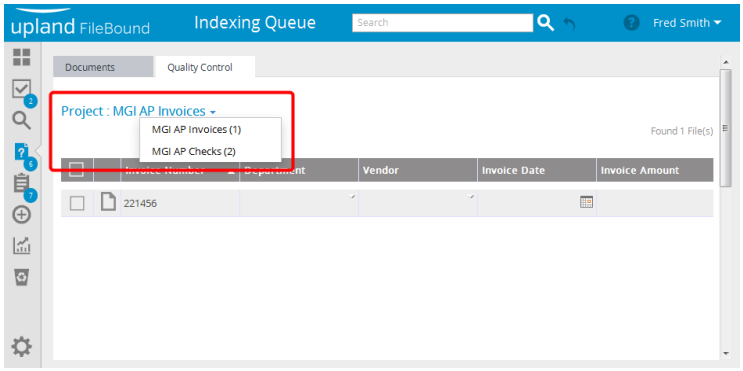
2. Click Quality Control

- Click the **Quality Control** tab within the **Indexing Queue** page.
  The files in quality control are displayed.



3. Change the Project

- Click **Project**, to select another project from the list.
  The files associated with the selected project that are in quality control are displayed.

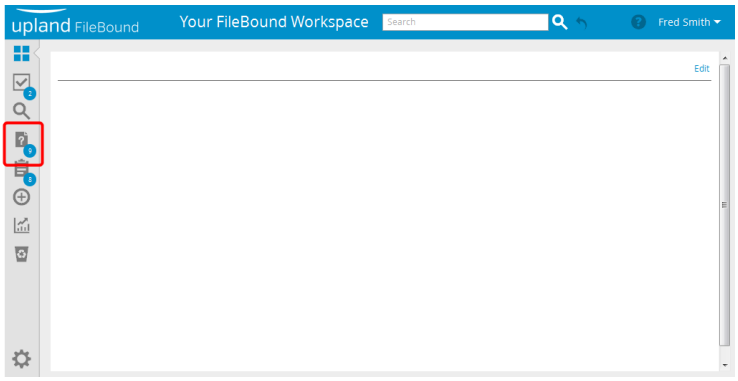


How can I move between index fields in Quality Control?

You can use the arrow keys on you keyboard to move between index fields within the **Quality Control** page. To be able to use the arrow keys, you need to click on a index field within the **Quality Control**. This lesson shows you how to move between index fields in the **Quality Control**.

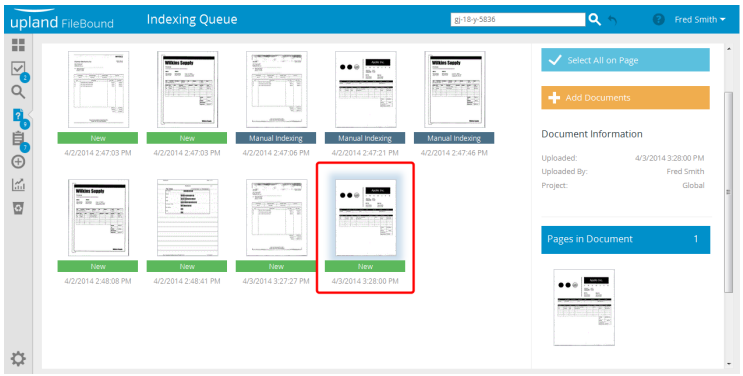
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



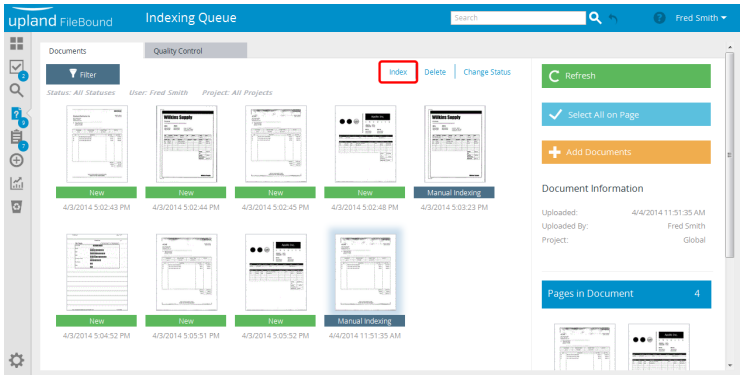
2. Select a Document

- Click the document, to select that document within the **Indexing Queue** page.



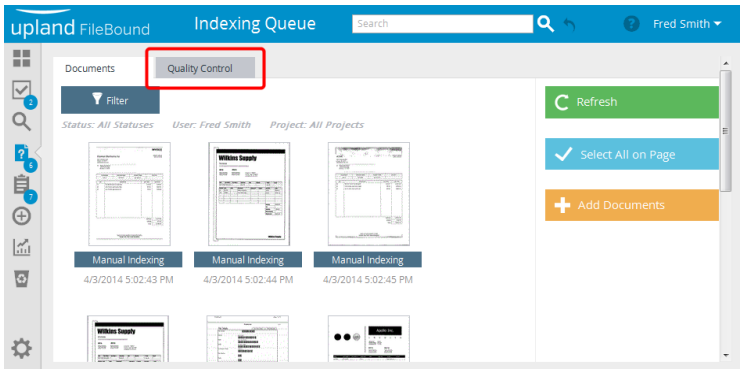
3. Open the Indexing Queue Viewer

- Click **Index** on the top-right of the **Indexing Queue** page.
  The indexing queue viewer opens.



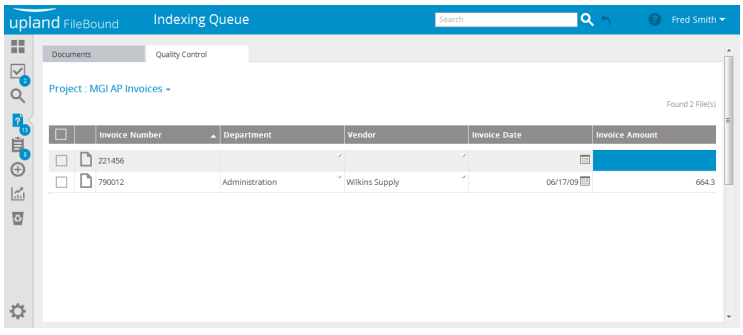
4. Click Quality Control

- Click the **Quality Control** tab within the **Indexing Queue** page.
  The files in quality control are displayed.



5. Click an Index Field

- Click a cell within the **Quality Control** tab.
  You can use the arrow keys to move between index fields.



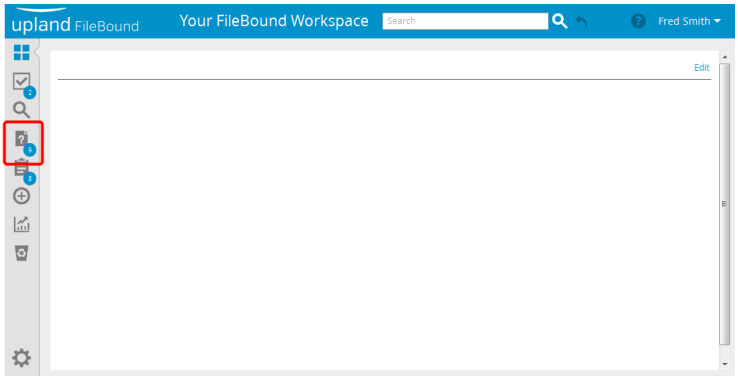
How do I discard changes made in Quality Control?

This lesson shows you how to discard changes made in Quality Control.

Note: **Quality Control** is only available to the users with System Administrator rights.

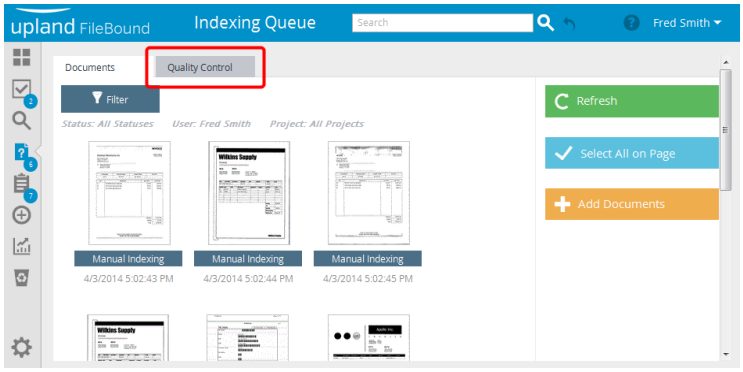
1. Open the Indexing Queue Page

- Click the indexing queue icon on the navigation pane.
  The **Indexing Queue** page opens.



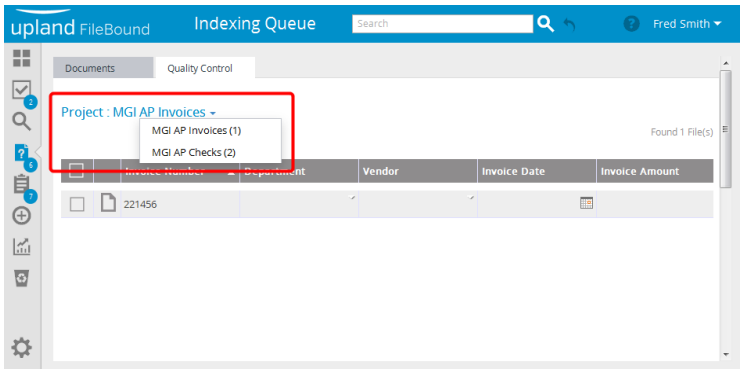
2. Click Quality Control

- Click the **Quality Control** tab within the **Indexing Queue** page.
  The files in quality control are displayed.



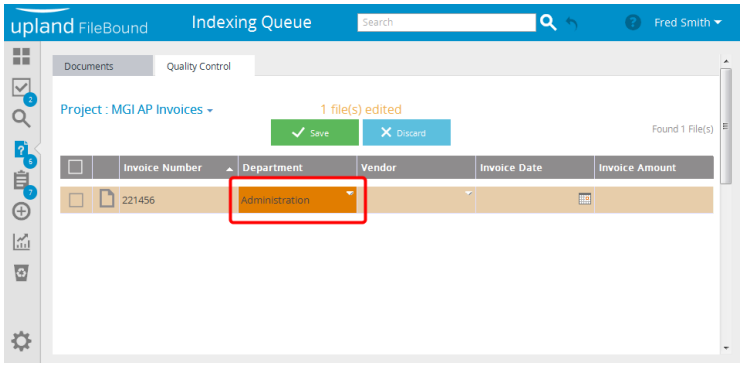
3. Select the Project

- Click **Project**, to select a project from the list. The files associated to the selected project that are in quality control are displayed.



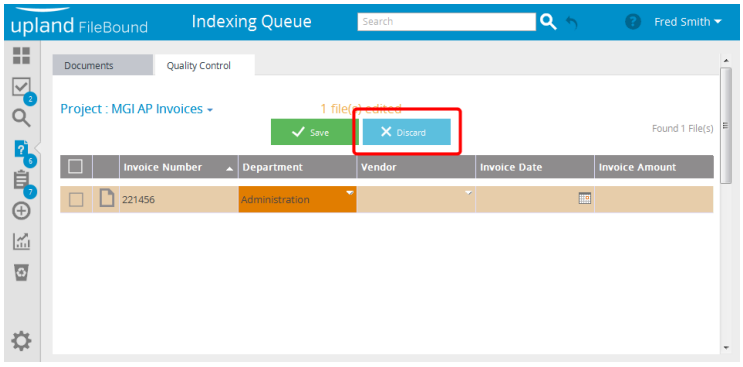
4. Edit the Index Field Values

1. Click the cell containing the value you want to change.
2. Type the new value in the cell.



5. Discard the Changes

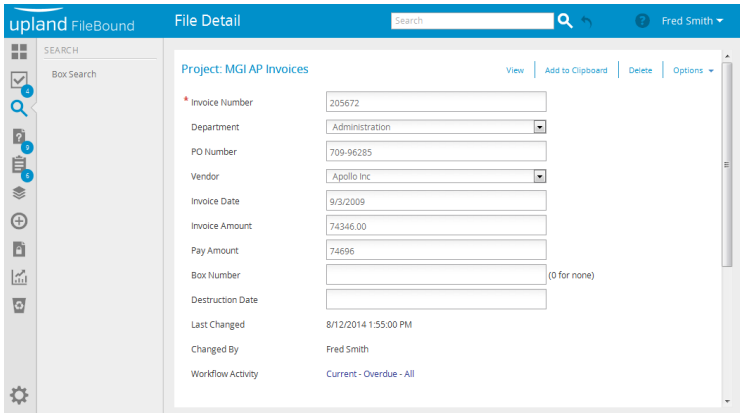
- Click **Discard**, to discard the changes.



Working With Files

What is the File Detail page?

File Detail Page



The **File Detail** page helps you manage files and its documents in a project. The **File Detail** page displays values of the index fields of the file, name of the user who last modified the file, and the date and time when the file was last modified.

You can perform file related operations such as adding documents to the file, viewing, editing, copying, deleting files; generating and printing barcodes; and adding file to the clipboard.

You can view workflow related information on the file, if the file is used in workflow processes. The workflow related information is organized as:

- **Current** - Displays workflow information for the file waiting on a process step for an action to be taken.
- **Overdue** - Displays workflow information for the file waiting on a process step for an action that is past its due date.
- **All** - Displays workflow information for the file in any workflow step.

The documents contained within the file are listed within the **File Detail** page. For each document, the following information is displayed:

- The number of pages contained within the document.
- The document name.
- The name of the user who added the document.
- The date and time when the document was added.
- The date and time when the document was last viewed.

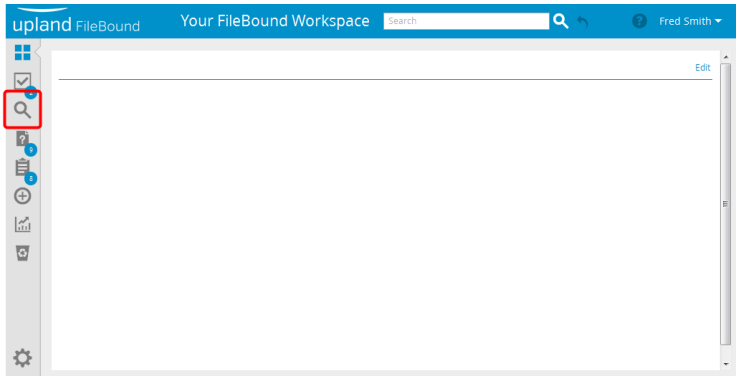
Using the various tabs of the **File Detail** page, you can manage documents of a file, perform file tracking activity, add notes for the file, and manage CAR data.

How do I view the File Detail page?

This lesson shows you how to view the **File Detail** page.

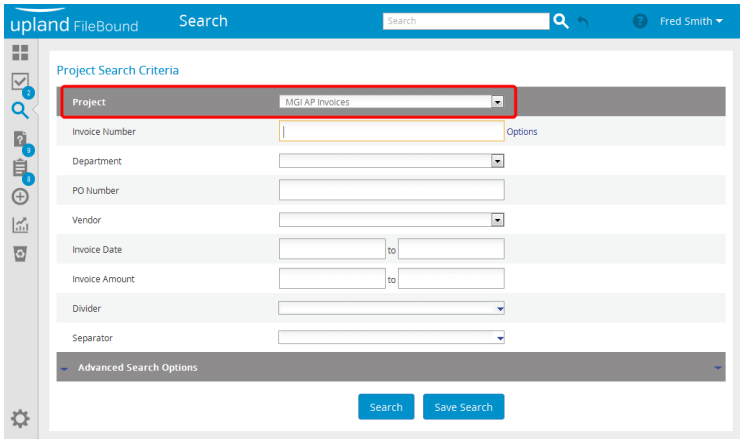
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



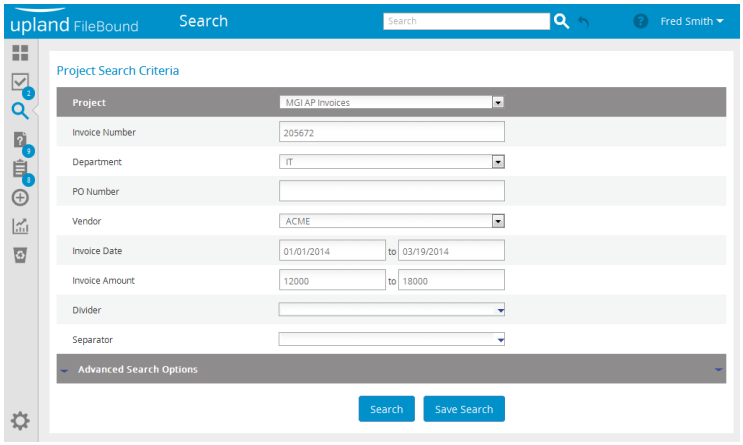
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields.
   Note: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



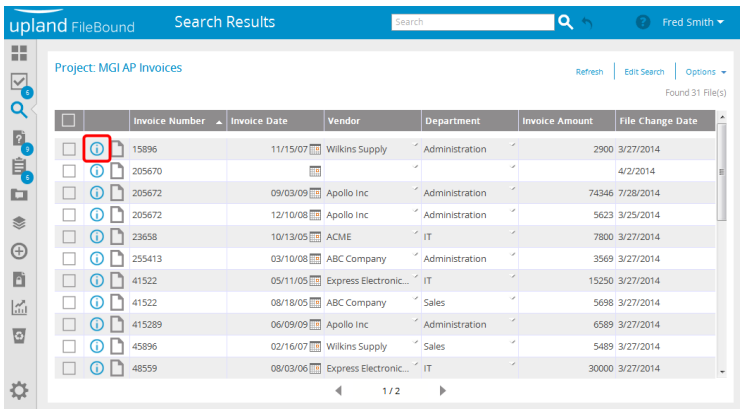
Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open File Detail Page

- Click the file detail icon adjacent to a file on the **Search Results** page.
  The **File Detail** page for that file opens.

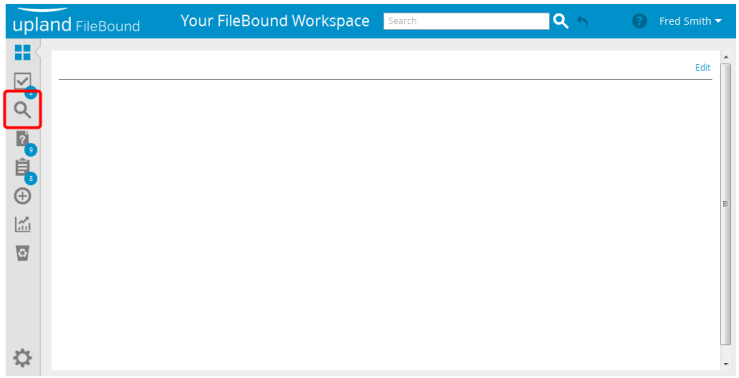


How do I view a document from the File Detail page?

This lesson shows you how to view a document from the **File Detail** page.

1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



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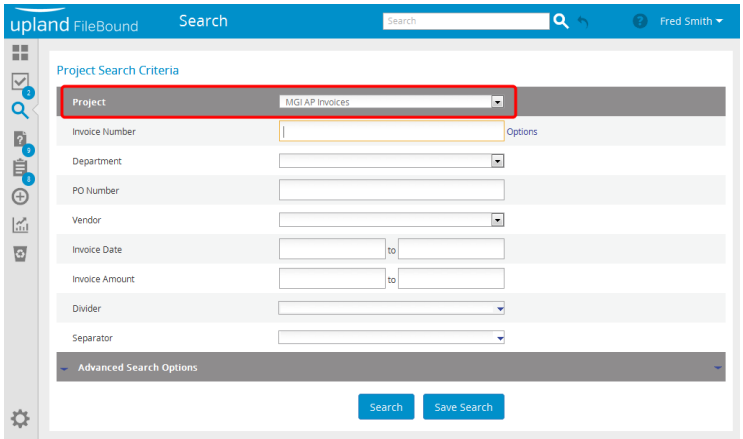

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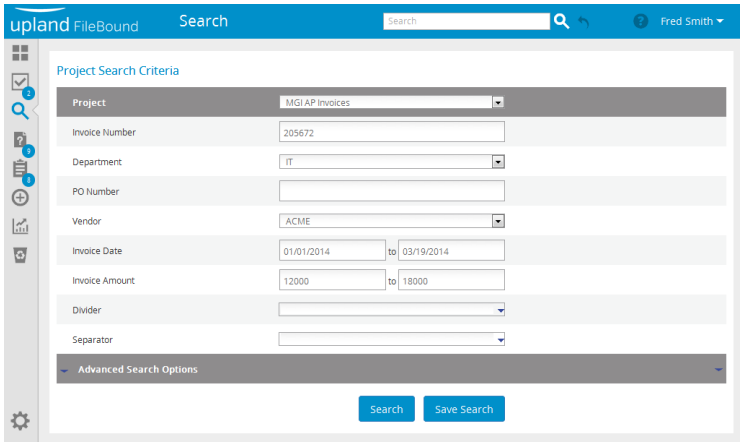

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As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open File Detail Page

- Click the file detail icon adjacent to a file on the **Search Results** page.
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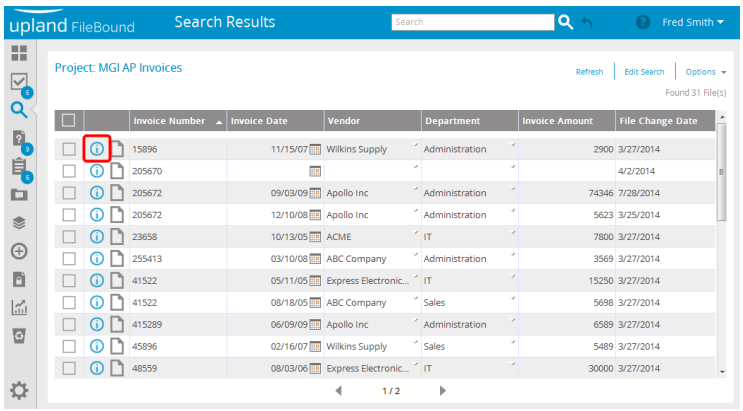
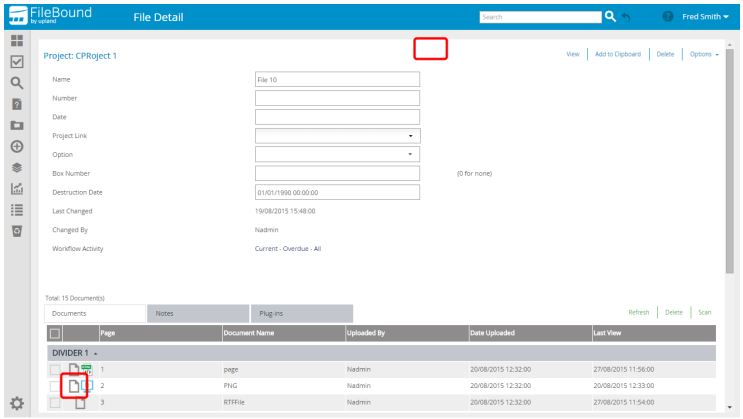


5. View a Document

1. You can expand separators and dividers that contains the document.
   Version Note: The ability to expand the separators and dividers is not available in the version earlier to 7.2.5.
2. Click the view icon adjacent to a document.

   Or,

   Select the check box adjacent to a file, and then click **View**.
   The selected document opens in the default viewer. For more information on Setting Default Document Viewer, click here.



Note: You can select check box adjacent to more then one documents, to view multiple document in the **Viewer**.

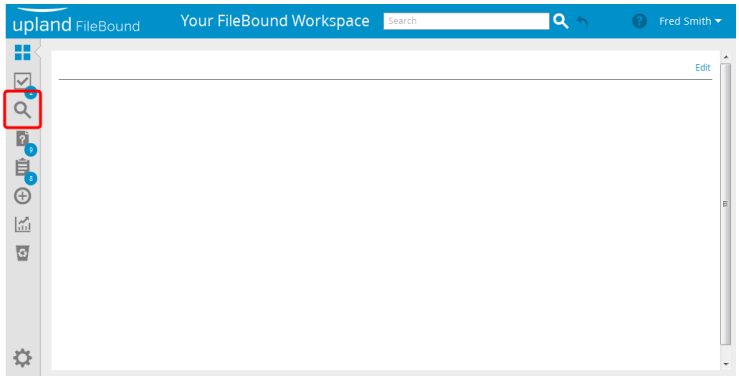
Note: If the document is locked by another user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

How do I scan documents into a file from the File Details page?

This lesson shows you how to scan documents into a file from the File Details page.

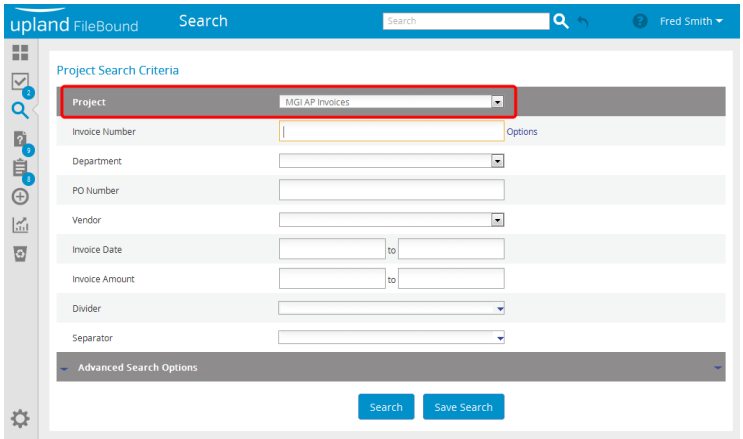
1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



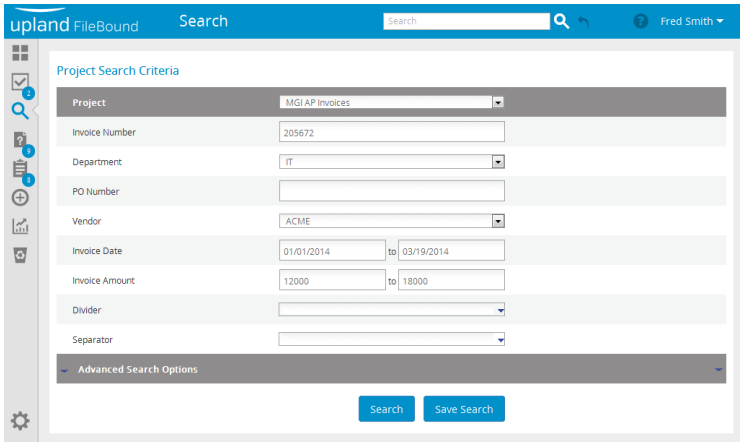
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields.
   Note: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



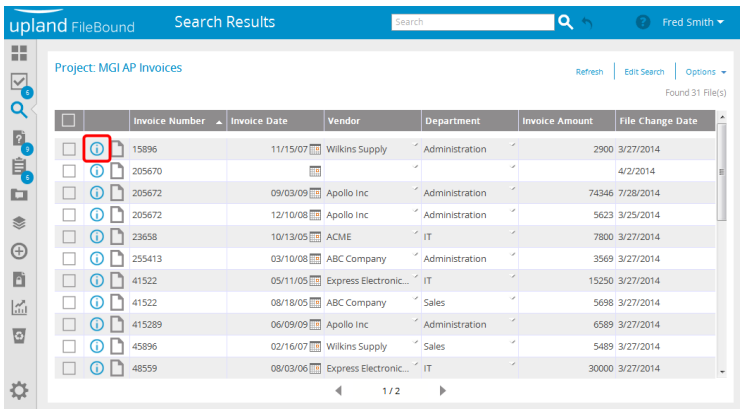
Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

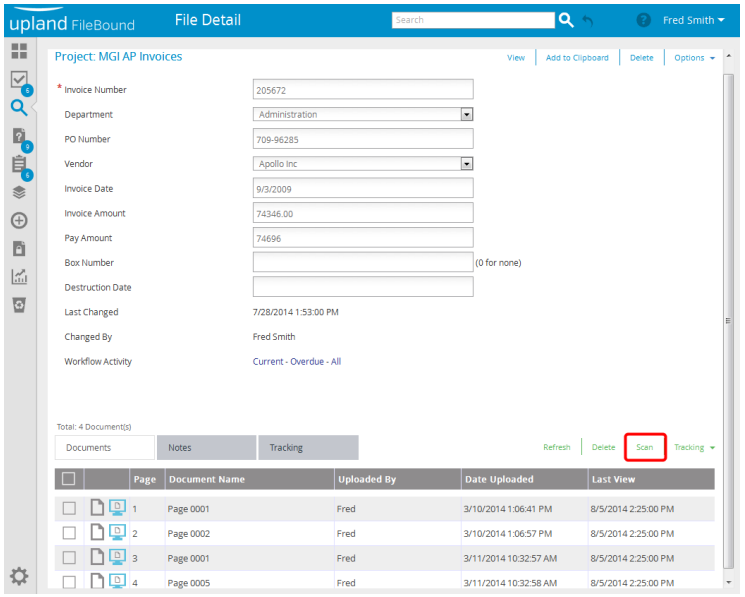
4. Open File Detail Page

- Click the file detail icon adjacent to a file you want to delete.
  The **File Detail** page for that file opens.



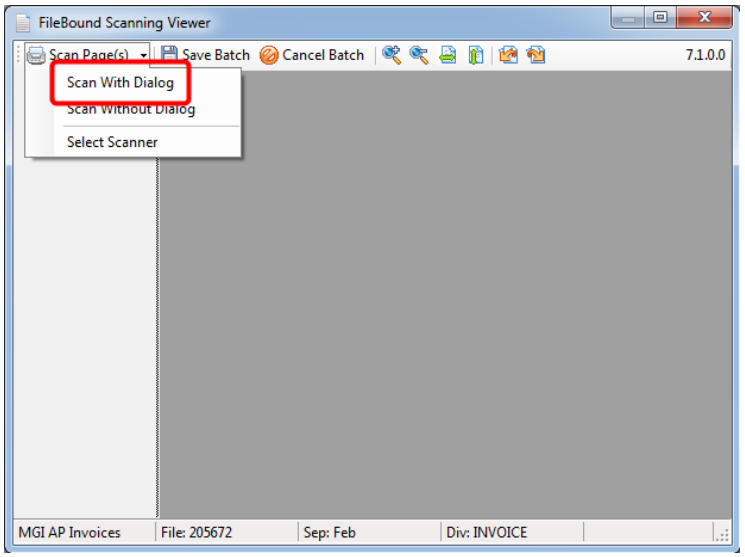
5. Open the Scanning Viewer

- Click **Scan**.
  The **Scanning Viewer** window opens.



6. Select Scan With Dialog Option

1. Select the **Scan With Dialog** option from the **Scan Page(s)** menu.
   The dialog for setting configurations of the scanner opens.
2. Make required changes to the scanner settings in the scanner settings dialog.
3. Click **OK** to scan pages.

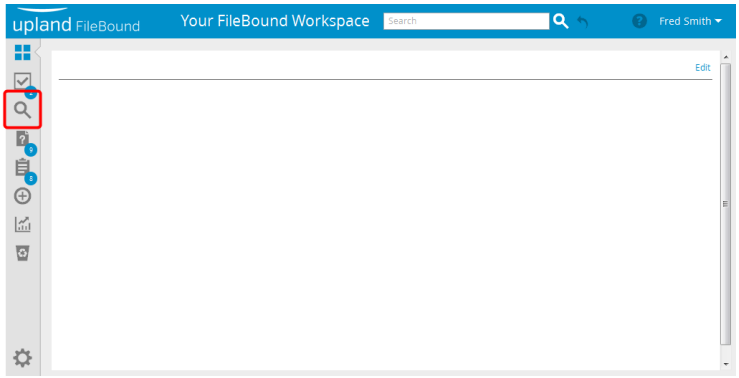


How do I delete documents within the File Detail page?

This lesson shows you how to delete documents within the **File Detail** page.

1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



2. Select a Project

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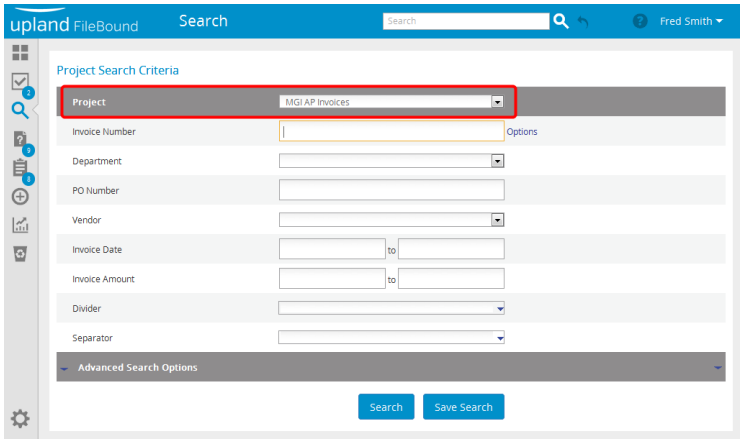
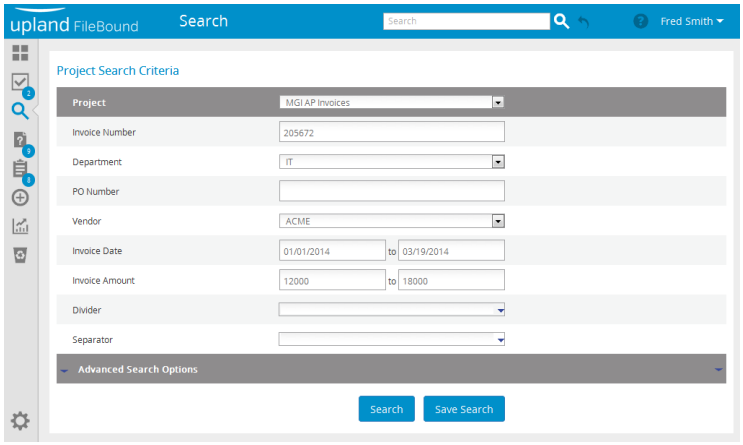


3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields.
   Note: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



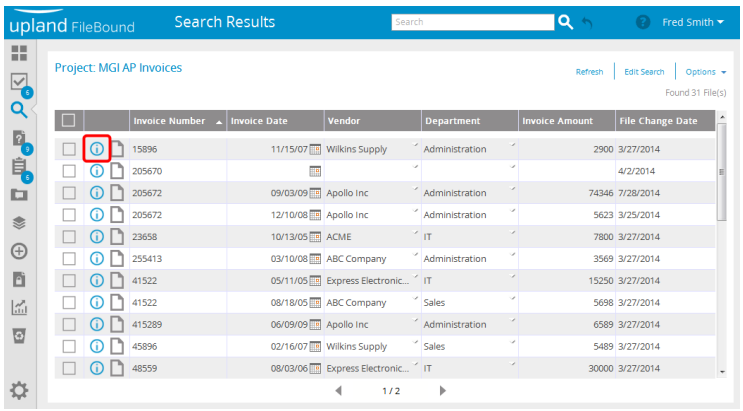
Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

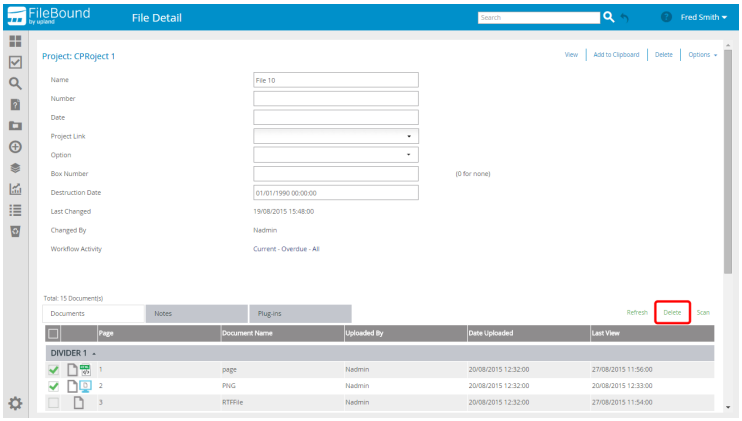
4. Open File Detail Page

- Click the file detail icon adjacent to a file on the **Search Results** page.
  The **File Detail** page for that file opens.



5. Delete Documents

1. You can expand separators and dividers that contains the document.
   Version Note: The ability to expand the separators and dividers is not available in the version earlier to 7.2.5.
2. Select the check boxes adjacent to the documents you want to delete.
3. Click **Delete**.
   The documents are deleted after confirmation.



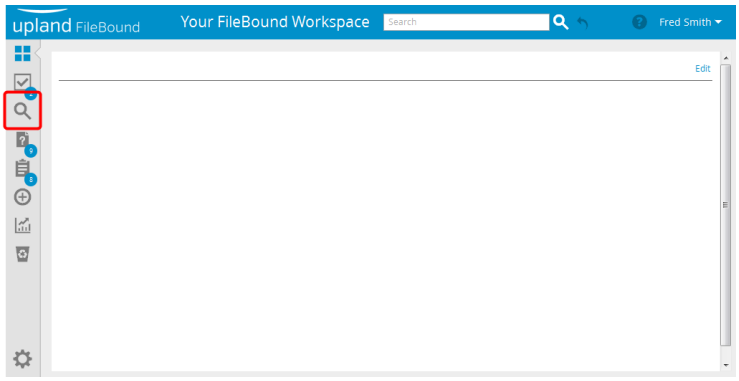
How do I add a file to the clipboard from the File Detail page?

WebDocs allows you to add files to your clipboard. Files added in the clipboard are simply pointers to the original file. Hence, one file can be in the clipboard of more than one user.

This lesson shows you how to add a file to the clipboard from the **File Detail** page.

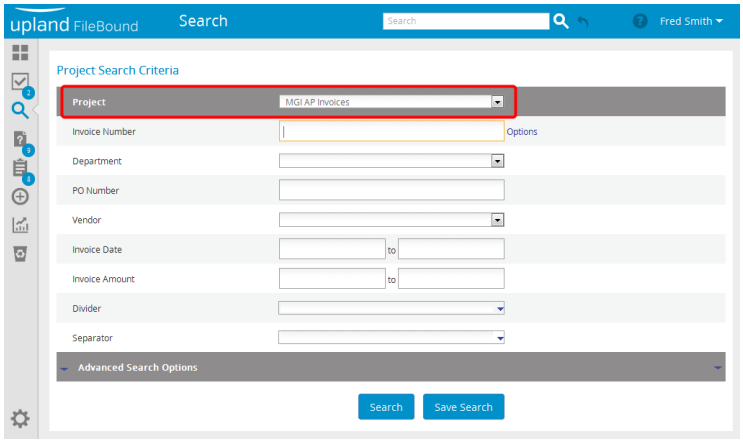
1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



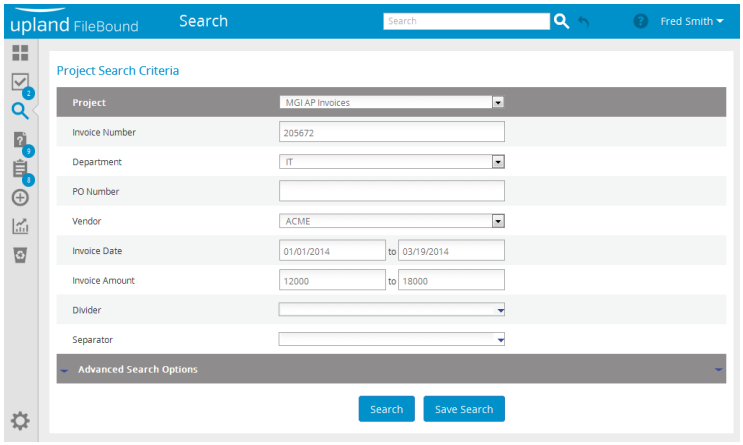
2. Select a Project

- Select a project from the **Project** list, to perform the search within that project.
  Projects are organized in the list within two separate sections, **Recent Projects** and **All Projects**. The projects that are used recently are listed within the **Recent Projects** section of the list and all the projects are listed within the **All Projects** section of the list.



3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields.
   Note: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



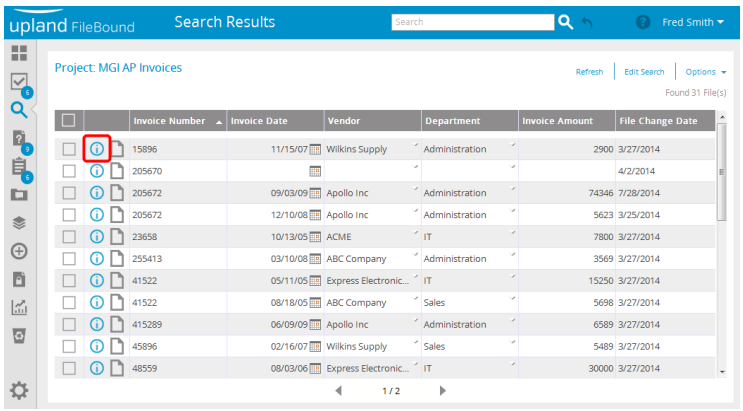
Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation, when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

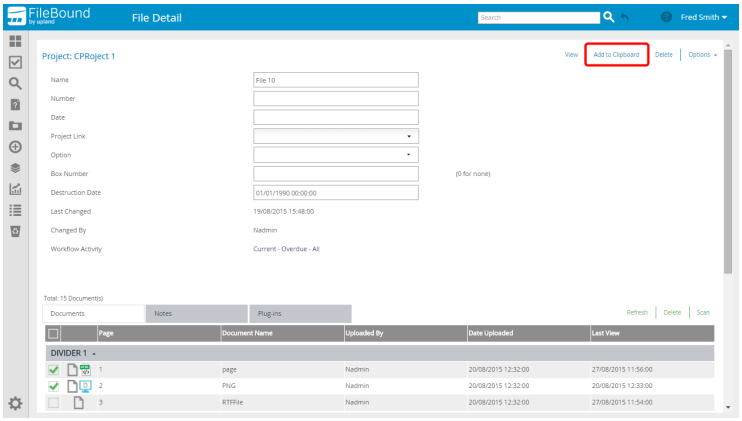
4. Open File Detail Page

- Click the file detail icon adjacent to the file you want to add to the clipboard.
  The **File Detail** page for that file opens.



5. Add File to the Clipboard

1. You can expand separators and dividers that contains the document.
   Version Note: The ability to expand the separators and dividers is not available in the version earlier to 7.2.5.
2. Select the check box adjacent to the documents you want to add to the clipboard.
3. Click **Add to Clipboard**, to add the file to your clipboard.

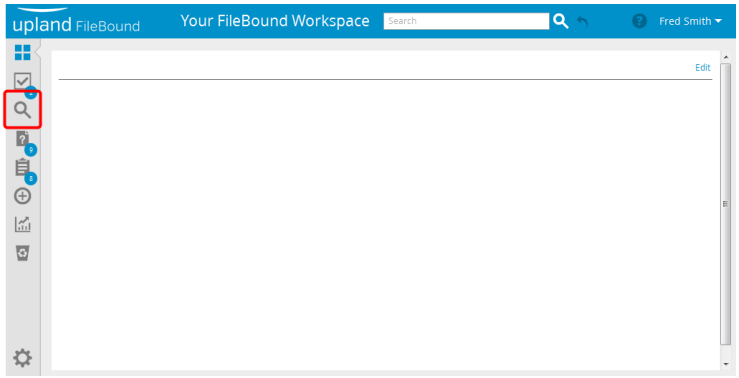


How do I delete a file within the File Detail page?

This lesson shows you how to delete a file within the **File Detail** page.

1. Open the Search Page

- Click the search icon on the navigation pane.
  The **Search** page opens.



2. Select a Project

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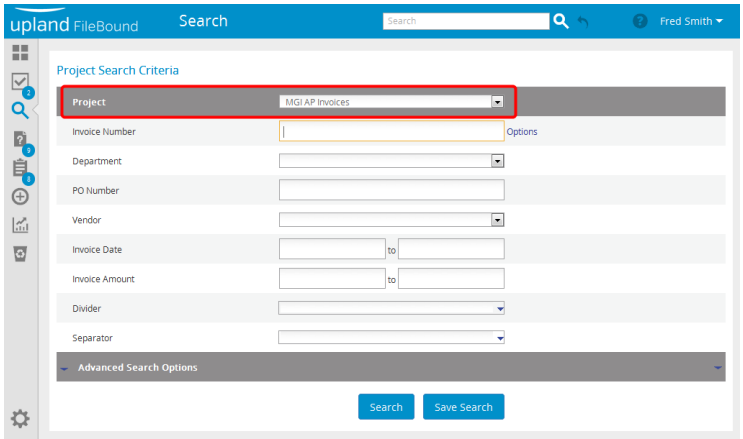

3. Specify the Search Criteria

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   Note: You can click **Advanced Search Options** to specify more search criteria.
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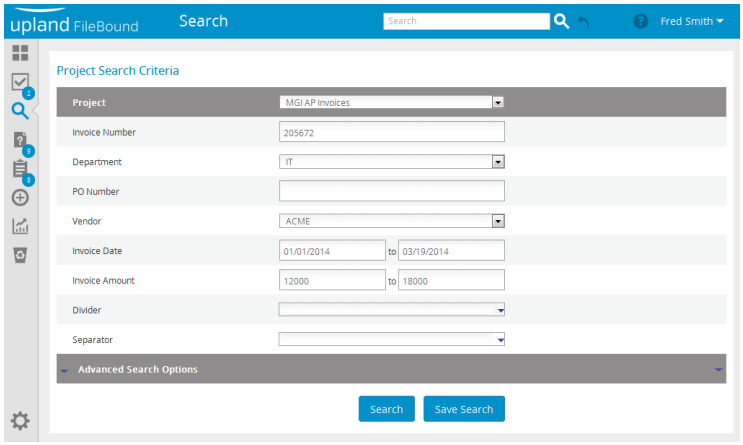

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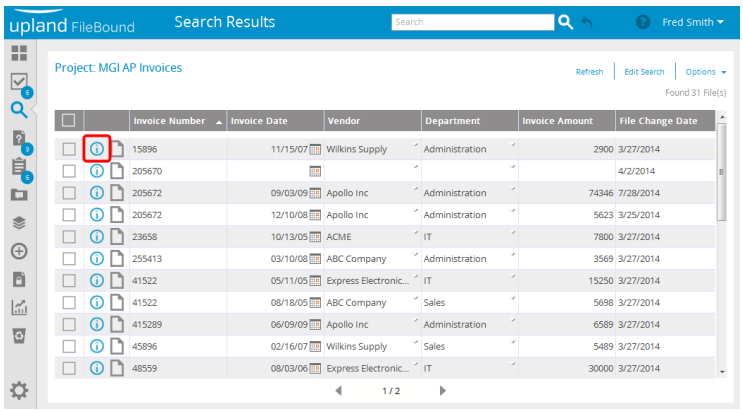
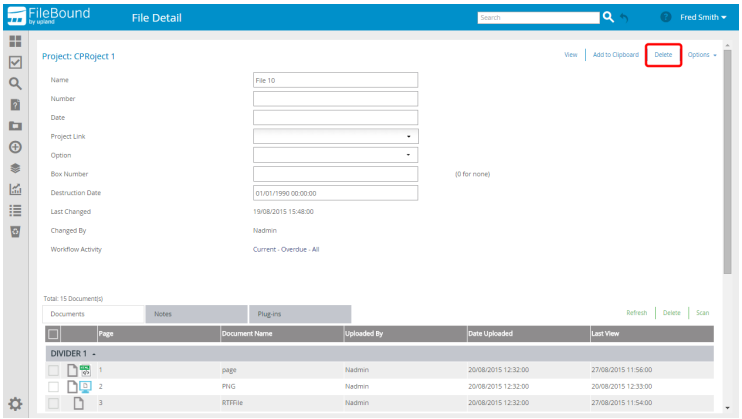
4. Open File Detail Page

- Click the file detail icon adjacent to a file you want to delete.
  The **File Detail** page for that file opens.



5. Delete the File

- Click **Delete** on the toolbar.
  The file and all its associated documents are deleted after confirmation.

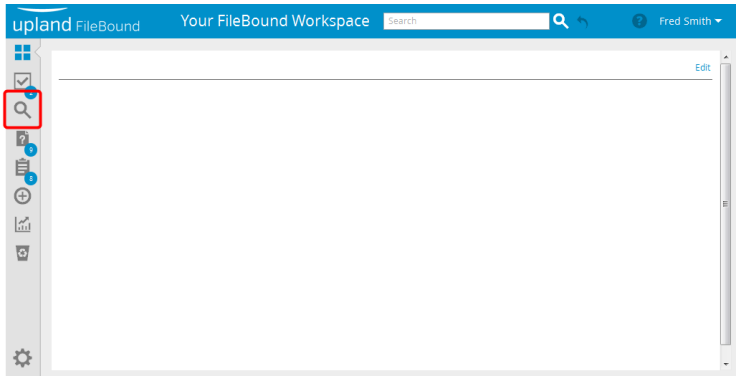


How do I add a file to another user's clipboard?

You can add a file to the clipboard of another user. This lesson shows you how to add a file to a different user's clipboard.

1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



2. Select a Project

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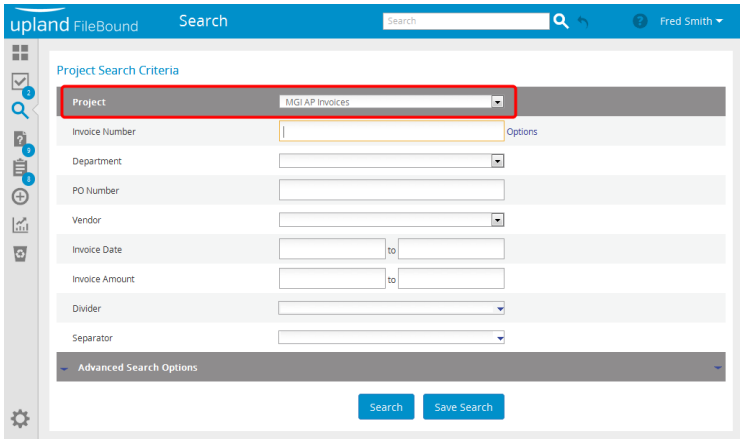
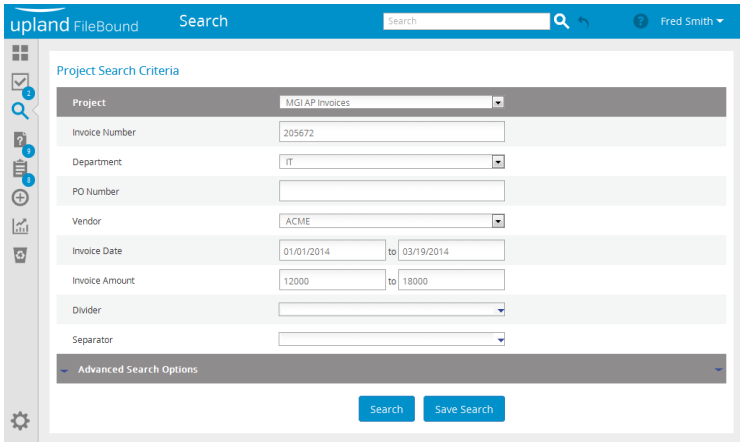


3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields. **Note**: You can click **Advanced Search Options** to specify more search criteria.
2. Click **Search**.



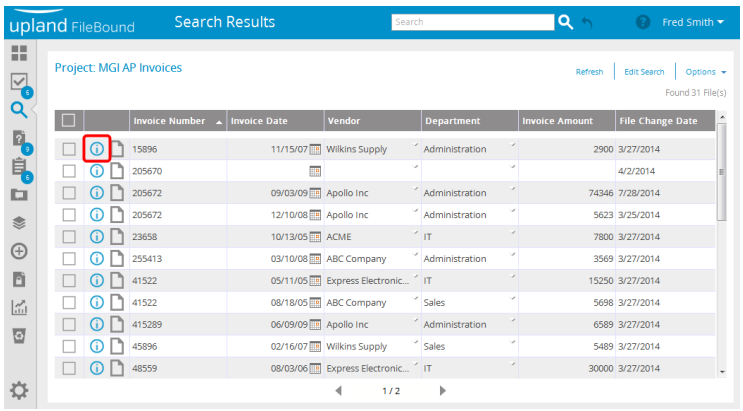
Note: For the list type index field, you can select multiple values by selecting the check box adjacent to the values you want to use.

As a default operation when two or more files are found using the given search criteria, the **Search Results** page opens. If there is only one record matching the search criteria, the **File Detail** page for that file opens.
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

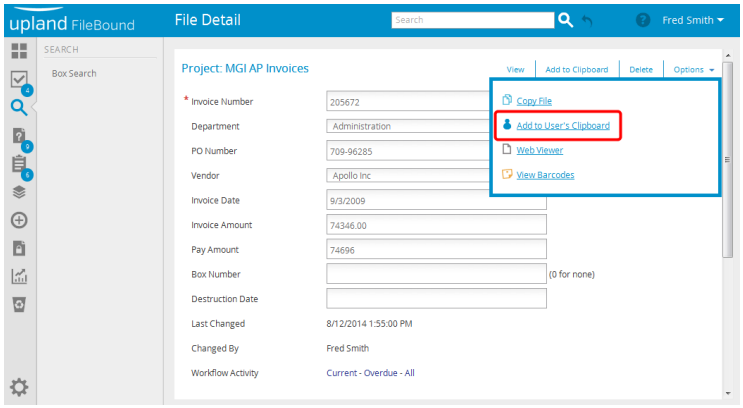
4. Open File Detail Page

- Click the file detail icon adjacent to a file you want to add to another user's clipboard. The **File Detail** page for that file opens.



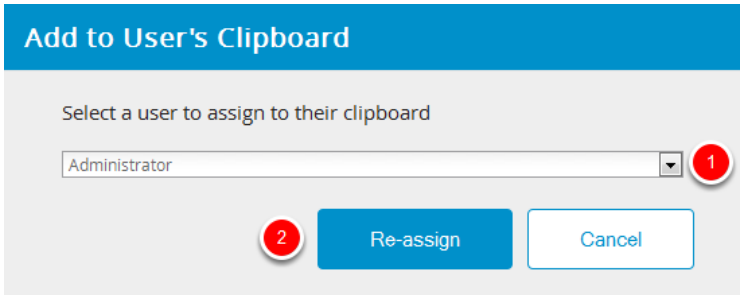
5. Open Add to User's Clipboard Dialog Box

- Click **Add to User's Clipboard** from the **Options** menu within the **File Detail** page.
  The **Add to User's Clipboard** dialog box opens.



6. Select a User

1. Select a user from the **Select a user to assign to their clipboard** list.
2. Click **Re-assign**.

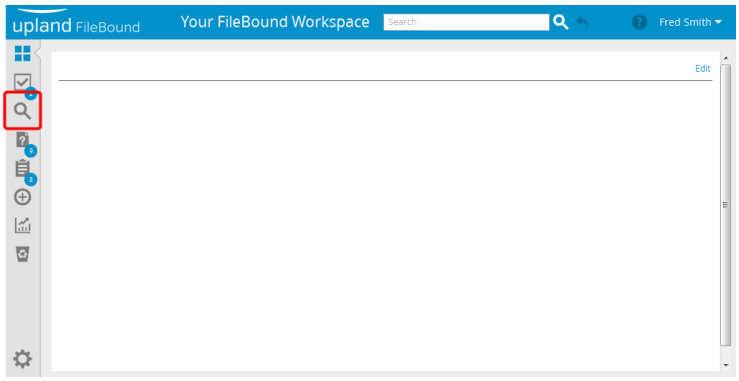


How do I edit a file within the File Detail page?

You can edit the values of the index fields for the file displayed within the **File Detail** page. This lesson shows you how to edit a file within the **File Detail** page.

1. Open the Search Page

- Click the search icon on the navigation pane. The **Search** page opens.



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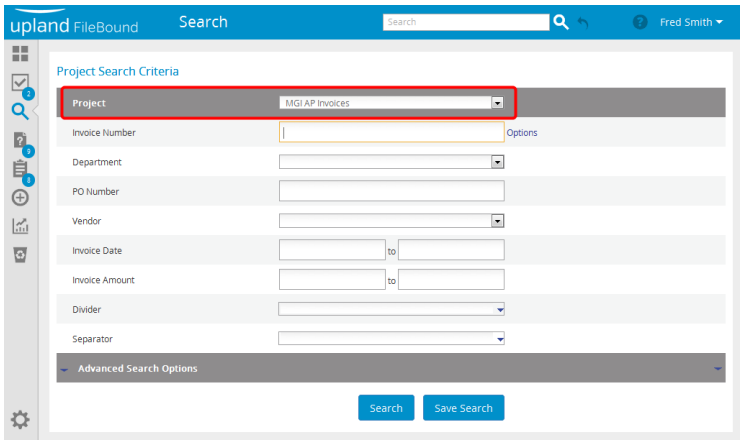

3. Specify the Search Criteria

1. Specify the search criteria that helps in getting a search result that includes the required files by providing information in the relevant index fields.
   Note: You can click **Advanced Search Options** to specify more search criteria.
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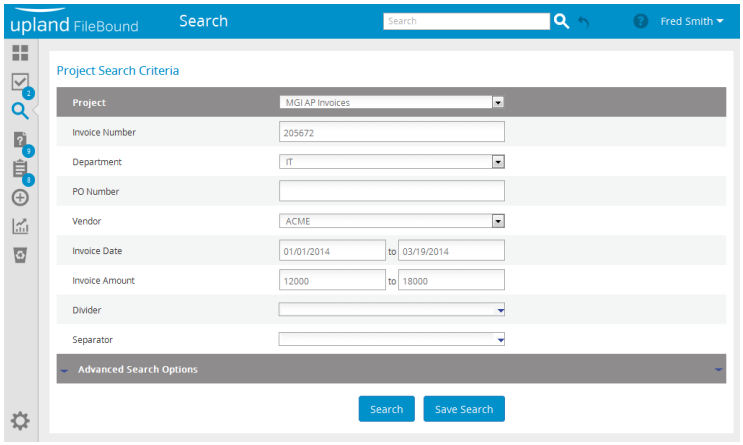

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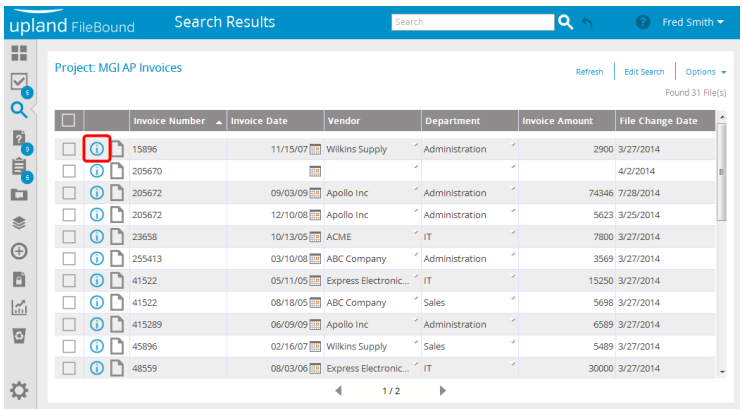
Note: The **File Detail** page is available, if it is enabled by the System Administrator.

Note: The user can select the **View Documents on Single Search Result** option within the **User Preferences**, to display the documents for the single file using the default document viewer.

4. Open File Detail Page

- Click the file detail icon adjacent to a file you want to edit.
  The **File Detail** page for that file opens.

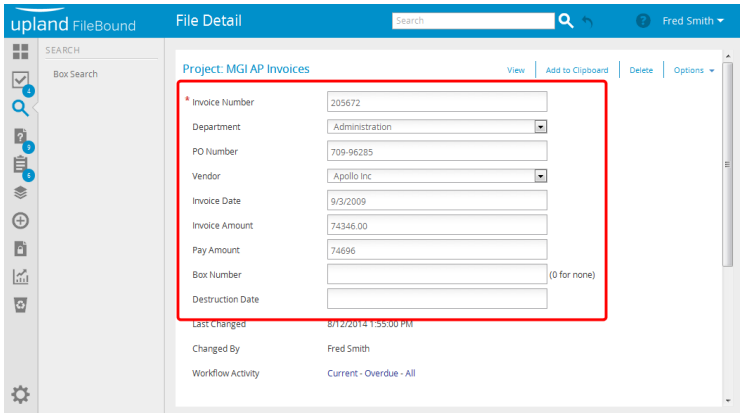


5. Edit the Index Field Values

- Type the new value of an index field in the relevant box.

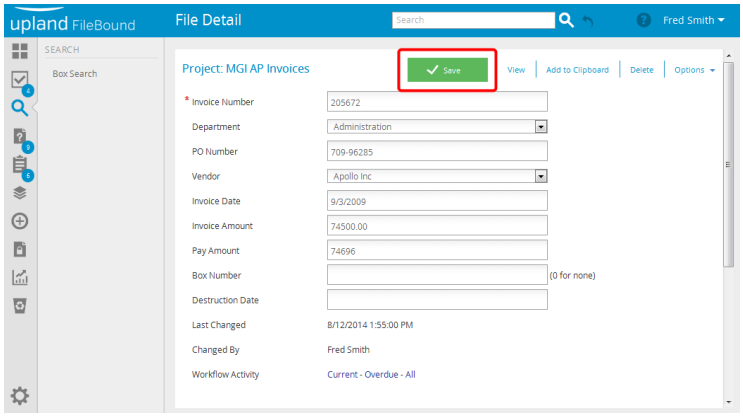
  Or,

  Select an option from the list.
  The **Save** button appears after you edit value of an index field.



6. Save the Changes

- Click **Save**, to save the changes.



Working With Assignments

What are Global Assignments?

This article provides information about the Global Assignments.

Global Assignments is a list of documents that are assigned to a user in in all workflow processes that the user works. These documents are assigned to you and waiting for you to take an action.

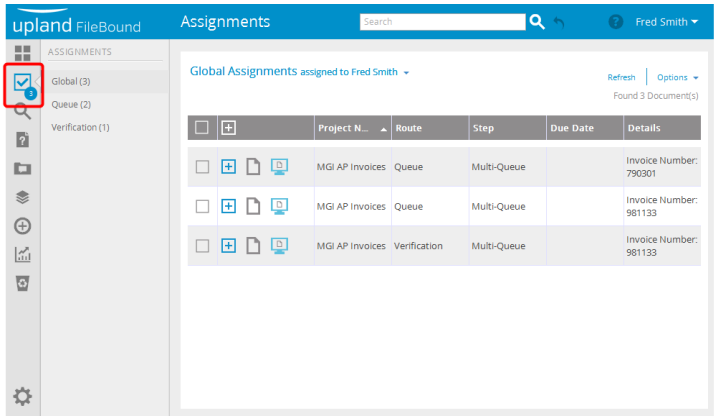
Note: If the **Start Screen** is set to the **Global Assignments** page from the **User Preference** configuration then the **Global Assignments** page opens, when you log on to WebDocs.

How can I see assignments for a specific process?

You can open the **Global Assignments** page from the **Navigation** panel. This lesson shows you how to view assignments for a specific process.

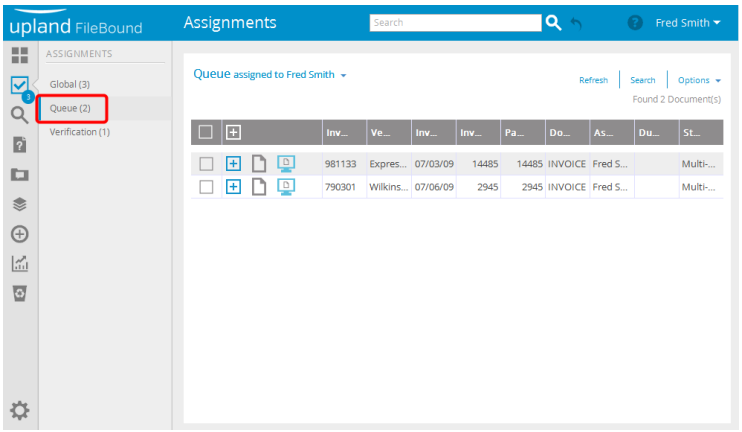
1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens displaying the **Global** assignments.



2. Click a Process

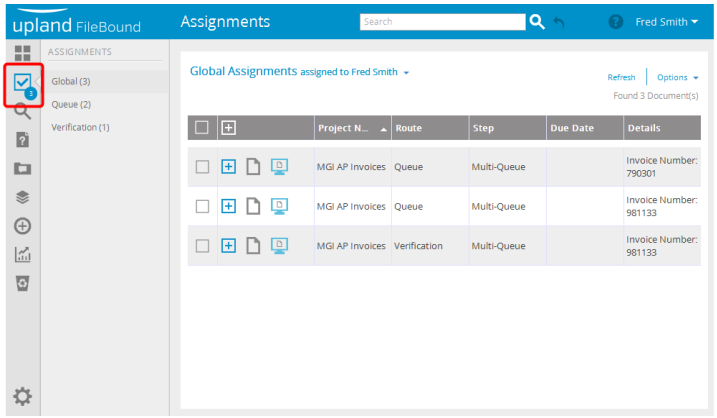
- Click the process for which you want to view assignments.
  Assignments for the selected process are displayed.



How do I view my Global Assignments?

Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens displaying the **Global** assignments.

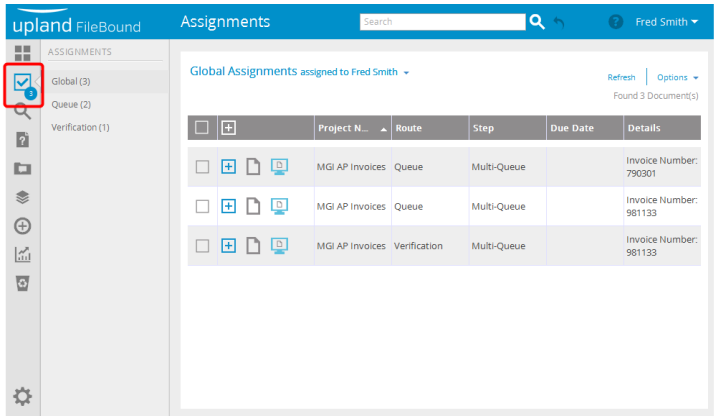


How do I take action on an assignment?

You can take an action on a document assigned to you directly from the Assignments page. This lesson shows you how to take an action on an assignment.

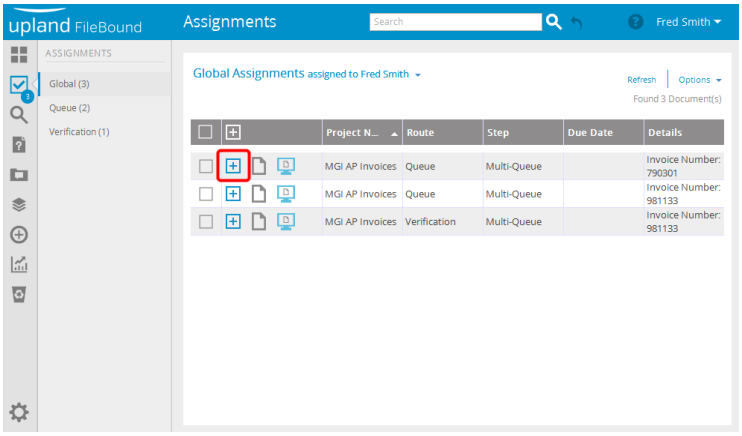
1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens displaying the **Global** assignments.



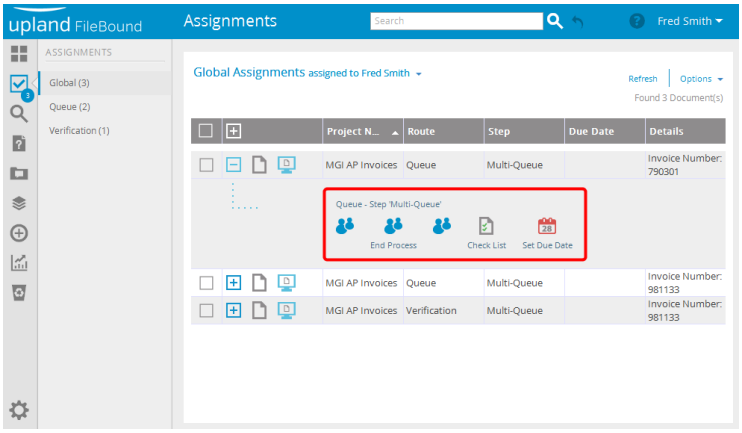
2. Expand an Assignment

- Click the plus sign adjacent to an assigned document to display the task buttons associated with that assigned document.
  Note: You might see different task buttons according to the configuration of the workflow process.



3. Take an Action

- Click a task button to take the action associated to that button.

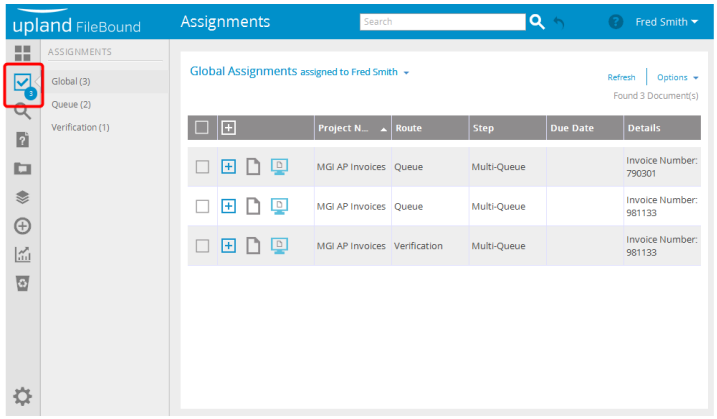


How do I preview an assignment?

This lesson shows you how to preview an assignment.

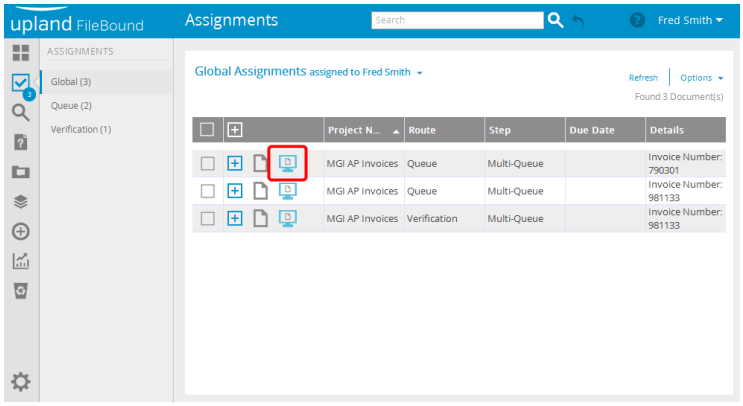
1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens displaying the **Global** assignments.



2. Preview an Assignment

- Click the preview icon adjacent to the assignment you want to preview.

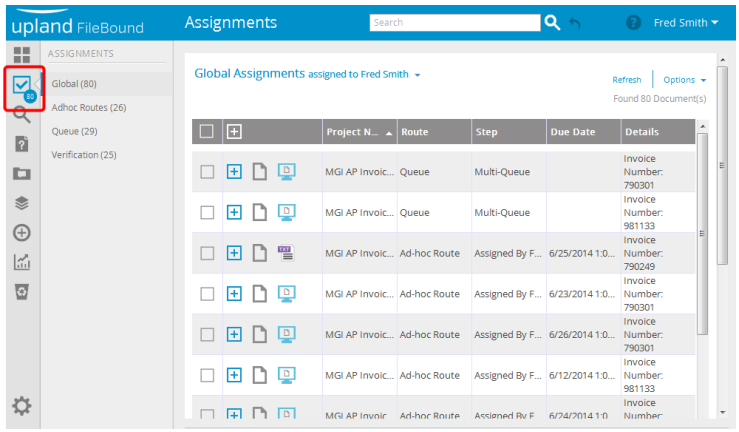


How do I view an assignment within a viewer?

This lesson shows you how to view an assignment within a viewer.

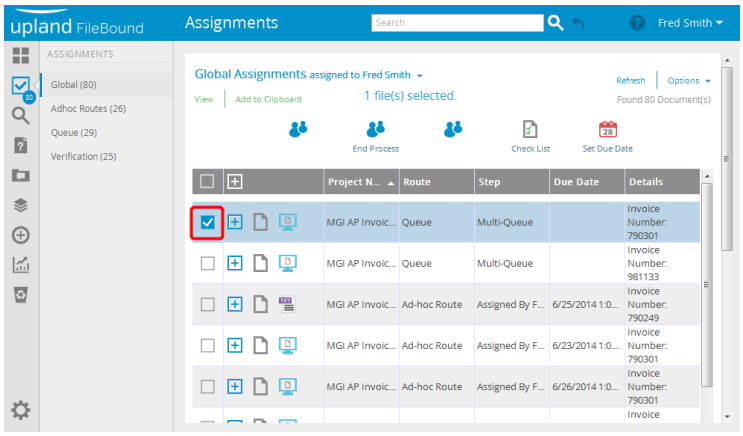
1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens and displays the **Global** assignments.



2. Select an Assignment

- Select the check box adjacent to an assignment you want to view in the **Viewer**.

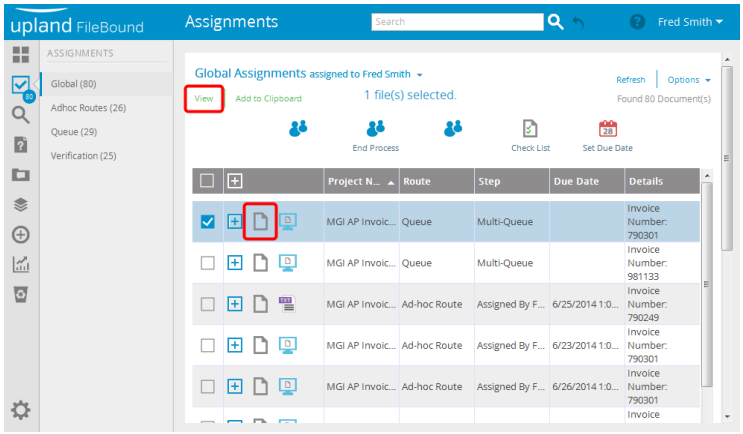


3. Open the Assignment in Viewer

- Click the **View Document** button adjacent to the assignment, to open the assignment within a viewer.

  Or,

  Click **View**.
  The selected file opens in the default viewer. For more information on setting the default Document Viewer, click here.



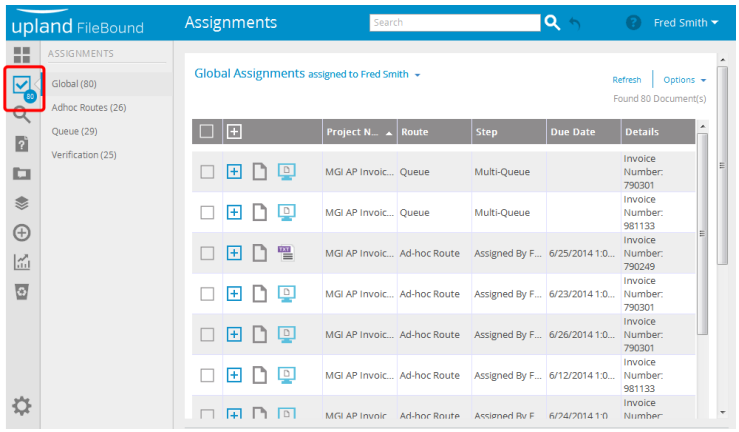
Note: If the document is locked by other user, a prompt is displayed within the Viewer mentioning the name of the user that has locked the document.

How do I add an assignment to my clipboard?

This lesson shows you how to add an assignment to your **Clipboard**.

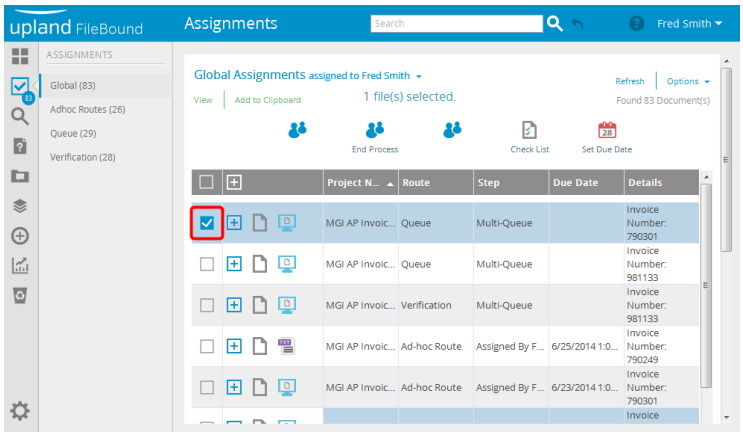
1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens and displays the **Global** assignments.



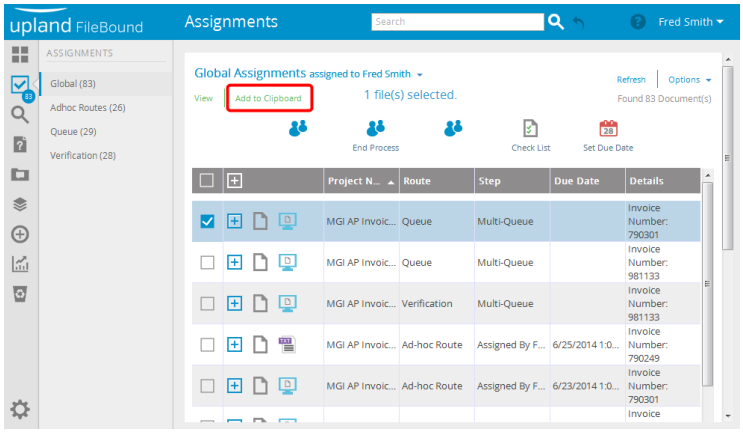
2. Select an Assignment

- Select the check box adjacent to an assignment you want to add to the **Clipboard**.



3. Click Add to Clipboard

- Click **Add to Clipboard**, to add the selected assignment to the **Clipboard**.

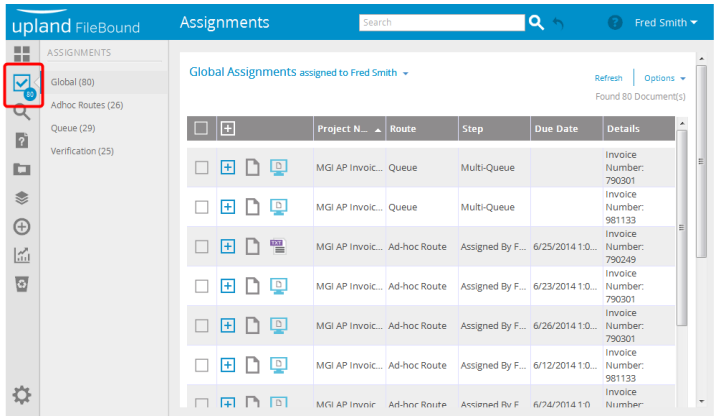


How do I see what step an assignment is on within a process?

This lesson shows you how to see what step an assignment is on within a process.

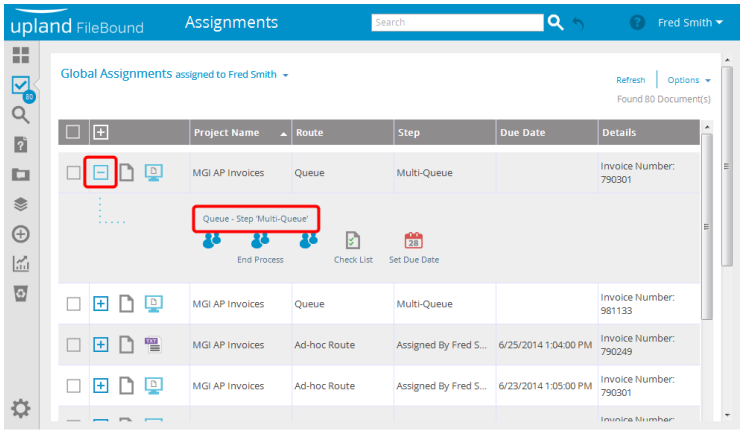
1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens and displays the **Global** assignments.



2. Expand an Assignment

- Click the plus sign adjacent to an assigned document.
  The current step of the document is displayed above the task buttons as Queue - Step 'current step name'. For example, in the above image the current step of the document is 'Multi-Queue'.

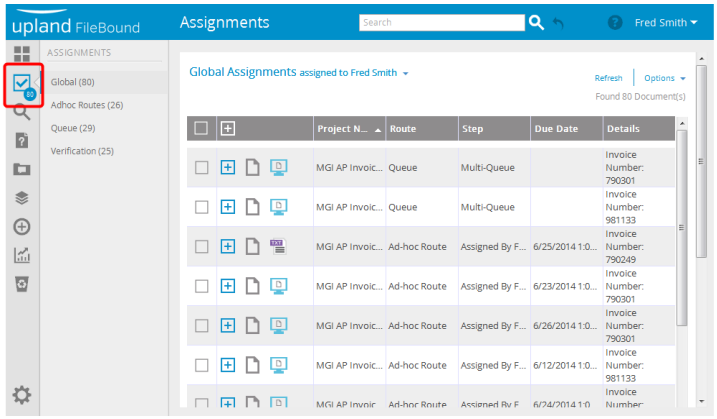


How do I see comments that were entered before arriving on a step?

This lesson shows you how to see comments that were entered before arriving on a step.

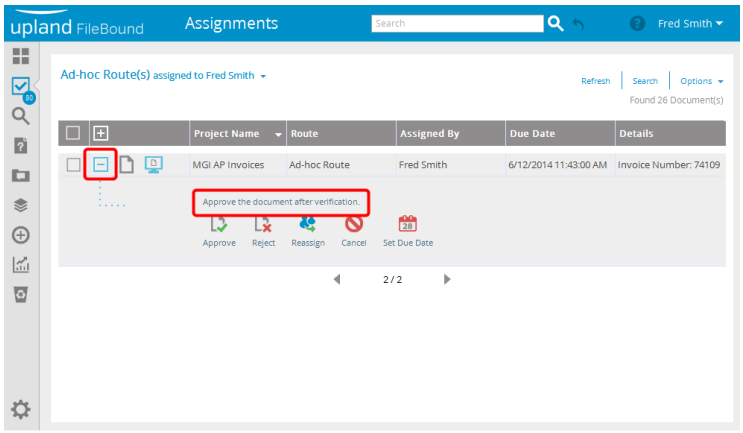
1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens and displays the **Global** assignments.



2. Expand an Assignment

- Click the plus sign adjacent to an assigned document.
  The comments are displayed above the task buttons.

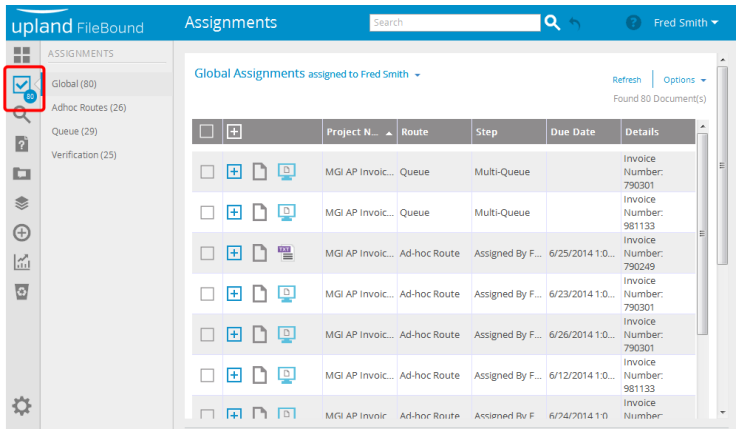


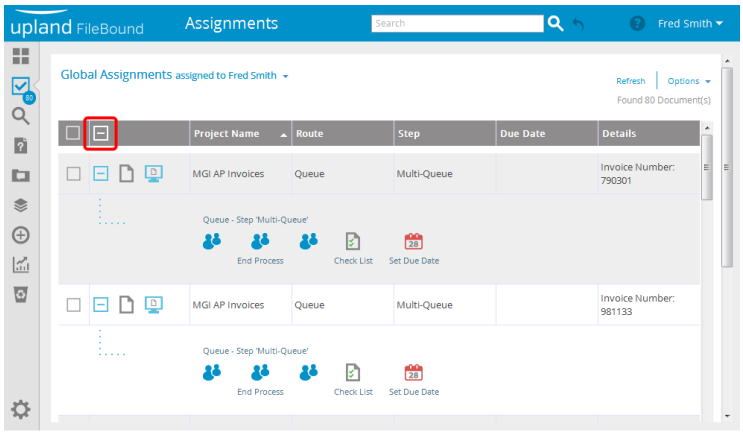
How do I expand all of the task buttons for all assignments?

This lesson shows you how to expand all of the task button for all assignments.

1. Open the Assignments Page

- Click the assignments icon on the navigation pane.
  The **Assignments** page opens and displays the **Global** assignments.



2. Click the Expand Button

- Click the plus sign on the column header, to expand all of the task buttons for all assignments.