

**EMC<sup>2</sup>**

QUICK REFERENCE

**EMC<sup>®</sup> ApplicationXtender<sup>®</sup>  
Document Manager  
5.40**

**Quick Reference**

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# ApplicationXtender Document Manager Quick Reference








This document provides quick reference information for ApplicationXtender Document Manager (AppXtender Doc Manager). This quick reference does not take the place of the *ApplicationXtender Document Manager User's Guide*.

## The AppXtender Doc Manager Image Toolbar

Table 1 AppXtender Doc Manager Image Tools

Button	Function
	Shows configured sticky views.
	Fits displayed page to window.
	Fits displayed page top to bottom.
	Fits displayed page left to right.
	Rotates displayed page 90 degrees to the left.
	Rotates displayed page 90 degrees to the right.
	Zooms in on displayed page.
	Zooms out on displayed page.
	Opens the Magnifier window.
	Displays previous page.
	Displays next page.
	Displays previous subpage.
	Displays next subpage.

**Table 1 AppXtender Doc Manager Image Tools (Continued)**

Button	Function
	Displays previous version of the page.
	Displays next version of the page.
	Shows the text or image for the document.
	Performs OCR on the displayed page.
	Switches between pan and selection modes.
	Shows or hides Index view.
	Shows/hides COLD form overlays.

## Document Processing Functions

**Table 2 Options and Functions for Document Processing**

Option	Function
Display	Opens the selected documents in Document Display View.
Thumbnail	Opens thumbnails for the selected documents in the Thumbnail view.
Print	Opens the Print dialog box, enabling you to print the selected documents.
Text Search	Allows you to search for a text string within the selected documents
Submit Full Text Index Job	Submits the selected documents to the Index Server for full-text indexing.
Submit OCR Job	Submits the selected documents to the Index Server for OCR.
Submit OCR Indexing	Submits an imported document to FineReader (or FormReader) for OCR processing; the resulting text is used to automatically index the document in IFS.
Submit to WorkflowXtender	Submits the selected documents to WorkflowXtender.
Submit to BI Gateway	Submits the selected documents/reports to ERMXtender for BI Gateway processing.

**Table 2 Options and Functions for Document Processing (Continued)**

<b>Option</b>	<b>Function</b>
Export COLD Documents	Exports the selected documents to a single text file.
Delete	Deletes the selected documents.
Select All	Selects all documents listed in the Result Set.
Clear Hits	De-selects all selected documents in the Result Set.
Collapse	Collapses the Result Set so that only selected documents appear.
Save As	Saves the Result Set listing as a file in HTML, ASCII text, or CSV format.
View As	Allows you to view Result Set hits as document names, folder names, or by details.
Properties	Displays the AppXtender Doc Manager Document Properties.

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## Creating a New Document

1. Right-click the name of the application for which you want to create a document and, from the shortcut menu, select New Document. Or, select the application and then, from the main menu, select Document > New Document from the main menu.
2. From the New Document submenu, choose the input method you want to use to create the document (Scan, Clipboard Paste, Clipboard Paste Special, Insert Object, Import File, Fax-in Queue).

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**Note:** AppXtender Doc Manager must be configured with Scan and Fax-in Queue capability for those functions to be available.

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3. If the Reason Code Required dialog box appears, select the appropriate check box, enter appropriate comments, and click OK.
4. If the Signature Properties dialog box appears, select a certificate, enter a comment, and click OK.
5. Your next action depends on the method you chose to create the new document:
  - If you chose Scan, AppXtender Doc Manager begins scanning.
  - If you chose Clipboard Paste, the text or graphic that you placed on the Windows Clipboard appears in the Document Display view document viewer.
  - If you chose Clipboard Paste Special, the Paste Special dialog box appears. Under As, select a format and click OK.
  - If you chose Insert Object, the Insert Object dialog box appears.
    - If you are creating a new object, select Create New, select an object type, and then click OK. A window appears that allows you to create and edit the new object.
    - If you are inserting an existing object, enable Create from File, enter the path and filename in the File box, and click OK.
  - If you chose Import File, the Import File dialog box appears. Select the file you want to import and click Open.
  - If you chose Fax-In Queue, from the FAX Server Import dialog box, select the fax you want to add and click Import.

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## Modifying the Document Index

1. If the document index is not in view, click the Show Index icon on the Image toolbar or select Document Index from the View menu and then choose a location (Left, Right, Top, or Bottom).
2. In the Values fields, enter appropriate values.
3. To save the index, click Save. To cancel your changes, click Cancel.

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## Auto Indexing

1. Enter data in one or more index fields in the Index view.
2. Press <F7>. AppXtender Doc Manager begins a search for Auto Index records that meet the specified criteria.
  - If only one record matches the criteria, the Index view is automatically populated.
  - If more than one record is retrieved, the AppXtender Doc Manager Result Set dialog box appears, listing the matching index records.
3. From the AppXtender Doc Manager Result Set dialog box, you can perform the following:
  - To choose an index record, select the record and click Select.
  - To delete a record from the Auto Index table, select the record and click Delete.
  - To delete all the records that are listed in the AppXtender Doc Manager Result Set from the Auto Index table, click Delete All.
  - To exit the AppXtender Doc Manager Result Set without choosing an index record, click Cancel.
4. If you selected an index record and clicked Select, the index information appears in the new document's Index View.
5. If necessary, make changes to the index information, then click Save.
6. Click Save.



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## Using Key Reference

1. Create a new document.
2. If the document index is not in view, click the Show Index icon on the Image toolbar or select Document Index from the View menu and then choose a location (Left, Right, Top, or Bottom).
3. Perform one of the following steps:
  - In Index view, enter a value into the key field. Then press <Tab> to populate all index fields with key reference values.
  - Enter data in one or more of the index fields and then press <SHIFT>+<F4>. A list of unused Key Reference records that meet the specified criteria and documents previously indexed with the same values appears. Select a record and click Copy Index.
4. If necessary, edit the index field data.
5. Click Save.

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## Creating a Query

1. Right-click on the application you want to search and select New Query from the shortcut menu.
2. In the Search tab that appears in Query view, enter search criteria.
3. Click Search.

## Query Functions

Once you have created a query, you can perform the actions described in the following table by right-clicking on the query in Applications view and selecting the specific function.

**Table 3 Applications View Query Functions**

Option	Query Function
Edit Query	Enter new search criteria on the Search tab and click Search. Right-click the query and select Save.
Run Query	The Query is rerun.
Delete Query	The Query is deleted. Click Yes to delete; click No to cancel.
Make Public	The Query is now accessible to all AppXtender Doc Manager users.
Make Private	The Query is now accessible only to you.

**Table 3 Applications View Query Functions**

Option	Query Function
Rename	Retype the new query name over the old.
Save	Edits to the Query are saved.
Save As	Enter a query name in the Save Query dialog box, and enable the Available to all users option if you want all users to have access to it. Click OK.

---

## Processing Documents from the Result Set

1. Select the documents you want to process. You have several options:
  - To select a single document, click the document.
  - To select multiple consecutive documents, click the first document and then, while holding down the <Shift> key, click the last.
  - To select multiple non-consecutive documents, hold down the <Ctrl> key while selecting the documents.
  - To select all documents in the Result Set, right-click a document in the Result Set to open the shortcut menu. Then choose Select All.

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**Note:** To cancel the Select All function, right-click a document in the Result Set to open the shortcut menu. Then choose Clear Hits.

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2. Right-click one of the selected documents and, from the shortcut menu, select one of the options.
3. If the Reason Code Required dialog box appears, enter appropriate comments and click OK.
4. If the Signature Properties dialog box appears, select a certificate, enter a comment, and click OK.

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## Printing Documents from the Result Set

1. To print documents in the Result Set, right-click the documents and select Print from the shortcut menu.
2. In the dialog box, select the printer from the Name drop-down list.
3. Select the number of copies you want to print for each of the selected documents.
  - To print all pages, select the All option.
  - To print a range of pages, enable the Page Range option and, in the Range field, type the range of pages to print.
4. To print multiple copies of each selected document, in the Copies area, select the number of copies to be printed.
5. If you do not want annotations to be included when the pages are printed, click the Hide Annotations check box. (This option is available only to users with appropriate privileges.)
6. To print text annotations displayed as icons on a separate page, click Print Text Note.
7. To start printing, click OK.

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## Transferring ApplicationXtender Documents to Records Manager for ApplicationXtender

1. Run a search against the appropriate IFS application to find the documents to be transferred.
2. From the Result Set tab, right-click on the first document you want to classify and transfer.
3. From the shortcut menu, select Classify And Transfer.
4. If necessary, log into RM for AppXtender by entering your user name and password.

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**Note:** You only need to log into RM for AppXtender once from AppXtender Doc Manager. This one-time login applies not only to the current AppXtender Doc Manager session but to future sessions as well.)

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5. In the Select File Plan dialog box, find the filing system file plan to which the document should be transferred by clicking the plus (+) signs to the left of the filing system and file plan names until the destination file plan folder appears.
6. With the destination file plan folder selected, click OK to transfer the document to the selected file plan. The Select File Plan dialog box closes, and the transferred document is removed from the AppXtender Doc Manager Result Set tab.
7. Repeat steps 2 through 6 for any other IFS documents to be classified and transferred.

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## Filing ApplicationXtender Documents for Retention

The procedures for filing ApplicationXtender documents for retention vary depending on whether the application is configured with records administration retention or Centera retention.

### Records Administration Retention

1. Run a search against the appropriate IFS application to find the documents to be filed for retention.
2. From the Result Set tab, right-click on the first document you want to file for retention.
3. From the shortcut menu, select File For Retention.
4. If necessary, log into Records Manager for ApplicationXtender by entering your user name and password.

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**Note:** You only need to log into Records Manager for ApplicationXtender once from AppXtender Doc Manager. This one-time login applies not only to the current AppXtender Doc Manager session but to future sessions as well.

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5. In the Select File Plan dialog box, find the filing system file plan in which the document should be filed by clicking the plus (+) signs to the left of the filing system and file plan names until the destination file plan folder appears.
6. With the destination file plan folder selected, click OK to file the document to the selected file plan for retention. The Select File Plan dialog box closes.
7. Repeat steps 2 through 6 for any other IFS documents to be filed for retention.

### Centera Retention

1. Query the application to locate the documents.
2. From the Result Set tab, select the documents and then right-click to open the Document Manager shortcut menu.
3. Select File for Retention.
4. Select a retention class or policy from the Retention Class or Policy list box on the Set Retention Options dialog box.
5. To apply the retention setting to previous versions of the document, enable File all available previous revisions for retention.
6. Click Set Retention.
7. Click OK.

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## Working with ApplicationXtender Documents Filed for Retention

The procedures for working with ApplicationXtender documents filed for retention vary depending on whether the application is configured with records administration retention or Centera retention.

### Records Administration Retention

1. Query the ApplicationXtender application configured with records administration.
2. From the Result Set tab, click the icon for the document you want to work with.
3. Select Document > Check Out from the Document Manager menu bar to check the document out of the ApplicationXtender repository.
4. Select Document > Check In from the Document Manager menu bar when you finish working with the document to check it back into the ApplicationXtender repository.

### Centera Retention

1. Query the application to locate the documents.
2. To filter query results, select one of the following options from the Show list box in the Query Options section of the Search tab:
  - All documents excluding documents on retention
  - Only documents on retention
  - Only documents on retention hold
  - Only documents on retention not on retention hold
3. Open the document in Document Display view.
4. Select Document > Check Out from the Document Manager menu bar to check the document out of the ApplicationXtender repository.
5. Select Document > Check In from the Document Manager menu bar when you finish working with the document to check it back into the ApplicationXtender repository. Document Manager saves the modified document as a new version.

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## Applying a Retention Hold to Documents

1. Query the application to locate the document.

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**Note:** The document must be in retention status before you can apply a retention hold to it.

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2. Open the document in Document Display view.
3. Select Document > Place Retention Hold from the Document Manager menu bar. Document Manager displays the Retention Hold Options dialog box.

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**Note:** To access the Retention Hold Options dialog box from the Query view Result Set, right-click the document from the Result Set and select Place Retention Hold.

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4. Select a retention hold label from the Retention Hold Label list box.
5. To create a new label, click Create New, and then type the name of the new label.
6. Click OK.

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## Removing a Retention Hold from Documents

To remove a retention hold from a document:

1. Query the application to locate the document.
2. Open the document in Document Display view.
3. Select Document > Remove Retention Hold from the Document Manager menu bar. Document Manager displays the Retention Hold Options dialog box.

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**Note:** To access the Retention Hold Options dialog box from the Query view Result Set, right-click the document from the Result Set and select Remove Retention Hold.

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4. Click Yes to confirm you want to remove the retention hold.

To remove a retention hold from a set of documents:

1. Select Utilities > Remove Retention Holds from the Document Manager menu bar.
2. Select the application from the Application list box.
3. Select the retention hold label from the Label list box.
4. Click Display Docs.

5. Select the documents from which you want to remove the retention hold:
  - To select all the documents, click Select All.
  - To select a specific document, select the check box next to that document.
6. Click Remove Holds.

