

Viewing Documents

An effective mechanism for storage and retrieval of data is one of the most important features of a useful document imaging system. As soon as a document is retrieved from storage, however, the focus shifts from your ability to access data to your ability to manipulate data. The flexibility to display a retrieved document in a way that highlights the important data in the document aids in efficient data processing. The ability to e-mail and print documents and versions of documents can also improve processing time.

In most areas, AppXtender Web Access Thin and Interactive Client modes have similar functionality. An exception to this is the functionality available when displaying documents.

The following topics discuss the features available from Document Display view for both Thin and Interactive Client modes:

- [Displaying a Page Using Thumbnails, page 194](#)
- [Working with Different File Types in Document Display View, page 198](#)
- [Selecting the Display Mode for a AppXtender Web Access Document, page 204](#)
- [Displaying AppXtender Web Access Documents, page 208](#)
- [Entering Reason Codes, page 210](#)
- [Thin Client Document Display View Functionality, page 211](#)
- [Interactive Client Document Display View Functionality, page 221](#)
- [Displaying ApplicationXtender Reports Management Reports, page 239](#)

Displaying a Page Using Thumbnails

Thumbnails are links to individual pages in a document.


Thumbnails allow you to quickly locate and display a page from a large document. The AppXtender Web Access thumbnails contact sheet allows you to reorder page(s) within a document. In addition, you can resize document thumbnails from the thumbnails contact sheet.

Refer to the following topics for more information:

- [Thumbnail View, page 196](#)
- [Thumbnails Contact Sheet, page 198](#)

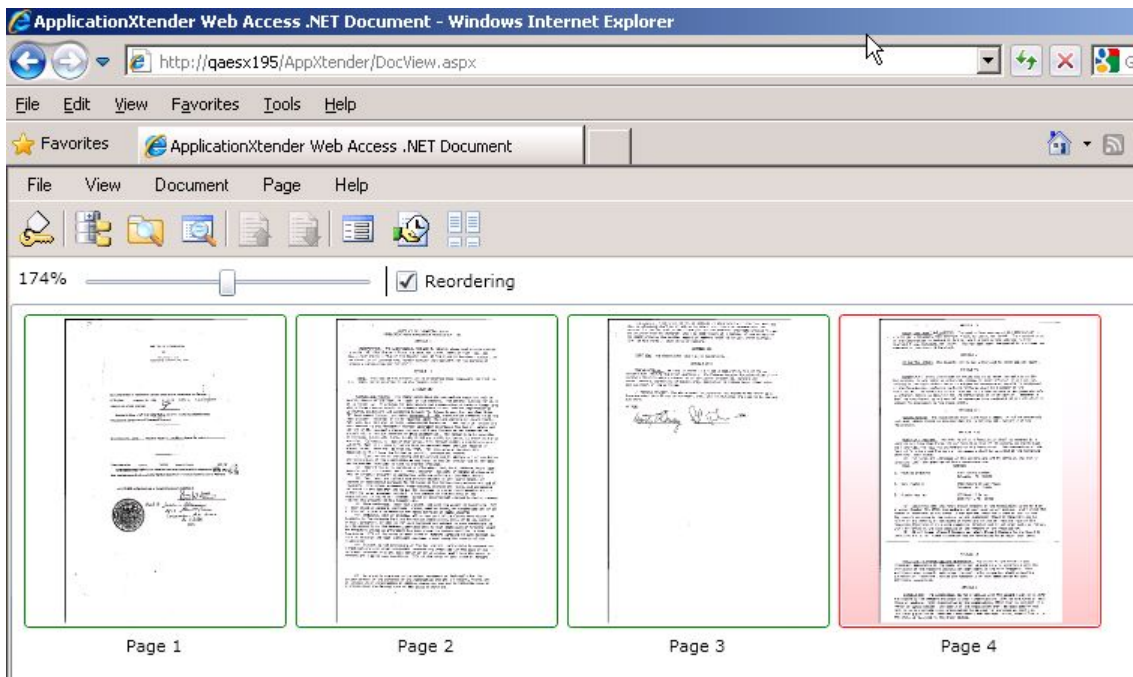
Reordering document pages

You can reorder page(s) in a document by dragging the desired thumbnail to a new location in the thumbnails contact sheet. First, activate the reordering from the thumbnails contact sheet using one of the following methods:

- Click the Reordering checkbox to enable reordering.
- Click  in the lower right corner of the thumbnail to be moved.
- Click and hold the **Shift** key (to move sequential thumbnails) or the **Ctrl** key (to move nonsequential thumbnails).

After activating the reordering feature, click a thumbnail for a page and drag it to the desired location within the document. Web Access highlights the selected (active) thumbnail in red and displays a vertical red indicator bar to identify the new location for the page once it is dropped, as shown in the following figure. The new page location is saved for all Web Access users.

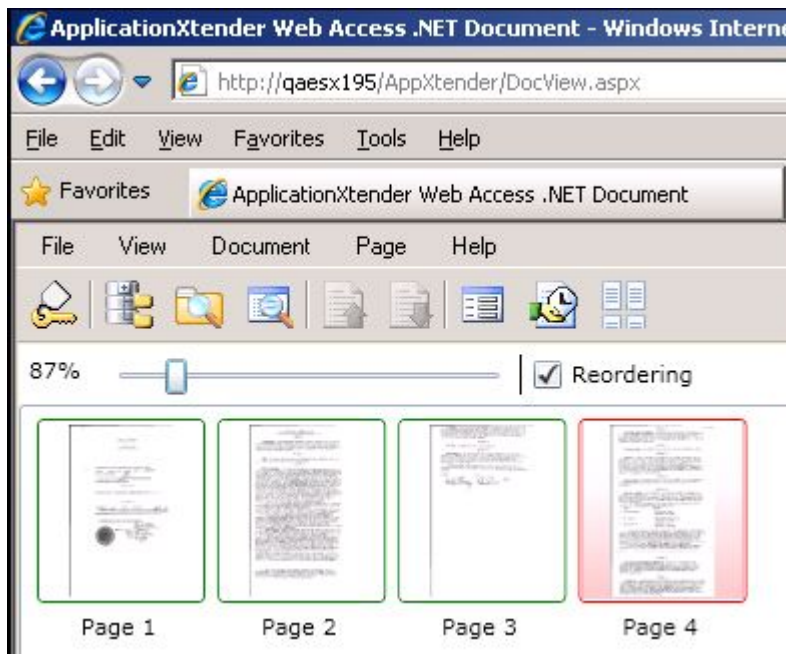
Figure 138. Thumbnails Contact Sheet: Reordering Document Pages



Resizing thumbnails

You can resize document thumbnails displayed in the thumbnails contact sheet by dragging the slider bar to the desired size. Available zoom sizes range from 50 to 300 percent of the original thumbnail size. Zoom settings are retained for the remainder of the Web Access session. As a result, the next time the you view document thumbnails within the same session, the images display at the previously viewed zoom setting.

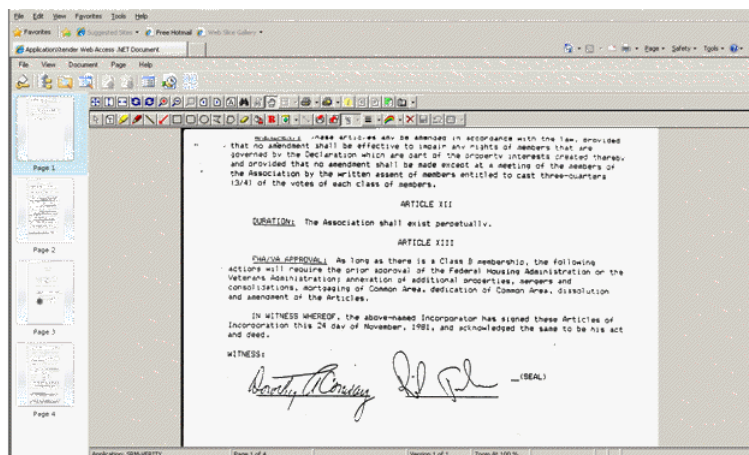
The following figure shows an example of thumbnails that have been resized to 68 percent of their original size.

Figure 139. Thumbnails Contact Sheet: Resizing Thumbnails

Thumbnail View

The Thumbnail view displays thumbnails next to Document Display view. Refer to [Document View Tab, page 72](#) for information on displaying the Thumbnail view.

Note: Icons appear in place of thumbnails for some file types. The following figure shows an example of the Thumbnails view and its associated Document Display view using the Microsoft Silverlight viewer.

Figure 140. Document Display View with Thumbnails View of Document Pages: Silverlight viewer

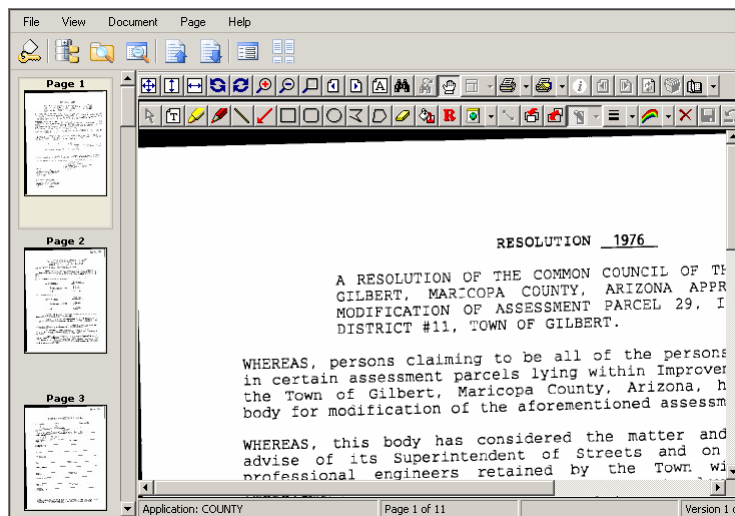
To display a page using Thumbnails view:

1. Scroll to the thumbnail in Thumbnails view.
2. Click the thumbnail or icon representing the page. Web Access displays the page.

Changing the Default Viewer for Document Thumbnails

The default viewer that is used to display document thumbnails in AppXtender Web Access is Microsoft Silverlight. You can request your system administrator to change the viewer to Java as described in the *EMC ApplicationXtender Web Access Administrators Guide*. The following figure shows an example of the Thumbnails view and its associated Document Display view using the Java viewer.

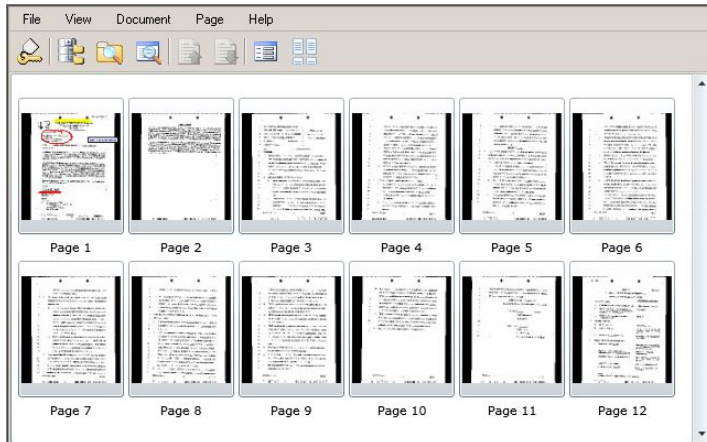
Figure 141. Document Display View with Thumbnails View of Document Pages: Java viewer




Thumbnails Contact Sheet

The thumbnails contact sheet displays thumbnails on a single sheet.

Figure 142. Thumbnails Contact Sheet



To display a page using the thumbnails contact sheet:

1. Click  on the Document Display View toolbar if Thumbnails view is active. Web Access displays the contact sheet.

Note: The contact sheet requires the Microsoft® Silverlight™ component to display thumbnails. Install the component if Web Access prompts you to do so.

2. Locate the thumbnail.
3. Click the thumbnail. Web Access displays the page.

Working with Different File Types in Document Display View

When you work with documents in ApplicationXtender Web Access, not all documents automatically appear in the Document Display viewer. In some cases, such as with a Word document, for example, you must click an icon to access the document in its native application. For more information, refer to the following topics:

- [C-6](#)
- [Supported File Types, page 199](#)
- [Unsupported Files, page 202](#)

Embedded Office Viewer

ApplicationXtender allows you to view, edit, and print Microsoft Office 2003 and 2007 documents in a native Office embedded window inside the ApplicationXtender Document Display view. This capability, which is available for Word, Excel, PowerPoint, and Visio Office document formats, uses Microsoft Object Linking and Embedding (OLE) technology.

You can enable the Office Viewer feature in ApplicationXtender Document Manager by selecting the **Use KeyView to display foreign files** option on the View tab of the Configuration dialog. If KeyView is enabled, ApplicationXtender displays supported Office documents using the Office Viewer automatically, in either read-only mode (without Office toolbars) or edit mode (with Office toolbars), depending on the current document read/write permission.

After editing a supported Office document within the embedded Office Viewer, you can:

- Save the file as a new page version using the **Save** button on the Office toolbar
- Discard the changes made to the file by closing the Document Display view without saving the changes

You can also print Office document pages using native Office document printing. Selecting the ApplicationXtender Page > Print command or Print toolbar button (if it is configured to print pages) invokes the Office print functionality. Alternatively, users can print the document using the standard ApplicationXtender Document Print functionality.

The following issues pertain to the Office Viewer feature:

- Each MS Office application behaves differently when used in embedded mode. Different versions of Office also behave quite differently in terms of the user interface.
- You are not prevented from editing Office documents that are in read-only mode. However, because Office toolbars are not available in read-only mode, you cannot save changes.
- In edit mode, each Office application provides an Office toolbar. The buttons on the toolbar may not be enabled or disabled correctly depending on the Office application. For example, the Save button works correctly for Word documents. However, it is always enabled, but not functional, for Excel and PowerPoint documents. This behavior is controlled by the Office application; therefore, ApplicationXtender cannot change it.

Supported File Types

Supported file types include: image files (TIFF, GIF, Windows Bitmap, PCX, DCX, JPEG, and TGA files for example), Rich Text Format (RTF) files, Hypertext Markup Language (HTML) files, and Adobe Portable Document Format (PDF) files.

The following topics describe the AppXtender-supported files:

- [Image Files, page 200](#)
- [COLD/ERM/Text Files, page 200](#)
- [Rich Text Format \(RTF\) Files, page 201](#)
- [Hypertext Markup Language \(HTML\) Files, page 201](#)
- [Portable Document Format \(PDF\) Files, page 201](#)

Image Files

Image files contain graphic data. They are added to AppXtender by either importing electronic files or scanning paper documents to product image files, which are then added to AppXtender.

By default, AppXtender Web Access stores images in their native format (for example, a TIFF file is stored as TIFF). AppXtender Web Access can also store image files in a different format supported by AppXtender. When you choose to store an image file in a specific image format, AppXtender ignores the original format and stores all images in the selected format.

AppXtender displays image files in the format in which they are stored. For example, depending on the image storage format, in addition to being displayed in their native format, black and white files and 4/8-bit color files can be displayed as TIFF or Windows bitmap files. True color files can be displayed as TIFF, Windows bitmap, or JPEG files as well as in their native format. If you store images using the JPEG format, you can configure the level of compression of the images through AppXtender.

Note: ApplicationXtender Web Access does not support progressive JPEGs. Importing a progressive JPEG into AppXtender Web Access results in the file being imported as a foreign file.

When you work with supported images in AppXtender, you have access to a wide range of AppXtender functionality. You can add annotations, enhance image quality, process the image using Optical Character Recognition (OCR), and adjust the display of the image in many ways to allow optimal viewing. Document Display properties are also available for image files, allowing you to change display settings from Document Display view.

COLD/ERM/Text Files

Text files can be added to AppXtender by importing them or by performing a ColdXtender/ApplicationXtender Reports Management extract and upload. Once the files are in AppXtender, they are stored as AppXtender-proprietary compressed text file format.

Note: In most cases, text files display as text files; otherwise, they display as foreign files. For information on configuring the File Types tab, consult your AppXtender system administrator or refer to the "Configuring AppXtender Document Manager Workstations" section of the *ApplicationXtender Desktop Installation Guide*.

You have access to a large range of AppXtender functionality when you are working with text files in AppXtender. You can add annotations and adjust the display of the image in many ways to allow optimal viewing of the image. You can also perform all of the export functions (such as printing, faxing, exporting, and e-mailing). If you have access to an Index Server for full-text indexing, you can submit text files to the ApplicationXtender Index Server. Document Display properties are also available for text files, allowing you to change display settings from Document Display view.

Form overlays can be added to ASCII documents from ApplicationXtender Reports Management to allow users to view the report data in the context of a standard form. (Form overlays cannot be added to PDF documents from AppXtender Reports Mgmt.) Depending on your AppXtender configuration, COLD/ERM documents with form overlay can be displayed with either text form overlay or image form overlay, or image form overlay only. COLD/ERM documents without form overlay are displayed in an ASCII format.

The following table provides an explanation of each supported text format.

Table 37. Document Storage Format for Text Files

Code	Description
ASCII	ASCII stands for the American Standard Code for Information Interchange. This character set is used on most PCs, Macintoshes, and other desktop computers. A report generated on a desktop computer is likely to be in an ASCII format.
EBCDIC	EBCDIC stands for Extended Binary Coded Decimal Interchange Code. This character set is used on IBM mainframes. A report generated on an IBM mainframe will be in EBCDIC format.
EBCDIK	EBCDIK is the Japanese variation on EBCDIC. This character set is used on IBM mainframes manufactured in Japan. A report generated on a Japanese IBM mainframe will probably be in EBCDIK format.

Rich Text Format (RTF) Files

AppXtender stores RTF files in their native format. You can perform all of the export functions (such as printing, faxing, exporting, and e-mailing). If you have access to an Index Server for full-text indexing and RTF file conversion is configured on the Index Server, you can submit RTF files for full-text indexing. (RTF file conversion is not necessary if your application is configured to use the K2 full-text engine.)

RTF files are displayed in their native format. The contents of the RTF file appear in the document viewer in Document Display view even if the KeyView Viewer is not enabled for foreign files. Because RTF is natively supported in AppXtender, the KeyView Viewer is not required to view file contents.

Note: Document Display properties are not available for RTF files.

Hypertext Markup Language (HTML) Files

HTML files are files written in the language used for display on the World Wide Web. A web page is typically in HTML format.

AppXtender stores HTML files in their native format. You can perform all of the export functions (such as printing, faxing, exporting, and e-mailing).

If you have access to an Index Server for full-text indexing, and HTML file conversion is configured on the Index Server, you can submit HTML files for full-text indexing. (HTML file conversion is not necessary if your application is configured to use the K2 full-text engine.)

Document Display properties are available for HTML files.

Portable Document Format (PDF) Files

PDF files are files in a proprietary Adobe format. AppXtender stores PDF files in their native format. You must download the ApplicationXtender Web Access Adobe Component to view PDF documents

in their native format in ApplicationXtender Web Access. For instructions, refer to [Installing Web Access Client Components](#), page 92.

When PDF files are displayed in their native format, the contents of the PDF file appears in the document viewer in Document Display view, even if you do not have the KeyView Viewer enabled for foreign files. Because PDF is natively supported in AppXtender, the KeyView Viewer is not required to view file contents.

You can add annotations and adjust the display of the PDF file in many ways to allow optimal viewing. Document Display properties are available for PDF files. You can also perform all of the export functions (such as printing, faxing, exporting, and e-mailing). While using these export functions, you may be able to hide annotations on a PDF file, depending on the privileges assigned to your user account.

If you have access to an Index Server for full-text indexing, you can submit PDF files for full-text indexing.

Note: PDF files that have been submitted for full-text indexing in releases prior to 4.6 can be full-text searched but the display of hits differs from that of PDF files submitted in the 4.6 release or later.

Unsupported Files

Unsupported files are stored in AppXtender in their native format. Unsupported files include foreign files and OLE files. For most unsupported file types, you can choose whether to add the file as an OLE object or a foreign file when you add the file to AppXtender. For more information, refer to the following topics:

- [Foreign Files](#), page 202
- [OLE Objects](#), page 203

Foreign Files

When you import a file that is *not* natively supported in AppXtender (that is, all files other than TIFF, GIF, Windows bitmaps, PCX, DCX, JPEG, TGA, RTE, HTML, and PDF), AppXtender stores the file as a foreign file. AppXtender stores foreign file types in their native file format.

Pages imported as foreign files are represented in AppXtender Web Access by an icon. To view the contents of the page, you must activate foreign file export using either the KeyView Viewer or a third-party viewer. For example, if you add a Microsoft Word document to ApplicationXtender as a new document, when you try to view the document in the AppXtender Web Access document viewer, a Word icon appears representing the page. To view the document contents, you must double-click the icon to launch Microsoft Word and display the document.

You can perform all of the export functions (such as printing, faxing, exporting, and e-mailing) for foreign files. If you have access to an Index Server for full-text indexing and foreign file conversion is configured on the Index Server, you can submit foreign files to the Index Server. (Foreign file conversion is not necessary if your application is configured to use the K2 full-text engine.) You can view page information for foreign files, and Document Display properties are also available. To edit a foreign file, you launch the foreign file in its associated source application and make changes to the document in that application.

Certain foreign files can be created, accessed, and modified using ODMA. If you want to create AppXtender documents with files from an ODMA-compliant application that is supported by AppXtender, you can do so. When you create a document through ODMA, that file is stored in AppXtender as a foreign file.

The following table lists the ODMA-compliant applications that are supported by AppXtender.

Table 38. ODMA-Compliant Applications Supported By AppXtender

Format	Application
Word Processing	Microsoft Word 2000
	Microsoft Word 2002 (XP)
	Microsoft Word 2003
	WordPerfect 12
Standard Graphic	Visio 2000
	Visio 2002 (XP)
	Visio 2003
Presentation	Microsoft PowerPoint 2000
	Microsoft PowerPoint 2002 (XP)
	Microsoft PowerPoint 2003
Other	Microsoft Project 2000



Caution: Use of ODMA with any of the Corel Office 2000 suite of products causes system failure and is *not* supported with AppXtender.

Your administrator decides how foreign files will be displayed in Document Display view in ApplicationXtender Web Access. If the KeyView Viewer is enabled in AppXtender configuration, the content of foreign files that are supported under KeyView appears in Document Display view. If the KeyView Viewer is not enabled, foreign files appear as icons.

For a list of the foreign files that can be viewed using the KeyView Viewer feature, refer to "Pre-defined Applications: _FORMS and _RSTAMP" in the *ApplicationXtender Core Components Administrator's Guide*.

OLE Objects

When you insert a file that is not supported in AppXtender as an object, AppXtender uses Object Linking and Embedding (OLE) to embed the file in AppXtender. AppXtender stores OLE objects in their native file format.

You can perform all of the export functions (such as printing, faxing, exporting, and e-mailing) for OLE objects. You can view page information for OLE objects in AppXtender. Document Display properties are also available for OLE objects.

You can choose how to display OLE objects in your AppXtender Document Display view. If you choose to insert the object normally, the content of the object appears in the view. If you choose to Display as Icon, the OLE object will appear as an icon in Document Display view.

If the OLE object is displayed as an icon, you can double-click the icon to activate the OLE object and start the source application. If not displayed as an icon, you can double-click the OLE object and perform in-place editing. In-place editing means that the AppXtender Document Manager menus change to the menus of the source application so that you can access source application commands without leaving the AppXtender Document Display view viewer.

Note: OLE objects cannot be submitted for full-text indexing.

Selecting the Display Mode for a AppXtender Web Access Document

If your AppXtender Web Access administrator has turned on the Check In/Check Out mode on the AppXtender Web Access server and you have selected the Prompt For Checkout check box on the Document View page of the Settings dialog box, you must check documents out before editing them. If you open a document that another user has checked out, it will open in read-only mode.

If Check In/Check Out is not available on your AppXtender Web Access system, you can view and edit documents regardless of who else is viewing or editing them.

For more information about the display modes available with AppXtender Web Access, including Check In/Check Out mode, refer to the following topics:

- [Normal Display Mode, page 204](#)
- [Check In/Check Out Document Display Mode, page 205](#)
- [Read-Only Document Display Mode, page 208](#)
- [Displaying AppXtender Web Access Documents, page 208](#)

Normal Display Mode

If your system is configured with normal display mode, you can open documents only in normal display mode. When AppXtender Web Access is in normal mode, use of revision control with AppXtender Web Access documents is optional. You can open and modify documents and, when you close them, the modifications are automatically saved to the AppXtender document repository.

You can check out documents while AppXtender Web Access is in normal mode to prevent other users from making changes while you are working on a document. However, you are not *required* to check out a document before making modifications.

Note: The reverse is also true. If another user checks a document out, you cannot modify the same document until the other user has checked it back in.



Caution: In order to prevent accidental data loss, it is strongly recommended that you check out documents before modifying them.

Check In/Check Out Document Display Mode

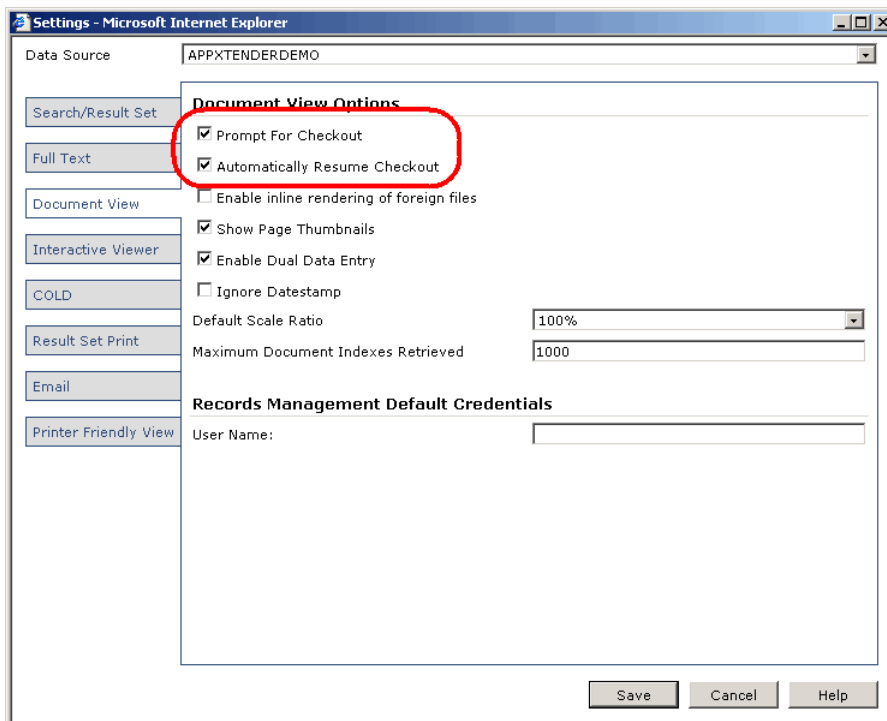
With AppXtender Web Access, you can check out documents when you need to make modifications to them. For other users accessing the document while you have it checked out, the document will open only in read-only mode.

AppXtender Web Access Check In/Check Out mode provides a more secure level of version control than is provided in normal AppXtender Web Access mode. It is strongly recommended that you check out any document you intend to edit. If you make changes to a document without checking it out, accidental data loss can occur if another user makes changes to the same document at the same time.

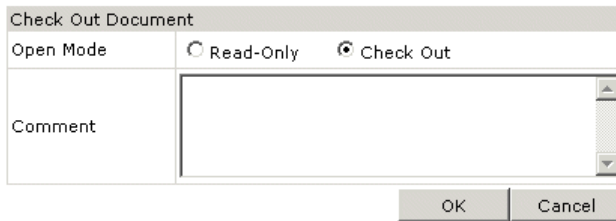
For example, assume you are editing a document and have added a few pages of new data. You have not checked the document out. Another user opens the same document, without seeing the changes you have made (since you are currently working on them), and makes additional changes. Meanwhile, you close and save the document. When the other user closes and saves the same document, his or her changes are saved, overwriting the work you did on the document. All of your changes are lost. If you had checked the document out *before* making changes, the other user would have had to open the document in read-only mode and would not have been able to make any modifications until you were finished and had checked the document back in.

In order to use the Check Out feature, on the Document View page of the Settings dialog box, you need to select the Prompt for Checkout and Automatically Resume Checkout check boxes and click Save.

Figure 143. Document Check-out Settings



Once you have configured AppXtender Web Access in this way, every time you view a document, the Check Out Document dialog box appears before Document Display view opens.

Figure 144. Check Out Document Dialog Box

Note: If you do not select the Automatically Prompt for Checkout option on the Settings dialog box, when Document Display view opens and the document displays, you can access the Check Out Document dialog box by clicking Check Out on the Document menu.

To check out a selected document:

1. From the query result set, select the document you want to work with. The Check Out Document dialog box appears.
2. Verify that the Check Out selection button is selected. If not, click the button to select it.
3. Enter a comment in the Comment text box.
4. Click OK. The document, which is now checked out to you, appears in Document Display view.

When you check out a document, a copy of the document as it exists in the ApplicationXtender repository is created by AppXtender. This copy becomes your working copy in AppXtender Web Access. Even when you close a document, you can keep the document checked out in order to continue working on it.

When you finish your modifications, you can choose to check the document back into the repository. You can replace the most recent revision in the repository with the current revision, or you can check it in as a new revision and mark it as a minor revision or a major revision.

If the application you are working with has Prompt for check out on open documents enabled, when you check in a document that is in final form, you can save the document as a final revision. Once this is done, users can open the document only in read-only mode and cannot modify the document. For information on enabling final revision functionality when setting up AppXtender applications, refer to "Creating an Application" in the *ApplicationXtender Core Components Administrator's Guide*.

Note: Users with deletion privileges can delete final document revisions from the AppXtender repository.

You can also choose to cancel checkout of the document. When you cancel checkout of the document, the working copy created when you checked the document out of the repository is deleted, and AppXtender considers the document revision in the repository as the current revision. Any changes that you made to the working copy are discarded.

While the document is checked out to you, any other user who accesses the document will get a read-only copy of the document. If you want other users to access the document in edit mode, you must check the document back in.

When you finish working with the document, you should check the document back in so that other users can edit the document if necessary. Part of the check-in procedure is to identify the status of the revision. You can assign the document revision as a minor revision, a major revision, or a replacement for the current revision.

The following table lists the three document revision types and describes the function of each type.

Table 39. Document Revision Types

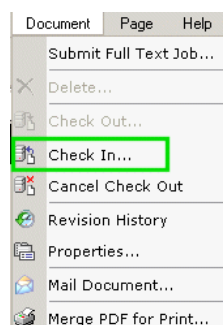
Option	Description
Check in as a minor revision	Creates a new AppXtender Web Access document version, keeps the previous version, and checks in the document. The new version uses the same document index information as the previous version. For each minor revision, the version number for the document increases by .1 (for example, version 1 becomes version 1.1).
Check in as a major revision	Creates a new AppXtender Web Access document version, keeps the previous version, and checks in the document. The new version uses the same document index information as the previous version. For each major revision, the version number for the document increases by 1 (for example, version 1 becomes version 2).
Replace current revision	Replaces the page revision that was retrieved when the AppXtender Web Access document was checked out and checks in the new document. The page version that you modified has been replaced and cannot be retrieved through AppXtender Web Access.
Final document	The document can be opened only in read-only mode; it cannot be checked out or modified.

If the application has final revision functionality, for the final revision of a document, you mark the document as a final revision when you check the document back into the repository. Once a document is saved as a final revision, it can be opened only in read-only mode and cannot be modified.

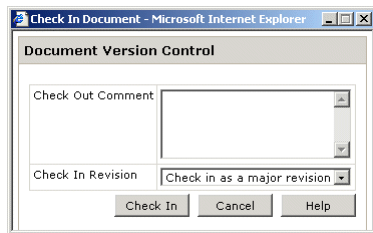
To check in a document:

1. On the Document Display view Document menu, click Check In.

Figure 145. Check In Option on Document Menu



The Check In Document dialog box appears.

Figure 146. Check In Document Dialog Box

2. Enter a comment in the Check Out Comment text box.
3. From the Check In Revision list box, select the revision status.
4. When you finish, click Check In.

Read-Only Document Display Mode

In read-only display mode, documents cannot be modified, they can only be read. There are several circumstances when you must work with documents in read-only mode, as follows:

- If you have already checked out a document and then open another instance of the same document
Note: To prevent this, select Automatically Resume Checkout on the Document View Page of the Settings dialog box. AppXtender Web Access will now automatically resume check out for any document that you have checked out previously but have not checked back in.
- If you open a document that is checked out by someone else
- If the Prompt For Checkout setting is selected on the Document View page of the Settings dialog box
- If the document has been finalized



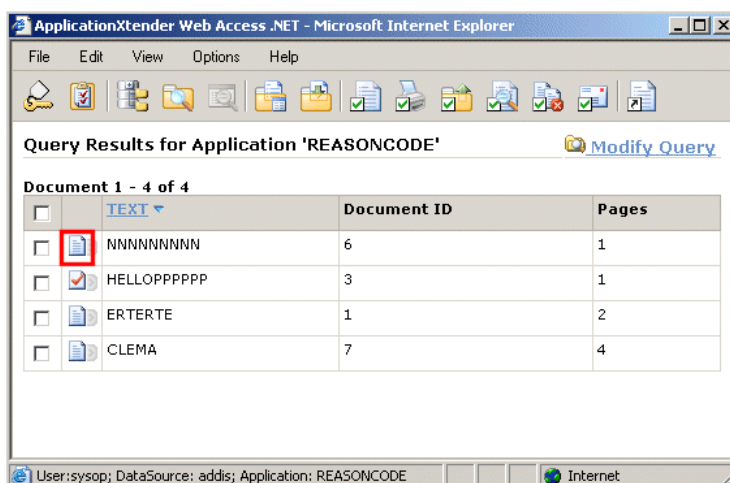
Caution: Modifications cannot be saved to a document if the document is opened in read-only mode. You cannot add or delete new pages or page revisions to the document, add annotations or redactions, or modify the document index.

If you open a document in read-only mode and decide that you want to make changes to the document, assuming the document is not already checked out by another user, you can check out the document using the Check Out option in the Document menu in Document Display view.

Displaying AppXtender Web Access Documents





In both Thin Client and Interactive Client mode, after running a query, you select documents from Query Results view to see the documents in Document Display view. Icons to the left of the document names on result set pages indicate either the document version for each document in the result set or whether the document has been checked out.


Figure 147. Document Icons in Query Results View



The following table explains the meaning of each icon.

Table 40. Document Icons (Query Results View)

Icon	Description	Meaning
	Blue page	Indicates the latest version of the document.
	Grey page	Indicates a previous revision of the document. You can open previous revisions only in read-only mode.
	Check mark on page	Indicates a user has checked out the document. When you check out a document, you are the only user who can modify the document. Other users opening the document can access the document only in read-only mode.
	Clock face on page	Indicates that the document has been filed for Centera retention, AppXtender software retention, or Records Manager retention. You cannot modify a document under retention; however, you can check out the document and create a new version of the document. For information on filing a document for retention, refer to Filing Documents for Retention , page 298.
		Before you can modify a document that is filed for Records Manager retention, you must check the document out. For information on filing a document for Records Manager

Icon	Description	Meaning
		retention, refer to Appendix B, Working with Records Manager for ApplicationXtender
	Clock face and lock on page	Indicates a retention hold has been applied to the document.

To display a document from a AppXtender Web Access result set, click the page icon for the document. When you click the icon, Document Display view opens and the document appears in the viewing area. You can then use the menu options and toolbar buttons to perform a variety of tasks.

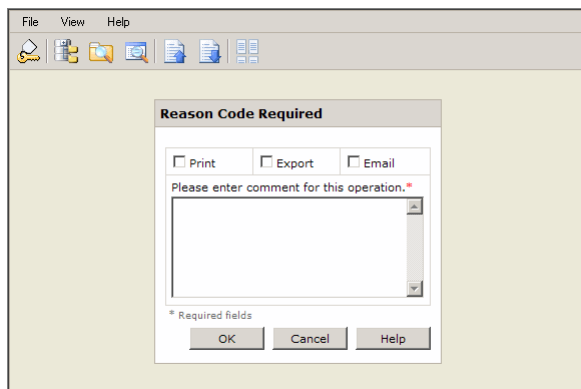
Note: The first time you access pages in the AppXtender Web Access interface, you may notice that they take some time to load. This is because AppXtender Web Access uses "just-in-time" compilation. With "just-in-time" compilation, the first time you access a page, ApplicationXtender Web Access compiles the page into its native code. The page is then cached and downloaded. With this method, although the page takes longer to load initially, it should load quickly the next time someone accesses it.

In AppXtender Web Access, you can open and view multiple documents simultaneously in read only mode. On the query result set page, click the document icon for the first document you want to open. The document appears in Document Display view. Return to the results page and select the second document you want to open. This document appears in another Document Display view. Continue for each of the remaining documents you want to open. When you finish, each document you opened appears in its own Document Display view.

Entering Reason Codes

When you select to view a document or select to print, export, or e-mail one or more documents, you may be prompted to enter a reason code and comments explaining the reason for your action.

Figure 148. Reason Code Required Dialog Box



To enter a reason code:

1. In the Reason Code Required dialog box, click the check box for the task you will be performing.

2. In the Please enter comment for this operation text box, type a comment describing the reason you are performing the task.

Note: You must type a comment in this text box.

3. Click OK. The Reason Code Required dialog closes.

Thin Client Document Display View Functionality

When you click to open a document from a query result set, Document Display view opens and the first page of the selected document appears. If Show Page Thumbnails is selected on the Settings dialog box Document View page, Thumbnails view appears to the left of the document image.

Note: When thumbnails are displayed, use the Page list box on the toolbar to navigate through the pages. For more information on navigating through multi-page documents, refer to [Thin Client Document Display View Menu Bar and Toolbar, page 211](#).

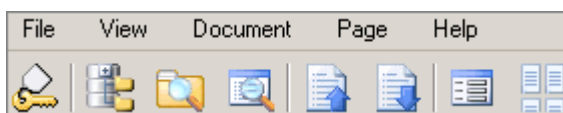
Refer to the following topics for more information about Document Display view functionality using the Thin Client:

- [Thin Client Document Display View Menu Bar and Toolbar, page 211](#)
- [Thin Client Document Display View Document Viewer, page 214](#)
- [Thin Client Document Viewer Toolbar, page 215](#)
- [Thin Client Document View Frame, page 217](#)
- [Printing AppXtender Document Pages in Thin Client Mode, page 218](#)
- [Exporting a Displayed Document to an XPS File, page 220](#)
- [E-Mailing a Displayed Document in Thin Client Mode, page 220](#)
- [Saving a Displayed Document, page 220](#)
- [Viewing Foreign Files, page 220](#)

Thin Client Document Display View Menu Bar and Toolbar

The Thin Client Document Display view menu bar and toolbar are located at the top of Document Display view.

Figure 149. Thin Client Document Display Menu Bar and Toolbar



For detailed information about the menu bar and toolbar, refer to the following topics:

- [Document Display View Menu Bar, page 212](#)
- [Document Display View Toolbar, page 213](#)

Document Display View Menu Bar

The Thin Client Document Display menu bar has five options: File, View, Document, Page, and Help. When you click File, View, Document, or Page, drop-down menus appear.

The following tables describe the options available from these function menus.

Table 41. Thin Client Document Display View File Menu

Option	Description
Previous Document	When viewing multiple documents, display previous document in the group of selected documents.
Next Document	When viewing multiple documents, display the next document in the group of selected document.
Logout	Log out of ApplicationXtender Web Access.

Table 42. Thin Client Document Display View View Menu

Option	Description
Applications	Display Applications List View
New Query	Display Query view for the currently selected application.
Query Results	Display the results from the last query that was run in the current session, if applicable.

Table 43. Thin Client Document Display View Document Menu

Option	Description
Previous Page	Display the previous page in a multi-page document.
Next Page	Display the next page in a multi-page document.
Navigate to Page	Display a specified page number.
Submit Full Text Job	Submit the document to the Index Server as a full text job.
Delete	Delete the current document.
Check Out	Check out a document.
Check In	Check a document back in.
Cancel Check Out	Cancel Check out request.
Copy or Move Pages	Copy or move document pages to another application.

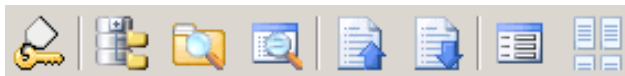
Option	Description
Save Protected Copy	Apply IRM protection to an exported document.
Revision History	Display the revision history for the document.
Properties	Display the document properties.
Mail Document	E-mail the document.
Merge PDF for Print	Merge PDF files and print document.

Table 44. Thin Client Document Display View Page Menu

Option	Description
Add Page	Add a page to a document.
Delete Page	Delete a page from a document.
Show Version	Show the version number for a document.
Next Subpage	Display next subpage in document.
Previous Subpage	Display previous subpage in document.
Text View	Display text view of document.
Printer-Friendly View	Display document pages in a printer-friendly format in a separate window from which you can print the pages.
Save Protected Copy	Apply IRM protection to an exported document.
Enable Scanning	You cannot scan documents in Thin Client mode, so this option is grayed out, indicating that it is not available.
Reorder Page	Reorder pages in a document.

Document Display View Toolbar









The Thin Client Document Display view toolbar has buttons to support the following functions: Logout, Applications, New Query, Query Results, Previous Document, Next Document, Document Index, and Toggle Document Thumbnail View.

Figure 150. Thin Client Document Display View Toolbar

Note: Some of these buttons may be grayed out depending on how long you have been logged on during the current session and the types of tasks you have been performing. For example, if you have not performed a query for the currently selected application, the Query Results button will not be available.

The following table describes the function of each button on this toolbar.

Table 45. Thin Client Document View Toolbar Buttons

Button	Function
	Log out of ApplicationXtender Web Access.
	Display Applications List view.
	Display Query view.
	Display Application Query Results for the most recently run query for the selected application (if any).
	Return to previous document.
	Go to next document, if any.
	Display Index view for the current document.
	Toggle between Thumbnails view and the thumbnails contact sheet.

Thin Client Document Display View Document Viewer

Document images appear in the document display viewer, which is located below the Document Display view menu bar and toolbar. The first page of the selected document appears by default when the viewer opens.

If the document you are working with has two or more pages and you selected Show Page Thumbnails in your user settings, Thumbnails view appears to the left of the Document View document viewer. (Thumbnails view is discussed in detail in [Thumbnail View, page 196](#).)

Note: When using the Thin Client, if annotations are configured for groups, only annotations viewable by all users appear on the page. To access and edit group-specific annotations and redactions, you must use the Interactive Client.

The document status bar at the bottom of the frame contains the name of the data source, the current page number and the total number of pages in the document, the page version and total number of versions, and the zoom percentage for the image. If the document has subpages, the subpage number also appears in the status bar.

Note: If the document is in Full Text View mode, full-text search and hits information also appear in the status bar.

Note: If HTML Export of Foreign Files is enabled on both the AppXtender Web Access server side and on your client, foreign files will be rendered as HTML rather than links that can be used to download or open the foreign file. If the foreign file is an unrecognized file type, it will appear as a

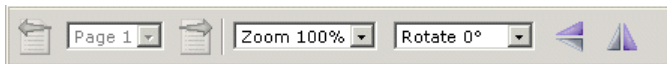
link that you can use to download or open the file in its native application. Refer to [Chapter 2, Customizing Your Workstation](#) for information on exporting foreign files as HTML.

Note: HTML Export of foreign files behaves the same way in both the Interactive Client and the Thin Client. For full information about viewing rendered HTML of foreign files, refer to [Viewing Foreign Files, page 220](#).

Thin Client Document Viewer Toolbar

The Thin Client Document Viewer toolbar is located at the top of the viewer window. There are four sets of controls on the Thin Client document viewer toolbar: navigation options, zoom controls, rotation controls, and mirroring controls.

Figure 151. Thin Client Document Viewer Toolbar



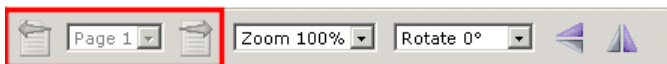
For information on the control options available from the document display viewer toolbar, refer to the following topics:

- [Thin Client Navigation Options, page 215](#)
- [Image Zoom Controls, page 216](#)
- [Rotation Controls, page 216](#)
- [Mirroring Controls, page 216](#)

Thin Client Navigation Options


If the document has more than one page, you can use the navigation controls to move from one page of the document to another.

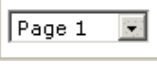

Figure 152. Thin Client Document Display View Navigation Controls



The following table describes the navigation options available in Thin Client mode.

Table 46. Thin Client Navigation Options

Option	Description
	Display the previous page.

Option	Description
	Select a page to view.
	Display the next page.

To move through the pages of multi-page documents:

- On the toolbar, use the next and previous arrows or the page list box.
- In the Document View frame, use the scroll bars on the right side and at the bottom of both the viewing area.
- In the thumbnails frame, click the thumbnails to preview pages or use the frame scroll bars. To display the page of the document corresponding to a thumbnail, double-click the thumbnail to select the page.

Image Zoom Controls

Use the image zoom controls to change the magnification of the image in the Document View frame. You can either zoom in on the page (enlarging image size) or zoom out (reducing image size). The available zoom percentages for viewing documents are listed in a list box to the right of the navigation controls.

To use the zoom controls:

- Select a percentage from the drop-down list.

Rotation Controls

Use the rotation controls to rotate the image in the viewer counterclockwise in 90° increments from 0° to 360°.

To use the rotation controls:

- Select a degree of rotation from the drop-down list.

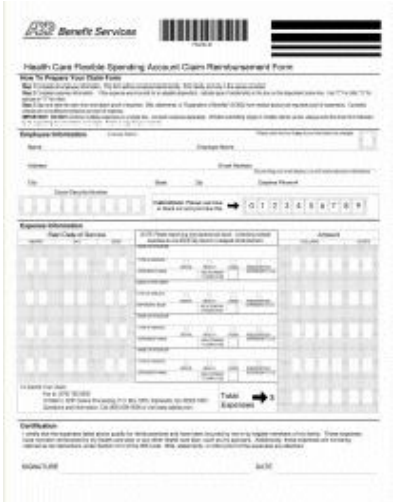

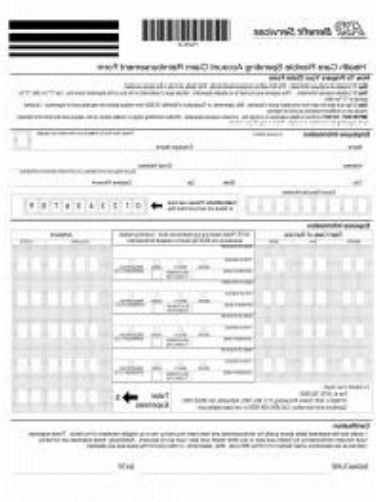
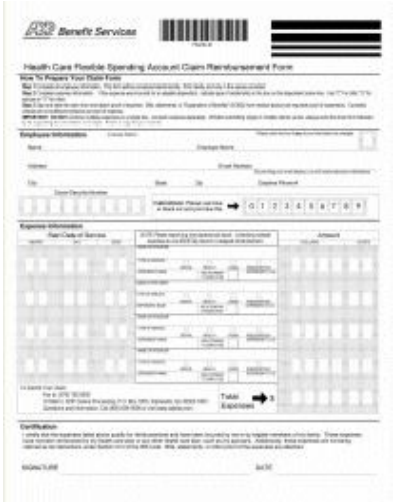

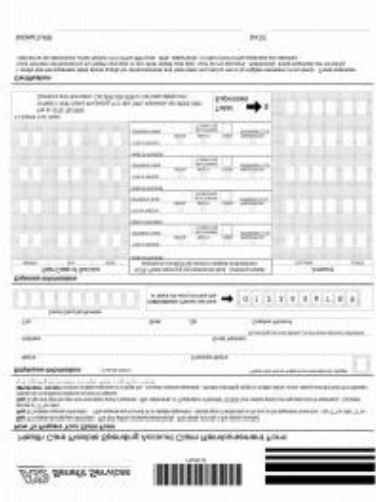
Note: Changing the rotation of an image only affects the way the image appears in the Thin Client viewer. It does not affect the document itself.

Mirroring Controls

Use the mirroring controls to display a mirror image of the displayed image. You can mirror an image left-to-right or top-to-bottom.

The following table shows the effects of the mirroring controls on a displayed image.

Table 47. Effect of Mirroring Controls

Original Image	Select This Control	Mirrored Image
		
		

Thin Client Document View Frame

Images of individual pages from the document appear in the Document View frame located below the Document Display view toolbar. The first page of the selected document appears by default when Document Display view opens.

If the document you are working with has two or more pages and if Show Page Thumbnails is selected on the Document View page of the Settings dialog box, Thumbnails view appears to the left of the Document View frame.

The status bar at the bottom of the Document View frame shows the name of the data source, the document ID, the current page number and the total number of pages in the document, and the page version. If the document has subpages, the subpage number also appears in the status bar.

Note: If the document is in Full Text View mode, full-text search and hits information also appear in the status bar.

Printing AppXtender Document Pages in Thin Client Mode

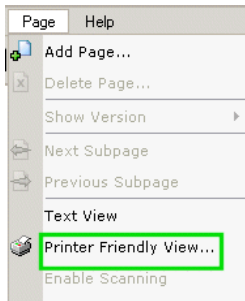
Thin Client printer-friendly functionality allows you to print pages from AppXtender documents directly from your Web browser.

Note: Printer-friendly options are configured on the Printer Friendly View tab on the Settings dialog box.

To print a page from an AppXtender document using the Thin Client:

1. From the result page, open the document from which you want to print.
2. Display the page to be printed in the Document View frame.
3. Click Page on the Document Display view menu. When the Page menu appears, click Printer Friendly View.

Figure 153. Printer Friendly View Option on Page Menu




The AppXtender Web Access Print View window opens, displaying the selected page in printer-friendly view.

Figure 154. Print Window (Printer Friendly View)

Printer Friendly View - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail News Groups



OTG Software
 6791 Danvers Boulevard
 Suite 003
 Bethesda, MD 20817
 (201) 937-1400

INVOICE

INVOICE NO: 163881
DATE: May 29, 1997

To:

_niays Portugal
 Saldio Monumental
 Av. Praia da Victoria 71A-7
 1C501 (Lisboa, Portugal)

Ship To:

Same
 End User: Insto

SALESPERSON	P.O. NUMBER	DATE SHIPPED	SHIPPED VIA	F.O.B. POINT	TERMS
Intt	13/14	5/28/97	D-AL Collect		Nr: 30

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
1	DisalExtender Software Level D-COC	\$2,099.00	\$2,099.00
1	Annual 1 st Tie Maintenance for DE OC 6/27/97 6/25/98	\$ 609.00	\$ 609.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
			\$ 0.00
		SUBTOTAL	\$2,608.00
		SALES TAX	
		SHIPPING & ADMIN FEE	
		TOTAL DUE	\$2,608.00

IMPORTANT NOTE:

Please remit payment upon receipt of this faxed Invoice. Original copy of invoice will follow for record keeping.

Payment Instructions:
 Make checks payable to: Optical Technology Group, Inc. You MUST include your invoice number to ensure

4. From the File menu, click Print. The Print dialog box appears.

Figure 155. Print Dialog Box

The screenshot shows the 'Print' dialog box with the 'General' tab selected. The 'Select Printer' list contains three options: 'ActiveTouch Document Loader', 'HP4100DTN_DOCUMENTATION on OTGPRINT' (which is selected and highlighted in blue), and 'WebWorks Rasterizer'. Below this list, the status is 'Ready', the location is 'Documentation 4th Floor', and the comment is 'Documentation 4th Floor'. There is a checkbox for 'Print to file' and a 'Find Printer...' button. The 'Page Range' section has three radio buttons: 'All' (selected), 'Selection', and 'Current Page'. Below these is a 'Pages' field with the number '1' entered. A text box below the 'Pages' field says 'Enter either a single page number or a single page range. For example, 5-12'. The 'Number of copies' section has a numeric field set to '1' and a 'Collate' checkbox. To the right of the 'Collate' checkbox are three small document icons labeled '1', '2', and '3'. At the bottom of the dialog are three buttons: 'Print' (highlighted), 'Cancel', and 'Apply'.

Note: Since only the currently displayed page is printed in Printer Friendly View, it is not necessary to select any of the Page Range option buttons.

5. If required, select another printer from the Select Printer list. Or, click Find Printer to connect to a printer.
6. At the Number of copies field, select the number of copies you want printed.
7. Click Print to print the currently displayed page.

8. When printing finishes, click Close from the File menu to close the Print window and return to Document Display view.
9. To print another page, repeat steps 2 through 8.

Exporting a Displayed Document to an XPS File

ApplicationXtender allows you to export a displayed document to an XPS file by using the Microsoft XPS Document Writer to print the document.

To print a displayed document to an XPS file, select Microsoft XPS Document Writer from the Name list box on the Print dialog box. Refer to [Printing AppXtender Document Pages in Thin Client Mode, page 218](#) for more information.

Note: Contact your system administrator or refer to the Microsoft Web site for more information on generating and viewing XPS files.

E-Mailing a Displayed Document in Thin Client Mode

You can use the AppXtender Web Access e-mail function to e-mail one or more documents. To access the e-mail dialog box, click the e-mail button. Information on e-mailing is presented in detail in "Using E-Mail Functionality" in [Using E-Mail Functionality, page 287](#).

Saving a Displayed Document

When working in Thin Client mode, use the browser Save function to save the document page currently displayed in the Document View frame.



Caution: Saving the displayed image using browser commands saves only the active AppXtender Web Access page, not all pages in the AppXtender Web Access document.

Viewing Foreign Files

Your Web Access administrator determines how the Web Access system processes foreign files. Refer to these topics for more information:

- [Using an Application to View a Foreign File, page 221](#)
- [Viewing Foreign Files in HTML Format, page 221](#)
- [Using Links to Manage Foreign Files, page 221](#)

Using an Application to View a Foreign File

Your Web Access administrator can configure the Web Access system to open a foreign file with a specific application. Web Access displays the foreign file name as a link. Clicking the link opens the file in the application if the application is installed on your workstation.

Viewing Foreign Files in HTML Format

Web Access displays HTML versions of foreign files if your Web Access administrator configured the Web Access system for this feature and you selected the Enable inline rendering of foreign files option on the Document View tab. Refer to [Document View Tab, page 72](#) for more information.

Using Links to Manage Foreign Files

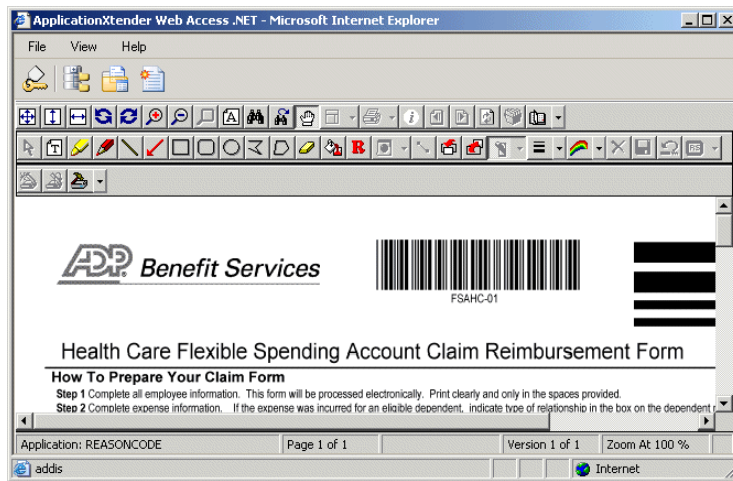
If your Web Access administrator configured the Web Access system to render foreign files in HTML format and the Enable inline rendering of foreign files option on the Document View tab is disabled, Web Access displays links to open the foreign file or render the foreign file. Refer to [Document View Tab, page 72](#) for more information.

To open or save the foreign file, click the Download Foreign File link. If the file's native application is installed on your workstation, Web Access allows you to open the file. If the native application is not installed on your workstation, Web Access allows you to only save the file.

To render the foreign file, click the Render Foreign File link.

Interactive Client Document Display View Functionality

AppXtender Web Access's Interactive Client mode allows users to view documents using the Interactive Client Viewer. All of the functionality available in the Thin Client is included in the Interactive Client, including foreign file conversion. In addition, the Interactive Client features image and annotation toolbars, which contain added content management functionality including annotations, enhanced zoom options, page rotation, magnification, printing, client workstation configuration, image information, and digital signature buttons. If you are viewing a text or COLD/AppXtender Reports Mgmt document, you have access to the Interactive Client Text Search feature.

Figure 156. Interactive Client Document Display View

The Interactive Client Document Display view has a menu bar, an application toolbar, viewing area toolbars, and a viewing area. The first page of the selected document appears in the Document View frame when Document Display view opens. If the document has multiple pages and the Show Page Thumbnails option is selected on the Settings dialog box, Thumbnails view appears to the left of the document image. Each thumbnail represents one page of the document. (Thumbnails represent pages and images but are much smaller in size.)

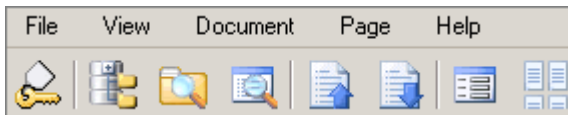
Refer to the following topics for more information about Document Display view functionality in Interactive Client mode:

- [Interactive Client Document Display View Menu Bar and Toolbar, page 223](#)
- [Interactive Client Document Display View Document Viewer, page 225](#)
- [Interactive Client Document View Frame Toolbar, page 226](#)
- [Navigating Displayed Document Pages in Interactive Client Mode, page 229](#)
- [Scanning Documents in Interactive Client Mode, page 230](#)
- [Printing Documents and Document Pages in Interactive Client Mode, page 230](#)
- [Exporting Documents and Document Pages to an XPS File, page 233](#)
- [Displaying Image Information, page 233](#)
- [Refreshing a Document, page 234](#)
- [Using the Text Search Feature, page 234](#)
- [Adding Annotations, page 235](#)
- [Adding Digital Signatures, page 235](#)
- [Saving Foreign Files as a New Version, page 235](#)
- [Using Document Properties Page Features, page 237](#)
- [Working with the Revision History Feature, page 239](#)

Interactive Client Document Display View Menu Bar and Toolbar

The Interactive Client Document Display window menu bar and toolbar are located at the top of the Document Display window.

Figure 157. Interactive Client Document Display Window Menu Bar and Toolbar



Note: Information on e-mailing is presented in detail in "Using E-Mail Functionality" in [Chapter 8, Managing Documents](#).

For more information, refer to the following topics:

- [Document Display View Menu Bar, page 212](#)
- [Document Display View Toolbar, page 213](#)

Document Display View Menu Bar

The Interactive Client Document View menu bar has five options: File, View, Document, Page, and Help. When you click File, View, Document, or Page, function menus appear.

The following tables describes the functions available from these function menus.

Table 48. Interactive Client Document Display View File Menu

Option	Description
Previous Document	When viewing multiple documents, display previous document in the group of selected documents.
Next Document	When viewing multiple documents, display the next document in the group of selected document.
Logout	Log out of ApplicationXtender Web Access.

Table 49. Interactive Client Document Display View View Menu

Option	Description
Applications	Display Applications List View.
New Query	Display Query view for the currently selected application.
Query Results	Display the results from the last query that was run in the current session, if applicable.

Table 50. Interactive Client Document Display View Document Menu

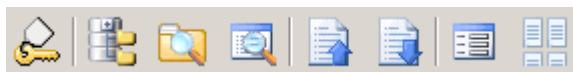
Option	Description
Submit Full Text Job	Submit the document to the Index Server as a full text job.
Delete	Delete the current document.
Check Out	Check out a document.
Check In	Check a document back in.
Cancel Check Out	Cancel Check out request.
Copy or Move Pages	Copy or move document pages to another application.
Save Protected Copy	Apply IRM protection to an exported document.
Revision History	Display the revision history for the document.
Properties	Display the document properties.
Mail Document	E-mail the document.
Merge PDF for Print	Merge PDF files and print document.

Table 51. Interactive Client Document Display View Page Menu

Option	Description
Enable Scanning	Allow documents to be scanned into AppXtender Web Access. Note: When you select Enable Scanning from the Page menu, the menu option changes to Disable Scanning.
Save Protected Copy	Apply IRM protection to an exported document.
Reorder Page	Reorder pages in a document.

Document Display View Toolbar









The Interactive Client Document Display view toolbar has buttons to support the following functions: Logout, Applications, New Query, Query Results, Previous Document, Next Document, Document Index, and Toggle Document Thumbnail View.

Figure 158. Interactive Client Document Display View Toolbar

Note: Some of these buttons may be grayed out depending on how long you have been logged on during the current session and the types of tasks you have been performing. For example, if you have not performed a query for the currently selected application, the Query Results button will not be available.

The following table describes the function of each button on this toolbar.

Table 52. Interactive Client Document View Toolbar Buttons

Button	Function
	Log out of ApplicationXtender Web Access.
	Display Applications List view.
	Display Query view.
	Display Application Query Results for the most recently run query for the selected application (if any).
	Return to previous document.
	Go to next document, if any.
	Display Index view for the current document.
	Toggle between Thumbnails view and the thumbnails contact sheet.

The two toolbars below the Document Display window toolbar are for manipulating the image in the view frame and adding annotations to the document. If you are working at a scanning workstation, a third toolbar with scan buttons also appears. These toolbars are discussed in detail in [Interactive Client Document View Frame Toolbar, page 226](#).

Interactive Client Document Display View Document Viewer

Document images appear in the document display viewer, which is located below the Document Display view menu bar and toolbar. The first page of the selected document appears by default when the viewer opens.

If the document you are working with has two or more pages and you selected Thumbnail view in your user settings, Thumbnails view appears to the left of the Document View document viewer. (Thumbnails view is discussed in detail in [Thumbnail View, page 196](#))

The document status bar at the bottom of the frame contains the name of the data source, the current page number and the total number of pages in the document, the page version and total number of versions, and the zoom percentage for the image. If the document has subpages, the subpage number also appears in the status bar.

Note: If the document is in Full Text View mode, full-text search and hits information also appear in the status bar.

Note: If HTML Export of Foreign Files is enabled on both the AppXtender Web Access server side and on your client, foreign files will be rendered as HTML rather than links that can be used to download or open the foreign file. If the foreign file is an unrecognized file type, it will appear as a link that you can use to download or open the file in its native application. Refer to [Chapter 2, Customizing Your Workstation](#) for information on exporting foreign files as HTML.











Note: HTML Export of foreign files behaves the same way in both the Interactive Client and the Thin Client. For full information about viewing rendered HTML of foreign files, refer to [Viewing Foreign Files](#), page 220.
















Interactive Client Document View Frame Toolbar

The Interactive Client document viewer toolbar includes buttons that allow you to manipulate document images, perform text searches, print document pages, display information about images, and create batches, among other things. If you have the proper permissions, you can use other buttons to make annotations and redactions including lines, arrows, highlights, text, and polyline annotations. You can use the buttons to show or hide annotations, save or delete annotations, and position annotations with reference to the document or batch page.

The Interactive Client Document View frame toolbar has two rows of buttons. The following table identifies the buttons on the first row of the toolbar.

Table 53. Document View Frame Toolbar-First Row



Button	Function
	Fit displayed page in the Document View area.
	Fit displayed page in the viewing area from top to bottom.
	Fit displayed page in the viewing area from left to right.
	Rotate displayed page 90 degrees to the left.
	Rotate displayed page 90 degrees to the right.
	Zoom in on displayed page.
	Zoom out in displayed page.
	Magnify a specific area of the displayed page. When you select the Magnifier button, the mouse pointer becomes a magnifier. When you position the magnifier and click the mouse, the selected region of the document appears in the Magnifier dialog box.
	Display the text or image for the displayed page.
	Display previous page of multi-page document. This button appears only when you view a multi-page document or batch document.

Button	Function
	Display next page of multipage document. This button appears only when you view a multi-page document or batch document.
	Display previous version of document. This button appears only when there is more than one version of the current document.
	Display next version of document. This button appears only when there is more than one version of the current document.
	Search for text in the displayed page.
	Continue searching for the text entered in the text Search dialog box.
	Switch between pan mode and selection mode.
	Displays or hides form overlays on COLD/ERM documents.
	Print current page and all or a range of subpages. Refer to Printing Documents and Document Pages in Interactive Client Mode , page 230 for more information.
	Print the document or PDF file and all or a range of pages.
	Display information about image.
	Display the previous subpage.
	Display the next subpage.
	Refresh the viewing area.
	Opens the Select Files for Batch Import window.
	Display menu of Page options.

The following table identifies the buttons on the second row of the toolbar.

Table 54. Document View Frame Toolbar-Second Row

Button	Function
	Select item
	Text
	Highlight
	Freehand
	Line

Button	Function
	Arrow
	Rectangle
	Rounded Rectangle
	Oval
	Polyline
	Polygon
	Use eraser
	Fill
	Create redaction
	Select default group
	Select All
	Move item to the front
	Move item to the back
	Show/Hide
	Select line width
	Select color
	Delete Item
	Save changes to document
	Cancel changes to document
	Rubber Stamp




If your computer is configured to operate a scanner, a third row is added to the toolbar.

Figure 159. Document View Frame Toolbar-Third Row



The following table identifies the buttons on the third row of the Document View Frame toolbar.

Table 55. Document View Frame Toolbar-Third Row

Button	Function
	Start scanning documents.
	Rescan documents.
	Scanner set up. For more information, refer to Scanning Documents in Interactive Client Mode, page 230 .

Navigating Displayed Document Pages in Interactive Client Mode

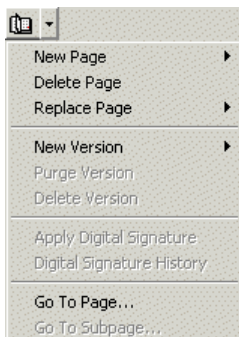
Use the previous page and next page buttons in the first row of the Document View frame toolbar to navigate multi-page documents.

Figure 160. Previous Page and Next Page Buttons

Previous subpage and next subpage buttons appear further along to the right on the same row. The subpage buttons are active only if the current document has subpages; otherwise, these buttons are unavailable.

Figure 161. Previous Subpage and Next Subpage Buttons

The last button in this row is the Page button. When you click this button, a menu of page options appears.

Figure 162. Page Menu

The last two options on this menu are used to go to a page (or subpage) that you specify. When you click Go To Page, a dialog box appears.

Figure 163. Go To Page Dialog Box

Scanning Documents in Interactive Client Mode

In Interactive Client mode, if you have the required permissions, you can scan documents and pages and add the images to the database. You can scan in new documents, as well as pages for existing documents.

The steps to scan documents are discussed in detail in [Chapter 4, Scanning](#).

Printing Documents and Document Pages in Interactive Client Mode

The Interactive Client offers two print options: Print current page and Print Document/PDF Print. Both of these options are discussed in the following section.

- [Printing Pages Using the Print Current Page Option, page 230](#)
- [Printing a Displayed Document or PDF Using the Print Document/PDF Print Option, page 231](#)

Note: To configure scale-to-gray and endorsement options and to turn the Save Tool toolbar on and off, go to the Interactive Viewer page on the Settings dialog box. Go to the COLD Page page on the Settings dialog box to configure COLD settings.

Printing Pages Using the Print Current Page Option

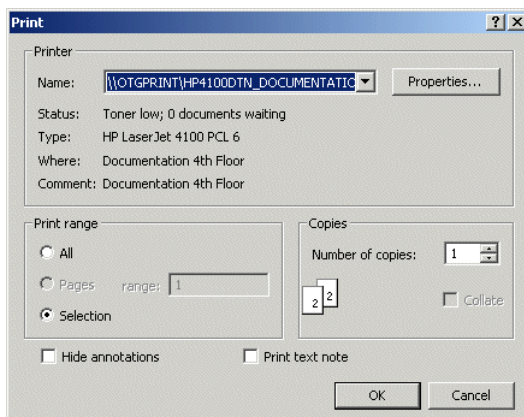
Use the Print current page button located on the Document View frame toolbar to print a single page from the currently displayed document.

Figure 164. Print current page Button on Document View Frame Toolbar

Note: To print a *range* of pages, use the Print Document/PDF Print option.

To print a page using the Print current page function:

1. If the document has more than one page, display the page you want to print in the viewer.
2. Click the Print current page button on the Document View frame toolbar. The Print dialog box appears, with the Selection option button selected.

Figure 165. Print Dialog Box-Interactive Client

3. If necessary, select another printer from the Printer list box.
4. To hide annotations while printing, select the Hide annotations check box.
5. To print graphical text notes on a separate sheet of paper, select the Print text note check box.
6. Select the number of copies you want printed from the Number of copies spin box.
7. Click OK to print the specified page. When printing is complete, the Print dialog box closes automatically and you are returned to the Document Display window.

Printing a Displayed Document or PDF Using the Print Document/PDF Print Option

Use the Print Document/PDF Print button to print displayed documents and PDFs. You can also use this option to print a range of pages from the displayed document or PDF. The Print Document/PDF Print option gives you more control over the quality of the printed documents.

Figure 166. Print Document/PDF Print Button on Document View Frame Toolbar

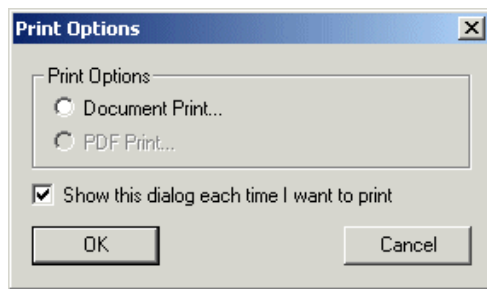
Note: Multiple documents can be printed simultaneously from the result set. Refer to [Printing Selected Documents](#), page 186 for more information.



Caution: You must download the ApplicationXtender Web Access Adobe Component in the Installed Components list in order to print PDF documents. For more information, refer to [Chapter 2, Customizing Your Workstation](#).

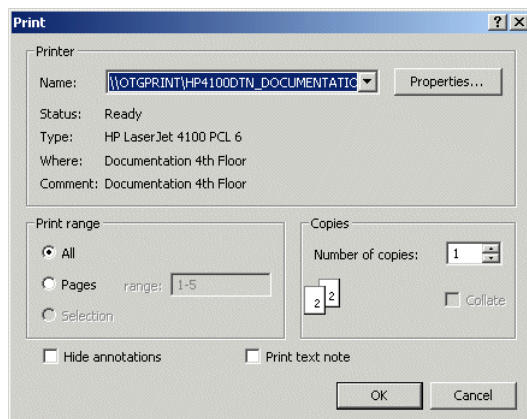
To print a displayed document using the Print Document/PDF Print button:

1. Click the Print Document/PDF Print button. The Print Options dialog box appears.

Figure 167. Print Options Dialog Box

AppXtender Web Access automatically selects either Document Print or PDF Print in the Print Options box. The other option is unavailable.

2. To bypass the Print Options dialog box in the future and always use the currently selected print option, clear the check mark from the Show this dialog each time I want to print check box.
3. Click OK. The Print dialog box appears.

Figure 168. Print Dialog Box

4. Notice that the All option button is automatically selected for you. To print only a range of pages from the document, click the Pages option button and type the range of pages in the text box in <#>-<#> format (for example, 2-5).
5. If necessary, select another printer from the Printer list box.
6. To hide annotations while printing, select the Hide annotations check box.
7. To print graphical text notes on a separate sheet of paper, select the Print text note check box.
8. At the Number of copies field, select the number of copies you want to print.
9. Click OK to print.

Exporting Documents and Document Pages to an XPS File

ApplicationXtender allows you to export documents and document pages to an XPS file by using the Microsoft XPS Document Writer to print documents or document pages.

To print documents and document pages to an XPS file, select Microsoft XPS Document Writer from the Name list box on the Print dialog box. Refer to [Printing Documents and Document Pages in Interactive Client Mode](#), page 230 for more information.

Note: Contact your system administrator or refer to the Microsoft Web site for more information on generating and viewing XPS files.

Displaying Image Information

You can view image information for a displayed document using the Image Information button on the toolbar.

When you click the Image Information button, the Image Information dialog box appears. There are two tabs with information: Information and Files.

Figure 169. Image Information Dialog Box-Information Tab

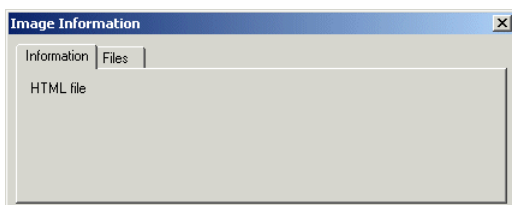
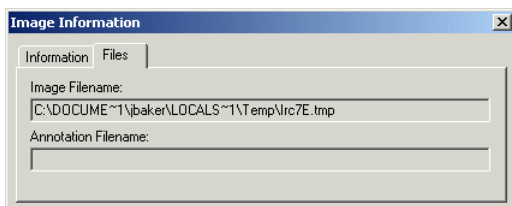


Figure 170. Image Information Dialog Box-Files Tab



The following table describes the information that appears on the Image Information dialog box tabs.

Table 56. Image Information Dialog Box

Option	Description
Information Tab	
Width	Number of pixels or characters used for width of page.

Option	Description
Height	Number of pixels or lines used for height of page.
Bits Per Pixel	Number of bits for each pixel.
Resolution	Resolution of the image.
Size	Compressed page file size (in bytes).
Compression	Type of compression used for this image.
Type	Page file type (TIFF, JPEG, etc.).
Files Tab	
Image Filename	Path location and filename of the stored page.
Save Tool Filename	Path location and filename of the annotations that appear on the page, if any.

Refreshing a Document

Use the Refresh button to refresh the current document.

Using the Text Search Feature

You can perform text searches from the Document View frame on COLD or text-only documents while using the Interactive Client. This feature saves you from having to read through an entire document to find matching text.

To search for text within a displayed text or COLD document or page:

1. Display a text or COLD document or page.
2. Click the Text Search button located on the Document View frame toolbar.
Note: If you do not see the Text Search button, you may be viewing an image. If the image has been submitted to the Full Text Index Server, you can click the Text View button to open the corresponding text file. The Text Search and Search Again buttons appear on the toolbar.
3. The Search dialog box appears. Enter the text you are searching for in the Find text box.
4. To find a specific combination of uppercase or lowercase text that matches your criteria, click the Ignore Case check box to remove the check mark.
5. Under Scope, indicate which pages you want to search: the displayed page (Page) or all pages in the document (Document).
6. Under Direction, indicate the direction in which you want AppXtender Web Access to search through the page: find next occurrence (Next) or find previous occurrence (Previous).
7. Under Origin, indicate where on the page you want AppXtender Web Access to start searching: search from previous search match (Last Match) or search from the top of the page (Top).

8. Click OK. AppXtender Web Access searches for the criteria you specified according to the settings you chose.
 - If AppXtender Web Access finds any text that matches the criteria, AppXtender Web Access highlights the first text match located.
 - If no match is found for the criteria, a Text not found message appears.
9. If a match is found and you want to locate another match in the selected direction, click the Search Again button on the Document Display window toolbar.

Adding Annotations

When you work with documents using the Interactive Client viewer, several types of annotations are available for your use. For example, you can use manual marks such as lines, arrows, and highlights to emphasize various parts of the document page. Shapes such as ovals, rectangles, and rounded rectangles can be added. The polyline feature allows you to add multi-node lines. Polygonal annotations can be used to emphasize asymmetrical areas. You can add text annotations that can be viewed as actual text or as an button. All annotations, including text, can be placed within documents in transparent or opaque (filled) mode.

Note: When you add annotations to a document with subpages, you can add annotations only to the first subpage of the document.

Steps to create annotations are discussed in detail in [Chapter 7, Annotations](#).

Adding Digital Signatures

With AppXtender Web Access, if you have the proper permissions, you can add digital signatures to document images.

To add a digital signature to a document:

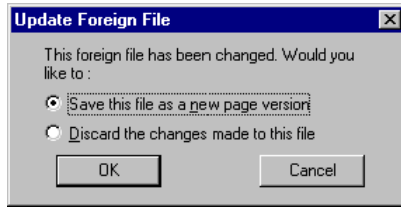
1. On the Document View toolbar, open the Page button list box.
2. Click Add Digital Signature.

Saving Foreign Files as a New Version

After making changes to a foreign file, you can save the document as a new version.

To save a foreign file as a new version:

1. Open the foreign file you want to modify.
2. Make changes to the document as needed.
3. Close the document. The Update Foreign File dialog box appears.

Figure 171. Update Foreign File Dialog Box

4. To save the document as a new version, click the Save this file as a new page version button.
To discard your changes, click the Discard the changes made to this file selection button.
5. Click OK.

Note: If you are working with a foreign file document that is checked out by another user, you will not be able to save any changes you make to the document. Instead, when you close the document, an Interactive Viewer OCX message appears. Click OK to exit.

If the document was batch indexed when it was imported or was not indexed when it was imported, when you close the document, the Save As dialog box appears. Navigate to the location where you want to save the document, and click the Save button.



Caution: If you have a foreign file open in AppXtender Web Access and the same document is opened by another instance of its associated application (including by other users on a network), you will not be able to save your foreign file edits.

Certain conditions can influence your ability to save a foreign file document as a new version. The following table lists some factors you should keep in mind.

Table 57. Considerations When Saving Foreign Files

Condition	Result
Check In/Check Out is selected and the document is not checked out.	You cannot make any changes to the document.
Check In/Check Out is not selected.	You can view and edit the document and (if desired) save to its original location as a new version.
You check the document out.	The document automatically saves to its original location as a new version.
Someone other than you checked the document out.	You can view and edit the document but cannot save it to its original location.
The document has been finalized.	You can only view the document. You cannot check the document out or modify it.
The document was batch indexed when it was imported.	You cannot automatically save the document to its original location.
The document is not indexed.	You cannot automatically save the document to its original location.

Using Document Properties Page Features

The Document Properties page allows you to view information about the active document.

Note: The browser status bar, located at the bottom of the browser window, will show the application name, number of versions, and the status of the document.

To access the AppXtender Web Access Document Properties page:

- On the Documents menu, click Properties. The AppXtender Web Access Document Properties dialog box appears.

Figure 172. AppXtender Web Access Document Properties Dialog Box

Document Properties	
General	
Application Name	REASONCODE
Revision	1.0
Created By	
Created On	
Modified By	
Modified On	
Check Out Comment	asdfa
Summary	
Title	
Subject	
Author	
Keywords	
Comment	
<input type="button" value="OK"/> <input type="button" value="Reset"/> <input type="button" value="Close"/> <input type="button" value="Help"/>	

For more information on document properties, refer to the following topics:

- [General Document Properties, page 237](#)
- [Saving Changes to Document Properties, page 238](#)

General Document Properties





The first section of the AppXtender Web Access Document Properties dialog box is the General Document Properties section. This section shows basic information about the document, including the application name, revision number, name and date of creation, and names and dates of revisions. These are system properties assigned by the AppXtender/AppXtender Web Access system, and as such, cannot be altered.

Figure 173. General Document Properties Section

General	
Application Name	REASONCODE
Revision	1.0
Created By	
Created On	
Modified By	
Modified On	
Check Out Comment	asdfa

The Summary section is in the lower part of the dialog box. This section contains information about document content (or ODMA attributes), including the document title, subject, author, keywords, and comments. These properties can be added and modified from the AppXtender Web Access Document Properties dialog box.

Figure 174. Summary Document Properties Section

Summary	
Title	<input type="text"/>
Subject	<input type="text"/>
Author	<input type="text"/>
Keywords	<input type="text"/>  
Comment	<input type="text"/>  

The following table describes the type of information you should enter for each field in the dialog box.

Table 58. Summary Document Properties

Column	Description
Title	Title of the document.
Subject	Subject of the document.
Author	Author of the document.
Keywords	Relevant keywords related to the document's content.
Comment	Comments about the document.

Note: Summary document properties can be used as search criteria. Refer to [Chapter 5, Retrieving Documents](#) for more information about retrieving documents by querying summary document properties

Saving Changes to Document Properties

After you have modified Summary Document Properties, you must save your changes.

To save document properties:

- Click OK.

To reset document properties to their original values:

- Click Reset.

Working with the Revision History Feature

When a document has multiple versions, a Revision History record is created. It lists the revisions that have been made, the user who checked in each revision, and the date the revision was made. It also allows you to open or delete a specific revision.

The following table summarizes the information listed on the Revision History record.

Table 59. Document Revision History Record Contents

Item	Description
Revision	Indicates revision number. Major revisions are one digit higher or lower than the previous/next revision. Minor revisions are indicated by tenths (that is, 2.1 is a minor revision of 2.0, and 3.0 is a major revision of 2.0).
User	Shows the name of the user who saved the revision.
Date	Shows the date and time the revision was saved.
Check In Comment	Shows the comments the user entered when checking in a revised document.

To access the Revision History record for a document:

1. Open the document.
2. Select Document > Revision History from the menu bar.

Displaying ApplicationXtender Reports Management Reports

ApplicationXtender Reports Management reports are retrieved using the New Report Query, which is available from the shortcut menu that appears when you right-click an application in the application list.

Note: Adobe Acrobat must be installed on your computer for you to view AppXtender Reports Mgmt reports. Refer to the *ApplicationXtender Web Access Release Notes* for the supported version of Adobe Acrobat.

To create a new Report Query:

1. Right-click the application in the application list.

2. Select New Report Query.
3. Enter search criteria to locate the reports you want to retrieve. To perform the simplest type of query, enter index values in the Search Value column.

Note: When querying for AppXtender Reports Mgmt reports, you are provided with only three index fields to query from: TIMESTAMP, DESC (Description), and RPTTYPE (Report Type). You can use all AppXtender Web Access index field query methods on these fields.

For information about entering criteria for more advanced searches, refer to [Chapter 5, Retrieving Documents](#).

After entering search criteria, click Submit to execute the query.

Note: To clear the search criteria text boxes and enter new criteria, click Reset.

Note: If you do not have an ApplicationXtender Reports Management license, an error message appears after you click Submit.

Query Results view appears, listing the AppXtender Reports Mgmt reports that met the search criteria.

Note: If no documents are found that meet the specified search criteria, a No Documents Found message appears.

4. Click on the page button next to the report you want to view. The Document Display window opens, and the report appears.

Depending on which client type you are using, the Document View page offers different options.

For more information, refer to the following topics:

- [Viewing ApplicationXtender Reports Management Reports Using the Thin Client, page 240](#)
- [Viewing ApplicationXtender Reports Management Reports Using the Interactive Client, page 241](#)

Viewing ApplicationXtender Reports Management Reports Using the Thin Client

In Thin Client mode, once you open the AppXtender Reports Mgmt report PDF in the Document Display window, you can navigate through the report pages or consolidate all pages into a single report. Using Adobe Acrobat's functionality, you can perform text searches and print reports.

Use the buttons in the toolbar to navigate through the report pages:

- Click the Forward arrow to view the next report page.
- Click the Back arrow to view the previous report page.
- Use the page list box to go to a specific page in the report.

To combine all AppXtender Reports Mgmt reports into a single PDF file:

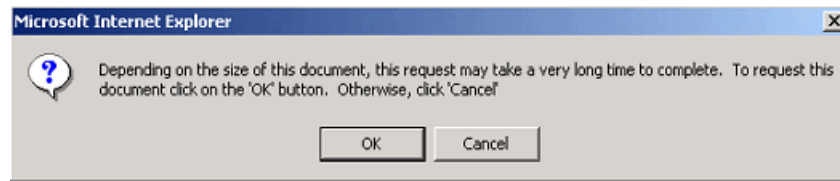
1. Click the Merge PDF Pages option on the Page menu.



Caution: Merge PDF Pages functionality is available only when the AppXtender Web Access server is running on an AppXtender Web.NET Web.

A dialog box appears, notifying you that it may take a long time for AppXtender Web Access to produce the merged PDF file, depending on the size of the document. Click OK to proceed.

Figure 175. Merge PDF Message



2. AppXtender Web Access merges the PDF. When it finishes, the merged report appears in the Document View frame. Once the report PDF is merged, you can navigate through PDF pages using the navigation options that Acrobat Reader makes available in the main view frame.

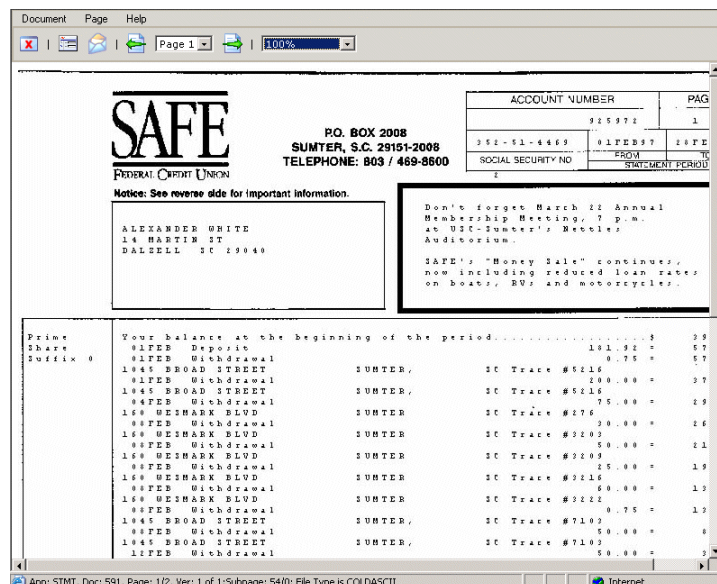
For more information, refer to the following topics:

- [Displaying ApplicationXtender Reports Management Reports, page 239](#)

Viewing ApplicationXtender Reports Management Reports Using the Interactive Client

Once you open a AppXtender Reports Mgmt report PDF in the Document View frame of the Interactive Client, you can navigate through the report pages and print the reports. Using Adobe Acrobat's functionality, you can also perform text searches.

Figure 176. Viewing an AppXtender Reports Mgmt Report Using the Interactive Client



To navigate pages:

- On the Interactive Client toolbar, click the Forward arrow to view the next report page. Click the Back arrow to view a previous report page.

To navigate to a particular report page:

1. On the Interactive Client toolbar, click the Go To Page button. The Go To dialog box appears.

Figure 177. Go To Dialog Box



2. In the Page field, type the number of the page you want to view, or use the arrow buttons to scroll to the page number. Click OK. The page you specified appears in the Document View frame.