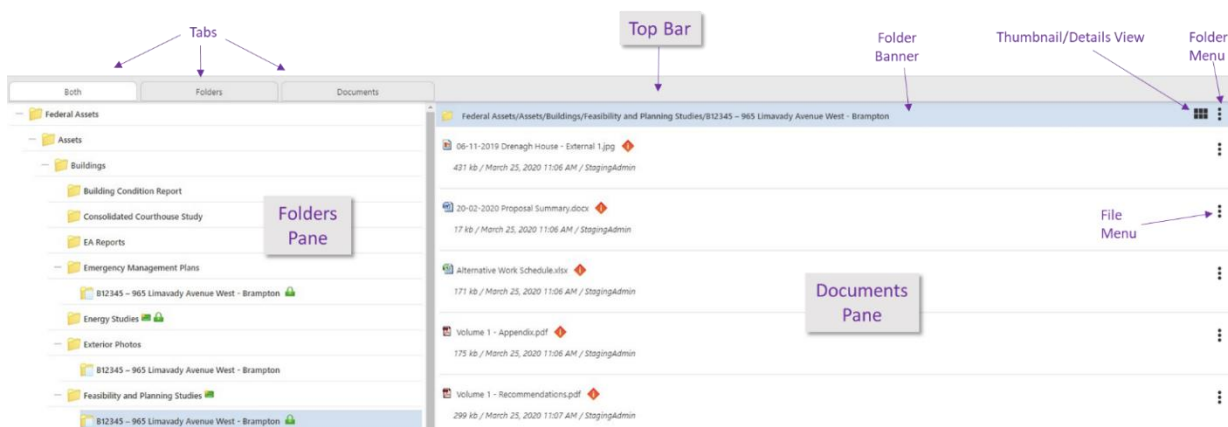









DocumentViewer - Tools



Quick Tips

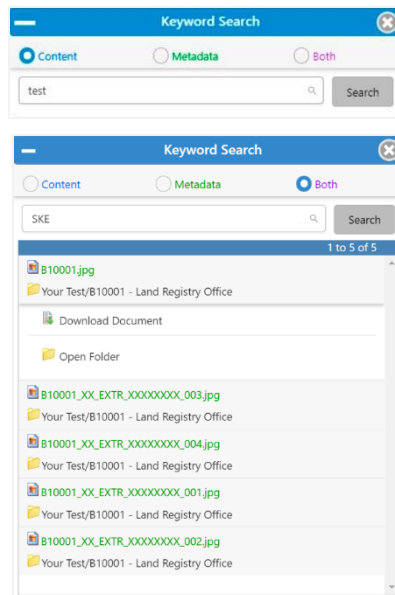


DocumentViewer Icons and their meanings

- I.  Folder without documents
- II.  Folder with documents
- III.   Toggle button for thumbnail or details view
- IV.  Checked – Out document
- V.  User Notifications set for folder
- VI.  Security set for folder

Search for a Document: How can I search for a document?



- 1) Right-click on the selected folder banner or select the ellipses  in the folder banner. A menu with folder functions will appear.
- 2) Select the **Keyword Search** function  which will launch the associated form.
- 3) Select 'Both' and input keywords/phrases
- 4) Click Search and all relevant documents will be listed.
- 5) Click on the file/folder name and the options appear below to download the document or open the folder which moves to that folder in a new DocumentViewer window.

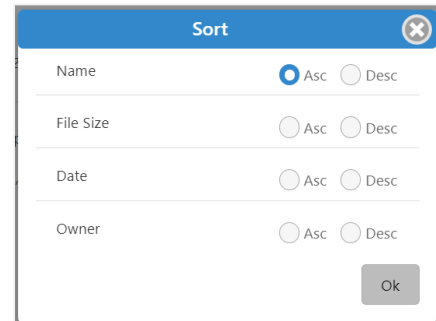


DocumentViewer - Tools



Quick Tips

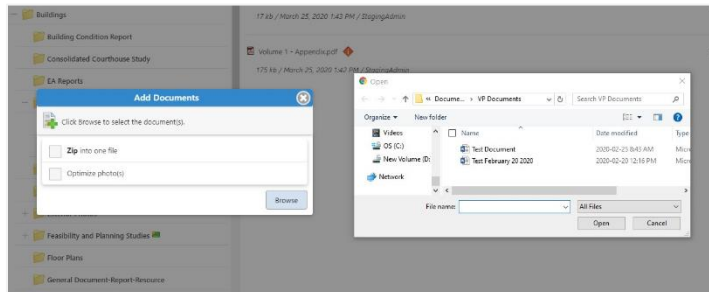
Sort Documents: How can I sort documents in a folder?

- 1) Right-click on the folder banner or select the ellipses  in the folder banner to open the Folder Menu. A menu with folder functions will appear.
- 2) Select **Sort** . A pop-up will appear. It has four categories on which you can sort the documents by Name, File Size, Date, and Owner. All of these can be sorted in Ascending or Descending order.
- 3) Select how you would like to sort the documents and select “Ok”. The folder will refresh sorted in the specified order.



Add Document: How can I add a document?


- 1) Right-click on the selected folder name in the folder banner or select the ellipses  in the folder banner. A menu with folder functions will appear.
- 2) Click the **Add Documents**  function
 - To Add one file, click “Browse” and navigate to that file on your local computer/network. Highlight it, and click Open.
 - To add multiple files/documents at the same time, click on the first file and hold the Shift key (sequential selection) and click on the last file, or hold the Ctrl key (individual selection) to select one or more individual files on your local computer/network, then
- 3) Click Open to finish and upload the documents to DocumentViewer.



Note: Drag-and-drop is available for uploading files. You can drag a file (or files) from your desktop into the Documents Pane.


Download Document: How can I download a document?

There are three ways to download a document;

- 1) Double-click on the document to start the download; or,
- 2) Click the ellipsis icon  in the document row and a menu for that document will appear at the bottom of the display; or,

DocumentViewer - Tools



Quick Tips

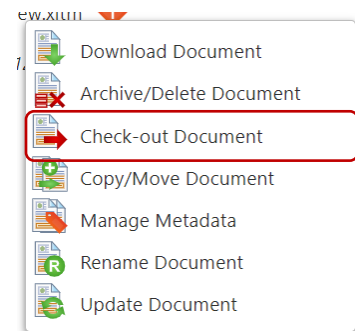
Right-click on the file record (desktop only) and a menu for that document will appear. Select the **Download Document**  function. This will start a browser file download along with progress/status.

Check-out Document: How can I prevent users from working on a document at the same time?


Editors and Admin can Check-out a document in DocumentViewer. This allows them to notify others that they are working on a document. This is intended to prevent users from working on a document at the same time resulting in the loss of work or conflicting versions.

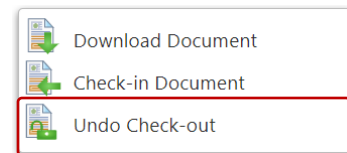
To Check-Out a document:

- 1) Right-click on a document or select the ellipses icon  in the document row to open the Document Menu.
- 2) Select **Check-out Document**. A prompt will appear asking if you would like to download the document.
- 3) **Select Ok to download or select the X to not download**. A small icon  indicating the document has been checked out will appear beside the document name in DocumentViewer.



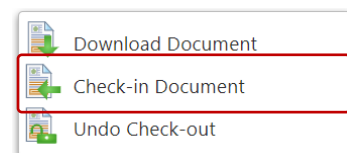
To Undo the Check-out:

- 1) Right-click on the document or select the ellipses icon  in the document row and select **Undo Check-out**. Editors can only undo the check-out of documents that they personally checked out. Admin can undo the check-out of all documents.



To Check-In a document:


- 1) To Check the document back in, right-click on the document.
- 2) Select **Check-in Document**.
- 3) A pop-up will appear allowing you to browse and select a document to upload as the new version. Editors and Admin can only check back in documents that they personally checked out.

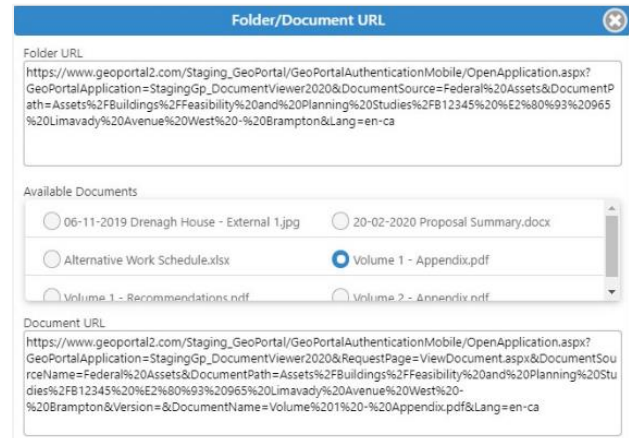


DocumentViewer - Tools


Quick Tips

Folder/Document URL: How can I share a document with other users?

- 1) Right-click on the selected folder name in the folder banner or select the ellipses  in the folder banner. A menu with folder functions will appear.
- 2) Select the **Folder/Document URL** function. In the form that pops-up, the first frame shows the URL to the selected folder. The second frame lists all the documents in the selected folder.
- 3) Select any one of the files by clicking on it. Once a file is selected then the third frame will display the URL for that file.
- 4) Select the entire URL text string and then copy it into memory for pasting into a browser or another document, email, etc.



Manage User Notifications: How can I change my email notification settings?

Once an Admin has set User Notifications settings for a folder a green envelope will appear beside that folder name.  If the Admin turns on the option for "Users Can Change Their Settings" then a user can customize their email notification settings.

- 1) Right-click on the selected folder name in the left pane. A menu with folder functions will appear.
- 2) Select the **Manage User Notifications** function. In the form that pops up, you will see the notification settings that the Admin set for the folder.
- 3) Uncheck the boxes for any actions that you wish to not receive a notification for and/or change the urgency of the notification by selecting a different option in the picklist.

