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This document provides instructions on using ApplicationXtender Web Access to create and manage ApplicationXtender documents.

As part of an effort to improve and enhance the performance and capabilities of its product lines, EMC periodically releases revisions of its hardware and software. Therefore, some functions described in this document may not be supported by all versions of the software or hardware currently in use. For the most up-to-date information on product features, refer to your product release notes.

If a product does not function properly or does not function as described in this document, please contact your EMC representative.

**Audience**

This document is part of the ApplicationXtender documentation set, and is intended for use by administrators and users who are responsible for using ApplicationXtender Web Access to manage ApplicationXtender documents, including creating new documents, retrieving and viewing documents, and performing tasks such as adding, searching for, editing, and deleting documents.
The following is a complete list of documentation related to this product:

- ApplicationXtender Web Access Technical Product Overview
- ApplicationXtender Web Access User’s Quick Reference
- ApplicationXtender Web Access .NET Administrator’s Guide
- ApplicationXtender Web Access .NET Administrator’s Quick Reference Card
- ApplicationXtender Web Access J2 Administrator’s Guide
- ApplicationXtender Web Access J2 Administrator’s Quick Reference Card
- ApplicationXtender Web Access Release Supplement

ApplicationXtender Web Access is one product in the ApplicationXtender 5 suite of products. The following is a list of documentation for related products that may be useful when working with ApplicationXtender Web Access:

- ApplicationXtender Technical Product Overview
- ApplicationXtender User’s Guide
- ApplicationXtender User’s Quick Reference
- ApplicationXtender Release Notes
- ApplicationXtender Image Capture Technical Product Overview
- ApplicationXtender Image Capture User’s Guide
- ApplicationXtender Image Capture User’s Quick Reference
- ApplicationXtender Image Capture Release Notes

Most of these documents can be found in the Documentation directory on the product media kit. All documents are in Adobe Acrobat Portable Document Format (PDF) and can be viewed by downloading and installing the Adobe Acrobat Reader. The Reader is available from Adobe at www.adobe.com. To install and use the Reader on the preferred platform, refer to the instructions on the Adobe web site.
Conventions used in this document

EMC uses the following conventions for special notices.

Note: A note presents information that is important, but not hazard-related.

CAUTION
A caution contains information essential to avoid data loss or damage to the system or equipment. The caution may apply to hardware or software.

IMPORTANT
An important notice contains information essential to operation of the software. The important notice applies only to software.

Typographical conventions
EMC uses the following type style conventions in this document:

Normal Used in running (nonprocedural) text for:
• Names of interface elements (such as names of windows, dialog boxes, buttons, fields, and menus)
• Names of resources, attributes, pools, Boolean expressions, buttons, DQL statements, keywords, clauses, environment variables, filenames, functions, utilities
• URLs, pathnames, filenames, directory names, computer names, links, groups, service keys, file systems, notifications

Bold: Used in running (nonprocedural) text for:
• Names of commands, daemons, options, programs, processes, services, applications, utilities, kernels, notifications, system call, man pages

Used in procedures for:
• Names of interface elements (such as names of windows, dialog boxes, buttons, fields, and menus)
• What user specifically selects, clicks, presses, or types

Italic: Used in all text (including procedures) for:
• Full titles of publications referenced in text
• Emphasis (for example a new term)
• Variables

Courier: Used for:
• System output, such as an error message or script
• URLs, complete paths, filenames, prompts, and syntax when shown outside of running text.
Where to get help

EMC support, product, and licensing information can be obtained as follows.

**Product information** — For documentation, release notes, software updates, or for information about EMC products, licensing, and service, go to the EMC Powerlink website (registration required) at:

http://Powerlink.EMC.com

**Technical support** — For technical support, go to EMC Customer Service on Powerlink. To open a service request through Powerlink, you must have a valid support agreement. Please contact your EMC sales representative for details about obtaining a valid support agreement or to answer any questions about your account.
This guide explains how to use ApplicationXtender® Web Access (AppXtender Web Access) to manage all types of ApplicationXtender® (AppXtender) documents. AppXtender Web Access is a Web-based product that unites the power of ApplicationXtender document retrieval with the universal accessibility of the Internet. With AppXtender Web Access and a standard Web browser such as Microsoft Internet Explorer or Netscape Navigator, you can create, index, retrieve, access, view, and manage ApplicationXtender documents via the Internet.

As you would expect from a browser-based application, ApplicationXtender Web Access has an intuitive interface with easy-to-use features. For instance, you can access most functionality by clicking either a menu item or toolbar button. Right-clicking data source, application, and saved search icons displays a shortcut menu of task choices. You can access Online Help from any window by clicking the Help menu option, clicking the Help toolbar button, or pressing F1 on the keyboard. In addition, certain dialog boxes have Help buttons that display Online Help specific to that dialog.
This section contains instructions and information essential to getting started with ApplicationXtender Web Access. It includes the following topics:

- Before You Begin ................................................................. 17
- Basic Feature Set Capabilities ............................................. 18
- ApplicationXtender Concepts .............................................. 19
- Capturing Content for the ApplicationXtender System .......... 32
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Before You Begin

There are two editions of ApplicationXtender Web Access: ApplicationXtender Web Access .NET (AppXtender Web.NET) and ApplicationXtender Web Access J2 (AppXtender WebJ2). For more information, refer to these topics:

- “AppXtender Web.NET Overview” on page 17
- “AppXtender WebJ2 Overview” on page 17

AppXtender Web.NET Overview

AppXtender Web.NET is deployed on Microsoft IIS web servers on the Microsoft Windows operating system.

AppXtender Web.NET features Active Server Page (ASP) technology to deliver dynamic, interactive sessions with users. ASP, which is used primarily by Microsoft, contains HTML and embedded programming code that is executed in the web server or application server.

AppXtender WebJ2 Overview

AppXtender WebJ2 is deployed on web servers compatible with Java 2 technology and on operating systems including Microsoft Windows, UNIX Solaris, and SuSE Linux.

AppXtender WebJ2 features Java Server Page (JSP) technology. JSP is the Sun/Java counterpart to Microsoft’s ASP and is the technology behind SunONE and Apache web servers. The JSP is an HTML page with embedded Java source code. Like ASP, JSP is executed in the web server or application server.

The Client Java Applet, supported with Java SDK, is supported with AppXtender WebJ2 on the Microsoft Windows, UNIX Solaris, and SuSE Linux operating platforms. You do not need to download and install any versions of the Java 2 Runtime Environment onto client workstations when operating AppXtender WebJ2.

The Netscape browser is tested and supported on the Microsoft Windows, UNIX Solaris, and SuSE Linux operating platforms.
Basic Feature Set Capabilities

AppXtender Web.NET and AppXtender WebJ2 have the same basic feature set. You can retrieve documents using a variety of search methods, such as index term searches, cross-application queries, document property searches, and more—all using a standard Web browser. Search results are presented in a result set. From the result set, you can perform ad hoc text searches to narrow down the set of documents in the search results. You can also select documents to view, edit, and print, as well as e-mail documents and pages as attachments or links.

Other ApplicationXtender Web Access functionality allows you to add new documents and pages to existing documents. When adding new documents, after uploading the file or scanning in the paper document, you enter descriptive information from the document into application-specific index fields. This is referred to as indexing the document. Indexing allows you to organize and efficiently search through stored documents. You can also use ApplicationXtender Web Access to index batches that have been added to applications using ApplicationXtender Document Manager or ApplicationXtender Image Capture.

Because ApplicationXtender Web Access uses ApplicationXtender security profiles, documents have the same protections as they do within AppXtender. When you log into ApplicationXtender Web Access with an AppXtender user name and password, AppXtender access privileges and restrictions are in effect throughout the session. Your access privileges control which documents you can access from within ApplicationXtender Web Access and the functionality that is available for you to use when working with documents.
ApplicationXtender Concepts

ApplicationXtender Web Access works with your existing ApplicationXtender system to provide robust AppXtender-style content management functionality via a Web browser. An understanding of the following ApplicationXtender concepts and terms can help you to use ApplicationXtender Web Access more effectively.

Basic concepts related to ApplicationXtender are discussed in the following topics:

◆ “ApplicationXtender Data Organization” on page 19
◆ “Indexes” on page 20
◆ “Document Retrieval” on page 22
◆ “Documents” on page 24
◆ “Data Source Management” on page 27
◆ “ApplicationXtender on Your Network” on page 31

ApplicationXtender Data Organization

ApplicationXtender uses a data hierarchy to organize stored data. The highest level of organization in AppXtender is the application. Documents are stored in applications and retrieved from applications.

Your AppXtender system administrator creates AppXtender applications in the ApplicationXtender Application Generator module of AppXtender Desktop. Each AppXtender application is based on an index consisting of one or more types of information, such as Name, SSN, and Address. This index information identifies each document stored in the AppXtender database.

The next level of organization in AppXtender is the document. When adding a document to an application, you must enter the required information from the document into the index fields. When the document is saved, it is compressed and stored in the document write path specified in the ApplicationXtender Application Generator. The record of index information is stored in the AppXtender database with a pointer to the document location.
Note: ApplicationXtender can be configured to store documents in any storage device that can be mapped by the AppXtender Document Manager workstation (for example, network file servers, local hard disks, and erasable and WORM optical media).

The last level in the AppXtender data hierarchy is the page and page version. Using ApplicationXtender Web Access, you can retrieve documents and then add new pages to the document. You can also annotate a page to create a new version of the page.

Indexes

The index is the central component in an AppXtender application. Application indexes consist of one or more fields where descriptive information pertaining to documents is stored. The information in these fields is used to retrieve specific documents from AppXtender.

When creating an application, the AppXtender administrator decides what index information must be entered in the index, what the format for that information will be, and how much space to provide for each entry.

AppXtender uses the fields specified during application creation to create an Index view in ApplicationXtender Web Access. When you add a new document to an application, a blank index record is provided for you to enter values for each of the index fields. The index record created when a document is added to AppXtender is used for all subsequent pages added to the document.

Note: You can index documents by manually keying in information or using automatic indexing features such as Auto Index and Key Reference indexing. Automatic indexing features are discussed in detail in “Using ApplicationXtender Web Access Automated Indexing Functionality to Index Documents” on page 149.

Indexes allow you to efficiently organize and search through stored documents. Since every stored document has an index record attached to it, AppXtender documents can be stored in any order and still be retrieved easily. By entering application-specific index data, you can search all index records for an application and retrieve only relevant documents.
If you have the required user permissions, when you access a document through ApplicationXtender Web Access, you can also view the document index record to see the data values used to index the document. You can also modify existing document index values from the Index view.

**Note:** Your ApplicationXtender system administrator must assign the appropriate security privileges to your user account for you to modify document index values.

Two processes related to indexing are full-text indexing and dual data entry. For more information, refer to the following topics:

- “Full-Text Indexing” on page 21
- “Dual Data Entry” on page 22

### Full-Text Indexing

You index documents for full-text search by submitting them to the Index Server. The Index Server is an ApplicationXtender Document Manager add-on module that provides full-text search functionality and OCR processing.

You can full-text index the following types of documents:

- Bi-level (black and white) images
- Rich Text Format (RTF) files
- Hypertext Markup Language (HTML) files
- Foreign files added by importing the files into AppXtender or uploading them to ApplicationXtender Web Access

Once a document has been full-text indexed, you can use full-text search to find the document even if you do not know any of its index values. You can also use full-text search to narrow down the results of index value searches. Full-text search is discussed in more detail in “Searching Using Full-Text Query” on page 201.
Getting Started

Dual Data Entry

Dual data entry is a validation measure used when indexing documents to ensure that each document is indexed correctly. When adding or modifying index field data using dual data entry, you must enter each index value two times. The first index value is accepted only when ApplicationXtender Web Access verifies a match with the second entry.

Note: You configure ApplicationXtender Web Access to use dual data entry from the ApplicationXtender Web Access Settings window. The Settings window is discussed in detail in "Customizing Your Workstation" on page 83.

Document Retrieval

Many of the query options available in AppXtender Document Manager are also available when using ApplicationXtender Web Access to search for stored documents. Several index-based queries are available for basic queries. You can also query document properties and configure cross-application queries to search multiple applications. AppXtender Web Access also has full-text index searching capability.

Four index-based queries are available in ApplicationXtender Web Access: wildcard, list of values, range, and expression operator. Brief descriptions of these queries appear in the following topics:

◆ “Wildcard Query” on page 23
◆ “List of Values Query” on page 23
◆ “Range (Expression) Query” on page 23
◆ “Expression Operators Query” on page 24

Note: For detailed information on using queries in ApplicationXtender Web Access, refer to “Retrieving Documents” on page 185.

If the optional Centera retention for AppXtender license is installed and you have the appropriate privileges, you can also search for documents that are under Centera retention or retention hold. Refer to “Retrieving Documents” on page 185 for procedures.
**Wildcard Query**

Wildcard queries can be used to perform “beginning with,” “ending with,” and pattern matching searches. Wildcard searches are useful in narrowing search results to control the number of documents returned in the search results.

You use a single asterisk (*) as a wildcard to match one or more characters when specifying search criteria. Wildcards are valid for index fields with the following data types: Text, Time Stamp, SSN, Telephone, Zip Code, Boolean Choice, and User-Defined List. For all other data types, use search expressions such as range or list of values. Refer to “Retrieving Documents” on page 185 for information on creating wildcard queries.

**List of Values Query**

With a list of values query, when entering search criteria, you can specify two or more values for each index. When the search runs, AppXtender Web Access looks for documents with index values that match any of values entered for the corresponding index values specified in the search criteria. As a result, the search will return a more inclusive set of documents. For information on creating a list of values query, refer to “Searching Using the List of Values Feature” on page 197.

**Range (Expression) Query**

With a range (expression) query, you can search for documents with index values that fall within a specified range of values. For example, you might search for records with index values that are greater than a certain number, records with dates within a specific date range, or records with company names not equal to (not the same as) the name of a specific company. Like the asterisk in wildcard queries, using range expressions like greater than (>) or less than (<) to specify a specific range of index values can reduce the number of documents returned in the result set by limiting the values that will satisfy the search criteria. This approach can return results that are more concise and accurate than those you might get using one of the other query options. For information on creating a range query, refer to “Searching Using the Expression Search Feature” on page 199.

**Note:** Search criteria must be entered in the correct syntax and format. Use the expression editor to ensure the query will run properly.
Expression Operators Query

Expression operators queries use expression operators such as *and*, *and not*, and *or* to combine index values and focus the search criteria. You build the query using the expression operators to combine one or more index values, including text strings, in a single expression. Other expression operators in addition to *and*, *and not*, and *or* include *near* ( ), *?* (character wildcard), and *+* (multiple character wildcard or lack of a character wildcard). For information on creating an expression operators query, refer to “Searching Using the Expression Search Feature” on page 199.

Documents

In AppXtender, a *document* is a file or group of files identified by an index record and stored in an application. A single document can contain from one page to thousands of pages.

You create new documents in AppXtender Web Access by adding objects such as word processing files or scanned images to applications and entering index information. Later, you can add other objects as additional pages of the same document. You can also store more than one type of object as pages within a single document. For example, you could have a word processing file and scanned image files in a single AppXtender document.

For more information related to ApplicationXtender documents, refer to the following topics:

- “Pages” on page 25
- “Records” on page 25
- “COLD/ERM Data” on page 25
- “OCR” on page 26
- “Annotations” on page 26
- “Redactions” on page 26
- “Digital Signatures” on page 27
- “KeyView Viewer” on page 27
Pages  The term page typically implies a single entity. Since AppXtender Document Manager and ApplicationXtender Web Access support data in many formats, page in ApplicationXtender Web Access refers to a single object. For example, a long word processing file (a single object) is considered a single page in AppXtender. Individual pages can take many forms such as word processing files, scanned images, video clips, and audio recordings. Each AppXtender document can have up to 250,000 pages.

When existing pages are annotated, AppXtender assigns version numbers to the original page and the annotated page. Each time a page is updated, it is assigned a new version number, with the most recent version having the highest version number.

Records  To keep document information together, AppXtender stores the index data for a document together as a single group; this is referred to as the document record. When you retrieve a stored document in AppXtender, the document record is also retrieved. This allows you to view all of the information used to identify the document. Because one piece of information stored with the record is a pointer to the document location, you can also access the stored document directly from the document record.

COLD/ERM Data  COLD (Computer Output to Laser Disk) data and ERM (Enterprise Report Management) data consist of report data generated from existing applications, indexed using an extraction process, and downloaded into AppXtender applications.

COLD and ERM data can be added to AppXtender through the use of ApplicationXtender Reports Management® (AppXtender Reports Mgmt). ERMX produces ASCII and Adobe Portable Document Format (PDF) documents. These documents are known as AppXtender Reports Mgmt documents.

AppXtender Document Manager and ApplicationXtender Web Access can perform text searches on AppXtender Reports Mgmt documents, allowing you to locate important data within reports. To view the report data in the context of a standard form, you can add form overlays to AppXtender Reports Mgmt ASCII documents returned in search results.

*Note:* Form overlays cannot be added to PDF documents.
OCR

AppXtender supports optical character recognition (OCR). During this process, an image of text (for example, a scanned document or page) is converted into actual text. You can use ApplicationXtender Web Access to submit documents to the OCR queue for processing. You can also configure ApplicationXtender Web Access to automatically OCR documents when they are submitted for full-text indexing.

*Note:* For pages or documents submitted for full-text indexing, after the OCR process is completed, the resulting text is sent to the ApplicationXtender Index Server.

Annotations

ApplicationXtender Web Access allows you to create annotations to add information to or edit information on any image or text page in a document or batch and to PDF files. An annotation is text or a shape added to a document page, typically for the purpose of adding notes, highlighting important information, or blocking areas of the page from view. Annotation types available in ApplicationXtender Web Access include text, highlighting, lines, arrows, and shapes. You can also annotate using rubber stamps created in AppXtender Document Manager.

*Note:* You must have redaction permissions to edit rubber stamp annotations. For information about your user permissions, consult with your AppXtender system administrator.

When you create an annotation in ApplicationXtender Web Access, the annotation is associated with the AppXtender document or batch page on which you created it. Annotations are edited and stored separately in the AppXtender database even though the annotation appears as part of the associated image or text when you view the annotated page.

Redactions

Redactions are annotation shapes that are filled and opaque. Redactions are typically used to secure information by hiding portions of image or text document or batch pages. You can apply redaction to all available annotation shapes, freehand lines, straight lines, arrows, rectangles, rounded rectangles, and ovals. When applied, the area of the page behind the redaction is not visible.
Digital Signatures

Digital signatures allow authorized users to electronically sign pages and versions of pages in AppXtender Document Manager and AppXtender Web Access. Like a written signature, the purpose of a digital signature is to guarantee that the individual signing the page is who he or she claims to be.

When a digital signature is applied to a document, a closed padlock icon appears at the bottom of the document image to signify the document is signed. If the document is modified later, the icon changes to show the padlock in the open position to signify that the document has been changed and the digital signature is no longer valid.

KeyView Viewer

The KeyView Viewer allows you to view the content of foreign files such as Microsoft Word files. The major benefit of the KeyView Viewer is that you do not need a third-party viewer to display the content of applicable foreign files. As soon as the content of a file appears, you can launch its native software program and edit the file.

Note: The KeyView Viewer is installed using ApplicationXtender Web Access Installed Components functionality. For more information, refer to “Customizing Your Workstation” on page 83.

Data Source Management

Data source management is a concept central to ApplicationXtender. A data source is the means by which AppXtender accesses data from a database. It is a composite of the database where an application stores information, the format of the stored data, and the data provider used by the application (or consumer) to access the data.

Microsoft SQL Server and Oracle multi-user relational database management systems are capable of supporting hundreds of users simultaneously.

CAUTION

Although Microsoft Access will work with ApplicationXtender Document Manager, it is not supported for use with either version of ApplicationXtender Web Access (.NET or J2).
For more information on data source management concepts, refer to the following topics:

- “Databases” on page 28
- “OLE DB” on page 28
- “Multiple Data Source Support” on page 30

**Databases**

A *database* is a collection of data tables of a particular database format. ApplicationXtender uses databases to store the tables of index and application information that form ApplicationXtender applications. When an application is created, details such as field definitions and security information are stored in database tables. When documents are added to the application, index information is stored in a database table, as are the pointers to the location of each document.

ApplicationXtender databases are accessed through OLE DB data providers. When a data source is defined, an OLE DB data provider is configured to access the data source. Because AppXtender supports OLE DB, it can use many different types of databases such as dBase, FoxPro, Oracle, DB2, MySQL, and Microsoft SQL Server.

**OLE DB**

OLE DB, a programming interface for accessing data, is a fundamental building block for storing and retrieving data using Microsoft’s Data Access Components (MDAC). OLE DB provides flexible data architecture that offers applications efficient access to databases. Data is accessed through OLE DB data providers. Data providers are installed with some operating systems and their service packs or with MDAC. Refer to the ApplicationXtender Web Access Release Notes for supported versions of MDAC.

If MDAC 2.5 or higher has not already been installed on the AppXtender Web Access server, the AppXtender Web Access setup wizard installs a current version of MDAC. MDAC installs data providers for SQL Server, Oracle, ODBC, and the Jet engine.

__Note:__ For ApplicationXtender Web Access J2, JDBC drivers must be obtained from the database vendor. For more information about data access for AppXtender WebJ2, consult your system administrator.
Three components are required to use OLE DB:

- An OLE DB consumer (ApplicationXtender)
- An OLE DB data provider (installed with MDAC)
- A Database Management System (DBMS) server (a Microsoft SQL Server or Oracle, for example)

Although AppXtender supports OLE DB, not all OLE DB data providers are certified for use with AppXtender. The following table lists AppXtender-certified databases and the corresponding OLE DB data providers. Refer to the ApplicationXtender Release Notes for specific versions of supported databases.

<table>
<thead>
<tr>
<th>AppXtender-Certified Databases</th>
<th>OLE DB Data Providers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft SQL Server</td>
<td>Microsoft OLE DB Provider for SQL Server</td>
</tr>
<tr>
<td>Oracle</td>
<td>Microsoft OLE DB Provider for Oracle</td>
</tr>
<tr>
<td>Microsoft Access (intended only for demonstration/evaluation purposes or standalone systems of low volume)</td>
<td>Microsoft Jet. 4.0 OLE DB Provider (may need to be installed separately); Microsoft OLE DB Provider for ODBC Drivers</td>
</tr>
<tr>
<td>Sybase SQL Anywhere</td>
<td>Microsoft OLE DB Provider for ODBC Drivers</td>
</tr>
<tr>
<td>IBM DB2&lt;sup&gt;3&lt;/sup&gt;</td>
<td>IBM OLE DB Provider for DB2</td>
</tr>
<tr>
<td>MySQL</td>
<td>MySQL Connector/ODBC (MyODBC); Microsoft OLE DB Provider for ODBC Drivers</td>
</tr>
</tbody>
</table>
Different OLE DB data providers are certified for use with AppXtender Web.NET and AppXtender WebJ2, as shown in the following table:

<table>
<thead>
<tr>
<th>AppXtender-Certified Databases</th>
<th>AppXtender Web.NET OLE Data Providers</th>
<th>AppXtender WebJ2 OLE Data Providers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft SQL Server</td>
<td>.NET Framework data provider for SQL Server</td>
<td>Type 4 JDBC driver for SQL Server</td>
</tr>
<tr>
<td>Oracle4</td>
<td>.NET Framework data provider for Oracle</td>
<td>Type 4 JDBC driver for Oracle</td>
</tr>
<tr>
<td>Sybase SQL Anywhere</td>
<td>.NET Framework data provider for ODBC</td>
<td>N/A</td>
</tr>
<tr>
<td>IBM DB2</td>
<td>IBM DB2 .NET Data Provider</td>
<td>Type 4 JDBC driver for DB2</td>
</tr>
<tr>
<td>MySQL</td>
<td>MySQL Connector/Net 1.0</td>
<td>MySQL Connector/J3.1</td>
</tr>
</tbody>
</table>

Provided you have security rights to access the data sources, you can log into multiple data sources simultaneously within ApplicationXtender Web Access. This allows you to access applications located on two or more data sources during a single ApplicationXtender Web Access session.

**Multiple Data Source Support**

Multiple data sources can be accessed simultaneously within AppXtender Web Access. In this way, provided you have security rights to access them, you can work with applications located on multiple data sources during a single AppXtender Web Access session. For information about selecting data sources, refer to “Selecting Data Sources” on page 54.
**ApplicationXtender on Your Network**

To increase performance, the files stored through AppXtender and the database AppXtender uses can be located on separate computers across a network. When you store a document in AppXtender, you are most likely storing it in a location on the network rather than on your local computer. The database where index information is stored is also probably on a server somewhere on your network.

The benefit of AppXtender to you as a ApplicationXtender Web Access user is that you do not have to decide where to store documents or remember where to go to locate them. This is all handled automatically by AppXtender. Therefore, from your perspective as a user, database location and document storage location are relatively unimportant.

In order to understand how your particular AppXtender system works, you may want to consult your AppXtender system administrator. The system administrator can tell you whether you have access to an Index Server (a full-text engine that has been selected for the applications you use), what functionality is configured for your workstation, what AppXtender data sources are configured for you, what functions you have rights to in AppXtender, and which edition of ApplicationXtender Web Access you will be working with (AppXtender Web.NET or AppXtender WebJ2).

*Note:* Knowing which functions are available to you will help you to better understand how to effectively use ApplicationXtender Web Access.
Capturing Content for the ApplicationXtender System

The ApplicationXtender system includes many options for adding content to the system. AppXtender Web Access provides two input options (scanning and batch import) and can be used to capture individual documents, batches of documents, and individual pages.

For more information, refer to the following topics:

◆ “Capturing Documents” on page 32
◆ “Adding Pages” on page 33

Capturing Documents

The method used to capture content using ApplicationXtender Web Access is determined by two factors: the format of the content to be added to the AppXtender system and the ApplicationXtender Web Access client mode in which you are working.

Note: AppXtender Web Access has two client modes: ApplicationXtender Web Access Thin Client and ApplicationXtender Web Access Interactive Client (IRC). For more information, refer to “ApplicationXtender Web Access Client Modes” on page 42.

ApplicationXtender Web Access features two content capture methods: scanning and batch import.

◆ Scanning is used to capture paper documents in a specified electronic image format. Depending on the scanner, you can scan single documents, batches of documents, or both single and batch documents.

Note: To access scanning functionality, AppXtender Web Access user settings must be configured for ApplicationXtender Web Access Interactive Client mode.

◆ The Batch Import function is used to import electronicallyformatted documents into AppXtender (provided the electronic format is one supported by AppXtender).

By providing batch scanning capability for paper documents and batch import capability for electronically-formatted documents, AppXtender Web Access makes document capture more efficient.
Adding Pages

In addition to being able to add new documents to the AppXtender system, you can also use ApplicationXtender Web Access to add individual pages to existing documents. Pages can be added by file import and, in ApplicationXtender Web Access Interactive Client mode, scanning.
How Documents are Stored and Displayed in AppXtender

When documents and pages are captured and electronic files are created, AppXtender verifies the file type and then stores the file as the identified type (such as image, text, foreign file format). Depending on the file type, AppXtender stores files as a supported file type or an unsupported file type.

Many of the functions available in AppXtender are file-type dependent. Because AppXtender is geared toward providing access to as many useful functions as possible, features are provided that can be used to work with particular file types. When you work with one file type, a certain set of features is available; when you work with other file types, some of those features may not be available.

Access to AppXtender functionality also depends on the operational mode in which you are using AppXtender: check in/check out mode or normal AppXtender mode. For more information on the different operational modes for AppXtender, refer to “ApplicationXtender Operational Modes” on page 49.

Note: The rights granted in your AppXtender user profile control which AppXtender functionality you can access. For more information on your user privileges in AppXtender, consult your AppXtender system administrator or refer to the “Managing Security” appendix of the ApplicationXtender Core Components Administrator’s Guide.

AppXtender has the capability to display file types in a variety of ways. The content of supported file types can be displayed in the AppXtender Web Access document viewer in Document Display view. Depending on the AppXtender configuration, unsupported file types can be displayed as icons representing foreign files, through KeyView Viewer support, or in their native applications in the AppXtender Web Access document viewer.

The following topics discuss how AppXtender stores different types of files and give a brief overview of the functions available for files stored in each format:

- “Supported Files” on page 35
- “Unsupported Files” on page 39
Supported Files

Supported files are files that AppXtender natively supports. 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” on page 35
- “COLD/ERM/Text Files” on page 36
- “Rich Text Format (RTF) Files” on page 37
- “Hypertext Markup Language (HTML) Files” on page 37
- “Portable Document Format (PDF) Files” on page 38

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. 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 images containing text to the Index Server, using OCR to extract the text for indexing. 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 3 Document Storage Format for Text Files

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASCII</td>
<td>ASCII stands for the American Standard Code for Information Interchange. This character set is used on most PCs, Macintoshs, and other desktop computers. A report generated on a desktop computer is likely to be in an ASCII format.</td>
</tr>
<tr>
<td>EBCDIC</td>
<td>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.</td>
</tr>
<tr>
<td>EBCDIK</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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.)

Document Display properties are not available for RTF files.

RTF files are displayed in their native format. The contents of the RTF file appears 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.

### 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).
Getting Started

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” on page 114.

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 the software cannot extract text from a PDF file, the pages are then processed for text content using OCR.

If you have access to an Index Server for full-text indexing, you can submit PDF files for full-text indexing. 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” on page 39
- “OLE Objects” on page 41

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, RTF, 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>
<thead>
<tr>
<th>Format</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word Processing</td>
<td>Microsoft Word 2000</td>
</tr>
<tr>
<td></td>
<td>Microsoft Word 2002 (XP)</td>
</tr>
<tr>
<td></td>
<td>Microsoft Word 2003</td>
</tr>
<tr>
<td></td>
<td>WordPerfect 12</td>
</tr>
<tr>
<td>Standard Graphic</td>
<td>Visio 2000</td>
</tr>
<tr>
<td></td>
<td>Visio 2002 (XP)</td>
</tr>
<tr>
<td></td>
<td>Visio 2003</td>
</tr>
<tr>
<td>Presentation</td>
<td>Microsoft PowerPoint 2000</td>
</tr>
<tr>
<td></td>
<td>Microsoft PowerPoint 2002 (XP)</td>
</tr>
<tr>
<td></td>
<td>Microsoft PowerPoint 2003</td>
</tr>
<tr>
<td>Other</td>
<td>Microsoft Project 2000</td>
</tr>
</tbody>
</table>

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.

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.
ApplicationXtender Web Access Client Modes

AppXtender Web Access supports two client modes: Thin Client and Interactive Client (IRC). Thin Client mode requires only that a supported web server and browser be installed on your computer. The Interactive Client can be downloaded from the server and installed manually or can be used on-demand for document display.

**Note:** Your ApplicationXtender Web Access administrator can either allow users to choose whether to use one mode or the other or control the mode setting by specifying the mode in the default user profile and then disabling user access to the setting.

The primary differences between the two client modes are in the options for processing documents from query results and the functionality that is available when documents are displayed. However, certain client functionality, such as thumbnail display and index display and modification, is available in both client modes. For more information, refer to the following topics:

- “Shared Functionality” on page 42
- “ApplicationXtender Web Access Thin Client Mode Functionality” on page 43
- “ApplicationXtender Web Access Interactive Client Mode Functionality” on page 46

Shared Functionality

ApplicationXtender Web Access offers a variety of search methods, including cross-application queries, index term searches, document properties searches, ad-hoc text searches, wildcard searches, list of values searches, and expression searches. Once a query is executed, the list of results, or result set, appears in the Query Results view.

From the result set, you can sort the results and display documents. When displaying multi-page documents, you can toggle back and forth through the pages.

You can configure ApplicationXtender Web Access so that thumbnails appear in result sets to represent retrieved documents. (Thumbnails are small representations of document pages. Icons are used to represent foreign files.) When you view documents, you can display thumbnails and icons representing the pages in the document.
In both modes, document version control can be provided using the check in/check out feature. Once a document is opened, you can view document indexes and, with appropriate privileges set in AppXtender, can modify indexes as needed. When modifying indexes, you can use dual data entry, multiple indexes referencing a single document, Auto Indexing, and Key Reference indexing in applications configured with those functions.

**Note:** Supported browsers can be used with either client mode in both English and French locales.

**ApplicationXtender Web Access Thin Client Mode Functionality**

You can view, edit, and print AppXtender documents in ApplicationXtender Web Access Thin Client mode using only the web server and browser, without any additional software. Because ApplicationXtender Web Access Thin Client requires only that a supported web server and browser be installed on your computer, if you are retrieving documents only for viewing, this mode is a more appropriate choice than ApplicationXtender Web Access Interactive Client mode.
In ApplicationXtender Web Access Thin Client mode, images are converted to GIF or JPEG format for viewing on-line. You can use preset zoom functions to scale documents and generate printer-friendly views for document printing. If your ApplicationXtender Web Access administrator configured foreign file export, assuming the corresponding application is available, you can use the KeyView viewer to view foreign files natively.

For more information, refer to the following topics:
- “Thin Client—Minimum Hardware and Software Requirements” on page 44
- “Thin Client—Supported Document Types” on page 44

**Thin Client—Minimum Hardware and Software Requirements**

The minimum hardware and software requirements for the AppXtender Web Access Thin Client are:
- Any platform that supports:
  - Microsoft Internet Explorer for client and server (for AppXtender Web.NET)
  - Netscape client and server (for AppXtender WebJ2)
  - Microsoft Internet Explorer with JavaScript and CSS enabled or Netscape Navigator with JavaScript and CSS enabled (JavaScript and CSS are enabled by default in both Internet Explorer and Netscape Navigator)
- Internet or corporate intranet connection

Refer to the ApplicationXtender Web Access Release Notes for specific versions of supported software.

**Thin Client—Supported Document Types**

The following document types can be displayed using the ApplicationXtender Web Access Thin Client. These document types are a subset of the AppXtender-supported document types. The Description column contains additional information and considerations for using the corresponding document type.
### Table 5  ApplicationXtender Web Access Thin Client Supported Document Types

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Image</td>
<td>Preset zoom ratios are provided. Annotation viewing is supported.</td>
</tr>
<tr>
<td>COLD</td>
<td>An image form overlay must be used for zoom ratios to be supported.</td>
</tr>
<tr>
<td>COLD with Text Form Overlay</td>
<td>No color bars. Text form overlays can be turned on and off from the Settings window.</td>
</tr>
<tr>
<td>COLD with Image Form Overlay</td>
<td>Image form overlays can be turned on and off from the Settings window. Zoom and custom fonts are allowed with image form overlay.</td>
</tr>
<tr>
<td>Foreign File</td>
<td>Presented as a link that you can click to download the file. If the application associated with the file type exists on your computer and a file association has been created on the IIS server, the document will open in Document Display view viewer in its native application. If your system administrator has configured the KeyView viewer, foreign files display as HTML files.</td>
</tr>
<tr>
<td>OLE Object</td>
<td>Embedded OLE objects are not supported in ApplicationXtender Web Access Thin Client mode. Add as foreign files rather than using OLE embedding.</td>
</tr>
<tr>
<td>PDF File</td>
<td>PDF files, like foreign files, are presented as links that you can click to download the file.</td>
</tr>
</tbody>
</table>

**Note:** The ApplicationXtender Web Access Thin Client displays PDF file content if the Adobe Acrobat Reader is installed on the computer.
When additional content management functionality is necessary, you may find ApplicationXtender Web Access Interactive Client mode to be a better choice than ApplicationXtender Web Access Thin Client mode. In addition to having all the functionality of the ApplicationXtender Web Access Thin Client, ApplicationXtender Web Access Interactive Client mode allows you to view documents in Document Display view using the ApplicationXtender Web Access Interactive Client viewer. The ApplicationXtender Web Access Interactive Client viewer displays images in their native format, allowing for the highest quality image.

The ApplicationXtender Web Access Interactive Client features the ApplicationXtender Web Access image and annotation toolbars. The image toolbar includes functionality such as enhanced zoom options, page rotation, magnification, printing, client workstation configuration, text search, text view, and image information. The annotation toolbar allows you to add text and shape annotations and redactions to documents in ApplicationXtender Web Access Interactive Client mode.

**Note:** If your workstation is a scan workstation, a scan toolbar will also appear in the ApplicationXtender Web Access Interactive Client viewer. From this toolbar, you can set up scan properties, select the scan mode, and initiate scanning.

For more information, refer to the following topics:

- “Interactive Client—Minimum Hardware and Software Requirements” on page 47
- “Interactive Client—Supported Document Types” on page 47
Interactive Client— Minimum Hardware and Software Requirements

The minimum requirements for the ApplicationXtender Web Access ApplicationXtender Web Access Interactive Client are:

- Windows operating system
- Microsoft Internet Explorer, which includes ActiveX support, or Netscape configured to render pages in Internet Explorer format (refer to “Configuring Netscape Security Settings” for more information)
- Internet or corporate intranet connection

Refer to the ApplicationXtender Web Access Release Notes for specific versions of supported software.

CAUTION

To use the multiple document print functionality available from the ApplicationXtender Web Access Interactive Client result set, your computer must meet all of these hardware and software requirements.

Interactive Client— Supported Document Types

The following document types can be displayed using the ApplicationXtender Web Access Interactive Client. These document types are a subset of the AppXtender supported document types. The Description column contains additional information and considerations for using the corresponding document type.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Image</td>
<td>Preset zoom ratios are provided. Annotation viewing and editing are supported.</td>
</tr>
<tr>
<td>COLD</td>
<td>Zoom ratios and color bars are supported.</td>
</tr>
<tr>
<td>COLD with Text Form Overlay</td>
<td>Color bars are supported. Font sizes and color bar settings can be configured from the Settings window.</td>
</tr>
<tr>
<td>COLD with Image Form Overlay</td>
<td>Image form overlays can be turned on and off from the Settings window. Zoom is allowed with image form overlay. Custom fonts can also be used with this overlay.</td>
</tr>
</tbody>
</table>
Getting Started

Table 6  ApplicationXtender Web Access Interactive Client Supported Document Types (continued)

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign File</td>
<td>Presented as a link that you can click to download the file. If your system administrator has configured the KeyView Viewer, foreign files display as HTML files.</td>
</tr>
<tr>
<td>OLE Object</td>
<td>Supports embedded OLE objects.</td>
</tr>
<tr>
<td>PDF File</td>
<td>Adobe Acrobat Reader must be installed before PDF files can be viewed in ApplicationXtender Web Access Interactive Client Document Display view. After Acrobat Reader is installed, the application is embedded within the ApplicationXtender Web Access Interactive Client Document Display view when a PDF file is opened. All Acrobat Reader navigation and viewing functions are supported. Refer to the ApplicationXtender Web Access Release Notes for the supported version of the Acrobat Reader.</td>
</tr>
</tbody>
</table>

For information about setting up ApplicationXtender Web Access Interactive Client components for Internet Explorer and Netscape, refer to “Customizing Your Workstation.”
ApplicationXtender Operational Modes

You can use ApplicationXtender Web Access to store and retrieve documents through the AppXtender interface. Like AppXtender Document Manager, ApplicationXtender Web Access has three modes of operation: normal mode, check in/check out mode, and reason audit mode. The normal and check in/check out modes of operation relate to the use of revision control in AppXtender. Revision control keeps track of who is working on a document and can also be used to track previous revisions of a document. Reason audit mode is used to audit document-related operations, such as document export and printing, and the reason they are performed.

Note: With normal mode and check in/check out mode, you may be able to choose the mode in which you want to work.

With normal mode, as long as the document has not been checked out of the AppXtender document repository, one user can access the document, make modifications, and then save his or her changes regardless of whether another user is also working with the same document.

When revision control is in use, you must check documents out before you can modify them. Check in/check out mode provides a more secure level of version control than is provided in normal mode. It is recommended that you use revision control and check out documents whenever you need to modify them so that other users cannot make modifications to the same document you are working on. This is particularly important if it may take more than one working session to modify the document.
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For example, assume you are in the process of adding a few pages of new data to a document, and you have not checked the document out. While you are working on the document, another user opens the same document and, without seeing the changes you have made (since you are still working on the document), makes additional changes. You close and save the document first. Later, when the other user closes and saves the same document, the changes you made are overwritten with his or her changes. As a result, all of the changes you made are lost and will need to be re-entered. If you had checked the document out to add the new data, the other user would have had to access the document in read-only mode and would not have been able to make any changes until you were finished and had checked the document back in.

With reason audit mode, you are required to enter the reason you are accessing a document and add explanatory comments whenever you create, display, export, print, or e-mail documents. Reason audit mode is configured by your administrator at the application level to facilitate compliance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

The following topics can help you understand how you would use each mode of operation when working with AppXtender documents.

- “Normal Mode” on page 50
- “Check In/Check Out Mode” on page 51
- “Reason Audit Mode” on page 53

Normal Mode

For you to access documents in normal mode in AppXtender, the AppXtender application you are working with must be in normal mode, the workstation you are working on must be in normal mode, and your AppXtender User Profile must be set for normal mode.

- An AppXtender application is in normal mode if the system administrator does not select the Prompt for checkout when open documents option when configuring the application.
- A workstation is in normal mode if the system administrator does not select the Prompt for check out when open option when configuring the workstation.
- Your AppXtender user profile is set for normal mode if the system administrator sets the Prompt for checkout option to False when configuring your User Profile settings.
When working with ApplicationXtender Web Access, assuming the application, workstation, and your user profile are all set for normal mode, you can switch between normal mode and check in/check out mode on demand by selecting the Prompt for checkout option on the Document View tab of the Settings window. If you are not sure which mode ApplicationXtender Web Access is in when you begin a session, check the User window to verify the setting is correct for the operational mode in which you want to work. If not, change the setting and then save the change. The new setting becomes effective as soon as you save. You do not have to log out of AppXtender Web Access and then log back in again.

Note: For information on configuring user session settings from the ApplicationXtender Web Access Settings window, refer to “Customizing Your Workstation” on page 83.

When your workstation is in normal mode and you select to open a document that another user has checked out, you automatically receive a read-only copy of the document, indicated in Document Display view by an '(RO)' notation in the status bar.

Note: The read-only copy of the document shows the contents as it was in the AppXtender repository at the time the document was checked out (that is, minus any changes made by the user who has the document checked out).

Check In/Check Out Mode

When you work with ApplicationXtender Web Access, even when the AppXtender application and workstation configuration settings made by the system administrator are for normal mode, if the Prompt for checkout option on your User Profile is set to True, you can use revision control when working with documents. You can switch from normal mode to check in/check out mode on demand by selecting the Prompt for checkout option on the AppXtender Web Access Document View tab of the Settings window.

If your administrator configured ApplicationXtender Web Access with check in/check out mode at the application level, you must work in check in/check out mode using revision control. Your administrator may also enable required comments on document check in, check out, or both and reason audit mode for some or all of the applications you work with.
Note: For information on how Prompt for check out when open documents is enabled when AppXtender applications are set up, refer to “Creating an Application” in the ApplicationXtender Core Components Administrator’s Guide.

When working in check in/check out mode, in order to access a document, you must check the document out of the AppXtender document repository. When you check out a document, AppXtender creates a copy of the document as it exists in the AppXtender repository. This copy becomes your working copy. When you save the changes you make to the working copy, they do not appear on the copy of the document in the repository as long as your working copy remains checked out.

If necessary, while you are working with a checked out document, you can cancel checkout. When you cancel checkout of a document, the working copy AppXtender created when you checked the document out is deleted, and any changes that you made to the working copy are discarded. AppXtender considers the revision of the document that you checked out as the current revision.

While you have a document checked out, if you are unable to complete work on the document during a single session, you can save and close the document and keep it checked out so that you can continue working on it in a later session. As long as you have the document checked out, other users can only access a read-only copy of the existing revision of the document—the version prior to your modifications.

When your workstation is in normal mode and you select to open a document that you already have checked out, you have the option of opening the checked out version of the document (the working copy) or a read-only copy of the document from the AppXtender repository (the document as it was when you checked it out).

When you finish modifying a checked out document, you must decide how (or whether) to resave the document to the AppXtender document repository. When you save your revised working copy of the document and check it into the AppXtender repository as a new document revision, you can mark it as either a minor revision or a major revision. You can either delete the existing version of the document from the AppXtender repository or save it as a previous document revision.
**Getting Started**

**Note:** For information on document revision types, refer to “Check In/Check Out Document Display Mode” on page 256.

If the application you are working with has been configured with Prompt for checkout on open documents enabled, when the document you are checking in is in final form, you can mark the document as a final revision. Once a document is marked as a final revision, users can open the document only in read-only mode and can no longer check out or modify the document. For information on how final revision functionality is enabled 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.

**Reason Audit Mode**

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) was put in place to protect health care patients by regulating how patient records are stored and accessed. ApplicationXtender contains options that can be used to help create a content management solution that facilitates compliance with the HIPAA regulations.

When the Reason Code option is enabled for an AppXtender application and the Audit Trail option is enabled, all document creation, printing, e-mail, and export actions are audited. You are required to enter comments explaining the reason for document creation, printing, e-mail, and export and to indicate the functionality you intend to use by enabling printing, e-mail, and export options. Those comments, along with your user identity, are logged using the Audit Trail feature.

For more information, refer to “Entering Reason Codes” on page 265.
Selecting Data Sources

A data source is the means by which AppXtender Web Access accesses data from a database. Information that is stored in the ApplicationXtender database includes application definitions, security information, document index information, and pointers to document locations.

Multiple data sources can be viewed simultaneously within AppXtender Web Access. In this way, you can access applications located on many different data sources during a single AppXtender Web Access session, provided you have security rights to access those data sources.

Note: The procedures in this section apply to ApplicationXtender Web Access .NET only. Contact your system administrator if you need assistance with selecting data sources for ApplicationXtender Web Access J2.

For more information, refer to the following topics:

◆ “Locating Data Sources” on page 55
◆ “Specifying a Default Data Source” on page 58
◆ “Specifying Multiple Data Sources” on page 59
◆ “Changing the Default Data Source” on page 60

For information on data source creation and configuration, consult your AppXtender system administrator or refer to the "AppXtender Data Sources" section of the ApplicationXtender Core Components Administrator’s Guide.

Note: You can save data source settings (which data sources are default and which are selected) to a file, along with other AppXtender workstation settings. Also, if you have such a saved settings file, you can load the data source settings from that file. For instructions, refer to "Saving and Loading Settings" in the ApplicationXtender Desktop Administrator’s Guide.

CAUTION

All of the settings that you enter in the Data Source Selector are stored in C:\Documents and Settings\All Users\Application Data\XSCM.CONFIG. Do not edit the contents of the XSCM.CONFIG file.
Locating Data Sources

The ApplicationXtender Data Source Selector module allows you to locate available data sources from any AppXtender workstation.

To locate data sources using the AppXtender Data Source Selector:

1. From the Windows Start menu, access the ApplicationXtender Desktop menu by selecting Programs > ApplicationXtender Desktop.

2. From the ApplicationXtender Desktop menu, select AppXtender Data Source Selector.

   The ApplicationXtender Data Source Selector dialog box appears.

3. To select a new data source, click Locate.
   
   The Data Link Properties dialog box appears with the Connection tab revealed.

   Note: If the list box is empty when the dialog box opens, data sources have not yet been selected for the workstation.

4. To select a new data source, click Locate.
   
   The Data Link Properties dialog box appears with the Connection tab revealed.
4. Select the Provider tab to reveal the tab contents.

5. On the Provider tab, select the appropriate data provider for one of the data sources in the data source group that you want to locate.

6. Select the Connection tab to reveal the tab contents again.

7. On the Connection tab, enter appropriate server and database information.
Note: For more information, consult your AppXtender system administrator or refer to the "ApplicationXtender Data Sources" section of the ApplicationXtender Core Components Administrator’s Guide.

8. To verify that you correctly entered the server and database information, on the lower right, click Test Connection.

9. If the test is successful, save the settings and close the Data Link Properties dialog box by clicking OK.

The ApplicationXtender Data Source Configuration dialog box reappears with the name of the available data source in the list box.

![ApplicationXtender Data Source Selector Dialog Box with Available Data Source Listed](image)

Figure 5 ApplicationXtender Data Source Selector Dialog Box with Available Data Source Listed

Note: If the connection test is not successful, correct the server and database information you entered previously and try the test again.

10. To configure another data source, repeat steps 3 through 9.

The first time you use the ApplicationXtender Data Source Selector to locate data sources for a workstation, before you can close the dialog box, you must specify a default data source. (This is true even when only one data source is available.) For the steps to specify the default data source for a workstation, refer to “Specifying a Default Data Source” on page 58.
**Specifying a Default Data Source**

In addition to locating data sources, you use the AppXtender Data Source Selector to set the default data source. This setting determines which data source is in use for ApplicationXtender Application Generator and the ApplicationXtender Import Wizards.

**Note:** When you log into ApplicationXtender Web Access, unless you selected another available data source (if any), you are automatically logged into the default data source. For information on logging into AppXtender Web Access, refer to “Logging Into ApplicationXtender Web Access” on page 68.

To set a default data source:

1. In the list box on the AppXtender Data Source Selector dialog box, double-click the data source you want as the default. A black circle with a white check mark appears next to the data source name.

   ![Figure 6 Default Data Source Selected](image)

   **Figure 6 Default Data Source Selected**

   **Note:** You can also set the default by clicking the data source in the list box and then clicking Set as Default.

2. To save the setting and close the dialog box, click OK. To save the setting without closing the dialog box, click Apply.
Specifying Multiple Data Sources

When multiple data sources are available from the AppXtender Data Source Selector, in addition to the default data source, you can select any of the other available data sources to be accessed from within ApplicationXtender Web Access. This way, you can work with applications from two or more data sources during a single AppXtender Web Access session.

Note: You can log into only those data sources for which you have a user account. For more information, consult your system administrator or refer to the "Managing Security" appendix of the ApplicationXtender Core Components Administrator’s Guide.

To specify multiple data sources to be accessed from within AppXtender Web Access:

1. In the AppXtender Data Source Selector list box, select a data source that you want to access from within AppXtender Web Access (other than the default data source).

2. Click Show/Hide. A black check mark appears next to the selected data source name, indicating the data source will be accessible from within AppXtender Web Access.

Note: Unchecked data sources will not appear as choices when you log into AppXtender Web Access.

Note: To cancel a selection, click the data source and then click Show/Hide. The check mark next to the data source name clears from the list box.

3. Repeat steps 1 and 2 for each data source that you want to be able to access.

4. To save your changes and close the dialog box, click OK. To save your changes without closing the dialog box, click Apply.

The next time you launch AppXtender Web Access, all data sources that you placed check marks next to are accessible.
Changing the Default Data Source

When two or more data sources are available, there may be times when you need to change which data source is the default.

To change the default data source selection:

1. From the Windows Start menu, select Programs and then ApplicationXtender Desktop. The ApplicationXtender Desktop menu appears.

2. From the ApplicationXtender Desktop menu, select AppXtender Data Source Selector. The ApplicationXtender Data Source Selector dialog box appears.

3. Double-click the data source you want to make the default data source. A black circle with a white check mark appears next to the data source name. Simultaneously, a black check mark appears next to the name of the previously selected default data source.

4. To save the new setting and close the dialog box, click OK.
Configuring Language Settings

Depending on your location, you may need to work with ApplicationXtender Web Access in a language other than English. For example, if you work with AppXtender Web Access in Interactive Client mode all or part of the time and the language setting of your Internet browser is set to English, you need to change the setting to your preferred language. In addition, the language pack for the selected language must be applied to the appropriate server (AppXtender Web.NET or AppXtender WebJ2).

Note: This change is not necessary if you work with AppXtender Web Access only in Thin Client mode. For information on Thin Client and Interactive Client modes, refer to “Thin Client Document Display View Menu Bar and Toolbar” on page 267 and “Interactive Client Document Display View Menu Bar and Toolbar” on page 280.

Language settings determine the language your computer uses when displaying menus, tools, dialog boxes, buttons, and other items. ApplicationXtender Web Access functionality is not affected when you change language settings. Only the appearance of text on the screen changes.

Note: If your Internet browser is currently set for your language, the appropriate language pack is applied to the AppXtender Web.NET or AppXtender WebJ2 server, and a localized version of ApplicationXtender Web Access for your language is available, you can install the localized version of ApplicationXtender Web Access on your computer. Once this is done, you should not need to change any language settings.

The steps you follow to change browser language settings vary depending on whether your browser is Internet Explorer or Netscape. For more information, refer to the following topics:

◆ “Configuring Internet Explorer Language Settings” on page 62
◆ “Configuring Netscape Language Settings” on page 63

Note: For detailed information on changing language settings, refer to Internet Explorer or Netscape Help.
Configuring Internet Explorer Language Settings

To configure Internet Explorer language settings, you need to specify the language to use for Web pages and select the appropriate character set (character coding method) for that language. If the required font is not installed on your computer, you also need to download and install the font.

Note: Character sets control how text is converted to the data used by your computer. Some languages share the same coding method; others have their own character sets.

For more information, refer to the following topics:

◆ “Selecting a Language for Web Pages” on page 62
◆ “Configuring Web Page Fonts” on page 63

Selecting a Language for Web Pages

To set your preferred language for Web pages:

1. Open Internet Explorer and, on the browser menu, select Tools. The Tools menu opens.
2. From the Tools menu, click Internet Options. The Internet Options dialog box appears.
3. In the lower part of the dialog box, click the Languages button. The Language Preference dialog box appears.

In the dialog box, currently available languages are listed in order of priority in the Languages text box. Buttons next to the text box allow you to change the order of priority by moving language selections up or down in the list.

Note: If necessary, you can also add languages to or remove languages from the Languages text box.

4. If your preferred language appears in a position other than at the top of the Languages list, use the Move Up button to move it to the top of the list. For example, if your preferred language, French/France[fr-fr]), is third from the top, you would click the Move Up button twice to move it to the top of the Languages list.
5. To save the setting and close the dialog box, click OK. The Internet Options dialog box appears.

6. To close the Internet Options dialog box, click OK.

**Configuring Web Page Fonts**

Changing the language appearing on Web pages works only when the appropriate font is installed on your computer. To be notified automatically if the font for the selected language needs to be downloaded and installed, use the Enable Install On Demand (Internet Explorer) feature.

To select configure web page fonts:

1. Open Internet Explorer and, on the browser menu, select Tools. Tools menu opens.
2. On the Tools menu, click Internet Options. The Internet Options dialog box appears.
3. Click the Advanced tab to reveal the advanced options.
4. In the Settings list, check the Browsers options to see if the Enable Install On Demand (Internet Explorer) feature is selected. If not, click the corresponding check box.
5. If you select the Enable Install On Demand check box, to apply the new setting, click Apply.
6. To close the Internet Options dialog box, click OK.

**Configuring Netscape Language Settings**

To configure Netscape language settings, you need to specify the language to use for Netscape itself, the language to use for Web pages, and the appropriate character set (character coding method) for the specified language.

**Note:** Character sets control how text is converted to the data used by your computer. Some languages share the same coding method; others have their own character sets.

For more information, refer to the following topics:

- “Selecting a Language for Netscape” on page 64
- “Selecting a Language for Web Pages” on page 65
Selecting a Language for Netscape

Netscape uses language packs for menus, tools, dialog boxes, and other items. It uses content packs for the home page, bookmarks, toolbar contents, My Sidebar, and other items.

To select your preferred language for Netscape:

1. Open Netscape and, on the Edit menu, select Preferences. The Preferences dialog box appears.

2. In the Category list on the left, double-click Appearance. The list of Appearance categories expands.

3. In the list of Appearance categories, select Languages/Content. The Language and Content Packs options appear to the right of the Category list.
   - The Installed language packs list shows the languages currently available for use for text on menus, dialog boxes, buttons and other items.
   - The Installed content packs list shows the languages currently available for use for the home page, toolbar contents, bookmarks, and other items.

4. From both the Installed language packs list and the Installed content packs list, select your preferred language.

   **Note:** If the language you want does not appear in the lists, select Download More to download the required language pack from Netscape Browser Central.

5. To close the Preferences dialog box, click OK.
Some Web pages are available in several languages. To change the language that Netscape uses for Web pages, you need to set your preferred language as your Web page language preference and, if necessary, update the default character coding method.

To set your preferred language for Web pages:

1. Open Netscape and, from the Edit menu, select Preferences. The Preference dialog box appears. Languages options appear to the right in the dialog box.

2. In the Languages in order of preference text box, if your preferred language appears in a position other than at the top of the list, use the Move Up button to move it to the top of the list. For example, if Paris, France, is your location and the your preferred language, French/France[fr-fr]), is third from the top, you would click the Move Up button twice to move French/France[fr-fr] to the top of the Languages list.

3. To change the character coding method, from the Default Character Coding list box, select the appropriate coding method.

4. Click OK.
Getting Started

Configuring Cache Settings

Before logging into ApplicationXtender Web Access on your workstation, you must configure your web server and browser settings so that each time a page is reloaded, cached documents will be compared with documents available on the network. This ensures that you are viewing and working with the most recent versions of documents.

The procedure to configure cache settings varies depending on whether you are working in Internet Explorer or Netscape.

For information on configuring cache settings, refer to the following topics:

◆ “Configuring Internet Explorer Cache Settings” on page 66
◆ “Configuring Netscape Cache Settings” on page 67

Configuring Internet Explorer Cache Settings

To configure cache settings in Internet Explorer:

1. Open Internet Explorer and, from the Tools menu, select Internet Options. The Internet Options dialog box appears.
2. In the Temporary internet files section of the dialog box, click the Settings button. The Settings dialog box appears.
3. Select the Every visit to the page button.
4. To close the Settings dialog box, click OK.
5. To save the settings and close the Internet Options dialog box, click OK.
Configuring Netscape Cache Settings

To configure cache settings in Netscape:

1. Open Netscape and, from the Edit menu, select Preferences. The Preferences dialog box appears.

2. Expand the Advanced node, and then click the Cache node. The Cache page of the Preferences dialog box appears.

3. Select the Every time (or Every time I view the page) button.

4. To save the new settings and close the Preferences dialog box, click OK.

Note: The procedure for configuring Netscape cache settings might vary depending on the version of Netscape. Refer to Netscape Help for more information on configuring cache settings.
Logging Into ApplicationXtender Web Access

With the cache settings properly configured, you can log into ApplicationXtender Web Access. The default entry point for both ApplicationXtender Web Access is the Login dialog box. Because ApplicationXtender Web Access is password-protected, you must correctly enter both the user name and password in order to access the software.

Your user name and password control your ApplicationXtender user account. ApplicationXtender Web Access monitors your work activities, allowing or denying access to information based on your assigned privileges in the underlying ApplicationXtender system.

**Note:** If you have questions about your user account, consult your ApplicationXtender administrator.

To log into ApplicationXtender Web Access:

1. In your browser Address text box, enter the web address for either ApplicationXtender Web Access .NET or ApplicationXtender Web Access J2.
   - The format for the ApplicationXtender Web Access .NET website URL is:
     
     HTTP (or HTTPS)://WebXServer/AppXtender/default.aspx
     
     where WebXServer is the IP address or domain of the AppXtender Web.NET web server and AppXtender is the AppXtender Web.NET server alias.
   - The format for the ApplicationXtender Web Access J2 website URL is:
     
     HTTP (or HTTPS)://host:port/WebXtender
     
     where host is the IP address or name of the server where the AppXtender WebJ2 web server is running and port is the AppXtender WebJ2 web server port for HTTP access.

   **Note:** If you do not know the IP address or domain of the web server or the host/port IP address or server name, ask your ApplicationXtender Web Access administrator for assistance.
The corresponding ApplicationXtender Web Access Login dialog box appears.

1. To log into a data source other than the default, select the name of the data source from the Data Source list box.

   **Note:** For a data source to appear in the Data Source list box, you must use the Data Source Selector to locate the data source and select it. For more information, refer to “Selecting Data Sources” on page 54.

2. Enter your ApplicationXtender login user name and password in the corresponding text boxes. If you have not been assigned a user name and password, contact your system administrator to obtain an ApplicationXtender user account.

3. To have full-text search capability during the session, select the Request Full Text Search Support check box.
Once you select this check box, it remains checked so that you have full-text search support each time you log into ApplicationXtender Web Access. To cancel full-text search support, click the check box to remove the check mark.

If your ApplicationXtender user account does not include full-text privileges, a message indicating this appears when you log in. If you have full-text privileges but the maximum number of full-text licenses has been exceeded, a warning message appears during login. In both cases, the Full-Text Query Criteria section will not appear in Application Query view.


![AppXtender Web Access Desktop—Application List View](image)
Working in AppXtender Web Access Application List View

As you work with ApplicationXtender Web Access, the content appearing on your user desktop at any given time is referred to as the view. The view changes based on the functionality you choose to work with. For example, when you select to create a query for an application, your user desktop changes to Application Query view for the selected application. When you run the query and results become available, the user desktop changes to the Query Results view. And when you select to view a document from the query result set, the desktop changes to Document Display view.

Note: Do not use Web browser navigation buttons to navigate between Web Access views. Use Web Access icons to navigate between views.

In this User’s Guide, AppXtender Web Access user desktop views and the associated menu commands and toolbar buttons are discussed in context of the type of work associated with each view. For example, “Retrieving Documents” on page 185, includes detailed information on Application Query view and Query Results view. In “Viewing Documents” on page 245, Document Display view and Thumbnails view are discussed.

The view that appears on the user desktop when you log into AppXtender Web Access is called the Application List view. From Application List view, you can log into any inactive data bases you are authorized to access, change your password for an active data source, select functionality to work with applications, and log out of ApplicationXtender Web Access.

For more information about working in Application List view, refer to the following topics:

- “Understanding Application List View” on page 72
- “Logging into a Data Source from the AppXtender Web Access User Desktop” on page 74
- “Changing Your Password” on page 76

For the procedure to log out of AppXtender Web Access, refer to “Logging Out of ApplicationXtender Web Access” on page 81.
Understanding Application List View

Application List view consists of a tree data structure listing available data sources and, for each data source you are logged into, the applications you can access from that data source.

Note: You can select which data sources appear on your user desktop and which are hidden using the AppXtender Data Source Selector. For more information, refer to “Selecting Data Sources” on page 54.

The data source you logged into (the active data source) is represented by an icon of a database with a key on the right. The applications you can access from the data source are represented by folder icons.

Figure 11  Active Data Source and Applications in Application List view

Note: Applications are created in ApplicationXtender’s ApplicationXtender Application Generator module. For more information, refer to the ApplicationXtender Core Components Administrator’s Guide or consult your system administrator.

The different levels in the data tree are called nodes. The nodes are arranged hierarchically, with top level—data source nodes—to the left. Application nodes are indented to the right beneath the corresponding data source node, and query nodes (if any) are indented to the right beneath the corresponding application node.
If, during a session, you log into two or more data sources, each of which has several applications, you may want to customize your view of the data tree so that only the nodes for the data source you are currently working with are revealed. To hide the application nodes for the other data sources from view, select the minus (close) button next to the corresponding data source. When the application nodes are hidden from view, a plus button replaces the minus button. To reveal the application nodes again, select the plus (open) button.

You open and close query nodes in the same way. When queries exist for an application, a plus (open) button appears to the left of the application’s folder icon. When you click the button, the query nodes are revealed below the application node. The button changes to a minus (close) button so that when you finish running the queries, you can hide the nodes from view.
Getting Started

Logging into a Data Source from the AppXtender Web Access User Desktop

When more than one data source is available within ApplicationXtender Web Access, data sources you have not yet logged into (inactive data sources) are represented by icons of a database with a closed padlock on the right.

![Figure 13 Inactive Data Source Icon](image)

To log into an inactive data source, you must have a user account for that data source. For more information about data source user accounts, consult your system administrator or refer to the "Managing Security" section of the ApplicationXtender Core Components Administrator's Guide.

**Note:** Once you log into a data source, it remains active until you log into another available data source or log out of AppXtender Web Access.

To log into an inactive data source:

1. In Application List view, right-click the data source name and then select Login. The Login to Data Source dialog box appears in a separate window.
2. To log in using the displayed user name and password, verify that the Auto login using same user credentials check box is checked. If not, select the check box.

To log in using another user name and password (assuming you have more than one login), enter that user name and password in the respective fields. Then check the Auto login using same user credentials check box; if the check box is selected, clear the check mark from the box.

3. If you want full text search privileges and the Request Full Text Search Support check box is not checked, select the check box.

4. To log in, click Login. When the data source becomes active, the data source node on the data tree expands to show the available application nodes.
Changing Your Password

At any time during your ApplicationXtender Web Access session, you can change your password for any active data source. Changing your password for a data source in ApplicationXtender Web Access also changes your ApplicationXtender password for that data source.

**CAUTION**

If your ApplicationXtender administrator configured ApplicationXtender using the Windows NT security model, you cannot change your password from within ApplicationXtender Web Access. Instead, you can change your password using Windows NT. Your ApplicationXtender/AppXtender Web Access password will automatically change to the password you set using Windows NT. For more information about ApplicationXtender security, contact your ApplicationXtender administrator or refer to the ApplicationXtender Core Components Administrator’s Guide.

To change your password for an active data source:

1. In Application List view, right-click the active data source for which you want to change your password. The data source menu appears.
2. Select Change Password. The Change Password dialog box appears.
CAUTION
For the Change Password option to appear on the menu, you must be logged into the selected data source. If you are not logged into the data source, the Logon menu appears instead.

3. In the Current Password text box, type your current password.
4. In the New Password text box, type your new password.
5. In the Confirm New Password text box, type your new password again.
6. Click OK.

Accessing Application List View from Another View

To return to Application List view from another view,

- From the main toolbar, select the Applications List button.
Other AppXtender Web Access Desktop Views

As you work with AppXtender Web Access, your desktop changes to display views corresponding to the functionality you are currently using. The view consists of the fields and buttons required to enter or display data. For example, when you set up a query to search for documents, Application List view is replaced by Query view.

![Query View](image)

Figure 18  Query View
Depending on the view, additional buttons may appear on the main toolbar or additional task toolbars appear below the main toolbar. In Document Display view, for example, a viewer toolbar appears with buttons that allow you to manipulate the image you are currently viewing. Depending on the configuration and the user’s permissions, an annotations toolbar may also appear.

**Note:** Do not use Web browser navigation buttons to navigate between Web Access views. Use Web Access icons to navigate between views.

![Document Display View](image)
The following table lists the main ApplicationXtender Web Access desktop views and the chapters in this guide where they are discussed.

<table>
<thead>
<tr>
<th>View</th>
<th>Refer to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application List</td>
<td>“Working in AppXtender Web Access Application List View” on page 71</td>
</tr>
<tr>
<td>Query</td>
<td>“Using Queries in ApplicationXtender Web Access” on page 187</td>
</tr>
<tr>
<td>Application Query Results</td>
<td>“Displaying Documents from Query Results View” on page 229</td>
</tr>
<tr>
<td>Document Display (Thin Client Mode)</td>
<td>“Thin Client Document Display View Functionality” on page 266</td>
</tr>
<tr>
<td>Document Display (Interactive Client Mode)</td>
<td>“Interactive Client Document Display View Functionality” on page 279</td>
</tr>
<tr>
<td>Thumbnails</td>
<td>“Using Thumbnails View” on page 246</td>
</tr>
<tr>
<td>Index</td>
<td>“Indexing Batch Pages” on page 133</td>
</tr>
<tr>
<td>Batch List</td>
<td>“Accessing a Batch for Indexing” on page 131</td>
</tr>
</tbody>
</table>
Logging Out of ApplicationXtender Web Access

When you finish working with ApplicationXtender Web Access, to ensure that the license assigned to you when you logged in will be available for another user as soon as you are off the system, it is important that you log out properly using the Log Out function.

To log out of ApplicationXtender Web Access:

1. On the main toolbar, select the Logout button.

   ![Logout Button on Main Toolbar](image)

   **Figure 20** Logout Button on Main Toolbar

   **Note:** The Logout button is always the first button to the left on the main toolbar, regardless of which view is currently displayed on your AppXtender Web Access user desktop.

   A message appears asking you to confirm your logout request.

2. To continue logging out, click Yes. The AppXtender Web Access user desktop clears from the screen, and the login dialog box appears.

3. To continue exiting from the web site, close the browser window.

   **Note:** ApplicationXtender Web Access .NET has a feature that automatically disconnects your computer from the ApplicationXtender system if you close the browser window before properly logging out of the system. The feature ensures the AppXtender Web Access license is released and available for another user. Contact your system administrator to determine if this feature is enabled.

   **Note:** The auto-log out feature is not available for AppXtender WebJ2.
When you work with ApplicationXtender Web Access, you can configure functionality based on your specific work requirements. When the work requirements change, you can quickly access your settings and reconfigure them for the new requirements. You can configure settings for result sets and text searches, document access and viewing, Interactive viewer functionality, COLD data, result set print settings, e-mail message and attachment formats, and page and paper settings for printer-friendly view.

You can also configure the document display client mode you want to use: ApplicationXtender Web Access Thin Client and ApplicationXtender Web Access Interactive Client.

- ApplicationXtender Web Access Thin Client provides faster image download and uses fewer client resources than the ApplicationXtender Web Access Interactive Client.
- ApplicationXtender Web Access Interactive Client provides enhanced content management, editing, and viewing features not available when using the ApplicationXtender Web Access Thin Client.

Note: The first time you log into AppXtender Web Access, ApplicationXtender Web Access Thin Client is selected by default. You can switch modes at any time from the Interactive Viewer tab of the Settings window.
Your configuration option settings are saved on the AppXtender Web.NET or AppXtender WebJ2 server as part of your user profile. These settings remain in effect for your AppXtender Web Access sessions no matter which workstation you are working on or which browser type you use to log into AppXtender Web Access. You can change the configuration settings at any time based on your work requirements.

**CAUTION**


This section contains information on customizing the AppXtender Web Access functionality on your workstation based on your specific work requirements. It includes the following topics:

- **Setting Configuration Options** ......................................................... 85
- **Setting Up the ApplicationXtender Web Access Interactive Client** 110
- **Installing Web Access Client Components** ................................. 114
Setting Configuration Options

ApplicationXtender Web Access .NET and ApplicationXtender Web Access J2 configuration options allow you to set up AppXtender Web Access based on your own work requirements. Configuration options are set from the Settings window. You can access this window from the Application List view, Application Query view, Query Results view, and Applications Batch List view.

To access the available options for AppXtender Web Access user settings from the Application List view, click the New/Modify Your User Settings button on the toolbar. Or, from the Edit menu, select User Settings. The Settings window appears.

![ApplicationXtender Web Access Settings Window](image)

There are eight tabs on the left in the Settings window. Each tab lists setting options for a specific type of functionality. To reveal the contents on any tab, select the tab. You can then select the required options to configure AppXtender Web Access based on your individual requirements.
Customizing Your Workstation

**Note:** Depending on your AppXtender security privileges, you may not have access to or be able to view all of the setting options. If you have questions about how AppXtender security profiles affect your AppXtender Web Access privileges, consult your AppXtender Web Access administrator or refer to the *ApplicationXtender Web Access .NET Administrator’s Guide* or the *ApplicationXtender Web Access J2 Administrator’s Guide*.

Always save any setting changes by selecting Save before closing the Settings window. If you close the window without saving, your changes will be lost.

**Note:** To cancel any changes since the last save and keep the previous options settings, click Cancel.

For more information on the option settings available from each Settings window tab, refer to the following topics:

- “Search/Result Set Tab” on page 87
- “Full Text Tab” on page 89
- “Document View Tab” on page 91
- “Interactive Viewer Tab” on page 93
- “COLD Tab” on page 102
- “Result Set Print Tab” on page 105
- “Email Tab” on page 106
- “Printer Friendly View Tab” on page 108
Search/Result Set Tab

On the Search/Result Set tab of the Settings window, you can specify settings for query and result set display options and for text search options.

Figure 22 Search/Result Set Tab

The following table lists the options on the Search/Result Set tab and describes the purpose of each.

Table 8 Search/Result Set Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Query And Result Set Display Options</strong></td>
<td></td>
</tr>
<tr>
<td>Display Documents in Separate Popup Window</td>
<td>Opens a separate browser window and displays documents in that window rather than in Document Display view on the AppXtender Web Access user desktop. Note: This setting applies only when viewing documents from query result sets. It does not affect document display during batch import or document indexing.</td>
</tr>
<tr>
<td>Automatically open document if query yields one result</td>
<td>When a query results in only one hit, automatically displays that document in Document Display view. Selected by default.</td>
</tr>
</tbody>
</table>
### Table 8  Search/Result Set Options (continued)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Previous Document Version</td>
<td>Displays previous document revisions from Document Display view.</td>
</tr>
<tr>
<td>Enable ODMA Search</td>
<td>Configures the search criteria page so that criteria can include document properties as well as document index values.</td>
</tr>
<tr>
<td>Show Document ID</td>
<td>Includes ApplicationXtender document IDs in query result sets.</td>
</tr>
<tr>
<td>Document ID sort order</td>
<td>Sets the sort order for documents in query result sets (the sort order is the order in which a result set is sorted and displayed based on document ID). Available values: Ascending, Descending, None.</td>
</tr>
<tr>
<td>Limit Search Size To</td>
<td>Limits the number of documents that can be retrieved with a query from the client browser. Enter any number from 0 to 1000.</td>
</tr>
<tr>
<td>Limit Query Results Page Size</td>
<td>Limits the number of results per page in query result sets. Enter any number from 1 to 25.</td>
</tr>
</tbody>
</table>

**Text Search Options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Text Search</td>
<td>Configures searches so that text searches can be performed from query result sets. The option is selected by default in AppXtender Web.NET and AppXtender WebJ2. AppXtender WebJ2 does not allow you to clear the check box.</td>
</tr>
<tr>
<td>Text Search Max Hits</td>
<td>The number of documents from the query result set that you want the text search to process. Enter any number from 1 to 1000.</td>
</tr>
</tbody>
</table>
**Full Text Tab**

The Full Text tab of the Settings window has options for full-text indexing.

![Figure 23 Full Text Tab](image)

The following table lists the options on the Full Text tab and describes the purpose of each.
Table 9 Full Text Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Full Text Search</td>
<td>Configures the Application Query view search criteria page for full-text search. The option is selected by default in AppXtender Web.NET and AppXtender WebJ2. AppXtender WebJ2 does not allow you to clear the check box. To make sure the feature is enabled in both versions of AppXtender Web Access, select Request Full Text Search Support on the Login page when logging on to the data source. <strong>Note:</strong> Clearing the check box to disable this option does not release the full-text license assigned to you when you logged into AppXtender Web Access.</td>
</tr>
<tr>
<td>Thesaurus</td>
<td>During queries, includes a thesaurus search for words that are related to the search criteria.</td>
</tr>
<tr>
<td>Automatically Convert To Text</td>
<td>Automatically uses optical character recognition (OCR) to process all image pages submitted to the ApplicationXtender Index Server for full-text indexing. When this option is <strong>not</strong> selected, only text pages can be submitted to the ApplicationXtender Index Server. This means that you must process image pages using OCR before submitting them for full-text indexing.</td>
</tr>
<tr>
<td>Automatically Submit New Documents For Full Text Index</td>
<td>Automatically submits all newly indexed documents to the default full-text queue.</td>
</tr>
<tr>
<td>Automatically Reindex Modified Documents</td>
<td>Automatically reindexes modified documents.</td>
</tr>
<tr>
<td>Default Full-Text Language</td>
<td>Specifies the language used for the OCR full-text indexing engine.</td>
</tr>
</tbody>
</table>
Document View Tab

The Document View tab of the Settings window contains document viewing options.

![Document View Tab](image)

**Note**: Document View settings apply to both ApplicationXtender Web Access Thin Client mode and ApplicationXtender Web Access Interactive Client mode. You can set additional viewing options for ApplicationXtender Web Access Interactive Client mode from the Interactive Viewer tab. For more information, refer to “Interactive Viewer Tab” on page 93.
The following table lists the options on the Document View tab and describes the purpose of each.

<table>
<thead>
<tr>
<th>Table 10</th>
<th>Document View Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Prompt For Checkout</td>
<td>Configures AppXtender Web Access so that when you select to open a document from a query result set, you are automatically prompted to check the document out.</td>
</tr>
<tr>
<td>Automatically Resume Checkout</td>
<td>Configures AppXtender Web Access to maintain the checkout status of any document that you have checked out and have closed without checking it back in so that the next time you access the document, you are not prompted to check it out again. Selected by default.</td>
</tr>
<tr>
<td>Enable inline rendering of foreign files</td>
<td>Configures HTML export of foreign files to take place on the server side.</td>
</tr>
</tbody>
</table>
| Show Page Thumbnails | Displays the Thumbnails view on the AppXtender Web Access user desktop along with Document Display view. Selected by default.  
**Note:** This setting does not affect the Query Results view.  
**Note:** To use the Next and Previous Page functions and the Go To Page function, this setting must be disabled. |
| Enable Dual Data Entry | Sets dual data entry as the required method for entering document indexes. Selected by default. |
| Ignore Datestamp | Causes queries to ignore Date Stamp fields in applications that contain that type of field. When indexing documents, if you are adding or modifying documents that contain a Date Stamp field, this option causes AppXtender Web Access to ignore the Date Stamp field (since it cannot be edited). |
| Default Scale Ratio | Sets the scale ratio for document page display.  
**Note:** This setting applies to both ApplicationXtender Web Thin Client and ApplicationXtender Web IRC mode. |
Customizing Your Workstation

Table 10  Document View Options (continued)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Document Indexes Retrieved</td>
<td>Specifies the maximum number of indexes referencing a single document that you can access. For example, if this option is set to 1000 and there are 5000 indexes referencing a single document, you will be able to access only the first 1000 indexes. This reduces system strain from individual documents that are referenced by large numbers of indexes. <strong>Note:</strong> The setting recommended for best performance is 1000.</td>
</tr>
</tbody>
</table>

**Records Management Default Credentials**

**User Name:** Default user name when logging into Records Manager for ApplicationXtender.

---

**Interactive Viewer Tab**

The Interactive Viewer tab of the Settings window contains viewer and print options available only in the ApplicationXtender Web Access Interactive Client mode.

![Interactive Viewer Tab](image)

**Figure 25 Interactive Viewer Tab (Upper Part)**
Figure 26  Interactive Viewer Tab (Lower Part)

The table on the following page lists the options on the Interactive Viewer tab and describes the purpose of each.

Table 11  Interactive Viewer Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interactive Viewer Options</td>
<td></td>
</tr>
<tr>
<td>Enable Interactive Viewer</td>
<td>Configures AppXtender Web Access to use the ApplicationXtender Web Access Interactive Client viewer in Document Display view rather than the ApplicationXtender Web Access Thin Client viewer.</td>
</tr>
</tbody>
</table>
| Use Verity KeyView to Display Foreign Files | Configures AppXtender Web Access to use the KeyView viewer when displaying foreign files.  
**Note:** When this setting is not selected, foreign file pages appear as icons. |
Table 11 Interactive Viewer Options (continued)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scale-To-Gray</td>
<td>Applies scale-to-gray to images appearing in the ApplicationXtender Web Access Interactive Client viewer. When a black and white image is</td>
</tr>
<tr>
<td></td>
<td>scaled to gray, the nearly unlimited shades of gray in the original image are converted to a limited number (usually 16 or 256) that most</td>
</tr>
<tr>
<td></td>
<td>computer hardware and software use to represent and manipulate images. Selected by default.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: This option applies to bi-tonal images only.</td>
</tr>
<tr>
<td>Display Annotation</td>
<td>Displays the annotation toolbar along with the IRC image toolbar. Selected by default.</td>
</tr>
<tr>
<td>Toolbar</td>
<td></td>
</tr>
<tr>
<td>Default Image Size</td>
<td>Sets the default size for images. Available values: Original Size, Width, Height, Window. For more information, refer to “Selecting a</td>
</tr>
<tr>
<td></td>
<td>Default Image Size” on page 97.</td>
</tr>
<tr>
<td>Print Options</td>
<td></td>
</tr>
<tr>
<td>Print Original Size</td>
<td>Prints documents in their original size. Selected by default.</td>
</tr>
<tr>
<td>Dithering</td>
<td>Applies dithering to improve print quality when printing documents on monochrome (black and white) printers. By creating the illusion of</td>
</tr>
<tr>
<td></td>
<td>varying shades of gray (black and white printer), dithering softens jagged edges in curves and diagonal lines at low resolutions and can</td>
</tr>
<tr>
<td></td>
<td>add realism to computer graphics.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: When you send an image to a color printer, AppXtender Web Access does not dither the image even if this option is selected.</td>
</tr>
<tr>
<td>Acceleration</td>
<td>Expedites printing of AppXtender documents and batches. Available values: None, XipPrint, Talaris, and Quick PCL. For more information,</td>
</tr>
<tr>
<td></td>
<td>refer to “Using the Acceleration Feature” on page 99.</td>
</tr>
<tr>
<td>Endorse Printed Pages</td>
<td>Configures printing so that documents printed from the ApplicationXtender Web Access Interactive Client viewer are endorsed. Selected by</td>
</tr>
<tr>
<td></td>
<td>default. For more information, refer to “Using the Endorsement Feature” on page 100.</td>
</tr>
<tr>
<td>Overlap Endorsement</td>
<td>Allows endorsements to overlap on images.</td>
</tr>
<tr>
<td>On Image</td>
<td></td>
</tr>
<tr>
<td>Endorsement Position</td>
<td>Sets the endorsement position. Available values: Lower Right, Lower Left, Upper Right, Upper Left.</td>
</tr>
</tbody>
</table>
### Table 11 Interactive Viewer Options (continued)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Endorsement Text (roughly 200 characters are allowed):</td>
<td>Specifies the text to appear in an endorsement. You can enter up to roughly 200 characters, including spaces. <strong>Note:</strong> The endorsement feature supports predefined macros. For more information, refer to “Using the Endorsement Feature” on page 100.</td>
</tr>
<tr>
<td><strong>Import Format</strong></td>
<td></td>
</tr>
<tr>
<td>Black &amp; White Images</td>
<td>Sets the import image format used for black and white images. Available values: Default, TIFF, Windows Bitmap.</td>
</tr>
<tr>
<td>4 or 8 Bit Color Images</td>
<td>Sets the import image format for 4- and 8-bit color images. Available values: Default, TIFF, and Windows Bitmap.</td>
</tr>
<tr>
<td>True-Color Images</td>
<td>Sets the import image format used for true color images. Available values: Default, TIFF, Windows Bitmap, JPEG.</td>
</tr>
<tr>
<td>JPEG Quality Factor</td>
<td>Sets the quality factor when JPEG is selected as the True Color Image format for imported images. For more information, refer to “Setting the JPEG Quality Factor” on page 101.</td>
</tr>
<tr>
<td>Separate Multi-Page Tiffs</td>
<td>Separates multi-page TIFFs. Selected by default.</td>
</tr>
<tr>
<td><strong>Export Format</strong></td>
<td></td>
</tr>
<tr>
<td>Use PDF format if possible</td>
<td>Exports document text and images in PDF format.</td>
</tr>
<tr>
<td>Black &amp; White Images</td>
<td>Sets the export image format used for black and white images. Available values: TIFF, Windows Bitmap, TIFF Compressed.</td>
</tr>
<tr>
<td>4 or 8 Bit Color Images</td>
<td>Sets the export image format used for 4- and 8-bit color images. Available values: GIF, Windows Bitmap, Windows Bitmap Compressed, TIFF, TIFF Compressed.</td>
</tr>
<tr>
<td>True-Color Images</td>
<td>Sets the export image format for true color images. Available values: JPEG, Windows BMP, GIF, TIFF, TIFF Compressed.</td>
</tr>
<tr>
<td>JPEG Quality Factor</td>
<td>Sets the quality factor when JPEG is selected as the True Color Image format for exported images. For more information, refer to “Setting the JPEG Quality Factor” on page 101.</td>
</tr>
</tbody>
</table>
Selecting a Default Image Size

The default image size setting you select for the ApplicationXtender Web IRC viewer determines how images appear in the viewer and whether you will need to use the scroll bars or zoom function when viewing images.

- Original size—The image appears in actual size (the number of pixels on the monitor equals the number of pixels stored for the image).

### Table 11 Interactive Viewer Options (continued)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>As Text/As Image Option Buttons</td>
<td>Specifies whether text files are exported in text or image format. The default is text format.</td>
</tr>
<tr>
<td>Use Multi-Page Files</td>
<td>Allows export of multi-page files.</td>
</tr>
<tr>
<td>Export In Archived Format</td>
<td>Specifies archived format for export. Note: When the archived format of a page is exported, no annotations are included on that page.</td>
</tr>
</tbody>
</table>

**Figure 27 Original Image Size Setting**
Customizing Your Workstation

- **Width**—The image fits in the viewer from left to right.

Figure 28  Fit to Width Image Size Setting

- **Height**—The image fits in the viewer from top to bottom.

Figure 29  Fit to Height Image Size Setting
• Window—The entire image appears in the viewer and the original aspect ratio is maintained

![Figure 30 Fit to Window Image Size Setting](image)

Note: By default, ApplicationXtender Document Manager and ApplicationXtender Web Access take into consideration both the image resolution and monitor resolution when rendering images for display.

Using the Acceleration Feature

Acceleration options allow you to expedite printing of AppXtender documents and batches. AppXtender supports XipPrint accelerator cards, Talaris printers, and Quick PCL printing.

Note: Pages with annotations, AppXtender Reports Mgmt pages with form overlays, and pages with print endorsements (from AppXtender Document Manager or AppXtender Web Access) are not printed in accelerated mode. Whenever one of these types of pages is printed, AppXtender Web Access ignores the Acceleration setting.

XipPrint

If you have an XipPrint II card, you can use the XipPrint printer acceleration feature. The XipPrint II is a card that can be installed in the SIMM socket of a printer. It takes over file decompression, resulting in quicker print job processing.
Customizing Your Workstation

Talaris
If you have a Talaris 1794FT or 3290FT printer, you can use the Talaris printer acceleration feature. The Talaris 1794FT and 3290FT printers take over file decompression, resulting in quicker print job processing.

Quick PCL
If you have a PCL5 compatible printer, such as HP III, HP IV, or Compaq, you can use the Quick PCL (Quick Print) printer acceleration feature. This feature significantly improves printing performance for black and white images from any PCL5 compatible printer. Quick Print bypasses the Windows GDI layer so that AppXtender Web Access talks directly to the Windows printer driver. This substantially reduces cycle time.

Note: Quick Print is valid for bi-tonal images only. Grayscale and color images are processed at the standard rate.

Using the Endorsement Feature
To print documents with an endorsement message in one corner, select Endorse Printed Pages and type the message in the Endorsement Text text box.

The endorsement feature supports predefined macros. The following table describes the macros.

Table 12 Endorsement Macros

<table>
<thead>
<tr>
<th>Macro</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>%DS</td>
<td>Displays the short form of the date, such as 3/2/2007, on which the page is printed.</td>
</tr>
<tr>
<td>%DL</td>
<td>Displays the long form of the date, such as Friday, March 02, 2007, on which the page is printed.</td>
</tr>
<tr>
<td>%T</td>
<td>Displays the time at which the page is printed.</td>
</tr>
<tr>
<td>%U</td>
<td>Displays the user who printed the page.</td>
</tr>
<tr>
<td>%P</td>
<td>Displays the current page number.</td>
</tr>
</tbody>
</table>

ApplicationXtender prints the endorsement on every page in the location selected from the Position drop-down list. The location of the macro output in the endorsement depends on the location of the macro in the text string.
Depending on the job requirements, you can choose to either overlap the image with the endorsement text or keep the image and endorsement text separate. To print the image to scale with the endorsement placed over the image, select the Overlap Endorsement On Image check box. To scale the image so that the endorsement does not cover any part of the image, leave the check box blank.

**Setting the JPEG Quality Factor**

JPEG compression allows you to reduce the file size of true color images while maintaining the necessary output image quality. You can set the quality factor to any number from 1 to 100, with 1 being the smallest file size with the lowest image quality and 100 being the largest file size with the highest image quality.

In most cases, you want to compress the file size as much as possible without negatively affecting the output image quality. If image quality is not important, you can set the quality factor very low to make an extremely small file. Conversely, if image quality is very important, you can set the quality factor high enough to prevent visible changes to the quality of the output image.

**Exporting in Archived Format**

By selecting the Export in Archived Format check box, rather than exporting pages in the format specified in the corresponding Export Format field (PDF, Black & White Images, 4 and 8 Bit Color Images, or True Color Images), you can export the pages in the same format in which they are stored in AppXtender.

For a page to be exported in its archived format, both of the following conditions must be true:

- If there are redactions on the pages being exported, you have sufficient privileges to hide all of the redactions.
- No subpage number appears after the BIN file names for the page to be exported.

**Note:** To see the image file name, from the ApplicationXtender Web IRC image toolbar, select the Information icon. When the Information dialog box appears, select the Files tab.
Customizing Your Workstation

COLD Tab

The Settings window COLD tab contains options for COLD documents, including color bars and box drawing options.

Figure 31  COLD Tab (Upper Part)

Figure 32  COLD Tab (Lower Part)

Note: COLD data is report data generated from existing applications, indexed using an extraction process, and downloaded into AppXtender applications.
The following table lists the options on the COLD tab and describes the purpose of each.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>COLD Options</strong></td>
<td></td>
</tr>
<tr>
<td>Allow Zoom</td>
<td>Activates the document zoom function. Selected by default.</td>
</tr>
<tr>
<td>Default View COLD Form Overlay</td>
<td>Specifies the type of COLD overlay to use when displaying documents. Available values: None, Text, and Image.</td>
</tr>
<tr>
<td>Default Print COLD Form Overlay</td>
<td>Specifies the type of COLD overlay to use when printing documents. Available values: None, Text, and Image.</td>
</tr>
<tr>
<td><strong>Color Bars</strong></td>
<td></td>
</tr>
<tr>
<td>Use These Default Settings</td>
<td>Configures AppXtender Web Access to use default color bar settings rather than application-specific color bar settings. Selected by default.</td>
</tr>
<tr>
<td>(Instead Of Application- Specific)</td>
<td></td>
</tr>
<tr>
<td>Show Color Bars</td>
<td>Turns on color view. Selected by default.</td>
</tr>
<tr>
<td>Color Bar Lines (1-6)*</td>
<td>Specifies the width of color bar bands. Available values: any number from 1 to 6. The default is 3. This is a required field.</td>
</tr>
<tr>
<td>Color Bar Color</td>
<td>Specifies the color used for color bar bands.</td>
</tr>
<tr>
<td><strong>Box Drawing:</strong></td>
<td></td>
</tr>
<tr>
<td>Enable Box Drawing For Form Data Text</td>
<td>Allows use of box drawing characters when displaying form data text.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>For form data text written in foreign languages that use ASCII values between 176 and 223, for the text to display correctly, this setting must be disabled.</td>
</tr>
<tr>
<td>Enable Box Drawing For Form Overlay Text</td>
<td>Allows use of box drawing characters when displaying form overlay text.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>For form overlay text written in foreign languages that use ASCII values between 176 and 223, for the text to display correctly, this setting must be disabled.</td>
</tr>
<tr>
<td><strong>Text Font Options</strong></td>
<td></td>
</tr>
<tr>
<td>Font Name</td>
<td>Specifies the name of the font to use for text.</td>
</tr>
<tr>
<td>Font Size*</td>
<td>Specifies the point size to use for the selected font. This is a required field.</td>
</tr>
<tr>
<td>Bold</td>
<td>Displays text in <strong>bold</strong> typeface.</td>
</tr>
</tbody>
</table>
Customizing Your Workstation

For more information, refer to the following topics:
- “COLD Options Settings” on page 104
- “COLD Page Color Bar Options” on page 104
- “COLD Page Box Drawing Options” on page 105

COLD Options Settings

Use the settings in the COLD Options section to configure the type of form overlays used for screen display and printer output and to disable/enable the document zoom function.

COLD Page Color Bar Options

Use the Color Bar options when you want a color bar background when viewing text documents. With this option selected, when you view documents in the ApplicationXtender Web IRC viewer, the background is composed of alternating bars of a selected color and white. You can change the color and width of the bands to suit your needs.

In addition to specifying default color bar settings for all COLD applications, you can configure separate color bar settings for the current application. To use color bar settings specific to the current COLD application, clear the check mark from the Use these Default Settings check box and then specify a line width and color.

Table 13  COLD Options (continued)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italics</td>
<td>Displays text in italic typeface.</td>
</tr>
</tbody>
</table>

**Overlay Font Options**

<table>
<thead>
<tr>
<th>Font Name</th>
<th>Specifies the name of the font to use for overlay text.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Font Size*</td>
<td>Specifies the point size to use for the selected font. This is a required field.</td>
</tr>
<tr>
<td>Bold</td>
<td>Displays overlay text in bold typeface.</td>
</tr>
<tr>
<td>Italics</td>
<td>Displays overlay text in italic typeface.</td>
</tr>
</tbody>
</table>
COLD Page Box Drawing Options

To correctly represent some AppXtender Web Access text documents, box drawing characters are used in place of several characters in the AppXtender Web Access font set. However, for text written in foreign languages that use characters with ASCII values from 176 to 223, this character substitution can result in some of the text characters being replaced with box drawing characters.

To avoid font substitution problems in these situations, before displaying or printing the foreign language documents, access the AppXtender Web Access Settings window and make sure the Enable Box Drawing for Form Data Text and the Enable Box Drawing for Form Overlay Text check boxes are not selected. If check marks appear in one or both of these boxes, clear the check boxes and then select Save.

Result Set Print Tab

The Result Set Print tab of the Settings window contains options for result set printing in ApplicationXtender Web IRC mode.
The following table lists the options on the Result Set Print tab and describes the purpose of each.

**Table 14 Result Set Print Options**

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ApplicationXtender Web Access Interactive Client - Result Set Only:</strong></td>
<td></td>
</tr>
<tr>
<td>Page Fetch Retry Enable</td>
<td>Configures AppXtender Web Access so that if an error occurs, when AppXtender Web Access attempts to retrieve a page, it will continue trying as many times as designated in the Page Fetch Retry Count text box. Selected by default.</td>
</tr>
<tr>
<td>Page Fetch Retry Count</td>
<td>Specifies how many attempts AppXtender Web Access will make to retrieve a page when an error occurs.</td>
</tr>
<tr>
<td>Separate Jobs Per Document</td>
<td>Configures AppXtender Web Access to print each document as a separate print job. Selected by default.</td>
</tr>
<tr>
<td>Cancel On First Print Failure</td>
<td>Configures AppXtender Web Access to cancel print jobs on the first print failure.</td>
</tr>
</tbody>
</table>

**Email Tab**

The Email tab contains settings for electronic mail message attachment and message formats.
The following table lists the options on the Email tab and describes the purpose of each.

<table>
<thead>
<tr>
<th>Table 15 Email Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
</tr>
<tr>
<td><strong>Attachment Formats:</strong></td>
</tr>
<tr>
<td>Use PDF format if possible</td>
</tr>
<tr>
<td>Use XPS format if possible</td>
</tr>
<tr>
<td>Black &amp; White Images:</td>
</tr>
<tr>
<td>4 or 8 Bit Color Images:</td>
</tr>
<tr>
<td>True-Color Images:</td>
</tr>
<tr>
<td>JPEG Quality Factor:</td>
</tr>
<tr>
<td>COLD Form Overlay</td>
</tr>
<tr>
<td>Display Text As: Text/Image Option Buttons</td>
</tr>
<tr>
<td>Use Archive File Format</td>
</tr>
<tr>
<td>Use Multi-Page Files</td>
</tr>
<tr>
<td>Send Attachments As Hyperlinks</td>
</tr>
</tbody>
</table>

**Email Message Options**

<table>
<thead>
<tr>
<th><strong>Option</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mail Message Format: Text/HTML Option Buttons</td>
<td>Specifies the formatt for mail messages. HTML is selected by default.</td>
</tr>
</tbody>
</table>
Customizing Your Workstation

Printer Friendly View Tab

The Printer Friendly View tab of the Settings window contains options for printer-friendly display of document pages.

![Printer Friendly View Tab](image)

Figure 35 Printer Friendly View Tab

The following table lists the options on the Printer Friendly View tab and describes the purpose of each.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print Options</strong></td>
<td></td>
</tr>
<tr>
<td>Desired Print DPI</td>
<td>Specifies the desired print DPI (dots per inch). Available values: 75, 100, 150, 200, 300, 400, 600.</td>
</tr>
<tr>
<td>Page Width</td>
<td>Specifies the desired page width (in inches).</td>
</tr>
<tr>
<td>Page Height</td>
<td>Specifies the desired page height (in inches).</td>
</tr>
<tr>
<td>Fit Page To Height</td>
<td>Configures AppXtender Web Access to print the entire contents of a page when the height of the document is greater than the height of the paper on which it is being printed. Selected by default.</td>
</tr>
</tbody>
</table>
### Table 16  
**Printer Friendly View Options (continued)**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page Margins</strong></td>
<td><strong>Top And Bottom</strong> Specifies the amount of space (in inches) for the top and bottom page margins.</td>
</tr>
<tr>
<td></td>
<td><strong>Left And Right</strong> Specifies the amount of space (in inches) for the left and right page margins.</td>
</tr>
</tbody>
</table>
Setting Up the ApplicationXtender Web Access Interactive Client

You must configure your browser to support the ApplicationXtender Web Access Interactive Client.

Note: The ApplicationXtender Web Access Interactive Client should be installed before you display any documents. If you display a document prior to installing the ApplicationXtender Web IRC, you will have to restart your browser.

For more information, refer to:
- “Setting Up the ApplicationXtender Web Access Interactive Client for Internet Explorer” on page 110.
- “Setting Up the Interactive Client for Netscape” on page 112.

Setting Up the ApplicationXtender Web Access Interactive Client for Internet Explorer

Although ApplicationXtender Web Access Thin Client mode downloads images faster and requires fewer client resources than the ApplicationXtender Web Access Interactive Client mode, ApplicationXtender Web IRC mode provides additional options such as page display, page rotation, enhanced printing, adding annotations, viewing image information, and links that allow you to open foreign files in their native applications for editing. You can switch from one mode to the other at any time. ApplicationXtender Web Access Thin Client mode is enabled by default.

Note: If you were granted the AppXtender Web Access PAL User privilege in ApplicationXtender Application Generator, you will be able to use only the ApplicationXtender Web Access Thin Client. Contact your AppXtender Web Access administrator or refer to the ApplicationXtender Web Access .NET Administrator’s Guide or ApplicationXtender Web Access J2 Administrator’s Guide for more information.

Note: To display documents in a separate window rather than in Document Display view in the AppXtender Web Access window, on the Settings window Search/Result Set tab, select the Display Documents in Separate Popup Window check box and then select Save.
Three steps are required when setting up an ApplicationXtender Web Access Interactive Client with MS Internet Explorer:

- On the Interactive Viewer tab on the Settings window, verify that the Enable Interactive Viewer option is selected. If not, select the check box. Then click Save to disable the ApplicationXtender Web Access Thin Client mode and begin using AppXtender Web Access with the ApplicationXtender Web Access Interactive Client viewer when in Document Display view.

- Set Internet Explorer security settings to allow the use of signed ActiveX controls. When you accept EMC Corporation security certificates, no settings are changed—an ActiveX component is loaded.

- To verify that signed certificates will be accepted in Internet Explorer, select Internet Options from the Tools menu, click the Security tab, and choose Custom Level. Be sure that beneath ActiveX Controls and plug-ins, Download signed ActiveX controls is set to Enable or Prompt.

Once you select the ApplicationXtender Web Access Interactive Client Viewer option and save the setting, the ApplicationXtender Web Access Interactive Client viewer will automatically load whenever you open a document.
Customizing Your Workstation

Note: Install the ApplicationXtender Web Access Interactive Client before you display any documents. If you display a document before installing the ApplicationXtender Web Access Interactive Client, you must restart your browser before continuing.

To use the ApplicationXtender Web Access Interactive Client with Internet Explorer:

1. Click the Settings button on the toolbar or select View, Settings. The Settings window appears.
2. Click the Interactive Viewer tab to reveal those options.
3. On the Interactive Viewer tab, select the Enable the Interactive Viewer option.
4. Click Save.

Note: The first time you configure AppXtender Web Access for the Interactive viewer, a security warning message will appear. To avoid seeing security warnings for the ApplicationXtender Web Access Interactive Client viewer in the future, select the Always trust content from EMC check box and then click Yes to continue.

Setting Up the Interactive Client for Netscape

Setting up the ApplicationXtender Web Access Interactive Client for Netscape consists of these steps:

- “Configuring Netscape Security Settings”
- “Enabling the Interactive Client”
- “Installing Interactive Client Components”

Note: Install the ApplicationXtender Web Access Interactive Client before displaying any documents. If you display a document before installing the ApplicationXtender Web Access Interactive Client, you will have to restart your browser.

Note: Since each version of Netscape has a different “registry,” when a new version is installed, it may not recognize the AppXtender Web Access Client setup of an old installation. If multiple versions of Netscape are running, each version needs to recognize and run the AppXtender Web Access Client software.
Configuring Netscape Security Settings

To configure Netscape security settings for Web Access:
1. Navigate to the ApplicationXtender Web Access server.
2. Add the ApplicationXtender Web Access server to the list of trusted sites.
3. Select the Internet Explorer rendering engine.
4. Select the Enable ActiveX option.

*Note:* Refer to Netscape Help for more information on configuring Netscape security settings.

Enabling the Interactive Client

To enable the Interactive Client:
1. Select Edit > User Settings from the ApplicationXtender Web Access menu bar.
2. Select the Interactive Viewer tab.
3. Select Enable Interactive Viewer.
4. Click Save.

Installing Interactive Client Components

When you query an application after enabling the Interactive Client for the first time, Web Access might prompt you to install the following components:

- Java Runtime Environment
- Interactive Viewer (IrcViewer.cab)

Follow the prompts to install each component. Accept the option to run thumbnails on your workstation if Web Access prompts you to do so.
Installing Web Access Client Components

Some Web Access features will not work until you install the following third-party components:

◆ Scan component for interactive control
◆ Adobe component for viewing and printing PDF files
◆ KeyView component for rendering foreign files
◆ Spell-check component for text annotations

CAUTION

EMC does not provide support for third-party components.

To install Web Access components on your workstation:

1. Select Help > Check Installed Components from the Web Access menu bar.
   
   **Note:** Your Web browser might prompt you to install Component Check software. Follow the prompts to install the software on your workstation. Contact your Web Access administrator if your workstation does not allow you to install the software.
   
2. Click the download icon next to the component that you want to install.

   Figure 37 Download Icon

   **Note:** Web Access might display a security warning depending on your Web browser security settings. Refer to your browser Help for more information on using the browser to download files.
   
3. Save the component installation file to your workstation.
4. Open the component installation file to start the component installation wizard.
5. Follow the wizard prompts to complete the installation.
6. Repeat steps 2 through 5 to install additional components. Web Access changes the status of the components to *Installed*.

7. Click Close to close the Component Check window.
Customizing Your Workstation
Using ApplicationXtender Web Access, you can perform many of the
document-related functions that are available in AppXtender
Document Manager. For example, you can add new documents,
delete existing documents, add pages to documents, and remove
pages from documents. You can also index batch documents and use
automated indexing functionality to automatically index new
documents.

This section provides information and procedures related to adding
and deleting documents and pages, indexing documents, and
submitting documents for full-text indexing.

- Adding Documents to AppXtender Applications ...................... 118
- Indexing Batches .............................................................................. 129
- Submitting Documents for Full-Text Indexing ......................... 158
- Adding Pages to ApplicationXtender Documents .................... 159
- Deleting Documents and Document Pages .............................. 163
Adding Documents to AppXtender Applications

The way you use ApplicationXtender Web Access to add documents to AppXtender applications depends on whether the documents are in paper or electronic form.

- For paper documents, authorized users scan the paper documents to create electronic files.
- For electronically formatted documents, authorized users import the electronic files into AppXtender Web Access.

**Note:** Electronic files can contain one or more individual documents.

This topic focuses on adding documents to AppXtender applications by importing electronic files. Scanning is discussed in Chapter 4. You must have the appropriate AppXtender privileges to add documents to AppXtender applications. For information about your user profile, consult your AppXtender system administrator or refer to the *ApplicationXtender Core Component’s Administrator’s Guide*.

AppXtender Web Access offers two ways to add documents to AppXtender applications: the New Document feature and the Batch Import feature.

![Batch Import Button and New Document Menu Item](image)
“Adding Documents Using the New Document Feature” on page 119
“Adding Documents Using the Batch Import Feature” on page 123

Adding Documents Using the New Document Feature

You can access the New Document feature from the application shortcut menus in Application List view. The specific steps you perform to import the document depends on the client mode in which you are working: Thin Client or Interactive Client.

Note: For information on AppXtender Web Access client modes, refer to “ApplicationXtender Operational Modes” on page 49.

Note: By default, all files not natively supported by AppXtender are imported as foreign files. This includes files other than TIFF, Windows BMP, TGA, RTF, JPEG, GIF, PCX, DCX, and Adobe PDF.

For more information, refer to the following topics:

- “Using the New Document Feature in Thin Client Mode” on page 119
- “Using the New Document Feature in Interactive Client Mode” on page 121

Using the New Document Feature in Thin Client Mode

To create a new document using the New Document feature in Thin Client mode:

1. From Application List view in Thin Client mode, right click the application to which the documents will be added. The application shortcut menu appears.

Working With Documents

3. Using the Browse feature, select the electronic file to be imported.

4. With the file path in the File Path text box, click Upload.

   The electronic file is imported into AppXtender Web Access, the File Path text box clears, and the New button appears in the main toolbar.

Note: Another dialog box that may appear automatically during the document import process is the Signature Properties dialog box. In this case, you must select a certificate, enter a comment, specify whether you want these settings to be used by default, and then select OK. (Depending on the configuration of the selected certificate, you may also need to provide a password.)

5. To index the new document, on the main toolbar, click the New button.

   Note: If you continue without indexing the imported document, the document is added to the list of available batches in Batch List view so that it can be indexed later. For more information, refer to "Indexing Batches" on page 129.

To import another electronic file, repeat steps 3 and 4.

To close the dialog box, click Cancel.
Using the New Document Feature in Interactive Client Mode

To create a new document using the New Document feature in Interactive Client mode:

1. From Application List view in Interactive Client mode, right-click the application to which the documents will be added. The application shortcut menu appears.
2. On the application shortcut menu, click New Document. Application List view is replaced by Document Display view. (At this point, nothing has been imported, so no image appears in the viewer.)

Figure 41 Document Display View - Interactive Client Mode

3. On the Document Display view toolbar, click the Page Menu button to access the drop-down list.

Figure 42 Page Button on Document Display View Toolbar - Interactive Client Mode
4. Choose a method for creating the new document:
   - To scan a new document, select Scan. Refer to “Scanning” on page 171 for more information.
   - To paste a new document from the Windows clipboard or Microsoft Outlook, select Clipboard Paste > Append.
   - To have more options when pasting from the Windows clipboard or Microsoft Outlook, select Clipboard Paste Special > Append. Select the paste options from the Paste Special dialog box, and then click OK.
   - To import a file, select Import File > Append. Navigate to the file that you want to import. Select the file and then click Open. The first page of the imported file appears in the viewer in Document Display view.

   **Note:** Another dialog box that may appear automatically during the document import process is the Signature Properties dialog box. In this case, you must select a certificate, enter a comment, specify whether you want these settings to be used by default, and then select OK. (Depending on the configuration of the selected certificate, you may also need to provide a password.)

   Notice that some buttons on the Interactive Client viewer toolbars are now available so that you can work with the document or batch. The specific buttons that become available depends on the AppXtender functionality you are authorized to use, the type of file that was imported, and the number of pages in the document or batch.

   **Note:** For detailed information on using the Interactive Client viewer toolbar buttons to view documents, refer to “Thin Client Document Display View Functionality” on page 266.
Adding Documents to AppXtender Applications

Adding Documents Using the Batch Import Feature

Another way to add documents with AppXtender Web Access is to use the Batch Import feature.

Note: By default, all files not natively supported by AppXtender are imported as foreign files. This includes files other than TIFF, Windows BMP, TGA, RTF, JPEG, GIF, PCX, DCX, and Adobe PDF.

The Batch Import procedure you follow when working in Thin Client mode is different than the procedure you follow when working in Interactive Client mode. In addition, in Thin Client mode, to view a document that has been imported, you must manually select to view the document. In Interactive Client mode, the document image appears in the Document Display viewer automatically when the document is imported.

For more information, refer to the following topics:

◆ “Using the Batch Import Feature in Thin Client Mode” on page 123
◆ “Using the Batch Import Feature in Interactive Client Mode” on page 126

Using the Batch Import Feature in Thin Client Mode

To import a new document using the Batch Import feature in Thin Client mode:

1. Select either the Batch Import button from the main toolbar or File>Batch Import from the menu bar.
The New Batch Document dialog box appears.

![New Batch Document Dialog Box](image)

**Figure 44 New Batch Document Dialog Box - Thin Client Mode**

**Note:** Depending on how the application is configured, the Memo text box may be automatically populated with information such as the current date and time.

2. From the Application Name list box, select the AppXtender application into which you are importing the batch.

3. In the Batch Name field, enter a name for the batch.

4. In the Memo text box, enter a comment.

5. To continue, click Next.

The Import New Page dialog box appears.

![Import New Page Dialog Box](image)

**Figure 45 Import New Page Dialog Box - Thin Client Mode**

6. In the File Path text box, enter the path to the electronic file to be imported. If you are not sure of the file path, click Browse and then locate and select the file.

7. To import the file, click Upload.
The file is imported to the specified location, and the Import New Page dialog box refreshes.

*Note:* Another dialog box that may appear automatically during the document import process is the Signature Properties dialog box. In this case, you must select a certificate, enter a comment, specify whether you want these settings to be used by default, and then select OK. (Depending on the configuration of the selected certificate, you may also need to provide a password.)

8. Repeat steps 6 and 7 to import additional files, if necessary.

9. After importing the last file, select Cancel to close the dialog box.

Your user desktop changes to Thin Client Document Display view, and the last page in the batch appears in the viewer.

Figure 46  Imported Batch in Thin Client Viewer

At this point, you can view the pages in the batch, index the batch, or select the Applications List button to return to Application List view and import another batch.

*Note:* For information on indexing batch pages, refer to “Indexing Batches” on page 129. For information on viewing document images, refer to “Viewing Documents” on page 245.
Using the Batch Import Feature in Interactive Client Mode

To import a batch in ApplicationXtender Web IRC mode:

1. Depending on the AppXtender Web Access view, select either the Batch Import button from the main toolbar or File > Batch Import from the menu bar.

![Batch Import Button on Main Toolbar](image1.png)

The New Batch Document dialog box appears.

![New Batch Document Dialog Box](image2.png)

**Note:** The Memo text box may be automatically populated with information such as the current date and time.

2. From the Application Name list box, select the AppXtender application to which you are importing the batch.
3. In the Batch Name field, enter a name for the batch.
4. If necessary, in the Memo text box, enter a comment.
5. To use the thin client upload feature to upload batch pages, select Thin client upload.
6. Click Next.
If you did not select Thin client upload, the desktop changes to Document Display view and the Interactive Client viewer appears. (At this point, nothing has been imported, so no image appears in the viewer.) Continue with step 7.

If you selected Thin client upload, the Import New Page dialog box appears. To complete the upload:

a. Click Browse and navigate to the first page file.

b. Select the file.

c. Click Open.

d. Click Upload.

e. Repeat steps a through d to upload additional files.

f. Click Cancel after you have uploaded all the batch files. The last file in the batch appears in the Document Display view. Continue with step 10.

7. On the viewer toolbar, select the Page button arrow button to open the Page menu.


When you select Append, the Import File dialog box opens in a separate window.

9. Select the file to be imported. Then click the Open button to begin the import.
The first page of the imported file appears in the viewer in Document Display view.

![Document Image Appears in the Interactive Client Viewer](image)

**Figure 50** Document Image Appears in the Interactive Client Viewer

**Note:** Another dialog box that may appear automatically during the document import process is the Signature Properties dialog box. In this case, you must select a certificate, enter a comment, specify whether you want these settings to be used by default, and then select OK. (Depending on the configuration of the selected certificate, you may also need to provide a password.)

10. Finish processing the batch. For more information, refer to:

- “Indexing Batches” on page 129
- “Viewing Documents” on page 245
Indexing Batches

Once batches of documents are imported into AppXtender applications, the individual documents in each batch must be indexed and saved as AppXtender documents so that they can be retrieved from the AppXtender database. You can choose to index batches manually or automatically.

For more information, refer to the following topics:

- “Understanding AppXtender Document Indexes” on page 129
- “Accessing a Batch for Indexing” on page 131
- “Indexing Batch Pages” on page 133
- “Returning to the Current Batch” on page 155

Understanding AppXtender Document Indexes

When an AppXtender system administrator creates an AppXtender application, he or she specifies the types of data required to identify documents related to that application. This set of data is referred to as the document’s index.

Different applications have different types of index data. For example, the index for one application may include a company name, purchase order number, and order date. The index for another application may include a Social Security number, employee first name, employee last name, employee number, and date of hire. Of the data comprising an index, some or all of the data will be required, or key, data.

To index batch documents, you enter appropriate information from the document into each index field. Once the index is saved, authorized users can use the index data to efficiently query for and retrieve the document from the AppXtender system.
When the AppXtender system administrator creates an application, he or she may configure some or all of the index fields for dual data entry. Dual data entry provides data validation when index information is entered during document creation.

When an index field is configured for dual data entry, it will have two input fields instead of one. The information you enter in the two fields must match. If it does not, when you try to save the index, you will get an error message.

**Figure 51: Entering Index Data for a Batch Document**

By default, your AppXtender Web Access user desktop is automatically set up for dual data entry. To change the setting, access the User window Document View tab and select the Enable Dual Data Entry check box to remove the check mark. Then select Save to save the new configuration and close the window.

**Figure 52: Dual Data Entry Fields**
Accessing a Batch for Indexing

If you are not able to index a new document or batch right after importing it, AppXtender Web Access automatically adds the document or batch to a list of documents and batches for the associated application that are awaiting indexing. Lists of documents and batches awaiting indexing appear in Application Batch List view.

To access Application Batch List view:

- On the main toolbar, select the Batch List button.

When Application Batch List view appears, if the application named in the Current Application list box has one or more unindexed batches, a list of those batches appears in the area below the Current Application field. To index a batch, to the right of the name of the batch you want to open, click the Open Batch icon.

If no list appears when you access Application Batch List view, no batches have been created for the selected application. To find a list of unindexed batches, from the Current Application list box, select the name of another application.
The following table describes the information listed for each batch in Application Batch List view.

### Table 17 Application Batch List View Information

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the batch.</td>
</tr>
<tr>
<td>Pages</td>
<td>The number of pages in the batch.</td>
</tr>
<tr>
<td>Time Stamp</td>
<td>The date and time the batch was created.</td>
</tr>
<tr>
<td>Scanned by</td>
<td>The name of the user that added the batch (either by scanning or using the Batch Import function).</td>
</tr>
<tr>
<td>State</td>
<td>The current status of the batch. Batches available for indexing have a status of Idle. When a batch is selected for indexing, its status is automatically reset to Indexing. <strong>Note:</strong> Only one user can work with a batch at any given time.</td>
</tr>
</tbody>
</table>

**Note:** From Application Batch List view, you can index batch documents or perform procedures to manage the available batches. The following topics focus on indexing batch documents. For information on managing batches, refer to “Managing Documents” on page 353.

To begin indexing a batch, from Application Batch List view, find the batch you want to work with in the list of batches to be indexed. Then select the Open Batch for Indexing button for that batch.

![Open Batch for Indexing Button](image-url)
Indexing Batch Pages

When you select a batch to index, Index view and Document Display view appear together on the AppXtender Web Access user desktop, and the first page of the batch appears in the viewer. If necessary, you can use the viewer buttons to optimize image quality. You might want to increase or decrease the amount of magnification (zoom), for example, to make the page easier to read. (For detailed information on manipulating images when viewing documents, refer to “Viewing Documents” on page 245.)

Figure 56 AppXtender Web Access User Desktop After Selecting a Batch

Index view consists of input fields for entering the index information for the selected application. Names of key fields appear in bold type.

Figure 57 Input Fields in Index View

Note: The AppXtender administrator sets up index fields and specifies their characteristics when creating and configuring the application.
The functionality available from the Index view toolbar depends on whether the selected application is configured with automatic indexing functionality. For applications configured with automatic indexing, the Index view toolbar contains five buttons: Auto Index, Select Indexes, Key Reference Indexing, Clear Index, and Help.

![Automatic Indexing Index View Toolbar](image)

**Figure 58  Automatic Indexing Index View Toolbar**

The following table shows the buttons available from the Index view toolbar for applications configured with automatic indexing and describes the functionality accessed by each button.

**Table 18  Automatic Indexing Index View Toolbar Buttons**

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Auto Index" /></td>
<td>Auto Index</td>
<td>Populate index input fields using data from the Auto Index database table. The AppXtender application must be configured for automatic indexing for this button to appear in the toolbar. For more information, refer to “Using the Auto Index Function to Index Batch Documents” on page 153.</td>
</tr>
<tr>
<td><img src="image" alt="Select Indexes" /></td>
<td>Select Indexes</td>
<td>Select existing index information to populate the index fields for the currently displayed page. For more information, refer to “Using the Select Indexes Function” on page 145.</td>
</tr>
<tr>
<td><img src="image" alt="Key Reference Indexing" /></td>
<td>Key Reference Indexing</td>
<td>Populate index input fields using data from the Key Reference database table. The AppXtender application must be configured for automatic indexing for this button to appear in the toolbar. For more information, refer to “Using the Key Reference Function to Index Batch Documents” on page 154.</td>
</tr>
</tbody>
</table>
For applications configured for manual indexing, the first time during the day that you access Index view, three buttons appear in the toolbar: Select Indexes, Clear Index, and Help. After indexing the first page in the batch, when you select to index the next batch page, a fourth button—Last Modified Indexes—appears on the toolbar.

### Table 18: Automatic Indexing Index View Toolbar Buttons (continued)

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Last Modified Indexes icon]</td>
<td>Copy information from the last index and paste it into the index fields for the currently displayed page. For information, refer to “Modifying an Index” on page 141.</td>
<td></td>
</tr>
<tr>
<td>![Clear Index icon]</td>
<td>Clear existing index information so that you can enter new data in the fields. Note that to clear data from only one field, rather than clicking Clear Index, select the field data and then press the Delete key.</td>
<td></td>
</tr>
<tr>
<td>![Help icon]</td>
<td>Access the online help.</td>
<td></td>
</tr>
</tbody>
</table>

Figure 59 Manual Indexing Index View Toolbar
Working With Documents

The following table shows the buttons available from the Index view toolbar for applications configured without automatic indexing and describes the functionality accessed by each button.

Table 19 Manual Indexing Index View Toolbar Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Select Indexes</td>
<td>Select existing index information to populate the index fields for the currently displayed page. For more information, refer to “Using the Select Indexes Function” on page 145.</td>
</tr>
<tr>
<td>Last</td>
<td>Last Modified</td>
<td>Copy information from the last index and paste it into the index fields for the currently displayed page. For information, refer to “Modifying an Index” on page 141.</td>
</tr>
<tr>
<td>Clear Index</td>
<td>Clear Index</td>
<td>Clear existing index information so that you can enter new data in the fields. Note that to clear data from only one field, rather than clicking Clear Index, select the field data and then press the Delete key.</td>
</tr>
<tr>
<td>Help</td>
<td>Access the online help.</td>
<td></td>
</tr>
</tbody>
</table>

For information on procedures to index batch documents, refer to the following topics:

- “Manually Indexing Batch Pages” on page 136
- “Using ApplicationXtender Web Access Automated Indexing Functionality to Index Documents” on page 149.

Manually Indexing Batch Pages

Batches can contain single page documents, multi-page documents, or both. For single page documents, you enter the required index information and select Save to create the new AppXtender document. For multi-page documents, assuming the pages are in sequential order, once you index the first page and create a document, you can add one or more additional batch pages to the same document without having to re-enter the index information. For batch pages belonging to existing AppXtender documents, you can select the existing document index and append the batch pages to the corresponding document. You also have the option of copying existing index information to use for new AppXtender documents.
When manually indexing batch pages, you can either enter values into the index fields one field at a time or select existing index information and paste it into the fields.

For more information, refer to the following topics:
- “Manually Populating Index Fields With Data” on page 137
- “Using the Select Indexes Function” on page 145

**Manually Populating Index Fields With Data**

To manually populate index fields with data:

1. On the page displayed in the viewer, find the information required for the first index field.
2. In Index view, add the data to the index field.
3. Repeat steps 1 and 2 for the remaining fields in Index view.

   **Note:** In addition to the key fields, populate all non-required fields for which data is available so that the document index will be as complete as possible.

4. When you finish entering data, to save the index information and create an AppXtender document, select Save.

   AppXtender Web Access creates the new ApplicationXtender document and then stores the physical document (electronic file or image file) and its index information in ApplicationXtender. The next page in the batch appears in the viewer.

   **Note:** The document most recently saved is referred to as the current document.

At this point in the manual index process, a new set of buttons appears in the Index view toolbar. The data in the index fields is grayed out, and a Modify button replaces the Save button.
The following table shows the buttons available from the Index view toolbar after you save a document index and describes the functionality accessed by each button.

Table 20  Index View Toolbar Button Functionality (After Save)

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach</td>
<td>Current Page</td>
<td>Attach the currently displayed page to the current document. For more information, refer to &quot;Attaching Pages to the Current Document&quot; on page 140.</td>
</tr>
<tr>
<td>Attach All</td>
<td>Pages</td>
<td>Attach all pages remaining in the batch to the current document. For information, refer to &quot;Attaching Pages to the Current Document&quot; on page 140.</td>
</tr>
<tr>
<td>Modify</td>
<td></td>
<td>Modify the index for the current document. For information, refer to &quot;Modifying an Index&quot; on page 141.</td>
</tr>
</tbody>
</table>
In addition, when you select save to save index information and create an AppXtender document, on the main toolbar, a grayed out button becomes available and an additional button appears on the toolbar. The following table shows these buttons and describes the functionality accessed by each.

### Table 20  Index View Toolbar Button Functionality (After Save) (continued)

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Select Indexes" /></td>
<td>Select Indexes</td>
<td>Select existing index information to populate the index fields for the currently displayed page. For more information, refer to “Using the Select Indexes Function” on page 145.</td>
</tr>
<tr>
<td><img src="image" alt="Clear Index" /></td>
<td>Clear Index</td>
<td>Clear existing index information so that you can enter new data in the fields. Note that to clear data from only one field, rather than clicking Clear Index, select the field data and then press the Delete key.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Help</td>
<td>Access the online help.</td>
</tr>
</tbody>
</table>

### Table 21  Additional Buttons on Main Toolbar (After Saving Index Information)

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New Document" /></td>
<td>New Document</td>
<td>Clears the index fields so that you can enter data for the next page in the batch. For more information, refer to “Indexing the Next Page in the Batch” on page 142.</td>
</tr>
<tr>
<td><img src="image" alt="View Last Indexed Document" /></td>
<td>View Last Indexed Document</td>
<td>Opens the current document and its index so you can view the data and, if necessary, modify the data. For more information, refer to “Opening the Last Indexed Document During Batch Indexing” on page 143.</td>
</tr>
</tbody>
</table>

To continue indexing, you have several choices. You can append additional batch pages to the current document, modify the index for the current document, or index the next page in the batch. You can also open the current document to view the document and, if necessary, modify its index information.
For information on these procedures, refer to the following topics:

- “Attaching Pages to the Current Document” on page 140
- “Modifying an Index” on page 141
- “Indexing the Next Page in the Batch” on page 142
- “Opening the Last Indexed Document During Batch Indexing” on page 143
- “Accessing the Last Indexed Document From the All Documents Have Been Indexed Dialog Box” on page 144

**Attaching Pages to the Current Document**

When a batch contains multiple pages belonging to the same document, after you index the first page and create the document in AppXtender, you can attach the rest of the pages to the AppXtender document without having to re-enter the index information.

The steps you perform to attach batch pages to the current document depend on the number of pages to be attached. If some but not all of the pages left in the batch are part of the current document, you attach the additional pages one page at a time. If all of the pages left in the batch are part of the current document, you can attach all of the pages simultaneously.

- To attach some but not all batch pages to the current document:
  1. From the Index view toolbar, select the Attach Current Page button.
     
     The selected page is removed from the batch and appended to the current document, and the AppXtender document is saved. The next page in the batch appears in the viewer.
  2. Repeat step 1 for each batch page to be attached to the current document.
  3. After attaching the last batch page belonging to the current document, from the main toolbar, select New Document to start indexing the next page in the batch.
To attach all batch pages to the current document:

1. From the Index view toolbar, select the Attach All Pages button.

All pages remaining in the batch are attached to the current document, and the AppXtender document is saved. Index view and Document Display view clear from your AppXtender Web Access user desktop and a dialog box appears so that you can select what you want to do next.

2. To continue indexing, from the dialog box, select Index Another Batch Document.

**Modifying an Index**

Another option you have after saving an index is to modify the index information.

When you modify an index, a Cancel button is added to the Index view toolbar. This allows you to cancel out of Modify mode if necessary.

To modify the index for the current document:

1. On the Index view toolbar, select the Modify button. The data in the index fields become available and the current document appears in the Document Display viewer.

2. Modify the values in the index fields as necessary.
3. When you finish, select Save. The index data is updated and saved, and the document clears from Document Display view.

**Indexing the Next Page in the Batch**

To begin indexing the next page in the batch:

- On the main toolbar, select the New Document button.

When you select new Document, in Index view, the data clears from the index fields and the Cancel button is removed from the Index view toolbar. In Document Display view, the next page in the batch appears in the viewer.

![Index View After Selecting New Document](image)

**Figure 63  Index View After Selecting New Document**

If there are no more pages in the batch, the All Document Pages Have Been Indexed dialog box appears.

![All Document Pages Have Been Indexed Dialog Box](image)

**Figure 64  All Document Pages Have Been Indexed Dialog Box**

To continue batch indexing, select Index Another Batch Document. If you have finished batch indexing, select your choice from the remaining options.
Opening the Last Indexed Document During Batch Indexing

When you save index information and create a document during batch indexing, the new document and its index information are added to AppXtender. However, you can still access the document at this point to view the pages in the document and, if necessary, modify the index values.

Note: Once you select New Document to continue batch indexing, you no longer have this option.

To open the last indexed document during batch indexing:

1. On the main toolbar, select the View Last Indexed Document button.


   ![Figure 65](image)

2. To modify the document’s index information, select Modify. Then make the necessary changes and select Save.

   To view pages of a multi-page document, use the Document Display viewer page controls. For information on viewing documents, refer to “Viewing Documents” on page 245.
3. To return to Batch Indexing mode, on the main toolbar, select the Return to Batch button.

**Figure 66  Return to Batch Button on Main Toolbar**

**Accessing the Last Indexed Document From the All Documents Have Been Indexed Dialog Box**

When you index and save the last page in a batch, AppXtender Web Access automatically exits batch indexing mode and the All Documents Have Been Indexed dialog box appears. To view the last document you indexed and saved from the batch, you must select an option from the dialog box.

To access the last indexed document from the All Documents Have Been Indexed dialog box:

- Select the Last Indexed Document option.

When you select Last Indexed Document, the dialog box clears, Document Display view appears on the AppXtender Web Access user desktop, and the first page of the document appears in the viewer. To access the document index, select the Document Index button on the main toolbar.

**Figure 67  Document Index Button on Main Toolbar**

*Note:* For information on viewing documents, refer to “Viewing Documents” on page 245. For information on modifying index information for AppXtender documents, refer to “Managing Documents” on page 353.
Using the Select Indexes Function

The Select Indexes function allows you to search for and use existing index information when indexing batch pages. When you select an existing index, you can either attach the current batch page to the AppXtender document to which the selected index belongs or create a new batch document using the same index data.

To access Select Indexes view:

1. In Index view, enter data from the current batch page into at least one key index field.
2. On the Index view toolbar, select the Select Indexes button.

Using the key data you entered, AppXtender Web Access searches the AppXtender application for documents with matching index information. When the search finishes, Index view clears and Select Indexes view appears.

![Select Indexes View](image)

A count of the total number of records in the result set appears on the left above the list of results.

**Note:** To return to Index view without selecting an index, on the Select Indexes view toolbar, select the Back to Index View button.
From Select Indexes view, you can copy and paste data from the selected index into the fields in Index view. Or, you can append the current batch page to the AppXtender document with the selected index.

For more information, refer to the following topics:

◆ “Copying Existing Index Data to Index a Batch Page” on page 146

**Copying Existing Index Data to Index a Batch Page**

To copy existing index data and paste it into the index fields for the current batch page:

1. Find the entry for the index data you want to copy.
2. To the left of the list entry, select the Copy Index button.

![Figure 69 Copy Index Button in Select Indexes View](image)

Select Indexes view clears, and Index view redisplays with the selected data pasted into the index fields.

**Note:** Copying an existing index does not remove it from the list of available indexes in Select Indexes view.

3. To continue, select Save.

A message appears telling you that the same index has been found in an existing document. You have the choice of either continuing to save the index or going back and modifying the data.
4. Select OK to continue saving the index. (To modify the index instead of saving it, select Cancel. For information on modifying an index, refer to “Modifying an Index” on page 141.)

When you select OK, another message appears giving you the choice of attaching the batch page to the existing document or creating a new document.

![Do You Want to Append Message](image)

**Figure 70** Do You Want to Append Message

5. To attach the page to the existing AppXtender document, select OK. Index view changes to Modify mode and the next page in the batch appears in the viewer.

![Index View After Attaching Page to Existing Document](image)

**Figure 71** Index View After Attaching Page to Existing Document

To create a new document, select Cancel. AppXtender Web Access creates a new AppXtender document, and then stores the document and its index information in ApplicationXtender.
Figure 72   Index View After Saving and Creating New Document

In Index view, the next page in the batch appears in the viewer. The previously selected index values continue to appear in the index field but are grayed out, and a Modify button has replaced the Save button.

Notice the new set of buttons in the Index view toolbar. The following table shows the buttons available from the Index view toolbar after you save a document index and describes the functionality accessed by each button.

Table 22   Index View Toolbar Button Functionality (After Save)

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Attach Current Page" /></td>
<td>Attach Current Page</td>
<td>Attach the currently displayed page to the current document. For more information, refer to “Attaching Pages to the Current Document” on page 140.</td>
</tr>
<tr>
<td><img src="image2" alt="Attach All Pages" /></td>
<td>Attach All Pages</td>
<td>Attach all pages remaining in the batch to the current document. For information, refer to “Attaching Pages to the Current Document” on page 140.</td>
</tr>
<tr>
<td><img src="image3" alt="Modify" /></td>
<td>Modify</td>
<td>Modify the index for the current document. For information, refer to “Modifying an Index” on page 141.</td>
</tr>
</tbody>
</table>
Using ApplicationXtender Web Access Automated Indexing Functionality to Index Documents

ApplicationXtender Web Access has several functions designed to reduce the amount of time spent entering data. Rather than modifying indexes for single documents, these functions modify field values for batches of documents.

Three features in AppXtender Web Access that allow you to automatically populate some or all of the index fields for a document are:

- **Auto Index**
- **Key Reference**
- **Last Index**

**Note:** Early versions of Netscape do not support Key Reference. Refer to the ApplicationXtender Web Access Release Notes for supported versions of Web browsers.

---

**Table 22** Index View Toolbar Button Functionality (After Save) (continued)

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Select Indexes]</td>
<td>Select Indexes</td>
<td>Select exist index information to populate the index fields for the currently displayed page. For more information, refer to &quot;Using the Select Indexes Function&quot; on page 145.</td>
</tr>
<tr>
<td>![Clear Index]</td>
<td>Clear Index</td>
<td>Clear existing index information so that you can enter new data in the fields. Note that to clear data from only one field, rather than clicking Clear Index, select the field data and then press the Delete key.</td>
</tr>
<tr>
<td>![Help]</td>
<td>Help</td>
<td>Access the online help.</td>
</tr>
</tbody>
</table>
The Auto Index and Key Reference functions each allow you to index batch documents automatically using index data from database tables. The Last Index function allows you to populate the index fields for one record with the index values used for the previous record.

**Table 23 Index View Automatic Indexing Functionality**

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
<th>Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Reference</td>
<td>Use Key Reference functionality to populate index input fields. For more information, refer to &quot;Using the Key Reference Function to Index Batch Documents&quot; on page 154.</td>
<td><img src="image" alt="Key Reference" /></td>
</tr>
<tr>
<td>Indexing</td>
<td>Reference fields. For more information, refer to &quot;Using the Key Reference Function to Index Batch Documents&quot; on page 154.</td>
<td><img src="image" alt="Indexing" /></td>
</tr>
</tbody>
</table>

For information on using automated indexing functions when indexing batch documents in ApplicationXtender Web Access, refer to the following topics:

- “Auto Index vs. Key Reference” on page 150
- “Using the Key Reference Function to Index Batch Documents” on page 154
- “Using the Last Index Function” on page 155

**Auto Index vs. Key Reference**

With the Auto Index function, you enter data into one or more index fields and then select a toolbar button to initiate the Auto Index feature. When AppXtender Web Access matches the data you entered against a record in the Auto Index table, it populates all other Auto Index-enabled fields for the new index with data from the record in the Auto Index table and then deletes the record from the table.

For example, assume for a certain application the Auto Index table contains index records with unique Social Security numbers. Each record also includes a name, date of birth, address, and phone number. When indexing a new batch document in AppXtender Web Access, you enter a Social Security number and then select the Auto Index feature. AppXtender Web Access finds the matching Social Security number in the Auto Index table, uses data from that record to populate the remaining fields on the new index, and then deletes the record from the table.

**Note:** Enter enough data in the input fields in Index view to limit matches from the Auto Index table to one.
The Key Reference feature operates in a very similar manner. Using data that you enter into one primary, or key, index field, AppXtender Web Access finds a matching record in the Key Reference table and then populates all other Key Reference-enabled index fields on the new index with data from the matching record. However, unlike records in the Auto Index table, the records in the Key Reference table are not deleted. For this reason, Key Reference can be a useful feature for automatically populating index information that is used to identify multiple documents, may need to be changed frequently, or both.

When modifying document indexes created using the Key Reference feature, updating index field data on one document may automatically update data in the same field on other documents with the same key index value.

- When you modify a data field value on an existing index record, AppXtender finds all index records with the same key value and makes the same change to those records.
- When you modify the key field value on an existing index record, AppXtender modifies only that document; all other documents having the original key value remain unchanged.

**Note:** For Auto Index and Key Reference functionality to be available for indexing, your AppXtender Document Manager/AppXtender Web Access administrator must configure the corresponding AppXtender application with Auto Index- or Key Reference-enabled fields.

For applications configured with Auto Index-enabled fields or Key Reference-enabled fields, when you access Index view, the Auto Index button and Key Reference button appear in the toolbar above the index entry fields.
Using the toolbar buttons, you can use the Auto Index function, the Select Indexes function, or the Key Reference function. You can also clear the input fields and enter new values.

The following table identifies which toolbar button to select for each action:

**Table 24 Index View Toolbar Buttons for Automatic Indexing**

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Auto Index" /></td>
<td>Populates Auto Index-enabled fields using data from the Auto Index table; then deletes the source record from the Auto Index table.</td>
</tr>
<tr>
<td><img src="image" alt="Select Index" /></td>
<td>Allows you to choose another index from a list of available indexes for the application.</td>
</tr>
<tr>
<td><img src="image" alt="Key Reference" /></td>
<td>Populates Key Reference-enabled fields using data from the Key Reference table.</td>
</tr>
<tr>
<td><img src="image" alt="Clear" /></td>
<td>Clears the values from all index fields so you can input new values.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Accesses AppXtender Web Access online help.</td>
</tr>
</tbody>
</table>
Using the Auto Index Function to Index Batch Documents

To index batch documents using the Auto Index function:

1. From Application Batch List view, access the batch of documents you want to index. Index view for the selected application opens on your AppXtender Web Access user desktop, and the first page in the batch appears in the Document Display viewer.

2. In the index input fields in Index view, enter enough data from the document to limit the number of matches from the Auto Index table to one (if possible) or as few records as possible.

   **Note:** The more unique data you can specify, the fewer the number of potential matches.

3. From the Index view toolbar, select Auto Index.

   ApplicationXtender Web Access compares the data in the index input fields against the records in the Auto Index table. If the data you input matches data from only one record in the Auto Index table, in Index view, AppXtender Web Access populates the blank index input fields with data from the Auto Index table record. Then AppXtender Web Access deletes the record from the Auto Index table.

   **Note:** If you enter data in the key index field, AppXtender Web Access checks for a match in the Key Reference table as well as the Auto Index table. In Index view, the key index field name appears in bold typeface.

   If Auto Index finds more than one matching record, an Auto Index Hit Results page appears. In this case, you must perform one of the following steps to continue indexing.

   • Select an index from the list of results by clicking the button to the left of the entry. The Auto Index Hit Results page closes, and the input fields in Index view are populated with data from the selected Auto Index record.

   **Note:** Auto Index data is removed from the Auto Index table as soon as you select it and save the index.

   • To delete specific document indexes, click the selection check box for each entry you want to delete and then click Delete.

   • To delete all of the document indexes in the Auto Index Hit Results, click Delete All.
• To exit the Auto Index Hit Results page without choosing an index, click Cancel. If no matching records are found, AppXtender Web Access displays an error message. To clear the message and continue, click OK.

Note: If you entered data in the key index field in Index view, even when there are no matching records in the Auto Index table and you get an error message, if AppXtender Web Access finds a matching record in the Key Reference table, it will use data from that record to populate the new index.

Using the Key Reference Function to Index Batch Documents

To index batch documents using the Key Reference function:

1. From Application Batch List view, access the batch of documents you want to index. Index view for the selected application opens on your AppXtender Web Access user desktop, and the first page in the batch appears in the Document Display viewer.

2. In Index view, enter data in the key index input field and then select Key Reference & Indexes.

CAUTION

In Index view, the key index field displays in bold typeface.

If more than one record matches the data you entered, an Existing Document Indexes page appears.

3. Select an index by clicking the button corresponding to the index values you want to use. The Existing Document Indexes page closes, and the index information populates the Field Value index fields.

If you change the key value in the Key Reference table, the data values change to match the data values for that record. If you change the key value to a value that is not in the Key Reference table, AppXtender Web Access creates a new record based on the new key value. If you change one or more of the data values corresponding to a key value, those data values are changed for every document in the AppXtender Document Manager database that contains the key value in its index.
Using the Last Index Function

The Last Index function allows you to populate the index fields for one record with the index values entered for the previous record.

To populate an index with the last values entered:
1. Click the Modify Index button in the Document Viewing page toolbar.
2. On the Document Index dialog box, click the Modify button.
3. On the refreshed Document Index dialog box toolbar, click the Last Indexes button. The index values from the previous record appear in the text box for the current record.
4. Click Save.

Click the Windows Close button to close the dialog box.

Returning to the Current Batch

In some cases, while you are indexing a batch, you may have to stop and perform some other function, like running a query to locate a document. When you are ready to resume batch indexing, you can access the batch you had been indexing when you left Batch Index mode without having to go to Application Batch List view and select the batch.

To access the current batch:
1. On the main toolbar, select View>View Current Batch.

![View Current Batch Option on View Menu](image)

Display Document view opens on your AppXtender Web Access user desktop (or in a separate window if that is how you have AppXtender Web Access configured), and the batch page you were indexing when you left Batch Index mode appears in the viewer.

2. On the main toolbar, select the New Document button to open Index view and resume batch indexing.
Working With Documents

Note: View Current Batch appears on the View menu only after you stop batch indexing without finishing the current batch. Once this condition is met, you can access View Current Batch from Application List view, Application Query view, and Query Results view.

Deleting Imported Batches

If there are problems with a batch of imported documents, as long as the documents have not yet been indexed, the batch can be deleted using the Delete Batch function.

To delete an imported batch of documents:

1. On the main toolbar, select the Batch List button.

![Batch List Button](image)

**Figure 75** Batch List Button (Application List view)

Application List view clears and Application Batch List view appears on your user desktop.
2. From the Current Application list box, select the application into which the batch was imported.

3. From the list of batches for the selected application, select the check box for the batch to be deleted.

   Note: If necessary, you can delete two or more batches in a single delete operation.

4. From the Application Batch List view toolbar, select the Delete Batch button.

   A message appears asking you to confirm the delete request.

5. Select OK to clear the message and continue the deletion process. When the delete process finishes, the list of batches automatically refreshes.
Submitting Documents for Full-Text Indexing

To make AppXtender Web Access documents available for retrieval using a ApplicationXtender Web Access full-text query, you must first submit the documents to a full-text queue on the ApplicationXtender Index Server for full-text indexing. Once a document has been indexed, you can search for the document using words within the document text.

Your ApplicationXtender Index Server must be configured and at least one full-text queue must be created and active for you to submit documents for indexing. For more information on configuring the ApplicationXtender Index Server, refer to the ApplicationXtender Index Server Administrator’s Guide.

**Note:** If you have the necessary permissions to access AppXtender Web Access settings, you can configure your AppXtender Web Access full-text settings to cause documents to be automatically added to a full-text indexing queue. For more information, refer to “Full Text Tab” on page 89.

To submit a document for full-text indexing:

1. Display the document you want to submit for indexing.
3. Select the full-text queue to which the document should be submitted for indexing from the Select Queue list.
4. Click OK to submit the document to the selected queue for indexing.
Adding Pages to ApplicationXtender Documents

When you add pages to an ApplicationXtender document, the new pages can be of the same object type as the existing pages or of any other object type. You can insert pages before or after any page in the document or append pages to the end of the document.

When inserting pages within a document rather than appending them to the end of the document, a good approach is to work with Thumbnails view selected. Using Thumbnails view, you can quickly locate and select the thumbnail of the page before or after which you want to add the new pages. When you select the page thumbnail, AppXtender Web Access automatically displays the page in the document viewer.

Figure 78 AppXtender Web Access User Desktop with Thumbnails View and Document Display View - Thin Client Mode

To configure AppXtender Web Access to display Thumbnails view:

1. Open the Settings window and access the Document View tab.
3. Select Save to save the setting and close the window.

The procedure you use to add pages to AppXtender documents depends on the client mode in which you are working: ApplicationXtender Web Access Thin Client or ApplicationXtender Web Access Interactive Client. For more information, refer to:

- “Adding Pages to Documents in Thin Client Mode” on page 160
- “Adding Pages to Documents in Interactive Client Mode” on page 161

Adding Pages to ApplicationXtender Documents


Adding Pages to Documents in Thin Client Mode

To add pages to an AppXtender document in ApplicationXtender Web Access Thin Client mode with Thumbnails view selected:

1. Locate the document to which the new pages will be added by querying the corresponding AppXtender application. (For information on retrieving AppXtender documents, refer to “Retrieving Documents” on page 185.)

2. When the query result set appears, find and select the document. The AppXtender Web Access user desktop changes to show Thumbnails view and Document Display view, and the selected document appears in the Thin Client viewer.

Note: Depending on how your system is configured, you may need to check out the document before working with it. For more information, refer to “Check In/Check Out Document Display Mode” in “Viewing Documents” on page 245.

3. To insert the new pages before or after a particular page in the document, in Thumbnails view, select the thumbnail for that page to display the page in the viewer. (If you are appending pages to the end of the document, you can skip this step.)

4. From the main menu, select Page>Add Page.


Figure 79 Import New Page Dialog Box - Thin Client Mode
The Current Page field shows the number of the currently selected page.

5. From the New Page Insertion Point list box, select the position in which the new pages should be added (Insert After, Insert Before, Append).

6. In the File Path text box, enter the path to the file to be imported. If you are not sure of the file path, click Browse and then locate and select the file.

7. To import the file, select Upload.

The new pages are inserted in the document at the selected insertion point. Thumbnails of the imported pages appear at the corresponding point in the sequence of thumbnails in Thumbnails view.

Adding Pages to Documents in Interactive Client Mode

To add pages to an AppXtender document in ApplicationXtender Web Access Interactive Client mode:

1. Locate the document to which the new pages will be added by querying the corresponding AppXtender application. (For information on retrieving AppXtender documents, refer to “Retrieving Documents” on page 185.)

2. From the query result set, locate and select the document.

The AppXtender Web Access user desktop changes to show Thumbnails view and Document Display view, and the document appears in the IRC viewer.

**Note:** Depending on how your system is configured, you may need to check out the document before working with it. For more information, refer to “Check In/Check Out Document Display Mode” in “Viewing Documents” on page 245.

3. To insert the new pages before or after a particular page in the document, in Thumbnails view, select the thumbnail for that page to display the page in the viewer. (If you are appending the pages to the end of the document, you can skip this step.)
4. On the IRC viewer toolbar, select the Page button to open the Page menu.

Figure 80  Page Button on Interactive Client Viewer Toolbar

5. From the Page menu and submenu, select New Page>Import File. The Import File submenu appears.

6. From the Import File submenu, select the position in which the new pages should be added (Insert After, Insert Before, Append). The Import File dialog box appears.

Figure 81  Import File Dialog Box

7. In the File Path text box, enter the path to the file to be imported. If you are not sure of the file path, click Browse and then locate and select the file.

8. To import the file, select Open.

The new pages are inserted in the document at the selected insertion point. Thumbnails of the imported pages appear at the corresponding point in the sequence of thumbnails in Thumbnails view.
Deleting Documents and Document Pages

Depending on the privileges granted in your AppXtender User Profile, you may be able to use ApplicationXtender Web Access to delete existing documents, document pages, or both documents and pages. For information on these procedures, refer to the following topics:

- “Deleting Documents from AppXtender Applications” on page 163
- “Deleting Pages from AppXtender Documents” on page 166

Deleting Documents from AppXtender Applications

Once a document has been indexed and added to AppXtender, if your AppXtender User Profile includes delete privileges, you can use the Delete Selected Documents function to delete the document from the corresponding AppXtender application. In this case, the deletion is performed from the Query Results view.

To delete a document from an application:

1. From Application List view, query the appropriate application to locate the document. (For information on querying applications, refer to “Retrieving Documents” on page 185.)
   
   The Query Results view appears with the result set of documents.

2. From the query result set, select the check box for the document to be deleted.
Working With Documents

Figure 82 Select Document to be Deleted (Query Results View)

Note: If necessary, you can select more than one document from the results to be deleted.

3. From the Query Results view toolbar, select the Delete Selected Documents button.
Deleting Documents and Document Pages

Figure 83  Delete Selected Documents Button (Query Results View)

A message appears asking you to confirm your deletion request.

4. To continue deleting the document, select Yes.

After the document is deleted, a Delete Log appears. The log details the actions taken by the system during the deletion process. If any errors or problems occurred, they will also be noted.

5. To close the log, select Close. A message appears asking you to refresh the Query Results list.

6. Select OK to clear the message and refresh the results.
Deleting Pages from AppXtender Documents

If your User Profile includes delete privileges, you can use the Delete Pages option from Document Display view to remove selected pages from multi-page application documents.

The procedure to delete pages using ApplicationXtender Web Access Thin Client varies slightly from the procedure using ApplicationXtender Web Access Interactive Client. For more information, refer to the following topics:

- “Deleting Document Pages in Thin Client Mode” on page 166
- “Deleting Document Pages in Interactive Client Mode” on page 168

Deleting Document Pages in Thin Client Mode

To delete pages from a multi-page document in ApplicationXtender Web Access Thin Client mode:

1. Access the Document View tab on Settings window and make sure that the Show Page Thumbnails option is selected. If it is not, click the check box to select this option.

2. Select Save to save and close the Settings window.

3. Run a query to find the document that contains the page to be deleted. (For information on querying applications, refer to “Retrieving Documents” on page 185.)

4. From the query result set, select the Open Document button to open the document in Document Display view.
5. Display the page to be deleted in the viewer by selecting the corresponding page thumbnail in Thumbnails view.

6. From the Document Display view menu, select Page>Delete Page. A prompt appears asking you to confirm the delete request.

7. Click OK to clear the prompt and delete the page.

8. To delete other pages from the document, repeat steps 5 through 7 for those pages.
Deleting Document Pages in Interactive Client Mode

To delete pages from a multi-page document in ApplicationXtender Web Access Interactive Client mode:

1. Access the Document View tab on Settings window and make sure that the Show Page Thumbnails option is selected. If it is not, click the check box to select this option.

2. Select Save to save and close the Settings window.

3. Run a query to find the document that contains the page to be deleted. (For information on querying applications, refer to “Retrieving Documents” on page 185.)

4. From the query result set, select the Open Document button to open the document in Document Display view.

The AppXtender Web Access user desktop changes to show Thumbnails view and Document Display view, and the selected document appears in the Interactive Client viewer.

Note: Depending on how your system is configured, you may need to check out the document before working with it. For more information, refer to “Check In/Check Out Document Display Mode” in “Viewing Documents” on page 245.
5. Display the page to be deleted in the viewer by selecting the corresponding page thumbnail in Thumbnails view.

6. On the IRC viewer toolbar, select the Page button to open the Page menu and then select Delete.

![Figure 86 Select Delete from Page Menu (IRC Viewer Toolbar)](image)

A prompt appears asking you to confirm the delete request.

7. Select Yes to clear the prompt and delete the selected page.

8. To delete other pages from the document, repeat steps 5 through 7 for those pages.
Using ApplicationXtender Web Access, you can scan and capture documents, index the images, and then store both in AppXtender. You can scan and capture individual pages as well as entire documents, and you can add pages to batches of documents.

**Note:** Whether a workstation is a scanning or retrieval workstation station depends on the choices your administrator made when installing ApplicationXtender Web Access client software.

These topics provide information on scanner setup and settings, and present procedures for scanning documents and additional pages:

- Introduction to the ApplicationXtender Scanning Component 172
- Tested Scanners and Drivers .......................................................... 173
- Accessing AppXtender Web Access Scanning Functionality .... 174
- Configuring Scan Settings .............................................................. 175
- Scanning Documents ................................................................. 181
- Scanning Additional Pages........................................................... 184
Introduction to the ApplicationXtender Scanning Component

To access and work with the ApplicationXtender Scanning Component from AppXtender Web Access, you must have scanning user permissions and must be working on a workstation that was installed and set up for document scanning.

The AppXtender Scanning Component provides two options for scanning and capturing paper documents to add to the AppXtender system:

- The integrated scan-and-index option allows you to scan documents and index them in a single process.
- The batch scanning option allows you to scan documents in one process and then index them later.

Both of these options are accessed from the ApplicationXtender Web Access Interactive Client Document Display view. For more information, refer to “Viewing Documents” on page 245.

**Note:** AppXtender Web Access can display multiple unindexed documents simultaneously, allowing you to scan pages and add them to unindexed documents as necessary. However, a displayed document is not saved to AppXtender Web Access until you index it and select Save.

The AppXtender Scanning Component supports several types of scanners and scanner interfaces. During AppXtender Web Access setup, your AppXtender administrator selects a scanning workstation type to install the appropriate scanner support files. Then the administrator installs the necessary scanner driver and selects the scanner from the AppXtender Web Access Select Scanner dialog box. (For information on selecting a scanner type, refer to “Selecting a Scanner Type” on page 176.)
Tested Scanners and Drivers

When the system administrator selects the scan workstation type during the process of installing AppXtender Web Access, scanner support files are automatically installed. Refer to the ApplicationXtender Release Notes for information on scanner drivers that AppXtender supports.

Scanner support files for scanners not supported by AppXtender must be manually installed. For more information, consult your system administrator or refer to the "ApplicationXtender" section of the ApplicationXtender Installation Guide.

The manufacturer’s recommended scanner driver must also be installed on your workstation for you to be able to scan from the AppXtender Web Access user desktop. For more information, consult your system administrator or refer to the "Planning ApplicationXtender Components" section of the ApplicationXtender Concepts and Planning Guide.
## Accessing AppXtender Web Access Scanning Functionality

For you to access AppXtender Scanning Component scanning functionality during an AppXtender Web Access session, ApplicationXtender Web Access must be configured to use the IRC viewer. To verify this, access the Interactive Viewer tab on the AppXtender Web Access Settings window and look at the Enable Interactive Viewer setting. If the check box is not selected, select it and then select Save.

After verifying the IRC viewer is the selected viewer, access Document Display view. To do this, run a query against an application and then select to view one of the documents in the query result set. The Interactive Client viewer appears in Document Display view on the AppXtender Web Access user desktop.

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**Note:** For information on querying applications and viewing documents from result sets, refer to "Retrieving Documents" on page 185.

When scanning is enabled, the AppXtender Scanning Component Scan toolbar appears below the Annotation toolbar in AppXtender Web Access Document Display view.

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**Figure 87** AppXtender Scanning Component Scan Toolbar - Interactive Client Viewer

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**Note:** If the Scan toolbar is hidden, that means scanning is currently disabled. To enable scanning, from the Document Display view menu, select View>Enable scanning.

The Scan toolbar consists of three buttons: Scan, Rescan, and Scanner Settings. If the Scan button is grayed out, that means you need to select a scanner type. Availability of the Rescan button is controlled by the scanner type.

---

**Note:** Information on scanner selection is discussed in “Selecting a Scanner Type” on page 176.
Configuring Scan Settings

From the ApplicationXtender Web Access user desktop, you can set several scanning properties to produce the desired results when you scan documents. These properties include DPI settings, brightness and contrast, dithering, and scanner feeder settings. Configurable parameters on the Scanner Settings dialog box are determined by the scanner type.

Note: Before using AppXtender Web Access to scan documents, you should have a basic understanding of the types of scanners used at your company and how each of them operates. For specific information on scanner settings and operation, refer to the instructions provided by the scanner manufacturer.

When scanning is initially enabled, you must select a scanner and configure scan settings. For later scanning sessions, if necessary, you can change certain scan settings such as the way in which document pages are fed through the scanner or how the driver is configured. You access scanner setting controls by selecting the Scanner Settings button on the Scan toolbar and then selecting from the menu.

The setting options that are available for you to change can vary depending on the scanner type.

The following topics provide information on using AppXtender Web Access scanner setting options:

◆ “Selecting a Scanner Type” on page 176
◆ “Selecting a Scan Feeder Option” on page 177
◆ “Selecting a Source” on page 178
◆ “Setting Scan Options” on page 179
◆ “Setting the Driver Configuration” on page 180
Selecting a Scanner Type

Because some of the scan setting options are automatically set based on the type of scanner you use, if you have just enabled scanned in AppXtender Web Access or if you have several types of scanners available and want to change to a different scanner, start by selecting a scanner type.

To select a scanner for your workstation:

1. If necessary, install and load the appropriate scanner driver on the scan workstation. For information, consult your AppXtender system administrator or refer to the “Planning Your ApplicationXtender Components” section of the ApplicationXtender Concepts and Planning Guide.

2. Log into ApplicationXtender Web Access, verify the Interactive viewer is selected, and then access a document in Document Display view.

   **Note:** If the ApplicationXtender Web Access Thin Client viewer appears when you access Document Display view, open the Settings window, select the Interactive Viewer tab, and then select Enable Interactive Viewer. Select Save to save the new setting and close the window.

3. From the IRC Scan toolbar, select the Scanner Settings button to access the menu.

4. Click Select Scanner. The Select Scanner dialog box appears.

![Select Scanner Dialog Box](image)

**Figure 89** Select Scanner Dialog Box
Note: If the scanner at your workstation does not appear in the Select Scanner list, make sure that the scan workstation type was selected when ApplicationXtender Web Access was installed and that the appropriate scanner driver was installed. For information, consult your AppXtender system administrator or refer to the “Planning Your ApplicationXtender Components” section of the ApplicationXtender Concepts and Planning Guide.

Note: If both ApplicationXtender and ApplicationXtender Web Access are running on the same workstation at the same time, only one can use a scanner driver at a time. If a particular scanner driver is being used for AppXtender, you cannot use that scanner driver for AppXtender Web Access until AppXtender is closed. To continue scanning, you must select a different scanner driver in AppXtender Web Access.

5. Click the entry for the appropriate scanner, and then click OK. Depending on the scanner your select, another dialog box might appear, allowing you to further configure the scanner driver. For instructions, refer to the documentation for your scanner.

Selecting a Scan Feeder Option

There are three options for operating the scanner feeder: auto feed, manual feed, and single feed. These options are mutually exclusive; only one of the options can be activated at a time.

For more information, refer to the following topics:

◆ “Using Auto Feed Mode” on page 177
◆ “Using Manual Feed Mode” on page 178
◆ “Using Single Feed Mode” on page 178

Using Auto Feed Mode

In auto feed mode, AppXtender Web Access scans all of the pages in the feeder in a single operation. When the feeder is empty, the scan session ends.

If you put more pages in the feeder after the session has ended, you must click the Scan button again to scan the new pages.

To use auto feed:

◆ From the Settings list box, select Auto Feed.
Scanning

Using Manual Feed Mode

In manual feed mode, AppXtender Web Access scans all of the pages in the feeder and then waits for you to add more pages. When you put more pages in the feeder, scanning continues. To scan the new pages, if the scan session times out and the feeder remains empty, you must click the Scan button again when you put more pages in the feeder.

The time-out is configurable, with a default of 20 seconds. The setting is specified in the Options dialog box. To access the dialog box, click Options on the Settings list box.

To use manual feed:
◆ From the Settings list box, select Manual Feed.

Using Single Feed Mode

In single feed mode, AppXtender Web Access scans only one page at a time. After each page is scanned, you must click the Scan button again to scan the next page.

To use single feed mode:
◆ From the Settings list box, select Single Feed.

Selecting a Source

The Source list box allows you to choose a scanner source. The scanner source is the source for the papers to be scanned. Scanner source options vary depending on the scanner. Available options may include Flatbed, ADF Simplex, and ADF Duplex.

The following table lists the typical source settings and explains what they mean.

Table 25 Typical Source Settings

<table>
<thead>
<tr>
<th>Source Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flatbed</td>
<td>Refers to using the scanner's top paper bed, similar to using a copy machine.</td>
</tr>
<tr>
<td>ADF Simplex</td>
<td>Refers to using the automatic document feeder to scan only the front side of the document.</td>
</tr>
<tr>
<td>ADF Duplex</td>
<td>Refers to using the automatic document feeder to scan both sides of the document.</td>
</tr>
</tbody>
</table>
To configure source settings:
1. From the Settings list box, click Source.
2. From the Source menu, click the source you want to use.

Setting Scan Options

From the Options dialog box, you can set the following scan options: remove blank pages, threshold setting, and scanner manual feed timeout.

![Example Options Dialog Box](image)

Some batches may contain one or more blank pages, which will produce blank images when they are scanned. Rather than manually deleting the blank pages after the batch is scanned, you can set a scanner option to skip blank pages. To have the scanner skip blank pages:

- Verify that the Remove blank pages (Black & white image only) check box is selected. If not, click the check box.

The threshold setting sets the amount of "noise" allowed on images. Everything appearing on a scanned image that is not on the paper page is referred to as "noise". Too much "noise" will negatively impact the sharpness and clarity of your images. To adjust the scanner threshold setting:

- Move the slider to the right for a cleaner image. Move it to the left to permit images with more "noise".
The scanner manual feed timeout refers to the amount of time after the last page is scanned during which you can scan additional pages without having to click the Scan button. The time is expressed in seconds. To change the manual scan time out setting:

◆ Enter the desired time (in seconds) in the Scanner Manual Feed Timeout text box. The default is 20 seconds.

### Setting the Driver Configuration

Driver configuration involves setting advanced features that relate to your scanner. The options vary depending on the scanner that you are using. Some settings that may be included are brightness, dither, and contrast.

To access the Scanner Settings dialog box:

◆ From the Settings list box, click Driver Configuration.

The Scanner Settings dialog box for your scanner appears. The options and buttons on the dialog box vary according to scanner type. For information on configuring advanced configuration settings for your scanner, refer to the documentation provided with the scanner.

When you finish, click OK to save the new settings. Any settings you change remain in effect until you change them again.
Scanning Documents

AppXtender Web Access supports the ISIS, TWAIN/WIN, Vidar Diagnostic Pro Plus, BUIC TS400 and 1500, Contex, and Ideal scanner interfaces as well as Kofax scanners. This topic provides steps for using AppXtender Web Access to scan documents into ApplicationXtender.

New documents are scanned using the batch import feature.

To scan new documents:

1. If the Scan toolbar is closed, click Page from the Document Display view menu, and then select Enable Scanning.
2. Click the Settings button on the Scan toolbar to open the list box.
3. Select the appropriate settings for the documents you need to scan. This might include setting the feed type, scanner source, scanner options, and driver configuration. For more information, refer to “Configuring Scan Settings” on page 175.
5. Prepare the paper documents for scanning. Document preparation requirements depend on the standards set for your company. Consult your AppXtender system administrator for guidelines. Some document preparation suggestions include:
   - Remove sticky notes, paper clips, and staples (if appropriate).
   - Make sure all of the pages are oriented in the same way.
   - If you are using an automatic document feeder, make sure the pages to be scanned are in good enough condition to run through the feeder (for example, torn or crumpled pages have been removed).
6. Load the documents into the scanner feeder.
   
   **Note:** To ensure proper page order and orientation, document pages are typically loaded face up with the top of the page entering the scanner first.

7. On the Document Display view toolbar, click the Batch Create button. The Select Files for Batch Import dialog box appears.
8. If necessary, navigate to the appropriate folder. Then select a file from the list of available files. The scanned images will be saved to this file.

9. In the Batch Name text box, type a name for the batch of scanned images.

10. Click Open.

11. On the Scan toolbar, click the appropriate scan feed button to begin scanning.

**Figure 91** Select Files for Batch Import Dialog Box

**Note:** While pages are being scanned, a Cancel button appears in the AppXtender Web Access status bar. Click Cancel at any time to stop scanning.

12. If the Reason Code Required dialog box appears, select the check boxes for the functionality that you will need when the document has been created (Print, Export, and/or Email). Enter a comment about the document you are creating in the text box, and click OK.

**Note:** For more information on entering reason codes, refer to “Entering Reason Codes” on page 265.
13. If the Signature Properties dialog box appears, select a certificate, enter a comment, specify whether you want these settings to be used by default, and click OK. (Depending on the configuration of the selected certificate, you may be asked to provide a password.)

During the scanning process, as each page is scanned, it appears in Document Display view. Thirty seconds after the page has been fully scanned, its image is automatically saved as a BIN file to the document write path for the application.

**CAUTION**

Always allow the full 30 seconds for processing. Otherwise, the scanned data will be lost.

When scanning is completed, the Index view appears next to Document Display view. The image of the last page scanned appears in Document Display view. To continue, enter data from the document into the corresponding index fields. Then click Save.

---

**Note:** Index information for the document can be entered at any time. You can enter it after the first page is scanned or after the last.
Scanning Additional Pages

Additional pages can be added to documents from any scanner certified for use with ApplicationXtender. Scanned pages can be inserted before or after a displayed page. They can also be appended to the end of a document.

For detailed information on adding scanned pages to documents, refer to “Adding Pages to ApplicationXtender Documents” on page 159.
Each time a document is added to ApplicationXtender Web Access, index information is added to identify the document. This index information is used for document retrieval. ApplicationXtender Web Access provides a variety of robust search and retrieval methods to allow you to perform queries to retrieve a specific set of documents. These search methods include Search by Index, Search by Wildcard, Search by List of Values, Expression Search, Full-Text Search, and Combination Search. In addition to these options, you can search document properties (ODMA attributes). You can even combine search options to retrieve only the documents most relevant to your needs.

If the optional Centera retention for AppXtender licensed feature is installed and enabled for the application, and you have the appropriate privileges, you can also search for documents that are under Centera retention or retention hold.

AppXtender Web Access deployments support full-text indexing. The AppXtender Index Server, an add-on module for ApplicationXtender, allows you to submit AppXtender Web Access documents to be full-text indexed and to run searches based on full-text data. AppXtender Web Access offers a wide range of options for performing full-text (or keyword) searches on indexed document pages. Text-based documents can be submitted directly to the Index Server for indexing. Image documents can be submitted to the Index Server, which processes the document using optical character recognition (OCR) and then indexes the resulting text.
ApplicationXtender Web Access can also search by document property content (ODMA attributes). Search parameters include, but are not limited to, author, document name, company, date, subject, comments, and keywords. For more information about searching document property content, refer to “Searching Document Properties” on page 221.

Once you retrieve a document, AppXtender Web Access provides a variety of other functions that you can use to work with the document, including document display, printing, annotations, page/document addition/deletion, index modification, and document property modification.

If you have the Report View privilege in the AppXtender Application Generator, in addition to searching applications for documents, you can also use AppXtender Web Access to query applications for AppXtender Reports Mgmt reports. AppXtender Reports Mgmt report retrieval provides the same index querying functions as retrieving AppXtender Web Access documents, and you can view and print AppXtender Reports Mgmt reports. You can find more information on the Report View function in “Displaying ApplicationXtender Reports Management Reports” on page 305.

This section explains how to access and use all of the search methods available in AppXtender Web Access. Refer to the following topics for more information:

- Using Queries in ApplicationXtender Web Access ..................... 187
- Searching a Single Application .................................................. 191
- Searching Multiple Applications .............................................. 209
- Searching Document Properties .............................................. 221
- Working with Saved Queries ................................................. 223
- Displaying Documents from Query Results View ..................... 229
Using Queries in ApplicationXtender Web Access

A query is a document search. It allows you to retrieve stored documents from AppXtender Web Access applications based on information that you specify as search criteria. With ApplicationXtender Web Access, you can search either one application or across multiple applications simultaneously (provided all the applications reside within the same data source).

Using Query functionality, you can create a new query, edit an existing query, and run a query. You select to create a new query from the shortcut menu for the application you want to query.

![New Query Menu Selection](image)

Saved queries are listed under the application to which they pertain.

![Saved Queries on Applications Window](image)

**Figure 93** View Menu New Query Selection

**Figure 94** Saved Queries on Applications Window
Retrieving Documents

You create and edit the actual query in Query view. Search criteria entries can be made in the following sections:

- Use the Index Name section to perform queries based on document index field information. Each index field is listed on a separate line. For more information, refer to “Creating a New Query” on page 192.

![Application Query View Index Name Section]

Figure 95: Application Query View Index Name Section

If ODMA attribute (document properties) searching is enabled on the Search/Result Set page on the Settings dialog box, document properties also appear in this section. For more information, refer to “Searching Document Properties” on page 221.
Use the Full-Text Query Criteria section to perform full-text queries. Full-text queries are queries based on the text within the documents. If you are using the K2 full-text engine, you can perform queries based on a thesaurus as well as the document text. For more information, refer to “Searching Using Full-Text Query” on page 201.

![Search Criteria Page Full-Text Query Criteria](image)

**Figure 96 Search Criteria Page Full-Text Query Criteria**

**Note:** You can perform queries using both the index and full-text search values. For more information, refer to “Searching Using a Combination Search” on page 207.

If the optional Centera retention for AppXtender licensed feature is installed and enabled for the application, and you have the Retention User privilege, the Query Options section of the search criteria page displays retention options.

For information on performing queries that search across multiple applications, refer to “Searching Multiple Applications” on page 209.
A Current Query drop-down appears at the top right in Application Query view. If you queried the selected application previously, to use the same search criteria for the current query, select Last Query. To run a report query on the application, select Report Query.

Figure 97  Current Query Drop-Down
Searching a Single Application

You can create a new query to search for documents and their previous revisions or for AppXtender Reports Mgmt reports within a single application. AppXtender Web Access provides flexible options for document searching by index value. In addition to entering exact index information as search criteria, you can enter lists of values, expressions (ranges), and wildcards. When queries are executed, if two or more records meet the search criteria you entered, Query Results view appears, listing those document index records.

**Note:** If only one document satisfies the search criteria, the document opens automatically in Document Display view.

Index field criteria is entered in the index field search criteria section on the search criteria page. The following table describes the purpose of each column.

<table>
<thead>
<tr>
<th><strong>Table 26</strong> Index Field Search Criteria Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
</tr>
<tr>
<td>Show</td>
</tr>
<tr>
<td>Index Name</td>
</tr>
<tr>
<td>Search Value</td>
</tr>
</tbody>
</table>
Creating Queries to Search a Single Application

AppXtender Web Access allows you to use several different methods to set search criteria for searching a single application. Refer to the following topics for more information about creating queries with specific search criteria:

- “Creating a New Query” on page 192
- “Using Advanced Index Value Search Criteria” on page 195
- “Searching Using the List of Values Feature” on page 197
- “Searching Using the Expression Search Feature” on page 199
- “Searching Using Full-Text Query” on page 201
- “Searching Using a Combination Search” on page 207

For information about saving, editing, renaming, or setting viewing rights to queries, refer to “Working with Saved Queries” on page 223.

Creating a New Query

You can create queries to search a single application for documents that match specific search criteria.

To create a new query using index field values:

1. To access Application Query view, right-click the name of the application you want to query and select New Query from the shortcut menu.

   The search criteria page appears.
Figure 98  Application Query View (New Query)

Note: To return to Application view, click the Application List button on the toolbar, or click Applications on the View menu.

2. If there are any index fields you do not want shown in the search results, in the Show column, click the check boxes for those fields to clear the check marks.

3. Enter the search criteria in the Search Value text boxes to the right of the selected index names.

Note: For more information on entering search criteria, refer to “Using Advanced Index Value Search Criteria” on page 195.
4. To filter query results for documents that have been filed for Centera retention, select one of the following options from the Show list box in the Query Options section of the tab:
   - All documents excluding documents on retention
   - Only documents on retention
   - Only documents on retention hold
   - Only documents on retention not on retention hold

   Note: Retention options do not appear in the list box if the application is not configured for Centera retention.

5. After entering search criteria and/or retention query options, perform one of the following actions:
   - Click Submit to execute the query without saving it for future use.
   - Enter a name for the query in the Query Name text box. To share the query with other users, select Available To All Users. Then, click Save to save and execute the query.

   Note: Saved queries are accessible directly from the AppXtender Web Access window.

   - Click Reset to clear the values from the Search Value text boxes. Then enter new search criteria.

What happens when a query is successfully completed varies depending on the number of documents found that match the search criteria.

- If the search returns only one result, Document Display view appears on your desktop and the document automatically opens in the viewer.
- If there are two or more results, Query Results view appears on your desktop. This view lists all of the documents in the query result set. For information about displaying documents from Query Results view, refer to “Displaying Documents from Query Results View” on page 229.
Note: If no documents meet the specified search criteria, a No Documents Found message appears. Click OK to clear the message and continue.

Using Advanced Index Value Search Criteria

In addition to entering specific index values for a basic index name search, there are several advanced index value searches. Using an advanced index value search method, you can search for a wider range of documents.

Four advanced index value search methods are discussed in the following topics:

◆ “Searching Using Wildcards” on page 196
◆ “Searching Using the List of Values Feature” on page 197
◆ “Searching Using the Expression Search Feature” on page 199
◆ “Searching Using Expression Operators” on page 205
Searching Using Wildcards

You can use an asterisk (*) as a wildcard in your search criteria. Using the wildcard character can narrow a search by controlling the number of documents returned in the search results.

Wildcards are valid for index fields with the data types Text, Time Stamp, SSN, Telephone, Zip Code, Boolean Choice, and User-defined List. For all other data types, use search expressions, such as a range or a list of values.

The asterisk wildcard matches any single character or string of characters. It is used for beginning with, ending with, and pattern searches. The following table shows how wildcards affect which documents are included in search results.

<table>
<thead>
<tr>
<th>Search Criteria</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMITH</td>
<td>Returns all documents with a Name of &quot;SMITH.&quot;</td>
</tr>
<tr>
<td>SM*</td>
<td>Returns all documents with a Name that begins with the characters &quot;SM.&quot;</td>
</tr>
<tr>
<td>*ITH</td>
<td>Returns all documents with a Name that ends with the characters &quot;ITH.&quot;</td>
</tr>
<tr>
<td>S*H</td>
<td>Returns all documents with a Name that begins with the character &quot;S&quot; and ends with the character &quot;H.&quot;</td>
</tr>
<tr>
<td><em>ITH</em></td>
<td>Returns all documents with a Name that contains the character pattern &quot;ITH.&quot;</td>
</tr>
</tbody>
</table>

Note: Always use the wildcard character with other search criteria. Entering only a wildcard in a search field results in a search of the entire database, which negatively impacts system performance on multi-user network systems.
To search for documents using the wildcard character:

1. On the search criteria page, enter index data in the Search Value text box for at least one field.

2. Click Submit to begin the search process. ApplicationXtender Web Access searches the active application for all records that match the specified criteria. If a single document satisfies the search criteria, the document opens automatically in Document Display view. If two or more matching documents are found, a list of those documents appears in Query Results view. For more information, refer to “Displaying Documents from Query Results View” on page 229.

**Searching Using the List of Values Feature**

A list of values search allows you to define multiple criteria for every search field. For an index named SSN, for example, you could enter 123-45-6789, 111-11-1111, and other Social Security numbers in the Search Value text box to search for multiple values.

ApplicationXtender Web Access locates all documents that contain any entry in the Search Value text box. All documents with 123-45-6789 in the SSN field and all documents with 111-11-1111 (as well as any others you add) are located and, if more than one document is found, listed in Query Results view. By allowing you to specify more alternatives, the list of values operation allows inclusive searches that retrieve a larger set of documents.

**Note:** If only one document satisfies the search criteria, the document automatically opens in Document Display view.
To search for documents using a list of values search:

1. Click the Search List button at the right of the Search Value text box you are using to specify search criteria.

![Figure 101 List of Values Button for List of Values Search](image)

The Search List editor appears.

2. In the Field Value text box, enter a value for the list.

3. To add the value to the list, click Add.

![Figure 102 Search List Editor](image)

4. Repeat steps 2 and 3 for each value you want to include.

![Figure 103 Value Added to List](image)
5. If necessary, edit the values selected for the list.
   - To replace a value with a new one, select the value to be replaced from the list box, enter a new value in the Field Value text box, and click Replace.
   - To delete a value, select the value to be deleted from the list box, and click Delete.
   - To delete all values in the list, click Delete All.

6. Click Ok. The list of values editor closes, and the specified criteria appears in the appropriate text box on the search criteria page.

7. Enter any other index values you want included in the query.

8. Click Submit to start the search. When the search successfully completes, if only one document satisfies the search criteria, that document opens automatically in Document Display view. If two or more documents satisfy the search criteria, Query Results view appears with a list of those document.

   **Note:** For information on accessing documents from Query Results view, refer to “Displaying Documents from Query Results View” on page 229.

### Searching Using the Expression Search Feature

Another way to search for a range of documents is to enter the index field search criteria as an expression. This gives you more options for narrowing a search within an index field. To help compose your search expression syntax, ApplicationXtender Web Access features an expression editor. To access the editor, click the Search Range button to the right of the index field search criteria text box.

#### Table: List Values for Search Criteria Page

<table>
<thead>
<tr>
<th>Index Name</th>
<th>Search Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEMBER NUMBER</td>
<td>40138, 74634, 20504</td>
</tr>
<tr>
<td>MEMBER NAME</td>
<td></td>
</tr>
</tbody>
</table>

#### Table: Search Range for Index Field Expression Search

<table>
<thead>
<tr>
<th>Index Name</th>
<th>Search Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEMBER NUMBER</td>
<td></td>
</tr>
<tr>
<td>MEMBER NAME</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 104** List Values Added to Search Criteria Page

**Figure 105** Search Range Button for Index Field Expression Search
For index field expression searches, use symbols representing expressions as part of the search criteria. These symbols include Between [], Greater Than >, Greater Than Or Equal To >=, Less Than <, Less Than Or Equal To <=, and Not Equal To <>. The following table shows the correct syntax for each expression.

**Table 28 Expression Syntax**

<table>
<thead>
<tr>
<th>Expression</th>
<th>Symbol</th>
<th>Correct Syntax Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Between</td>
<td>[ , ]</td>
<td>['1', '2']</td>
</tr>
<tr>
<td>Greater than</td>
<td>&gt;</td>
<td>&gt;2222.00</td>
</tr>
<tr>
<td>Greater than or equal to</td>
<td>&gt;=</td>
<td>&gt;=2222.00</td>
</tr>
<tr>
<td>Less than</td>
<td>&lt;</td>
<td>&lt;2222.00</td>
</tr>
<tr>
<td>Less than or equal to</td>
<td>&lt;=</td>
<td>&lt;=2222.00</td>
</tr>
<tr>
<td>Not Equal to</td>
<td>&lt;&gt;</td>
<td>&lt;&gt;2222.00</td>
</tr>
</tbody>
</table>

To search for documents using an index field expression search:

1. Click the Search Range button corresponding to the Search Value text box you are using to specify search criteria.

   The expression editor appears.

2. From the Type of Comparison list box, choose the type of comparison you want to use.

3. Enter a value in the Value text box.

   **Note:** If you selected Between [ ] as the type of comparison, enter a value in the And text box.
4. Click OK. The expression editor closes, and the search criteria page appears with the selected expression syntax in the Search Value text box.

<table>
<thead>
<tr>
<th>Show</th>
<th>Index Name</th>
<th>Search Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>MYINDEX</td>
<td>Expression: ['00000' '99999']</td>
</tr>
</tbody>
</table>

**Figure 107 Expression Syntax in Search Value Text Box**

**Note:** You must use the exact format when entering expression syntax. An error message displays when the expression syntax is incorrect. Click OK to clear the message and continue.

**Figure 108 Format not valid Message**

5. Click Submit to start the search. When the search successfully completes, if only one document satisfies the search criteria, that document opens automatically in Document Display view. If two or more documents satisfy the search criteria, Query Results view appears with a list of those documents.

**Note:** For information on accessing documents from Query Results view, refer to “Displaying Documents from Query Results View” on page 229.

**Searching Using Full-Text Query**

ApplicationXtender Web Access supports full-text (keyword) searches of documents in the full-text database. The full-text search option searches the text of all of the documents in the full-text database. You can submit documents from AppXtender Web Access to the AppXtender Index Server for full-text conversion. The documents are then submitted to the full-text database.
The AppXtender Index Server uses either the ProIndex full-text engine or the K2 full-text engine to submit documents to the full-text database. For more information on the AppXtender Index Server, refer to the ApplicationXtender Index Server Administrator’s Guide. For details on querying using the K2 or ProIndex full-text engine, refer to the manufacturer’s documentation.

Only documents that have been submitted to the AppXtender Index Server can be retrieved in a full-text search. If documents have not been submitted to the server, full-text search features are not available. If you have a full-text license, a search criteria page with a Full-Text Query Criteria section appears regardless of whether you have full-text data.

**Note:** The full-text search feature is enabled by default in AppXtender Web.NET. To use the full-text search feature in AppXtender WebJ2, select Request Full Text Search Support on the Login page when logging on to the data source.
There are four types of full-text searches: All Words, Any Words, Exact Phrase, and Expression.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Words</td>
<td>Searches for documents containing ALL words entered in the Criteria text box.</td>
</tr>
<tr>
<td>Any Words</td>
<td>Searches for documents containing ANY words entered in the Criteria text box.</td>
</tr>
<tr>
<td>Exact Phrase</td>
<td>Search for documents containing the exact phrase entered in the Criteria text box.</td>
</tr>
<tr>
<td>Expression</td>
<td>Searches for documents containing the Expression entered in the Criteria text box.</td>
</tr>
</tbody>
</table>

If the AppXtender Index Server is configured to use the K2 full-text engine, a Thesaurus check box appears in the Query Options section of the search criteria page. Selecting the Thesaurus feature allows you to search for words that are related to your search criteria. It contains a list of synonyms or keys for possible words to be used in a search.

The thesaurus control file (*.ctl) is installed when K2 servers are installed. When the Thesaurus check box is selected and a full-text search is performed, AppXtender Web Access searches the thesaurus control file for synonyms or keys for words in the search criteria. For more information on the thesaurus control file and its configuration, refer to the K2 Collection Reference Guide.
Another query option is the Include previous document revisions check box. When this check box is selected, the search returns both current and previous versions of documents that meet the search criteria.

**Note:** When the Show Previous Document Version option on the Search/Result Set page of the Settings dialog box is checked, the Include previous document revisions check box in the Full-Text Query Criteria section of the search criteria page is automatically selected. Clearing the check box on the search criteria page does not affect the setting of the Show Previous Document Version check box on the Search/Result Set page. For more information, refer to "Search/Result Set Tab" in "Customizing Your Workstation" on page 83.

To search for documents using the Full-Text Query Criteria option:

1. Select one of the Search Type options for the query.
2. Enter the search criteria in the Criteria text box.
3. To use the thesaurus to search for synonyms for the search criteria, click to select the Thesaurus check box.

**Note:** The Thesaurus check box is available only when the K2 full-text engine is used to submit documents to the full-text database. For more information, refer to the ApplicationXtender Administrator’s Guide.

4. To search previous revisions of documents, select the Include previous document revisions.
5. To save the query so that you can use it again, type a name in the Query Name text box.

**Note:** Check the Available To All Users check box to allow others to use the saved query.

6. Click Submit. When the search successfully completes and Query Results view appears, the FTS View dialog box opens. For more information Query Results view, refer to "Search/Result Set Tab" in “Customizing Your Workstation” on page 83.
Searching Using Expression Operators

The expression operators search option uses expression operators to focus the document search. You build the query by combining the words or text strings that you want to search for with expression operators such as and and or. You can also combine operators for more complex searches.

*Note:* By default, AppXtender Web Access interprets search expressions from left to right, interpreting each search operator one at a time, and narrowing the results with each subsequent search.

The following table describes each of the expression operators that can be used in ApplicationXtender Web Access queries.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>and</strong></td>
<td>When you use the <em>and</em> operator between two words, AppXtender Web Access searches for documents that contain both words.</td>
</tr>
<tr>
<td><strong>or</strong></td>
<td>When you use the <em>or</em> operator between two words, AppXtender Web Access searches for documents that contain at least one of the words.</td>
</tr>
<tr>
<td><strong>and not</strong></td>
<td>When you use the <em>and not</em> operator between two words, AppXtender Web Access searches for documents that contain the first word but not the second.</td>
</tr>
<tr>
<td><strong>near( )</strong></td>
<td>When you use the <em>near ( )</em> operator after two words, AppXtender Web Access searches for documents in which both words occur in any order within a range that you specify between the parentheses.</td>
</tr>
<tr>
<td><strong>Character wildcard</strong></td>
<td>When you use a <em>question mark (?)</em> in a text string, AppXtender Web Access searches for documents that contain the string of text but allows any single character to take the place of the question mark in the text string.</td>
</tr>
</tbody>
</table>
Retrieving Documents

Table 30  Expression Operators (continued)

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>String wildcard</td>
<td>When you use an asterisk (*) in a text string, AppXtender Web Access searches for documents that contain the specified string of text but allows any number of characters or even the lack of a character to take the place of the asterisk in the text string.</td>
</tr>
<tr>
<td>Parentheses</td>
<td>You can use parentheses to group search expressions to control the order in which AppXtender Web Access performs the searches. When you use parentheses in an expression, AppXtender Web Access searches first for documents that contain the expression in parentheses.</td>
</tr>
<tr>
<td>Backslash</td>
<td>By default, when you use symbols such as question marks (?), asterisks (*), and parentheses ( ), AppXtender Web Access interprets them as operators. If you want to search for these and many other symbols as characters in a text string, you must precede each symbol with a backslash ().</td>
</tr>
</tbody>
</table>

The following table provides an example for each of the expression operators. As you review the examples, remember that AppXtender Web Access interprets search expressions from left to right.

Table 31  Examples of Expression Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Example</th>
<th>Finds Documents With</th>
</tr>
</thead>
<tbody>
<tr>
<td>and</td>
<td>Mason and Simon</td>
<td>Both Mason and Simon</td>
</tr>
<tr>
<td>or</td>
<td>Mason or Simon</td>
<td>Either Mason or Simon</td>
</tr>
<tr>
<td>and not</td>
<td>Mason and not Simon</td>
<td>Mason but not Simon</td>
</tr>
<tr>
<td>near ( )</td>
<td>Mason near (20) Simon</td>
<td>Both Mason and Simon, within a range of 20 words of each other</td>
</tr>
<tr>
<td>?</td>
<td>L?O</td>
<td>A string of 3 consecutive characters, in which the first must be L, the second one can be any character, and the last must be O.</td>
</tr>
<tr>
<td>*</td>
<td>S*</td>
<td>Any string that begins with S</td>
</tr>
<tr>
<td>( )</td>
<td>Mason and (Simon or Schiff)</td>
<td>Either Simon or Schiff first. Of those documents, AppXtender Web Access retrieves documents that also contain Mason</td>
</tr>
<tr>
<td>\</td>
<td>(Mason?)</td>
<td>(Mason?)</td>
</tr>
</tbody>
</table>
In some cases, the words or text strings you want to search for will already include characters used as expression operators, such as a question mark or an ampersand. When expression operator characters are used literally in a query, the character must be preceded by a backslash. The following table lists each of the characters to which this rule applies.

<table>
<thead>
<tr>
<th>Character Name</th>
<th>Symbol</th>
<th>Character Name</th>
<th>Symbol</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parentheses</td>
<td>(</td>
<td>Caret</td>
<td>^</td>
</tr>
<tr>
<td>Brackets</td>
<td>[</td>
<td>Tilde</td>
<td>~</td>
</tr>
<tr>
<td>Angle brackets</td>
<td>&lt; &gt;</td>
<td>Number sign</td>
<td>#</td>
</tr>
<tr>
<td>Double quotes</td>
<td>&quot;</td>
<td>Colon</td>
<td>:</td>
</tr>
<tr>
<td>Asterisk</td>
<td>*</td>
<td>Backslash</td>
<td>\</td>
</tr>
<tr>
<td>Question mark</td>
<td>?</td>
<td>Blank space</td>
<td></td>
</tr>
<tr>
<td>Pipe</td>
<td></td>
<td></td>
<td>Null</td>
</tr>
<tr>
<td>Ampersand</td>
<td>&amp;</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Searching Using a Combination Search**

You can combine Search by Index and Full-Text Search criteria when creating queries. This is referred to as a combination search. You build a combination search by entering criteria in the Search by Index and Full-Text Search text boxes. Then select the AND option or the OR option.

When you use the AND operator, AppXtender Web Access searches for documents that contain both sets of criteria. When you use the OR operator, AppXtender Web Access searches for documents that contain at least one set of criteria. For more information, refer to “Searching Using Expression Operators” on page 205.

AppXtender Web Access interprets the search expression from left to right.

To search for documents using a combination search:

1. Enter criteria in the Index Name criteria section.
2. Enter criteria in the Full-Text Query Criteria section.
3. If appropriate, select the Thesaurus check box, the Include previous document revisions check box, or both.

4. To save the query so that you can use it again, type a name in the Query Name text box.

    **Note:** Select the Available To All Users check box to allow others to use the saved query.

5. Click Submit. When the search successfully completes and Query Results view appears, the FTS View page opens. For more information about Query Results view, refer to “Navigating Through Pages in Query Results View” on page 233.
Searching Multiple Applications

In AppXtender Web Access, regular queries are limited to a single application. To create and run queries that search multiple AppXtender Web Access applications for selected index information, full-text information, or both, you use the cross-application query feature. For example, using a cross-application query, you could search three different applications for information on the Social Security number 111-22-3333. Or, you could search for all documents containing the text “most recent software releases.”

To create and configure a cross-application query, you must have Java™ Runtime Environment installed on your computer. In addition, cross-application queries must be configured to search only applications within the same data source.

For more information about cross-application queries, refer to the following topics:

◆ “Installing Java Runtime Environment” on page 209
◆ “Configuring a Cross-Application Query” on page 212
◆ “Using a Cross-Application Query” on page 218
◆ “Running a Cross-Application Query” on page 219

Note: AppXtender Web Access does not support querying for AppXtender Reports Mgmt-generated reports across multiple applications.

Installing Java Runtime Environment

The cross-application query wizard in AppXtender Web Access is implemented using a Java applet. To run the wizard, the Java™ Runtime Environment (JRE) must be installed on your computer. Refer to the ApplicationXtender Web Access Release Notes for the supported version of JRE.

To install the Java Runtime Environment:

1. Right-click the application that you want to create a cross-application query for, then select New Cross App Query.
Retrieving Documents

Figure 112  Selecting New Cross Application Query

A Security Warning appears.

Figure 113  Java Runtime Security Warning

2. To accept all security certificates from EMC in the future, click Yes.

The Cross App Query pop-up window appears. Then the InstallShield Wizard for Java 2 Runtime Environment dialog box appears.

**Note:** If the Cross App Query pop-up window loads and you are not prompted to install the Java Plug-in, the Java Runtime Environment is already installed on your computer. Proceed to “Configuring a Cross-Application Query” on page 212.
3. Click Next.

4. Select the appropriate Locale and Region from the corresponding dialog boxes, and then click Install. The installation components for the Java Runtime Environment download. When the download is complete, the License Agreement page appears.

5. Read the agreement. If you agree, click Yes to continue. The Choose Destination Location page appears.
6. Verify that the specified destination folder is the location where the Java 2 Runtime Environment program files should be installed. If the listed folder is incorrect, click Browse and select the correct destination.

7. Click Next. Java 2 Runtime Environment Setup begins installing the program.

8. Select the browser for which you want to make Java Runtime Environment the default if the wizard displays the Select Browsers screen.

9. Click Next to continue. The Java 2 Runtime Environment installation continues. When it finishes, the cross-application query pop-up window begins loading the cross-application query Java applet.

---

**Configuring a Cross-Application Query**

When creating a new cross-application query, you can configure the query using the new cross-application query feature. Using the Cross-Application Query Configuration dialog box, you set query parameters, including which applications are to be included in the query and which fields within the applications are to be used. You also define the fields used as search fields for querying and the fields you want to appear in Query Results view.

---

**Note:** When configuring a query, for maximum effectiveness, select index fields that are common across all of the selected applications.

You perform two basic steps when configuring a new cross-application query:

- Select the applications to include in the query
- Select the application fields to include in the query

The following procedure describes these steps in more detail.

To configure a cross-application query:

1. Right-click the application for which you want to create a cross-application query, and click New Cross App Query on the shortcut menu. The Cross Application Query Configuration dialog box appears.
Searching Multiple Applications

Retrieving Documents

Figure 116  Cross Application Query Configuration Dialog Box

Note: If the Java 2 Runtime Environment is not installed, a security warning appears instead of the Cross Application Query Configuration dialog box. Follow the instructions provided in “Installing Java Runtime Environment” on page 209 before proceeding with your query.

2. From the Application List text box, click one of the applications that you want to include in the query.

3. Click >. The selected application and its index fields are added to the Selected Applications text box.

   Note: To use all of the applications in the Application List list, click >>.

4. Repeat steps 2 and 3 for each additional application you want to include in the query.
Retrieving Documents

Note the icons to the left of the field names in the Selected Applications list. These icons indicate the cross-application query status for each field. There are three types of icons. To access information about the icon types from the dialog box, click the Legend button.

The following table describes what each type of icon represents.

**Table 33 Cross-Application Query Icons**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>🚫</td>
<td>Field will not be used in the query and will not appear in Query Results view. (This is the default setting for application fields in a cross-application query.)</td>
</tr>
<tr>
<td>🔴</td>
<td>Field will be used as search criteria.</td>
</tr>
<tr>
<td>☑️</td>
<td>Field will not be used as search criteria but will display in Query Results view.</td>
</tr>
</tbody>
</table>
5. To remove one or more applications from the Selected Applications list, perform one of the following steps:
   - To remove a single application, select the application and click `<`.
   - To remove all applications from the list, click `<<`.

6. Configure the index fields for the cross-application query. You have the following choices for each field:
   - To make a field searchable, click the icon until a question mark appears. At a minimum, at least one search criteria index field must be common to at least two of the included applications. To ensure relevancy of returned documents, however, all search criteria index fields should be common to all included applications.

   **Note:** When using a date field as a cross-application query search field, the date format must exactly match for you to find the date and view it.

   Each application must share a searchable field with at least one other application included in the query. For example, if you are searching three applications, the first and second application could have one field in common, and the second and third application could have another field in common.

   - If a selected application has no fields in common with the other applications, you will receive the following error message: “Application X does not share any searchable fields with other applications.” You will not be able to use the query in its current state.
   - To include a field in Query Results view, click the icon until a check mark appears.

   **Note:** If an index field that is configured to display in Query Results view is not common to all applications, the field will appear in Query Results view but will not show any information for documents from those applications not containing that index field.

   - To exclude a field from both the search criteria page and Query Results view, click the icon until the red “not allowed” icon appears.
CAUTION

Most cross-application query search field formats should match exactly across applications. Phone number fields are the exception. And while formatting can differ between phone number fields, the total number of digits must match. For example, a phone number field with the (nnn)nnn-nnnn format can be used with a phone number field using the nnn-nnn-nnnn format because both have a total of 10 digits. But a nnn-nnnn phone number format could not be used in the same query because it has only 7 digits.

7. To restrict access to the cross-application query, clear the Available to all users check box. Leaving the check mark in the check box makes the query accessible to all users.

8. When you finish configuring the fields, click Apply to save the query. The Cross Application Query Save As dialog box appears.

9. Type a name for the cross-application query in the Enter the name of the query text box and then click Save. The Cross Application Query save as dialog box closes, and the Cross Application Query Configuration dialog box appears.

10. Click Apply to save the query. A confirmation message appears.
11. Click OK to clear the confirmation message.

12. Click Close to close the Cross Application Query Configuration dialog box. When the AppXtender Web Access window appears, the new cross-application query is listed beneath each application that it is configured to use.
The icon for a cross-application query is different than the icon for other queries, as shown in the following example.

![Cross Application Query Icon](image1)

![Single Application Query Icon](image2)

**Figure 121 Query Type Icons**

### Using a Cross-Application Query

After creating a cross-application query, you can enter search criteria and run the query. You can use wildcards, expressions, full-text, and combination queries when entering the search criteria. For information on entering criteria for advanced searches, refer to “Creating a New Query” on page 192.

Pre-configured cross-application queries appear on the AppXtender Web Access window beneath each application that they are configured to search.

To add search criteria to cross-application query fields:

1. Right-click the cross-application query you want to run. When the shortcut menu appears, select Edit.

   **Note:** The icon to the left of a query signifies the type of query. The Cross App Query icon identifies cross-application queries. A question mark icon identifies regular queries.

   The search criteria page appears.

   ![Cross Application Query Search Criteria Page](image3)

   **Figure 122 Cross Application Query Search Criteria Page**

   Index fields that were configured to be searchable when the query was first created are listed by index name.

   2. Select the check boxes for the indexes you want to search.
3. Enter the values that you want to search for into the Search Value fields to the right of the index names. To include all documents for the selected applications in Query Results view, leave the Search Value fields blank.

**Note:** To hide an index value from the query results, clear the Show check box for the corresponding index name.

4. Click Save to save your changes.

5. Click Submit to run the query.

**Running a Cross-Application Query**

After creating a cross-application query and specifying the search criteria, you can run the query directly from the AppXtender Web Access window. For more information about configuring cross-application queries, refer to “Configuring a Cross-Application Query” on page 212.

To run a cross-application query, right-click the query listing. When the shortcut menu appears, select run.

When the query successfully completes, Application Query Results view appears with a list of hits (documents that met the search criteria). The number of hits appears at the top of the result set listing. Each hit is listed by application, with the fields that were specified as searchable or displayable when you configured the query. (For information about configuring fields to appear in Application Query Results view for cross-application queries, refer to “Configuring a Cross-Application Query” on page 212.)

The maximum number of results displayed in Query Results view will not exceed the number configured in the Limit Search Size box on the Search/Result Set page of the Settings dialog box, multiplied by the number of applications included in the cross-application query. For example, a cross-application query that applies to three applications run in a AppXtender Web Access session that allows for 50 maximum query results will return the first 50 results from each application and yield a maximum of 150 query results in Query Results view.
Retrieving Documents

Figure 123  Cross Application Query Results View

You can open one or more documents from Query Results view. For more information, refer to “Displaying Documents from Query Results View” on page 229. You can also print, perform a text search on, delete, and e-mail documents, as well as export selected COLD documents. For more information, refer to the following topics:

◆ “Navigating Through Pages in Query Results View” on page 233
◆ “Printing Selected Documents” on page 237
◆ “Exporting Selected COLD Documents” on page 239
◆ “Performing a Text Search on Selected Documents” on page 239
◆ “Deleting Selected Documents” on page 241
◆ “E-Mailing Selected Documents” on page 241

Note: AppXtender/AppXtender Web Access security affects cross-application queries on an application and document security level. For example, if your application security setting restricts you from viewing one of the applications included in a cross-application query, only documents from applications that you can view will appear in Query Results view. In addition, if you are restricted from viewing certain documents using AppXtender’s Document Level Security, restricted documents are not retrieved during a cross-application query. If you have questions about your security privileges, consult your AppXtender/AppXtender Web Access system administrator or refer to the “Managing Security” section of the ApplicationXtender Installation Guide.
Searching Document Properties

AppXtender Web Access allows you to search for documents based on document properties (attributes). These properties include title, author, subject, owner, comment, and keywords.

**Table 34 ODMA Attributes**

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Title]</td>
<td>Searches document titles.</td>
</tr>
<tr>
<td>[Author]</td>
<td>Searches document authors.</td>
</tr>
<tr>
<td>[Subject]</td>
<td>Searches document subjects.</td>
</tr>
<tr>
<td>[Owner]</td>
<td>Searches document owners.</td>
</tr>
<tr>
<td>[Comment]</td>
<td>Searches document comments.</td>
</tr>
<tr>
<td>[Keywords]</td>
<td>Searches document keywords.</td>
</tr>
</tbody>
</table>

Refer to the following topics for more information:

- “Selecting ODMA Attribute Search” on page 221
- “Searching Using ODMA Attributes” on page 222

**Selecting ODMA Attribute Search**

In order to search document properties, you must select ODMA attribute searching from the Settings dialog box.

To select the ODMA attribute searching option:

1. Select **Edit > User Settings** from the AppXtender Web Access menu bar. The Settings dialog box appears.
2. On the Search/Result Set page, select Enable ODMA Search.
3. Click Save.
Searching Using ODMA Attributes

When ODMA attribute searching is selected on the Search/Result Set page, document attribute options appear on the search criteria page. ODMA attribute index fields are listed below the application index fields on the search criteria page. Each attribute index field name is enclosed within square brackets.

To search by ODMA attributes:

1. Access the search criteria page.
2. Enter search criteria in the Search Value text boxes for the indexes and ODMA attribute indexes that you want to search. Refer to “Creating a New Query” on page 192 or “Editing a Saved Query” on page 226 for more information about creating or editing queries.
3. Click Submit to start the search process. When the search completes, if only one document satisfies the search criteria, that document opens in Document Display view. If two or more documents satisfy the search criteria, those documents are listed in Query Results view.
Working with Saved Queries

You can save AppXtender Web Access queries so that you can use them multiple times. This allows you to execute the query quickly from the AppXtender Web Access window. When you create a saved query, you can make the query available to all users. Otherwise, it will be a private query that only you can access.

For more information on working with saved queries, refer to the following topics:

- “Saving a Query” on page 223
- “Running a Saved Query” on page 226
- “Editing a Saved Query” on page 226
- “Renaming a Saved Query” on page 227
- “Deleting a Saved Query” on page 228

Saving a Query

You can save any query that you create, whether it is a standard AppXtender query or a cross-application query.

To save a query:

1. Enter query values on the search criteria page as described in “Creating a New Query” on page 192.
2. In the Save Options section, enter a name for the query in the Query Name text box.
Retrieving Documents

Figure 125  Save Options Section on Search Criteria Page

3. To allow all users to access the query, click the Available To All Users check box. A check mark appears in the box, indicating the query is a shared query.

   In the default setting, shown in the previous figure, the check box is unchecked. This indicates that the query is a private query that only you can access.

4. Click OK. The query is saved.

Saved queries are listed under the associated application on the AppXtender Web Access window.
Working with Saved Queries

Retrieving Documents

Figure 126  Saved Queries for Application

Identifying Public and Private Queries on the AppXtender Web Access Window

When a query is saved, the name of the query is listed with the application to which it belongs on the AppXtender Web Access window.

A locked padlock next to a query name indicates that the query is private—only the person who created the query can access the query. An unlocked padlock next to a query name indicates that all AppXtender Web Access users can access and run the query.

Note: Even if a cross-application query is listed as public, you can see the query only if you have access to at least one of the applications used in the query. Also, if you do not have access to all applications within a cross-application query, the query results do not show matches from the restricted applications. If you have questions about your security privileges, contact your AppXtender/AppXtender Web Access system administrator or refer to the "Managing Security" section of the ApplicationXtender Installation Guide.

To change the availability setting for a query using Internet Explorer:

1. Right-click the name of the query you want to work with, and select Properties from the shortcut menu. The Query Dialog box appears.
Retrieving Documents

Figure 128 Query Properties Dialog Box

2. Based on the current check box setting, perform one of the following steps:
   • To make a public query private, click the Available To All Users check box to clear the check mark from the box.
   • To make a private query public, click the Available To All Users check box to display a check mark in the box.
3. Click OK.

Running a Saved Query

You can run saved queries directly from the AppXtender Web Access AppXtender Web Access window.

To run a saved query:
1. On the AppXtender Web Access window, click on the plus sign (+) next to the application you want to query. The list of saved and cross-application queries for that application appears.
2. Double-click the query you want to run. The query process begins. When it completes, Query Results view appears.

Editing a Saved Query

You can edit any saved query from the search criteria page.

Note: You can also edit cross-application queries. For more information, refer to “Using a Cross-Application Query” on page 218.
To edit a saved query:
1. On the AppXtender Web Access window, right-click the query name and select Edit from the shortcut menu. The search criteria page appears with the current search criteria for the query.
2. Edit the search criteria.
3. Click Save.

**Renaming a Saved Query**

You can rename any of your saved queries.

To rename a saved query:
1. On the AppXtender Web Access window, expand the application node that contains the query you want to rename.
2. Right-click the query you want to rename, and select Properties from the shortcut menu. The Query Properties dialog box appears.
3. In the Query Name text box, replace the existing name with the new name.

4. Click OK. The query name on the AppXtender Web Access window is updated to show the new name.

Deleting a Saved Query

If necessary, you can delete a saved query.

To delete a saved query:

1. Right-click the query name on the AppXtender Web Access window and select Delete from the shortcut menu. A dialog box appears, asking you if you are sure you want to delete the selected query.

2. Click OK to continue. The selected query is deleted, and the AppXtender Web Access window is refreshed.
Displaying Documents from Query Results View

Query Results view lists the document records that match the most recent search criteria. The records are arranged in table format, with a column for each index field and a row for each of the returned index values. Results can be sorted in ascending or descending order, based on any available index term.

![Query Results View](image)

Figure 131 Query Results View

**Note:** When no search results are retrieved, a “No documents found” message appears.

With the exception of the selection columns to the left, the number and type of data columns in Query Results view can vary depending on the type of search performed (Search by Index, Search by Wildcard, Search by List of Values, Expression Search, Full-Text Search, or Combination Search).

The first column on the left in Query Results view is the document selection column. To select a document to work with, select the corresponding check box. To cancel a selection, click the check box to remove the check mark.
To the right of the document selection column is a status column. The icons in this column indicate whether the document in the result set is the latest version of the document or a previous revision and whether the document is currently checked out. The following table explains the meaning of each icon.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Blue page" /></td>
<td>Indicates the latest version of the document.</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Grey page" /></td>
<td>Indicates a previous revision of the document. You can open previous revisions only in read-only mode.</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Check mark on page" /></td>
<td>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. Once you check out a document, it remains checked out to you until you check it back into the repository, even if you need to work with the document over multiple AppXtender Web Access sessions.</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Clock face on page" /></td>
<td>Indicates the document has been filed for either Centera retention or Records Manager retention. You cannot modify a document under Centera retention; however, you can check out the document and create a new version of the document. For information on filing a document for Centera retention, refer to “Filing Documents for Centera Retention” on page 378. 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 retention, refer to Appendix B, “Working with Records Manager for ApplicationXtender.”</td>
<td></td>
</tr>
</tbody>
</table>

The arrow on the right of each page icon accesses a function menu.
When you click the arrow, a page function menu appears. From this menu, assuming you have the necessary privileges, you can open the document; export, e-mail, or print the document; perform an ad hoc text search on the document; or delete the document. In addition, you can add a link to the document to your browser favorites list or copy the link, if desired. If the document is a PDF, you can select View as PDF to open the PDF file in Document Display view.

Page icons are also used to represent documents that are available to be filed for retention or transferred using the Records Manager for AppXtender interface. An icon of a page with a right-facing arrow coming out from behind the page means the document is available to be added to Records Manager for ApplicationXtender. Depending on the requirements, you can file the document for retention, classify and transfer the document, or file the document for retention and then classify and transfer the document.

Note: When both procedures are required for a document, file the document for retention first and then do the classify and transfer procedure. Once documents are classified and transferred to Records Manager for AppXtender, they are removed from the search results list and can no longer be accessed from ApplicationXtender Web Access.
The icon for documents that have been filed for retention is similar to the icon for available documents but with the addition of a clock face on the page.

**Note:** For information about filing AppXtender documents for retention using RM, refer to “Filing AppXtender Documents for Retention Administration” on page 393. For information about transferring AppXtender document to Records Manager for AppXtender, refer to “Transferring AppXtender Documents for Records Management” on page 391. For information about setting AppXtender documents under Centera retention, refer to “Filing Documents for Centera Retention” on page 378.

To display a document from Query Results view, click the icon for the document in the result set that you want to view. The document view page opens in a separate window, and the document appears.

To display multiple documents from Query Results view, click the selection check box for each document. Then click the Open Selected Documents icon.

**Note:** When Check In/Check Out is selected, if you open a document that another user already has open, you must view the document in read-only mode. For more information on Check In/Check Out, refer to “Check In/Check Out Mode” on page 51.

For more information about ApplicationXtender Web Access Query Results view, refer to the following topics:
- “Using Query Results View Features” on page 233
- “Navigating Through Pages in Query Results View” on page 233
- “Sorting Results in Query Results View” on page 234
Using Query Results View Features

The AppXtender Web Access result set page offers several features to enhance navigation and query result display. These include the following:

- You can sort result set lists in either ascending or descending order based on available index terms. If you cancel a sort, the result set order reverts to its original state.

- When the number of retrieved documents exceeds the number set to appear in Query Results view, navigation features become available.

- You can perform text searches and print and e-mail selected documents, export COLD documents, perform text searches, and delete selected documents directly from the result set.

For more information on using these features, refer to the following topics:

- “Navigating Through Pages in Query Results View” on page 233
- “Sorting Results in Query Results View” on page 234
- “Using Queries in ApplicationXtender Web Access” on page 187
- “Working with Saved Queries” on page 223
- “Displaying Documents from Query Results View” on page 229

Navigating Through Pages in Query Results View

You specify the maximum number of results you want to appear on each result set page from the Search/Result Set page on the Settings dialog box. When the specified maximum number of search results per page is reached in the results set, the list continues on to another page.

When there are two or more result set pages, use the buttons on the right at the top in Query Results view to navigate through the pages.
Retrieving Documents

Figure 134 Result Set Navigation Buttons

To navigate through result set pages:

- Click the next page button ( ) to go to the next page of the result set.
- Click the last page button ( ) to go to the last page of the result set.
- Click the previous page button ( ) to return to the previous page of the result set.
- Click the go to first page button ( ) to return to the first page of the result set.

Sorting Results in Query Results View

Column headings in the query result set that are underlined indicate that the items in the column can be sorted and arranged in ascending or descending order.

Figure 135 Column Heading Indicates Column Can Be Sorted
For columns that are available for sorting, to sort by a particular column, click that column heading. The items in the column are sorted and then the rows in the result set are arranged in the resulting order (ascending or descending).

**Modifying a Query**

If the documents you are trying to find do not appear in the result set list in Query Results view, you can return to Query view for the selected application and modify the search criteria.

To return to Query View and modify the current query:

- In Query Results view, click the Modify Query link to the upper right.

![Modify Search Criteria Link in Query Results View](Figure 136 Modify Search Criteria Link in Query Results View)

Query Results view is replaced by Query view. You can then modify the search criteria and run the search again.
### Using the Query Results View Toolbar

In addition to the Logout and Settings buttons on the toolbar, the Query Results view toolbar features the following buttons:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Return to Application view" /></td>
<td>Click to return to Application view. Note that after returning to Application view, you can redisplay the results from the previous query in Application Query Results view by selecting View&gt;Query Results.</td>
</tr>
<tr>
<td><img src="image" alt="Access Query view" /></td>
<td>Click to access Query view for the selected application and set up a new query. Note that you must run at least one query during a session for this button to be available.</td>
</tr>
<tr>
<td><img src="image" alt="Access Batch List view" /></td>
<td>Click to access Batch List view.</td>
</tr>
<tr>
<td><img src="image" alt="Access Batch Import view" /></td>
<td>Click to access Batch Import view.</td>
</tr>
<tr>
<td><img src="image" alt="Print documents" /></td>
<td>Click to print documents selected from the result set.</td>
</tr>
<tr>
<td><img src="image" alt="Export COLD documents" /></td>
<td>Click to export COLD documents selected from the result set.</td>
</tr>
</tbody>
</table>
Table 36  Buttons on Query Results View Toolbar (continued)

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Button" /></td>
<td>Click to perform a text search on documents selected from the result set.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Button" /></td>
<td>Click to delete documents selected from the result set.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Button" /></td>
<td>Click to e-mail documents selected from the result set.</td>
</tr>
</tbody>
</table>

After the first query you run, an additional button appears in the toolbar—(Application Name) Query View button.

To perform document functions from Query Results view, such as printing selected documents, first select the documents you want to work with by clicking the corresponding document selection check box. Then select the toolbar button of your choice.

**Printing Selected Documents**

To print selected documents from a result set:

1. In Query Results view, select the selection check boxes for the documents you want to print. To print all of the documents, click the Select All check box (the check box directly above the first document selection check box in the results list).

2. On the toolbar, click the Print Selected Documents button. The Print dialog box appears.
Retrieving Documents

Figure 137  Print Dialog Box

Note: For information about configuring general result set printing options, refer to "Search/Result Set Tab" in “Customizing Your Workstation” on page 83.

3. If necessary, select another printer from the Name list box.

4. When printing a multipage document, select the appropriate setting in the Print Range section.
   • To print all pages, select All.
   • To print a range of pages, select Pages. Then, in the text box to the right, type the starting and ending page numbers as a range, using <#>-<#> format. To print pages 1 through 11 of a 20-page document, for example, you would type 1-11 in the text box.
   • To print only a single page, Select Pages. Then, in the text box to the right, type the page number in as a range, using <#>-<#> format. Use the same number for both the starting and ending page numbers in the range. For example, to print only page 4 of a document, you would type 4-4.

   Note: For single-paged documents, the All selection button is the only option available in the Print Range section of the Print dialog box.

5. In the Copies section, enter the number of copies needed.

6. To hide annotations, click the Hide Annotations check box. A check mark appears in the box.
7. To print text notes, click the Print text note check box. A check mark appears in the box.

8. Click OK to start printing. When printing ends, the Print Log window appears.

9. To clear the print log and return to the result set, click Close.

**Exporting Selected COLD Documents**

To export COLD documents from a result set:

1. In Query Results view, select the selection check boxes for the COLD documents in the result set that you want to export. To export all of the COLD documents, click the Select All check box.

2. On the toolbar, click the Export Selected COLD Documents button. The Export COLD Document Page(s) dialog box appears.

3. To change the folder in which the exported documents will be saved, select the desired folder from the Save in list box.

4. In the File name field, enter a name for the exported file.

5. Click Save. The selected documents are exported to the specified folder.

   When the process ends, a message appears asking if you want to view the export log.

6. To view the export log, click Yes. To clear the message without viewing the log, click No.

**Performing a Text Search on Selected Documents**

After submitting a query and receiving a list of documents matching the search criteria, you can further refine the results by performing a text search on the records in the result set.

To perform a text search on records selected from a result set:

1. In Query Results view, select the selection check boxes for the documents you want to include in the text search. To include all of the documents, click the Select All check box.

2. On the toolbar, click the Text Search Selected Documents button. The Text Search window opens.

3. Type the text you are searching for into the text box.
Retrieving Documents

Figure 138 Search Criteria Entered

If your are searching for text used in a previous search, click the arrow button to access a list box of available text criteria. Then select the criteria you want to use.

4. To find any combination of uppercase and lowercase text that matches the criteria, click the Ignore case check box to clear the check mark.

5. To make the search a fuzzy search, click the Fuzzy search check box. A check mark appears in the box.

Note: When you select Fuzzy Search, ApplicationXtender Web Access also returns text that may not exactly match the search criteria. For example, when searching for the word "safe" with Fuzzy Search selected, AppXtender Web Access could also return the words "sale," "same," and "cafe" because the first or last two letters in each word match the corresponding letters in the search term. AppXtender Web Access would not return "case" or "fame" because the spelling of those words differs too much from the search term.

6. Click OK. The Text Search window refreshes. Search processing information appears in the upper part of the window, and the results appear in the lower part. Each instance of the specified text string appears as a link in the text.

7. To view any document in the list of text search hits, click the link in the entry for the document you want to view.
Deleting Selected Documents
To delete selected documents from a result set:

1. In Query Results view, select the selection check boxes for the documents you want to delete. To delete all of the documents, select the Select All check box (the check box directly above the first document check box in the results list).

2. On the toolbar, click the Delete Selected Documents button. A confirmation message appears.

3. To delete the documents, click Yes. After the documents have been deleted, a message appears asking if you want to view the delete log.

4. To see the delete log, click Yes. To clear the message without viewing the log, click No.

When Query Results view is refreshed, the deleted documents are no longer in the result list.

E-Mailing Selected Documents
Using ApplicationXtender Web Access, you can e-mail documents, pages, and links to AppXtender Web Access documents and pages.

Note: To e-mail documents and pages in AppXtender Web Access, you must first register your e-mail address as described in “Viewing Documents” on page 245.

To e-mail selected documents:

1. If you are e-mailing documents from the result set, select the check boxes for the documents you want to send. To e-mail all of the documents, click the Select All check box (the check box directly above the first document selection check box in the results list).

2. On the result set or Document Display view toolbar, click the Email Selected Documents button. The Email Selected Documents From Resultset dialog box appears. The From: field is automatically populated with your e-mail address.
Retrieving Documents

**Note:** If the ApplicationXtender Web Access E-Mail Address Registration ID Request appears instead of the Compose Electronic Mail Message form, your e-mail address is not registered and you cannot send e-mail. Before proceeding, register your e-mail address following the instructions in “Registering Your E-Mail Address” in “Viewing Documents” on page 245.

3. Click the To: link to access the E-mail Address Book and select a recipient. Or, type the recipient’s e-mail address in the To: text box.

**Note:** To select recipients from the E-mail Address Book, click the To: check box for each address you want to include. Then click OK to close the address book. The To: text box is automatically populated with the selected recipients.

4. Repeat step 3 for any carbon copy (Cc) or blind carbon copy (Bcc) recipients to whom you want to send the e-mail.

5. Type the subject in the Subject text box.

6. From the Mail Format list box, select the HTML or text as the format.

7. From the Attachments list box, select Entire Document or Page Range

   If you select Page Range, type the starting and ending page numbers in `<#>-<#>` format in the Page Range text box.

   **Note:** If you select Entire Document, the Page Range option is unavailable.

8. To send attachments as a hyperlink appearing in the message body, select the Send Attachments as hyperlinks check box.

   **Note:** ApplicationXtender Reports Management reports *must* be e-mailed as hyperlinks.
CAUTION

When e-mailing documents as hyperlinks, be aware that authentication is still required to access the hyperlinked documents. Recipients of e-mailed hyperlinks must have the appropriate permissions within AppXtender and AppXtender Web Access to view the documents.

9. In the Message text box, type the message that you want to send with the document or page.

10. When you are ready to send the e-mail, click Send.

Note: If your browser times out, the e-mail will be sent from the server.
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:

- Using Thumbnails View .................................................................. 246
- Working with Different File Types in Document Display View .... 248
- Selecting the Display Mode for a AppXtender Web Access Document ...................................................................................... 255
- Displaying AppXtender Web Access Documents ....................... 262
- Entering Reason Codes ................................................................... 265
- Thin Client Document Display View Functionality ................... 266
- Interactive Client Document Display View Functionality ........... 279
- Displaying ApplicationXtender Reports Management Reports 305
Using Thumbnails View

Thumbnails are small representations of document pages. You can configure ApplicationXtender Web Access so that when you view documents in Document Display view, thumbnails and icons representing the pages in the document appear in Thumbnails view next to Document Display view. (For information on configuring Thumbnails view, refer to “Document View Tab” on page 91).

Figure 139  Document Display View with Thumbnails View of Document Pages

In the previous figure, a COLD document icon represents the first page of the document, and a small representation of the page appears for the second page of the document.

Note: Icons appear in place of thumbnails for some file types.
Thumbnails are links to individual pages in the document. When you work with a long document and need to view a certain page within the document, rather than moving through the document page by page, you can use the thumbnail to quickly display the page you want.

To use a thumbnail to display a document page:

1. In Thumbnail view, scroll through the thumbnails until you find the page you want to display.
2. To access the page, click the thumbnail or icon representing the page.
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:

- “Supported File Types” on page 248
- “Unsupported Files” on page 252

**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” on page 248
- “COLD/ERM/Text Files” on page 249
- “Rich Text Format (RTF) Files” on page 250
- “Hypertext Markup Language (HTML) Files” on page 251
- “Portable Document Format (PDF) Files” on page 251

**Image Files**

Image files contain graphic data. They are added to AppXtender by either importing electronic files or scanning paper documents to produce 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>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASCII</td>
<td>ASCII stands for the American Standard Code for Information Interchange. This character set is used on most PCs, Macintoshs, and other desktop computers. A report generated on a desktop computer is likely to be in an ASCII format.</td>
</tr>
<tr>
<td>EBCDIC</td>
<td>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.</td>
</tr>
<tr>
<td>EBCDIK</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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” on page 114.

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” on page 252
- “OLE Objects” on page 254

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, RTF, 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>
<thead>
<tr>
<th>Format</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word Processing</td>
<td>Microsoft Word 2000</td>
</tr>
<tr>
<td></td>
<td>Microsoft Word 2002 (XP)</td>
</tr>
<tr>
<td></td>
<td>Microsoft Word 2003</td>
</tr>
<tr>
<td></td>
<td>WordPerfect 12</td>
</tr>
<tr>
<td>Standard Graphic</td>
<td>Visio 2000</td>
</tr>
<tr>
<td></td>
<td>Visio 2002 (XP)</td>
</tr>
<tr>
<td></td>
<td>Visio 2003</td>
</tr>
<tr>
<td>Presentation</td>
<td>Microsoft PowerPoint 2000</td>
</tr>
<tr>
<td></td>
<td>Microsoft PowerPoint 2002 (XP)</td>
</tr>
<tr>
<td></td>
<td>Microsoft PowerPoint 2003</td>
</tr>
<tr>
<td>Other</td>
<td>Microsoft Project 2000</td>
</tr>
</tbody>
</table>

**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” on page 255
◆ “Check In/Check Out Document Display Mode” on page 256
◆ “Read-Only Document Display Mode” on page 261
◆ “Displaying AppXtender Web Access Documents” on page 262

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 140  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 141  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>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check in as a minor revision</td>
<td>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).</td>
</tr>
<tr>
<td>Check in as a major revision</td>
<td>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).</td>
</tr>
<tr>
<td>Replace current revision</td>
<td>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.</td>
</tr>
<tr>
<td>Final document</td>
<td>The document can be opened only in read-only mode; it cannot be checked out or modified.</td>
</tr>
</tbody>
</table>

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:

Viewing Documents

Figure 142 Check In Option on Document Menu

The Check In Document dialog box appears.

Figure 143 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 144 Document Icons in Query Results View

The following table explains the meaning of each icon.

Table 40 Document Icons (Query Results View)

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Blue page</td>
<td>Indicates the latest version of the document.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Grey page</td>
<td>Indicates a previous revision of the document. You can open previous revisions only in read-only mode.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Check mark on page" /></td>
<td>Check mark on page</td>
<td>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. Once you check out a document, it remains checked out to you until you check it back into the repository, even if you need to work with the document over multiple AppXtender Web Access sessions.</td>
</tr>
<tr>
<td><img src="image" alt="Clock face on page" /></td>
<td>Clock face on page</td>
<td>Indicates that the document has been filed for either Centera retention or Records Manager retention. You cannot modify a document under Centera retention; however, you can check out the document and create a new version of the document. For information on filing a document for Centera retention, refer to “Filing Documents for Centera Retention” on page 378. 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 retention, refer to Appendix B, “Working with Records Manager for ApplicationXtender.”</td>
</tr>
<tr>
<td><img src="image" alt="Clock face and lock on page" /></td>
<td>Clock face and lock on page</td>
<td>Indicates a retention hold has been applied to the document.</td>
</tr>
</tbody>
</table>
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.
Enter 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 145  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.
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 display in a column 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” on page 267.

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” on page 267
- “Thin Client Document Display View Document Viewer” on page 270
- “Thin Client Document Viewer Toolbar” on page 271
- “Thin Client Document View Frame” on page 274
- “Printing AppXtender Document Pages in Thin Client Mode” on page 274
- “Exporting a Displayed Document to an XPS File” on page 277
- “E-Mailing a Displayed Document in Thin Client Mode” on page 277
- “Saving a Displayed Document” on page 277
- “Viewing Foreign Files” on page 278
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.

![Thin Client Document Display Menu Bar and Toolbar](image)

**Figure 146 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” on page 267
- “Document Display View Toolbar” on page 282

Document Display View Menu Bar


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

**Table 41 Thin Client Document Display View File Menu**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Document</td>
<td>When viewing multiple documents, display previous document in the group of selected documents.</td>
</tr>
<tr>
<td>Next Document</td>
<td>When viewing multiple documents, display the next document in the group of selected document.</td>
</tr>
<tr>
<td>Logout</td>
<td>Log out of ApplicationXtender Web Access.</td>
</tr>
</tbody>
</table>

**Table 42 Thin Client Document Display View View Menu**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications</td>
<td>Display Applications List View</td>
</tr>
<tr>
<td>New Query</td>
<td>Display Query view for the currently selected application.</td>
</tr>
<tr>
<td>Query Results</td>
<td>Display the results from the last query that was run in the current session, if applicable.</td>
</tr>
</tbody>
</table>
### Viewing Documents

#### Table 43 Thin Client Document Display View Document Menu

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Page</td>
<td>Display the previous page in a multi-page document.</td>
</tr>
<tr>
<td>Next Page</td>
<td>Display the next page in a multi-page document.</td>
</tr>
<tr>
<td>Navigate to Page</td>
<td>Display a specified page number.</td>
</tr>
<tr>
<td>Submit Full Text Job</td>
<td>Submit the document to the Index Server as a full text job.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the current document.</td>
</tr>
<tr>
<td>Check Out</td>
<td>Check out a document.</td>
</tr>
<tr>
<td>Check In</td>
<td>Check a document back in.</td>
</tr>
<tr>
<td>Cancel Check Out</td>
<td>Cancel Check out request.</td>
</tr>
<tr>
<td>Revision History</td>
<td>Display the revision history for the document.</td>
</tr>
<tr>
<td>Properties</td>
<td>Display the document properties.</td>
</tr>
<tr>
<td>Mail Document</td>
<td>E-mail the document.</td>
</tr>
<tr>
<td>Merge PDF for Print</td>
<td>Merge PDF files and print document.</td>
</tr>
</tbody>
</table>

#### Table 44 Thin Client Document Display View Page Menu

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Page</td>
<td>Add a page to a document.</td>
</tr>
<tr>
<td>Delete Page</td>
<td>Delete a page from a document.</td>
</tr>
<tr>
<td>Show Version</td>
<td>Show the version number for a document.</td>
</tr>
<tr>
<td>Next Subpage</td>
<td>Display next subpage in document.</td>
</tr>
<tr>
<td>Previous Subpage</td>
<td>Display previous subpage in document.</td>
</tr>
<tr>
<td>Text View</td>
<td>Display text view of document.</td>
</tr>
<tr>
<td>Printer-Friendly View</td>
<td>Display document pages in a printer-friendly format in a separate window from which you can print the pages.</td>
</tr>
<tr>
<td>Enable Scanning</td>
<td>You cannot scan documents in Thin Client mode, so this option is grayed out, indicating that it is not available.</td>
</tr>
</tbody>
</table>
Document Display View Toolbar

There are seven tools on the Thin Client Document Display view toolbar: Logout, Applications, New Query, Query Results, Previous Document, Next Document, and Document Index.

![Thin Client Document Display View Toolbar](image)

**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>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Logout" /></td>
<td>Log out of ApplicationXtender Web Access.</td>
</tr>
<tr>
<td><img src="image" alt="Applications" /></td>
<td>Display Applications List view.</td>
</tr>
<tr>
<td><img src="image" alt="Query" /></td>
<td>Display Query view.</td>
</tr>
<tr>
<td><img src="image" alt="Query Results" /></td>
<td>Display Application Query Results for the most recently run query for the selected application (if any).</td>
</tr>
</tbody>
</table>
### Viewing Documents

**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 Thumbnail view in your user settings, thumbnails representing each page appear in Thumbnails view to the left of the Document View document viewer. (Thumbnails view is discussed in detail in “Using Thumbnails View” on page 246.)

**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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Previous Document" /></td>
<td>Return to previous document.</td>
</tr>
<tr>
<td><img src="image" alt="Next Document" /></td>
<td>Go to next document, if any.</td>
</tr>
<tr>
<td><img src="image" alt="Index View" /></td>
<td>Display Index view for the current document.</td>
</tr>
</tbody>
</table>

---

**Table 45 Thin Client Document View Toolbar Buttons**

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Previous Document" /></td>
<td>Return to previous document.</td>
</tr>
<tr>
<td><img src="image" alt="Next Document" /></td>
<td>Go to next document, if any.</td>
</tr>
<tr>
<td><img src="image" alt="Index View" /></td>
<td>Display Index view for the current document.</td>
</tr>
</tbody>
</table>
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 “Customizing Your Workstation” on page 83 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” on page 278.

**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.

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

- “Thin Client Navigation Options” on page 271
- “Image Zoom Controls” on page 272
- “Rotation Controls” on page 273
- “Mirroring Controls” on page 273

**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.
Viewing Documents

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

<table>
<thead>
<tr>
<th>Table 46 Thin Client Navigation Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
</tr>
<tr>
<td>![PrevPage]</td>
</tr>
<tr>
<td>![Page1]</td>
</tr>
<tr>
<td>![NextPage]</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th>Original Image</th>
<th>Select This Control</th>
<th>Mirrored Image</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Original Image" /></td>
<td><img src="image2.png" alt="Select This Control" /></td>
<td><img src="image3.png" alt="Mirrored Image" /></td>
</tr>
<tr>
<td><img src="image4.png" alt="Original Image" /></td>
<td><img src="image5.png" alt="Select This Control" /></td>
<td><img src="image6.png" alt="Mirrored Image" /></td>
</tr>
</tbody>
</table>
**Viewing Documents**

**Thin Client Document View Frame**


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 representing each page appear in a frame 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.
The AppXtender Web Access Print View window opens, displaying the selected page in printer-friendly view.

Figure 151  Print Window (Printer Friendly View)
4. From the File menu, click Print. The Print dialog box appears.

![Print Dialog Box](Figure 152)

**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” on page 274 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” on page 365.

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” on page 278
- “Viewing Foreign Files in HTML Format” on page 278
- “Using Links to Manage Foreign Files” on page 278

**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” on page 91 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” on page 91 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 153 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 appear in a column 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” on page 280
- “Interactive Client Document Display View Document Viewer” on page 284
- “Interactive Client Document View Frame Toolbar” on page 285
- “Navigating Displayed Document Pages in Interactive Client Mode” on page 291
- “Scanning Documents in Interactive Client Mode” on page 292
- “Printing Documents and Document Pages in Interactive Client Mode” on page 292
- “Exporting Documents and Document Pages to an XPS File” on page 296
- “Displaying Image Information” on page 296
- “Refreshing a Document” on page 298
- “Using the Text Search Feature” on page 298
- “Adding Annotations” on page 299
- “Adding Digital Signatures” on page 299
- “Saving Foreign Files as a New Version” on page 300
- “Using Document Properties Page Features” on page 301
- “Working with the Revision History Feature” on page 304

---

**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.

![Interactive Client Document Display Window Menu Bar and Toolbar](image)
Note: Information on e-mailing is presented in detail in "Using E-Mail Functionality" in “Managing Documents” on page 353.

For more information, refer to the following topics:

- Document Display View Menu Bar 281
- Document Display View Toolbar 282

Document Display View Menu Bar


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

Table 48 Interactive Client Document Display View File Menu

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Document</td>
<td>When viewing multiple documents, display previous document in the group of selected documents.</td>
</tr>
<tr>
<td>Next Document</td>
<td>When viewing multiple documents, display the next document in the group of selected document.</td>
</tr>
<tr>
<td>Logout</td>
<td>Log out of ApplicationXtender Web Access.</td>
</tr>
</tbody>
</table>

Table 49 Interactive Client Document Display View View Menu

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications</td>
<td>Display Applications List View</td>
</tr>
<tr>
<td>New Query</td>
<td>Display Query view for the currently selected application.</td>
</tr>
<tr>
<td>Query Results</td>
<td>Display the results from the last query that was run in the current session, if applicable.</td>
</tr>
</tbody>
</table>

Table 50 Interactive Client Document Display View Document Menu

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit Full Text Job</td>
<td>Submit the document to the Index Server as a full text job.</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete the current document.</td>
</tr>
<tr>
<td>Check Out</td>
<td>Check out a document.</td>
</tr>
</tbody>
</table>
Viewing Documents

Table 50  Interactive Client Document Display View Document Menu

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check In</td>
<td>Check a document back in.</td>
</tr>
<tr>
<td>Cancel Check Out</td>
<td>Cancel Check out request.</td>
</tr>
<tr>
<td>Revision History</td>
<td>Display the revision history for the document.</td>
</tr>
<tr>
<td>Properties</td>
<td>Display the document properties.</td>
</tr>
<tr>
<td>Mail Document</td>
<td>E-mail the document.</td>
</tr>
<tr>
<td>Merge PDF for Print</td>
<td>Merge PDF files and print document.</td>
</tr>
</tbody>
</table>

Table 51  Thin Client Document Display View Page Menu

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Scanning</td>
<td>Allow documents to be scanned into AppXtender Web Access.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>When you select Enable Scanning from the Page menu, the menu option changes to Disable Scanning.</td>
</tr>
</tbody>
</table>

Document Display View Toolbar

There are seven tools on the Interactive Client Document Display view toolbar: Logout, Applications, New Query, Query Results, Previous Document, Next Document, and Document Index.

Figure 155  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>
<thead>
<tr>
<th>Button Function</th>
<th>Table 52 Thin Client Document View Toolbar Buttons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Log out of ApplicationXtender Web Access.</td>
<td></td>
</tr>
<tr>
<td>Display Applications List view.</td>
<td></td>
</tr>
<tr>
<td>Display Query view.</td>
<td></td>
</tr>
<tr>
<td>Display Application Query Results for the most recently run query for the selected application (if any).</td>
<td></td>
</tr>
<tr>
<td>Return to previous document.</td>
<td></td>
</tr>
<tr>
<td>Go to next document, if any.</td>
<td></td>
</tr>
<tr>
<td>Display Index view for the current document.</td>
<td></td>
</tr>
</tbody>
</table>

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” on page 285.
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 representing each page appear in Thumbnails view to the left of the Document View document viewer. (Thumbnails view is discussed in detail in “Using Thumbnails View” on page 246.)

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 “Customizing Your Workstation” on page 83 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” on page 278.
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>
<thead>
<tr>
<th>Table 53 Document View Frame Toolbar-First Row</th>
</tr>
</thead>
<tbody>
<tr>
<td>Button</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td><img src="image" alt="Fit displayed page in the Document View area." /></td>
</tr>
<tr>
<td><img src="image" alt="Fit displayed page in the viewing area from top to bottom." /></td>
</tr>
<tr>
<td><img src="image" alt="Fit displayed page in the viewing area from left to right." /></td>
</tr>
<tr>
<td><img src="image" alt="Rotate displayed page 90 degrees to the left." /></td>
</tr>
<tr>
<td><img src="image" alt="Rotate displayed page 90 degrees to the right." /></td>
</tr>
<tr>
<td><img src="image" alt="Zoom in on displayed page." /></td>
</tr>
<tr>
<td><img src="image" alt="Zoom out in displayed page." /></td>
</tr>
</tbody>
</table>
### Viewing Documents

**Table 53  Document View Frame Toolbar-First Row (continued)**

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Magnifier" /></td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Page Display" /></td>
<td>Display the text or image for the displayed page.</td>
</tr>
<tr>
<td><img src="image" alt="Previous Page" /></td>
<td>Display previous page of multi-page document. This button appears only when you view a multi-page document or batch document.</td>
</tr>
<tr>
<td><img src="image" alt="Next Page" /></td>
<td>Display next page of multipage document. This button appears only when you view a multi-page document or batch document.</td>
</tr>
<tr>
<td><img src="image" alt="Previous Version" /></td>
<td>Display previous version of document. This button appears only when there is more than one version of the current document.</td>
</tr>
<tr>
<td><img src="image" alt="Next Version" /></td>
<td>Display next version of document. This button appears only when there is more than one version of the current document.</td>
</tr>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Search for text in the displayed page.</td>
</tr>
<tr>
<td><img src="image" alt="Search Continue" /></td>
<td>Continue searching for the text entered in the text Search dialog box.</td>
</tr>
<tr>
<td><img src="image" alt="Mode Switch" /></td>
<td>Switch between pan mode and selection mode.</td>
</tr>
<tr>
<td><img src="image" alt="Form Overlay" /></td>
<td>Displays or hides form overlays on COLD/ERM documents.</td>
</tr>
<tr>
<td><img src="image" alt="Page Print" /></td>
<td>Print current page and all or a range of subpages. Refer to “Printing Documents and Document Pages in Interactive Client Mode” on page 292 for more information.</td>
</tr>
<tr>
<td>Button</td>
<td>Function</td>
</tr>
<tr>
<td>--------</td>
<td>----------</td>
</tr>
<tr>
<td>![Print icon]</td>
<td>Print the document or PDF file and all or a range of pages.</td>
</tr>
<tr>
<td>![Information icon]</td>
<td>Display information about image.</td>
</tr>
<tr>
<td>![Previous page icon]</td>
<td>Display the previous subpage.</td>
</tr>
<tr>
<td>![Next page icon]</td>
<td>Display the next subpage.</td>
</tr>
<tr>
<td>![Refresh icon]</td>
<td>Refresh the viewing area.</td>
</tr>
<tr>
<td>![Batch import icon]</td>
<td>Opens the Select Files for Batch Import window.</td>
</tr>
<tr>
<td>![Page options icon]</td>
<td>Display menu of Page options.</td>
</tr>
</tbody>
</table>

Table 53: Document View Frame Toolbar-First Row (continued)
The following table identifies the buttons on the second row of the toolbar.

<table>
<thead>
<tr>
<th>Table 54 Document View Frame Toolbar-Second Row</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Button</strong></td>
</tr>
<tr>
<td><img src="image" alt="Select item" /></td>
</tr>
<tr>
<td><img src="image" alt="Text" /></td>
</tr>
<tr>
<td><img src="image" alt="Highlight" /></td>
</tr>
<tr>
<td><img src="image" alt="Freehand" /></td>
</tr>
<tr>
<td><img src="image" alt="Line" /></td>
</tr>
<tr>
<td><img src="image" alt="Arrow" /></td>
</tr>
<tr>
<td><img src="image" alt="Rectangle" /></td>
</tr>
<tr>
<td><img src="image" alt="Rounded Rectangle" /></td>
</tr>
<tr>
<td><img src="image" alt="Oval" /></td>
</tr>
<tr>
<td><img src="image" alt="Polyline" /></td>
</tr>
<tr>
<td>Button</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
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<td></td>
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<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
If your computer is configured to operate a scanner, a third row is added to the toolbar.

![Document View Frame Toolbar-Third Row](image)

**Table 54** Document View Frame Toolbar-Second Row (continued)

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Delete Item" /></td>
<td>Delete Item</td>
</tr>
<tr>
<td><img src="image" alt="Save changes to document" /></td>
<td>Save changes to document</td>
</tr>
<tr>
<td><img src="image" alt="Cancel changes to document" /></td>
<td>Cancel changes to document</td>
</tr>
<tr>
<td><img src="image" alt="Rubber Stamp" /></td>
<td>Rubber Stamp</td>
</tr>
</tbody>
</table>

**Figure 156** Document View Frame Toolbar-Third Row
The following table identifies the buttons on the third row of the Document View Frame toolbar.

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Start scanning documents." /></td>
<td>Start scanning documents.</td>
</tr>
<tr>
<td><img src="image" alt="Rescan documents." /></td>
<td>Rescan documents.</td>
</tr>
<tr>
<td><img src="image" alt="Scanner set up." /></td>
<td>Scanner set up. For more information, refer to “Scanning Documents in Interactive Client Mode” on page 292.</td>
</tr>
</tbody>
</table>

### 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 157** 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 158** 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.
Viewing Documents

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.

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 “Scanning” on page 171.

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” on page 293
- “Printing a Displayed Document or PDF Using the Print Document/PDF Print Option” on page 294
Viewing Documents

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.

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.

![Print Dialog Box-Interactive Client](image)
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.

---

**Note:** Multiple documents can be printed simultaneously from the result set. Refer to “Printing Selected Documents” on page 237 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 “Customizing Your Workstation” on page 83.

---

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.
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.

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” on page 292 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.
The following table describes the information that appears on the Image Information dialog box tabs.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Information Tab</strong></td>
<td></td>
</tr>
<tr>
<td>Width</td>
<td>Number of pixels or characters used for width of page.</td>
</tr>
<tr>
<td>Height</td>
<td>Number of pixels or lines used for height of page.</td>
</tr>
<tr>
<td>Bits Per Pixel</td>
<td>Number of bits for each pixel.</td>
</tr>
<tr>
<td>Resolution</td>
<td>Resolution of the image.</td>
</tr>
<tr>
<td>Size</td>
<td>Compressed page file size (in bytes).</td>
</tr>
<tr>
<td>Compression</td>
<td>Type of compression used for this image.</td>
</tr>
<tr>
<td>Type</td>
<td>Page file type (TIFF, JPEG, etc.).</td>
</tr>
<tr>
<td><strong>Files Tab</strong></td>
<td></td>
</tr>
<tr>
<td>Image Filename</td>
<td>Path location and filename of the stored page.</td>
</tr>
<tr>
<td>Save Tool Filename</td>
<td>Path location and filename of the annotations that appear on the page, if any.</td>
</tr>
</tbody>
</table>
**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 “Annotations” on page 309.

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.

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

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

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 IE or Netscape, will show the application name, number of versions, and the status of the document.
To access the AppXtender Web Access Document Properties page:


**Figure 169** AppXtender Web Access Document Properties Dialog Box

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

- “General Document Properties” on page 302
- “Saving Changes to Document Properties” on page 304

**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 170** General Document Properties Section
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 171: Summary Document Properties Section]

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

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Title of the document.</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject of the document.</td>
</tr>
<tr>
<td>Author</td>
<td>Author of the document.</td>
</tr>
<tr>
<td>Keywords</td>
<td>Relevant keywords related to the document's content.</td>
</tr>
<tr>
<td>Comment</td>
<td>Comments about the document.</td>
</tr>
</tbody>
</table>

Note: Summary document properties can be used as search criteria. Refer to “Retrieving Documents” on page 185 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>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revision</td>
<td>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).</td>
</tr>
<tr>
<td>User</td>
<td>Shows the name of the user who saved the revision.</td>
</tr>
<tr>
<td>Date</td>
<td>Shows the date and time the revision was saved.</td>
</tr>
<tr>
<td>Comment</td>
<td>Shows the comments the user entered when checking in a revised document.</td>
</tr>
</tbody>
</table>

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.
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 “Retrieving Documents” on page 185.

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” on page 306
- “Viewing ApplicationXtender Reports Management Reports Using the Interactive Client” on page 307

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 server rather than a AppXtender WebJ2 Web server.

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.
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” on page 305

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.
Viewing Documents

Figure 173 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 174 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.
The ApplicationXtender Web Access Interactive Client (IRC) allows authorized users to attach annotations to AppXtender document or batch pages to highlight important information, comment on the contents of the page, or block areas of the page from view. You can add annotations to images, text, and Portable Document Format (PDF) files.

Figure 175  Annotation Added to Page
You can customize several annotation properties to create desired effects. For example, you can change the line width and colors of annotations. Or you can use the filled setting in combination with the redaction feature to block sections of a document from view. You can also overlap annotations by moving one annotation in front of or behind another annotation. A show/hide feature allows you to view or hide annotations with a single click.

There is no limit to the number of annotations that can be placed on a page; however, a large number of annotations could slow down or distort page rendering.

Annotations can easily be saved or deleted. You can also use the Cancel Changes function to remove changes you made to annotations since the last save.

**Note:** Contact your ApplicationXtender administrator if you have any questions about your annotation privileges.

For more information, refer to the following topics:

- Annotation Types ...................................................... 311
- Saving Annotations ................................................... 312
- Creating Line and Shape Annotations .................. 313
- Creating Text Annotations ........................................ 325
- Rubber Stamp Annotations ........................................ 329
- Hiding Annotations ................................................... 332
- Modifying Annotations .............................................. 339
- Printing Text Annotations .......................................... 350
- Removing Annotations .............................................. 351
There are five types of annotations that you can use to annotate your documents:

- Line annotations include the straight line, the freehand line, the arrow, and the polyline.
- Shape annotations include the rectangle, the rounded rectangle, the oval, and the polygon. Shape annotations have a fill color and a line color.
- Highlight annotations are similar to rectangle annotations except that they have no fill color and the default color is not configurable.
- Text annotations have both fill color and line color configuration options, and can be displayed as either text or icons.
- Rubber Stamp annotations include rubber stamp annotation attributes such as type (text or image) and content (text string or embedded bitmap) as well as standard annotation attributes.

Note: Rubber stamps must be created and configured by the AppXtender system administrator before they are available for use.

Annotations can be transparent or non-transparent (opaque). Lines, shapes, highlights, and rubber stamps are transparent by default. Text annotations, on the other hand, are non-transparent by default. You must have redaction privileges to create or modify non-transparent annotations.
Annotations

Saving Annotations

After creating an annotation, you have these options for saving the annotation to the document page:

- Click the Save Changes button on the Annotation toolbar.
- Press w.
- Close the document or batch.

Click Yes on the Interactive Viewer OCX dialog box to save the annotation if you choose to close the document or batch.

Figure 176 Saving an Annotation After Closing a Document or Batch

Refer to “Modifying Annotations” on page 339 for information on modifying annotations after they have been saved to a page.
Creating Line and Shape Annotations

The process to create line and shape annotations involves configuring annotation properties and then creating the annotation on the page.

For information on these tasks, refer to the following topics:

- “Configuring Annotation Properties” on page 313
- “Creating Annotations” on page 318

Configuring Annotation Properties

The first step in creating a line or shape annotation is to check the current annotation properties and, if necessary, change the defaults. For example, all annotations have default color settings that you can change. You can select a different line color, fill color, or both before adding an annotation to a document. Another property you may want to modify is the default line width, making the line broader or more narrow.

**Note:** Default colors for text annotations are set separately from line and shape annotation settings. For information on configuring text annotations, refer to “Creating Text Annotations” on page 325.

Two other properties you can set for annotations are fill and redaction.

- Use the fill property to fill an annotation with a selected fill color rather than using only a line color to show the outline of the annotation.
- Use the redaction property to hide parts of a document from view by changing annotation colors from transparent to opaque.

All annotation properties are set using buttons on the Document Display window Annotation toolbar.

---

Figure 177 Annotations Toolbar
For more information on specifying annotation properties, refer to the following topics:

- “Setting the Default Line Width” on page 314
- “Setting Line and Fill Colors” on page 315
- “Setting the Color for Highlight Annotations” on page 316
- “Using the Fill Annotation Feature” on page 316
- “Using the Redaction Feature” on page 317

Note: The steps to modify annotation properties for existing annotations are discussed in detail in “Modifying Annotations” on page 339.

### Setting the Default Line Width

Line width settings are used for line and shape annotations. You configure line width from the Annotation toolbar.

To set the line width for line and shape annotations:

1. On the Annotation toolbar, click the list box arrow for the Line Width button. The Line Width list box appears.

   ![Line Width Button and Drop-Down List](image)

   **Figure 178** Line Width Button and Drop-Down List

   Note: The currently selected setting is highlighted.

2. Click the line width you want to use. Your selection is highlighted, and the list box closes.

   Note: Line width settings for existing annotations are set from the Annotation Properties dialog box. For more information, refer to “Modifying Annotations” on page 339.
Setting Line and Fill Colors

You use the color feature to set the line and fill colors for line and shape annotations. Select your default colors before creating the annotation.

![Color Button](image)

**Figure 179  Color Button**

To set the default colors for lines and shape annotations:

1. Click the list box arrow for the Color button. The color selection box appears.

![Color Selection Box](image)

**Figure 180  Color Selection Box**

   Available colors appear in the grid of colors in the upper part of the selection box. Two overlapping rectangles appear in the lower part of the box. The rectangle to the front shows the current line color for lines and shape annotation outlines. The rectangle to the back shows the current fill color for shape annotations.

2. To change the line color, on the color grid, click the desired color. The rectangle to the front fills with the selected color.

3. To change the fill color for shape annotations, on the color grid, right-click the desired color. The rectangle to the back fills with the selected color.

**Note:** The colors of existing line or shape annotations are changed from the Annotation Properties dialog box. For information on changing colors of existing annotations, refer to “Modifying Annotations” on page 339.
Annotations

Setting the Color for Highlight Annotations

The default color for new highlight annotations is yellow. This setting cannot be changed. After creating a highlight annotation, change the highlight color from the Annotation Properties dialog box. Refer to “Modifying Annotations” on page 339 for more information.

Using the Fill Annotation Feature

The filled setting is used to fill annotation shapes with the default fill color.

![Filled Annotation Shape](image)

Figure 181 Filled Annotation Shape

**Note:** When you create an annotation shape without selecting the filled setting, only the outline of the shape appears on the page.

Normally, when annotations are filled, the fill color is transparent, and you can see anything appearing on the page through the fill color. When you select both the Fill button and the Redaction button before creating the annotation, however, the fill color is opaque, hiding the part of the page underneath the shape from view. (For information on redaction, refer to “Using the Redaction Feature” on page 317.)

To toggle the fill setting on and off, choose one of the following options:

- Click the Fill button on the Annotation toolbar.
- Press i.

**Note:** You change the fill setting of an existing annotation from the Annotation Properties dialog box. For more information, refer to “Modifying Annotations” on page 339.
Using the Redaction Feature

The redaction feature causes colors to appear opaque rather than transparent. When you select the redaction feature before creating a line or shape annotation, the line or shape outline appears opaque.

**Note:** You can use redaction along with the fill feature to block areas of images or text pages from view.

To toggle redaction on and off, choose one of the following options:

◆ Click the Redaction button on the Annotation toolbar.
◆ Press d.

**Note:** You change the redaction setting of existing annotations from the Annotation Properties dialog box. For more information, refer to “Modifying Annotations” on page 339.
Annotations

Interaction Between Redactions and OCR/Full-text

When applying redaction annotations, keep the following points in mind:

- If you use an annotation with redaction to hide text on a document that was previously OCR-processed and then save the annotated page, the existing text view of the document is deleted.
- If you use an annotation with redaction to hide text on a document that was previously full-text indexed and then save the annotated page, the existing text view of the document is deleted and the document is automatically resubmitted to the Index Server.
- If you use an annotation with redaction to hide text in a PDF file, the text is still considered a hit by a text search. When you display a PDF document and perform a text search with a word that is hidden under a redaction as search criteria, the search stops when it hits the word, but the highlighted word remains hidden.
- If you use an annotation with redaction to hide text in a PDF file and the PDF file is later submitted to the Index Server for full-text indexing, the text hidden behind the redaction is not removed. This means that users who do not have the appropriate privileges to use redaction to hide text can find the document by performing a full-text search with the hidden text as search criteria.

Creating Annotations

After configuring annotation properties, you can add any one of several different types of annotations to an AppXtender page. You can apply any text, line, shape, or highlight annotation that best emphasizes the desired area of the image. You can also apply rubber stamp annotations created by your AppXtender administrator. Rubber stamps can be custom text strings or embedded bitmaps.

Only users with appropriate privileges can work with annotation features.
Creating Line and Shape Annotations

Note: If your user account includes annotation group options but does not give you individual annotation privileges, your annotation group must be set as the default in order for you to use annotation features. If you have questions about the annotation privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the ApplicationXtender Core Components Administrator’s Guide.

For more information, refer to the following topics:

◆ “Creating Line Annotations” on page 319
◆ “Creating Shape Annotations” on page 322
◆ “Creating a Highlight Annotation” on page 324

Creating Line Annotations

You can add basic line annotations and polyline annotations to AppXtender documents. Basic line annotations include straight lines, freehand lines, and arrows. Polyline annotations consist of a series of connected straight lines.

For more information, refer to the following topics:

◆ “Creating a Basic Line Annotation” on page 319
◆ “Creating a Polyline Annotation” on page 320

Creating a Basic Line Annotation

Basic line annotations include straight lines, freehand lines, and arrows.

Note: You can use the freehand line feature to draw curved lines, straight lines, and combination lines (lines with curved parts and straight parts).

To add a basic line annotation to a page:

1. Display the document page to which you want to add the annotation.
2. Choose one of these options to select a line annotation:
   • Click the appropriate button on the Annotation toolbar.
   • Press the keyboard shortcut.
The following table lists the available line annotations.

<table>
<thead>
<tr>
<th>Table 60</th>
<th>Creating Basic Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Create</td>
<td>Click</td>
</tr>
<tr>
<td>A straight line</td>
<td></td>
</tr>
<tr>
<td>A freehand line</td>
<td></td>
</tr>
<tr>
<td>An arrow</td>
<td></td>
</tr>
</tbody>
</table>

A button showing the selected line type appears with the mouse pointer.

3. Drag the mouse pointer from a starting point on the page to an end point. As you drag the pointer, a new line annotation appears on the page.

   Note: To erase the new line, right-click the mouse.

4. When you want the line to end, release the mouse button.

5. Save the annotation. Refer to “Saving Annotations” on page 312 for more information.

Creating a Polyline Annotation

A polyline is a series of lines connecting multiple points, or nodes. Because the nodes defining the polyline do not have to be aligned, you can create line annotations that are not straight lines. Polyline annotations can contain angles and can even delineate shapes.
Note: A shape created with the polyline feature cannot be filled with color. To create a custom shape using straight lines and a fill color, you can use the polygon feature rather than the polyline feature. For information on polygon annotations, refer to “Creating a Polygon Annotation” on page 323.

Each point in a polyline annotation is specified by a single left mouse click. You draw the line point by point, stretching each straight-line segment from the endpoint of the previous segment.

To add a polyline annotation to a page:

1. Display the document page to which you want to add the annotation.

2. Choose one of these options to activate the polyline annotation symbol:
   - Click the polyline button on the Annotation toolbar.
   - Press p.

3. Click where you want the polyline to start. This creates the first node in the line.

4. Move the pointer and click again to set the endpoint for the first segment of the polyline. This node is also the starting point of the next segment in the polyline.

5. Continue to add line segments by moving the pointer and clicking wherever you want each segment to end.

Note: To erase a new polyline, right-click the mouse.

6. When the polyline is complete, double-click to create the last node.

7. Save the annotation. Refer to “Saving Annotations” on page 312 for more information.
Creating Shape Annotations

You can add basic shape annotations and polygon annotations to AppXtender documents. Basic shape annotations include rectangles, rounded rectangles, and ovals. Polygon annotations consist of a series of connected, straight lines that form a closed shape. Polygon annotations can be filled with color like any other shape.

For more information, refer to the following topics:

- “Creating a Basic Shape Annotation” on page 322
- “Creating a Polygon Annotation” on page 323

Creating a Basic Shape Annotation

Basic shape annotations include rectangles, rounded rectangles, and ovals.

To add a basic shape annotation to a page:

1. Display the document page to which you want to add the annotation.
2. Choose one of these options to select a shape annotation:
   - Click the appropriate button on the Annotation toolbar.
   - Press the keyboard shortcut.

   The following table lists the available shape annotations.

<table>
<thead>
<tr>
<th>Shape Type</th>
<th>Click</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>A rectangle</td>
<td></td>
<td>R</td>
</tr>
<tr>
<td>A rounded rectangle</td>
<td></td>
<td>N</td>
</tr>
<tr>
<td>An oval</td>
<td></td>
<td>O</td>
</tr>
</tbody>
</table>

An button representing the selected shape type is added to the mouse pointer.

3. Drag the mouse pointer from a starting point to an end point. As you drag the pointer, the shape annotation appears on the page.
4. When you reach the end point, release the mouse button.

5. Save the annotation. Refer to “Saving Annotations” on page 312 for more information.

Creating a Polygon Annotation
With the polygon feature, you can create asymmetrical shape annotations with a number of user-defined sides. Each left mouse click defines the point of a corner, or node, of the polygon.

Note: The nodes defining the polygon do not have to be in alignment.

To add a polygon annotation to a page:

1. Display the document page to which you want to add the annotation.

2. Choose one of these options to activate the polygon annotation symbol:
   - Click the polygon button on the Annotation toolbar.
   - Press g.

3. Click where you want the polygon to start. This creates the first node in the shape.

4. Move the pointer to create the first line of the polygon.

5. To set the endpoint for the line, click again to add a second node. At this point, the shape appears as a line between the two points.

Note: The second node is also the starting point for the next line of the polygon.

6. Draw the next line of the polygon by moving the pointer and then clicking wherever you want the third node in the shape to be located.

   When you click to create the third node, a line is automatically added to attach the third node to the first node of the polygon, forming a triangle shape.

7. Continue to create the desired polygon shape by moving the pointer and clicking to add lines and nodes. Each time a new node is added, a line is automatically created to attach the last and first nodes of the shape.
Creating a Highlight Annotation

Use the highlight annotation feature to emphasize or bring attention to a particular area of an AppXtender document.

**Note:** New highlight annotations are always colored yellow.

To add a highlight annotation to a page:

1. Display the document page to which you want to add the highlight annotation.
2. Choose one of these options to activate the highlighter annotation symbol:
   - Click the highlight button on the Annotation toolbar.
   - Press h.
3. Drag the mouse pointer from a starting point to an end point. As you drag the pointer, a new highlight annotation appears on the page.

**Note:** To erase the new highlight, right-click the mouse.

4. Save the annotation. Refer to “Saving Annotations” on page 312 for more information.
Creating Text Annotations

AppXtender has two tools that allow you to attach text annotations to AppXtender documents. The text appears on the document page inside a box. Both the text and the box are non-transparent by default.

![Text Comment on a Document Image](image)

**Note:** You must have redaction privileges to create and modify non-transparent text annotations.

**Note:** You must have the Global Annotations privilege to view or modify the text of a text annotation created by another user. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the ‘Managing Security’ section of the *ApplicationXtender Core Components Administrator’s Guide*.

The following topics explain how to create text comments:

- “Using the Annotation Text Editor” on page 325
- “Using the In-place Text Editor” on page 328

### Using the Annotation Text Editor

The Annotation Text Editor is a dialog box text annotation tool. To use the Annotation Text Editor to create a text comment:

1. Display the page to which you want to add the text comment.
2. Choose one of these options to activate the text annotation symbol:
   - Click the text button on the Annotation toolbar.
   - Press t.
3. Click the location on the image where you want to place the comment. The Annotation Text Editor dialog box appears.
4. In the text box in the upper part of the dialog box, type the text that you want to use as the comment. Press Enter to start a new line in the editor.

5. To check the spelling of the text comment, click Sp. The Check Spelling dialog box appears.

   **Note:** You must install the spell-checker software component if ApplicationXtender Web Access displays a message stating the check spelling engine is missing. “Installing Web Access Client Components” on page 114 explains how to install third-party software components.

6. Correct or confirm the spelling of any questionable words.

   **Note:** Click Help on the Check Spelling dialog box for more information on spell-checker options.

7. Click OK to close the ApplicationXtender message box after all words are checked.

8. To display this comment as an icon, select Display as icon.

   **Note:** If a check mark appears in the Display as icon check box and you want to display the annotation as text, click the box to clear the check mark.

9. To modify the text font and color, click Advanced. The dialog box expands to show the advanced options.
The boxes in the upper part of the Advanced settings area control the text font characteristics, such as font size and appearance.

Notice the grid of colors in the lower part of the Advanced settings area. These are the available colors. Under this grid, there are two overlapping rectangles. The color in the rectangle to the front is the current text line color (the color of the text itself). The color in the rectangle to the back is the current text fill color (the color that appears in the background behind the text).

Note: Color selections in the Annotation Text Editor dialog box apply only to text annotations and do not affect shape, line, or highlight annotations.

- To change the text color, click the desired color on the grid. The selected color appears in the selection box to the front.
- To change the background color behind the text, right-click the desired color on the grid. The selected color appears in the selection box to the back.
- Select the desired font size from the Size list box.

Note: To modify the size of a text annotation, you must change the text font size.

10. Select the check boxes for any other desired font properties.
11. Select the Set as Default check box to save the current settings as the default.
12. Click OK. The text annotation appears on the page.
Annotations

13. Save the annotation. Refer to “Saving Annotations” on page 312 for more information.

**Using the In-place Text Editor**

The in-place text editor is a What You See Is What You Get (WYSIWYG) text annotation tool.

To use the in-place text editor to create a text annotation:

1. Display the page to which you want to add a text annotation.
2. Choose one of these options to activate the text editor:
   - Press Shift-t.
   - Press and hold down Alt, left-click the Text button on the Annotation toolbar, release Alt.
     The cursor becomes a pushpin.
3. Left-click and drag the pushpin over the page to define the border of the text editor.

   ![In-place Text Editor](image)

   **Figure 188 In-place Text Editor**

4. Type the text annotation. Press Ctrl-Enter to start a new line in the editor.
5. Click Sp to check the spelling of the text annotation. The Check Spelling dialog box appears.

   **Note:** You must install the spell-checker component if ApplicationXtender Web Access displays a message stating the check spelling engine is missing. “Installing Web Access Client Components” on page 114 explains how to install third-party software components.

6. Correct or confirm the spelling of any questionable words.
Rubber Stamp Annotations

Rubber stamp annotations are predefined annotations that can be used to describe certain events. For example, you could have a rubber stamp that says "Added by <Username> on <Date>," where Username and Date are populated by your name and the date you added the annotation. Some rubber stamps can be composed of an image so that you can place a signature or other relevant graphic on a document page.

When you select the Rubber Stamp tool, AppXtender places the stamp on the AppXtender page wherever you click your mouse. You can move or delete a rubber stamp annotation, just as you can other types of annotations.

**Note:** You must have redaction permissions to edit rubber stamp annotations. For information about your user permissions, consult with your AppXtender system administrator.

**Note:** Rubber stamps must be created and configured by the AppXtender system administrator before they are available for use. Also, only users with appropriate privileges can control rubber stamp annotation features. If you need a rubber stamp that has not been configured or if you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator.
Adding Rubber Stamp Annotations to Documents

You can select rubber stamps from a list of available stamps. This list includes all the rubber stamps created for the current application.

To add a rubber stamp annotation:

1. Display the document page to which you want to add the annotation.

2. Choose one of these options to open the rubber stamp selection list:
   - Click the rubber stamp button on the Annotation toolbar.
   - Press s.

3. From the list of stamps, click the rubber stamp you want to use.

4. Click OK. The rubber stamp selection list closes. On the image, the mouse pointer changes to include a rubber stamp button.

5. Place the cursor where you want the rubber stamp to appear and click. The stamp appears on the page.

Note: If the rubber stamp list box appears when you click the button, click More rubber stamps... to open the rubber stamp selection list.
Figure 190  Rubber Stamp Applied to Image

Note: To add a rubber stamp to a document more than once, click each point on the page where you want the stamp to appear.

6. To cancel the rubber stamp function, click the Rubber Stamp button on the Annotation toolbar. The mouse pointer returns to its normal state.

7. Save the annotation. Refer to “Saving Annotations” on page 312 for more information.
Annotations

Hiding Annotations

When you display, print, e-mail, or export annotated AppXtender documents, for security reasons, you may want to hide the annotations. And when you finish, you will probably want to reveal the hidden annotations to return the image to its original state.

Only users with appropriate privileges and appropriate annotation group options can hide annotations. Annotation groups are allowed to hide only those annotations assigned to their annotation group.

**Note:** If you have questions about the privileges assigned to your AppXtender user profile, or about the annotation group configuration of your AppXtender user account, consult your AppXtender system administrator or refer to the “Managing Security” section of the ApplicationXtender Core Components Administrator’s Guide.

The procedure you follow to hide and show annotations depends on the specific task you are performing. The following topics describe the procedures for hiding annotations when viewing, printing, e-mailing, and exporting documents:

- “Hiding Annotations When Viewing Documents” on page 332
- “Hiding Annotations When Printing” on page 333
- “Hiding Annotations When E-mailing” on page 336
- “Hiding Annotations When Exporting” on page 336

**Hiding Annotations When Viewing Documents**

To hide all annotations when viewing AppXtender documents, on the Annotation toolbar, click the Show/Hide button. To redisplay the hidden annotations, click the button again.

![Show/Hide Button on the Annotation Toolbar](image-url)
Hiding Annotations When Printing

You can print AppXtender documents, pages, and images without showing annotations. AppXtender Web Access provides an option on the Print dialog box to hide all annotations. The Print dialog box can be accessed using either the Print current page or Print Document/PDF Print buttons on the Annotation toolbar.

![Print current page Button and Print Document/PDF Print Button](image)

**Note:** You can also hide annotations when printing AppXtender documents from Query Results view.

Only users with appropriate privileges can hide annotations when printing.

**Note:** If your user account includes annotation group options but does not grant you individual annotation privileges, the annotation group to which you are assigned must be set as the default for you to use annotation features. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the *ApplicationXtender Core Components Administrator’s Guide*.

To hide annotations when printing the currently displayed page:

1. Display the document you want to print.
2. On the Annotation toolbar, click the Print current page button. The Print dialog box appears.
3. Select to hide any annotations by clicking the Hide annotations check box to add a check mark to the box.

   **Note:** If the Hide annotations check box is already selected, do not change the setting.

4. To begin printing, click OK. The document without annotations is sent to the printer, and the Print dialog box closes automatically.

   To hide annotations when printing an entire document or a PDF document:

   1. Display the document you want to print.

   2. On the Annotation toolbar, click the Print Document/PDF Print button to print the displayed document or PDF. The Print Options dialog box appears.

   ![Print Options Dialog Box](image)
Only the selection button appropriate to your document (Document Print... or PDF Print...) is available.

**Note:** If you do not want the Print Option dialog box shown every time you print a document using the Print Document/PDF Print feature, click the Show this dialog each time I want to print check box to clear the check mark from the box. The next time you click the Print Document/PDF Print button, AppXtender Web Access bypasses the Print Options dialog box and immediately opens the Print dialog box.

3. Click the available selection button and then click OK. The Print dialog box appears.

![Print Dialog Box for Print Document/PDF Print Function](image)

4. To select a different printer, select a printer from the Name list box.

5. To print more than one copy of the document, select the appropriate number from the Number of copies box.

6. Select to hide any annotations by clicking the Hide annotations check box to add a check mark to the box.

   **Note:** If the Hide annotations check box is already selected, do not change the setting.

7. To begin printing, click OK. The document is sent to the printer, and the Print dialog box closes automatically.
Hiding Annotations When E-mailing

You can hide annotations on AppXtender documents when you send the documents by e-mail. Only users with appropriate privileges can hide annotations when e-mailing documents.

Note: If your user account includes annotation group options but does not grant you individual annotation privileges, the annotation group to which you are assigned must be set as the default in order for you to use annotation features. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the ApplicationXtender Core Components Administrator’s Guide.

To hide annotations when e-mailing a document, on the Annotation toolbar, click the Show/Hide button. To redisplay the annotations, click the button again.

Note: For details on the steps to e-mail a document, refer to “Using E-Mail Functionality” on page 365.

Hiding Annotations When Exporting

You can export AppXtender documents and pages without annotations. The steps you follow depend on whether you are exporting a document or a page. For details, refer to the following topics:

◆ “Hiding Annotations When Exporting Documents and PDFs” on page 337
◆ “Hiding Annotations When Exporting Document Pages” on page 337

Only users with appropriate privileges can hide annotations when exporting documents and pages.

Note: If your user account includes annotation group options but does not grant you individual annotation privileges, the annotation group to which you are assigned must be set as the default in order for you to use annotation features. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the ApplicationXtender Core Components Administrator’s Guide.
Hiding Annotations When Exporting Documents and PDFs

The Export Document Pages dialog box allows you to hide all annotations when exporting documents and PDFs.

To hide annotations when exporting documents and PDFs:

1. Display the document or PDF you want to export.
2. From the Annotation toolbar, click the Show/Hide Annotations button. Any annotations on the page are hidden from view.

3. From the Annotation toolbar, click the list box arrow button for the Print Document/PDF Print button to see a list box.

4. Click Export. The selected document or PDF is immediately exported.

Hiding Annotations When Exporting Document Pages

To hide annotations when exporting document pages:

1. Display the document page you want to export.
2. From the Annotation toolbar, click the Show/Hide Annotations button. All annotations in the document are hidden from view.

3. From the Annotation toolbar, click the list box arrow button for the Print current page button to see a list box.

5. Select the appropriate file from the list of files. When you click your selection, the file name appears in the File name field.

   **Note:** AppXtender Web Access automatically populates the Save as type field.

6. Click Save to begin the export process. The Export Document Pages dialog box closes, and a message appears as the selected page is exported. The message clears automatically when the export process finishes.
Modifying Annotations

The properties of an annotation can be modified after it has been added or saved to an image. You can alter the line width, color, opacity, or fill of the annotation. For more information, refer to the following topics:

- “Selecting an Annotation” on page 339
- “Moving an Annotation” on page 341
- “Resizing an Annotation” on page 341
- “Overlapping Annotations” on page 341
- “Modifying Annotations” on page 339
- “Editing Text Rubber Stamp Annotations” on page 348

Note: Only users with appropriate privileges can modify annotations. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the ApplicationXtender Core Components Administrator’s Guide.

Note: If you created and saved annotations while the CM security provider was in use and now are using the Windows security provider, you must have both the Global Annotations and Edit Annotations privileges assigned to your profile to modify the annotations before the security provider was changed. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the ApplicationXtender Core Components Administrator’s Guide.

Selecting an Annotation

To select a single annotation on a page, on the Annotation toolbar, click the Select button and then click the annotation.
To select more than one annotation at a time, you follow different steps depending on whether you want multiple annotations or all annotations on the page. The following table describes these two methods:

<table>
<thead>
<tr>
<th>To Select</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple annotations</td>
<td>On the Annotation toolbar, click the Select button. Click one of the annotations that you want to select. While holding the Shift key, click each additional annotation that you want to select.</td>
</tr>
<tr>
<td>All annotations</td>
<td>Click the Select All button on the Annotation toolbar.</td>
</tr>
</tbody>
</table>

When you select an annotation, the appearance of the annotation changes to indicate that it is selected. The way the annotation is changed depends on the type of annotation. For example, a selected text annotation is enclosed in a gray frame, a selected arrow has a handle on each end, and a selected oval is both enclosed in a gray frame and has handles at various points around the frame.

![Appearance of Selected Annotations](image)

**Note:** Press the spacebar to toggle between annotation selection mode and pan mode.
Modifying Annotations

Moving an Annotation

You can use the mouse pointer to move a single annotation or multiple annotations at once.

To move annotations:
1. Select the annotations that you want to move. For instructions, refer to “Selecting an Annotation” on page 339.
2. Hold the pointer over the selected annotation or annotations. The pointer changes to crossed double arrows.
3. Drag the annotation or annotations to a new location. Changes to the selected annotation or annotations are reflected immediately.
4. Save your changes. Refer to “Saving Annotations” on page 312 for more information.

Resizing an Annotation

You can use the mouse pointer to resize any type of annotation, including text annotations created with the in-place text editor.

To resize a single annotation:
1. Select the annotation that you want to resize. For instructions, refer to “Selecting an Annotation” on page 339.
2. Hold the pointer over one of the handles on the selected annotation. The pointer changes to a double arrow.
3. Drag the handle to a new location. Changes to the selected annotation are reflected immediately.
4. Save your changes. Refer to “Saving Annotations” on page 312 for more information.

Overlapping Annotations

In addition to placing multiple annotations on an image, ApplicationXtender allows you to overlap annotations, extending one annotation over another.

When a new annotation is created, it is placed on the top, or front, "layer" of the page. Any existing annotations are on a bottom, or back, "layer" of the page.
Using buttons on the Annotation toolbar, you can move annotations from one layer to the other. One button allows you to move one annotation in front of another annotation. Another button allows you to move one annotation behind another annotation.

**CAUTION**

When overlapping annotations, create the annotations using the redaction feature so that the colors are opaque. Otherwise, the colors will be transparent and you cannot distinguish which annotation is in front and which is in back.

**CAUTION**

When you draw a freehand annotation around an existing annotation on an AppXtender page, you cannot select the existing annotation. For example, if you draw a "freehand" annotation around a text annotation and then try to select the text annotation, only the freehand annotation is selected. In addition, when a freehand annotation only crosses part of another annotation, AppXtender may not allow you to select the other annotation.

Note: AppXtender can accurately pinpoint the exact hit for a simple shape annotation. For example, if you click the lines or border of a line annotation or a non-filled rectangle, oval, or rounded-rectangle, AppXtender determines whether or not the mouse pointer hit the simple shape annotation. However, since a freehand annotation is not a simple shape annotation, AppXtender uses a minimum rectangular area, which covers all the nodes of a freehand annotation, to determine whether or not the mouse pointer hit the freehand annotation.

To move an annotation to the front layer:

1. Select the annotations that you want to move to the front. For instructions, refer to “Selecting an Annotation” on page 339.

2. Choose one of these options to move the annotations:
   - Click the To Front button on the Annotation toolbar.
   - Press Shift-semicolon (;).
To move an annotation to the back layer:
1. Select the annotations that you want to move to the back. For instructions, refer to “Selecting an Annotation” on page 339.
2. Choose one of these options to move the annotations:
   • Click the To Back button on the Annotation toolbar.
   • Press the semicolon (;) key.

To modify a shape annotation:
1. Select the annotation. For instructions, refer to “Selecting an Annotation” on page 339.
2. Right-click and select Properties from the shortcut menu.
3. The Annotation Properties dialog box appears.
The upper part of the Annotation Properties dialog box provides information on the selected annotation including type of annotation, whether the redaction and/or filled properties are selected, the selected line and fill colors, and the selected line width.

The following information appears in the lower part of the dialog box:

- The creation date and time and the name of the user who created the annotation
- For modified annotations, the date and the name of the user who made the modification
- If the annotation is assigned to an annotation group, the name of that annotation group

*Note: If the AppXtender system is using the Windows security provider, the domain name is provided with each user name.*
4. Change the properties of the annotation. The following table describes how to change each property in the Annotation Properties dialog box:

<table>
<thead>
<tr>
<th>To Modify</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transparency/Opacity</td>
<td>Next to Options, select the Redaction check box.</td>
</tr>
<tr>
<td>Fill/No Fill status</td>
<td>Next to Options, select the Filled check box.</td>
</tr>
<tr>
<td>Line color</td>
<td>Under Colors, select a new color.</td>
</tr>
<tr>
<td>Fill color</td>
<td>Under Colors, right-click a new color.</td>
</tr>
<tr>
<td>Line width</td>
<td>Under Line Width, select a new line width.</td>
</tr>
</tbody>
</table>

5. Click Apply. Web Access applies the new properties to the annotation.

6. Click OK to close the Annotation Properties dialog box.

7. Save your changes. Refer to “Saving Annotations” on page 312 for more information.

### Modifying Text Annotations

Web Access allows you to modify the properties of a text annotation and annotation text.

For more information, refer to these topics:

- “Changing the Properties of a Text Annotation” on page 345
- “Modifying Annotation Text” on page 347

To change the properties of a text annotation:

1. Select the text annotation. For instructions, refer to “Selecting an Annotation” on page 339.

2. Right-click and select Properties from the shortcut menu.

![Text Annotation Shortcut Menu](image-url)
Note: Click the ellipses button (...) on the in-place text editor if it appears.

The Annotation Text Editor dialog box appears.

![Annotation Text Editor Dialog Box](Image)

**Figure 208 Annotation Text Editor Dialog Box**

3. Click Advanced. The advanced options appear.

![Annotation Text Editor Dialog Box: Advanced Options](Image)

**Figure 209 Annotation Text Editor Dialog Box: Advanced Options**
4. Change the properties of the annotation. The following table describes how to change each property in the Annotation Text Editor dialog box:

<table>
<thead>
<tr>
<th>To Modify</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display status</td>
<td>Click the Display as button check box.</td>
</tr>
<tr>
<td>Font size</td>
<td>Under Font, select a value from the Size list box.</td>
</tr>
<tr>
<td>Font appearance</td>
<td>Under Font, click the check boxes that you want to change (Bold, Underline, Italic, and/or Strike out).</td>
</tr>
<tr>
<td>Outline status</td>
<td>Under Font, click the Transparent check box.</td>
</tr>
<tr>
<td>Text color</td>
<td>Under Colors, click a new text color.</td>
</tr>
<tr>
<td>Fill color</td>
<td>Under Colors, right-click a new fill color.</td>
</tr>
</tbody>
</table>

**Note:** Refer to “Modifying Annotation Text” on page 347 for more information.

5. Click Apply. Web Access applies the new properties to the text annotation.

6. Click OK to close the Annotation Text Editor dialog box.

7. Save your changes. Refer to “Saving Annotations” on page 312 for more information.

To modify annotation text:

1. Select the text annotation. For instructions, refer to “Selecting an Annotation” on page 339.

2. Right-click and select Properties from the shortcut menu.

   The Annotation Text Editor appears if it was used to create the annotation.

   The in-place text editor appears if it was used to create the annotation.

**Note:** If the in-place text editor window is too small in the Document Display view, the Annotation Text Editor appears after you select Properties from the shortcut menu.
3. Change the text.
4. Apply the new text:
   - Click the green check mark if you changed the text in the in-place text editor.
   - Click Apply if you changed the text in the Annotation Text Editor, and then click OK to close the editor.
5. Save your changes. Refer to “Saving Annotations” on page 312 for more information.

**Editing Text Rubber Stamp Annotations**

You can make changes to the annotation properties of rubber stamp annotations, including the redaction option, the line and fill colors, and the line width.

**Note:** The text of a rubber stamp can be modified only in ApplicationXtender. See your AppXtender system administrator about modifying rubber stamp text or creating new rubber stamps.

To edit an existing rubber stamp annotation:

1. Display the document page with the rubber stamp annotation you need to modify.
2. Right-click the rubber stamp to access the Annotation shortcut menu, and then click Properties. The rubber stamp Annotation Properties dialog box appears.
The upper part of the Annotation Properties dialog box provides information on the selected rubber stamp annotation including type of rubber stamp, whether the redaction property is selected, the selected line and fill colors, and the selected line width.

The following information appears in the lower part of the dialog box:

- The creation date and time and the name of the user who created the rubber stamp annotation
- For modified rubber stamp annotations, the date and the name of the user who made the modification
- If the rubber stamp annotation is assigned to an annotation group, the name of that annotation group

**Note:** If the AppXtender system is using the Windows security provider, the domain name is provided with each user name.

3. Change the properties of the rubber stamp annotation as required. The following table describes how to change each property in the Annotation Properties dialog box:

<table>
<thead>
<tr>
<th>To Modify</th>
<th>Do This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transparency/Opacity</td>
<td>Next to Options, select the Redaction check box.</td>
</tr>
<tr>
<td>Line color</td>
<td>Under Colors, select a new color.</td>
</tr>
<tr>
<td>Fill color</td>
<td>Under Colors, right-click a new color.</td>
</tr>
<tr>
<td>Line width</td>
<td>Under Line Width, select a new line width.</td>
</tr>
</tbody>
</table>

4. To preview the modifications, click Apply. The rubber stamp annotation changes to show the new properties, and the dialog box remains open so that you can continue to make changes if desired.

5. When you are satisfied with your changes, click OK. The rubber stamp annotation is modified and the Annotation Property dialog box closes.

6. Save your changes. Refer to “Saving Annotations” on page 312 for more information.
Printing Text Annotations

You can print the contents of one or more text annotations from the Document Display window.

**Note:** Only users with appropriate privileges can print text annotations. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the ApplicationXtender Core Components Administrator’s Guide.

To print text annotations:

1. Select the text annotations that you want to print. For instructions, refer to “Selecting an Annotation” on page 339.
2. Right-click the selected annotations.
3. When the shortcut menu appears, select Print text. The standard Windows Print dialog box appears.
4. Click OK. The contents of the selected text annotations print.
Removing Annotations

You can remove annotations from a page either by erasing or deleting them.

**Note:** Only users with appropriate privileges can modify and delete annotations. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security" section of the *ApplicationXtender Core Components Administrator’s Guide*.

**Note:** If the AppXtender system has been converted from the CM security provider to the Windows security provider and you created and saved annotations while using the CM security provider, you must have both the Global Annotations and Edit Annotations privileges assigned to your profile to modify and delete those annotations. If you have questions about the privileges assigned to your AppXtender user profile, consult your AppXtender system administrator or refer to the "Managing Security” section of the *ApplicationXtender Core Components Administrator’s Guide*.

For more information about removing annotations, refer to the following topics:

- “Erasing Annotations” on page 351
- “Deleting Annotations” on page 352

### Erasing Annotations

Use the eraser tool to remove single annotations from the displayed image.

To erase an annotation:

1. Choose one of these options to activate the eraser tool:
   - Click the Eraser button on the Annotation toolbar.
   - Press e.

   ![Eraser Button](image211.png)
Annotations

2. For shape annotations, click the any part of the annotation. For line, text, and rubber stamp annotation, click the annotation line/outline. The annotation is erased from the page.

3. Save your changes. Refer to “Saving Annotations” on page 312 for more information.

Deleting Annotations

You can delete one or more annotations from a displayed image.

To delete annotations:

1. Select the annotations that you want to delete. For instructions, refer to “Selecting an Annotation” on page 339.

2. Choose one of these options to delete the annotations:
   • Right-click, then select Delete from the shortcut menu.
   • Press x.

3. Save your changes. Refer to “Saving Annotations” on page 312 for more information.
ApplicationXtender Web Access has several functions to help you manage documents. For instance, the Batch List function allows you to change batch names, view and modify memos, delete batches, change the status of batches, scan batch pages, and refresh batch lists. You can view the documents from the Document View window. You can also use the e-mail function to e-mail selected documents as either inserted files or links. For more information, refer to the following topics:

- Working with Application Batch List View Functionality ........ 354
- Modifying Document Index Field Values ............................ 362
- Viewing the Signature History for a Page ......................... 364
- Using E-Mail Functionality ............................................. 365
- Linking AppXtender Documents to eRoom ....................... 370
Working with Application Batch List View Functionality

When batches are added to AppXtender, information about each batch appears in the list for the corresponding application in Application Batch List view. You can then use Application Batch List view functionality to index batch documents and manage unindexed batches.

To access Application Batch List view:

- Depending on the current AppXtender Web Access view, from the View menu, select the Batch Index (list). Or, on the toolbar, click the Batch List button.

Application Batch List view appears on your user desktop.

The name of the currently selected application appears in the Current Application field. The batches associated with that application, if any, are listed in the area below the field.
To work with a different application, select the application name from the Current Application list box. If batches exist for the selected application, information about those batches appears in the list. If there are no batches for the selected application, an empty list appears.

The following table describes the information shown in Application Batch List view.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Batch name</td>
</tr>
<tr>
<td>Pages</td>
<td>Number of pages in the batch</td>
</tr>
<tr>
<td>Timestamp</td>
<td>Date and time the batch was created in ApplicationXtender</td>
</tr>
<tr>
<td>Scanned by</td>
<td>Name of the user who scanned the batch into ApplicationXtender</td>
</tr>
<tr>
<td>State</td>
<td>Status of the batch (Idle or Indexing)</td>
</tr>
</tbody>
</table>

For more information about working with Application Batch List functionality, refer to the following topics:

- “Working with the Application Batch List View Menu” on page 355
- “Managing Unindexed Batches” on page 358

**Working with the Application Batch List View Menu**

The main menu in Application Batch List view has four choices: File, View, Edit, and Help.

**File Menu Options**  
The File menu has two options: Batch Import and Logout.
Managing Documents

The following table describes the options in the File menu.

**Table 67 File Menu Options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Import</td>
<td>Import a new document or batch.</td>
</tr>
<tr>
<td>Logout</td>
<td>Log out of ApplicationXtender Web Access.</td>
</tr>
</tbody>
</table>

**Edit Menu Options**

The Edit menu has four options: Delete, Reset to Idle, User Settings, and Administration.

**Figure 215 Application Batch List Edit Menu**

The following table describes the options in the Edit menu.

**Table 68 File Menu Options**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Delete the selected batch.</td>
</tr>
<tr>
<td>Reset to Idle</td>
<td>Reset the status of the selected batch to Idle.</td>
</tr>
<tr>
<td>User Settings</td>
<td>Open the Settings window.</td>
</tr>
<tr>
<td>Administration</td>
<td>Access administration functionality. Note that this menu option is available only to users with AppXtender Administrator privileges.</td>
</tr>
</tbody>
</table>

**View Menu Options**

The View menu has four options: Applications, New Query, Query Results, Refresh List.

**Figure 216 Application Batch List View Menu**
The following table describes the options in the View menu.

### Table 69 File Menu Options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications</td>
<td>Display Applications List view.</td>
</tr>
<tr>
<td>New Query</td>
<td>Display Application Query view for the</td>
</tr>
<tr>
<td>Query Results</td>
<td>Displays the result set from the most recent query in Query Results view.</td>
</tr>
<tr>
<td></td>
<td>Note that until you run a query during the current session, this option is</td>
</tr>
<tr>
<td></td>
<td>grayed out.</td>
</tr>
<tr>
<td>Refresh List</td>
<td>Refreshes the list to add any batches that were added to the application</td>
</tr>
<tr>
<td></td>
<td>after you access it in Application Batch List view.</td>
</tr>
</tbody>
</table>

### Working with the Application Batch List Toolbar

In addition to the Logout and Application List buttons, the Application Batch List view toolbar has four buttons: Delete Batch, Change Batch Status, Batch Import, and Refresh Batch List.

![Figure 217 Application Batch List View Toolbar](image)

The following table describes functions accessed by these buttons.

### Table 70 Application Batch List View Toolbar Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Batch</td>
<td>Deletes the currently selected batch.</td>
</tr>
<tr>
<td>Change Batch Status</td>
<td>Changes the status of the currently selected batch to Idle.</td>
</tr>
<tr>
<td>Batch Import</td>
<td>Accesses Application Batch Import view for the currently selected application.</td>
</tr>
<tr>
<td>Refresh Batch List</td>
<td>Refreshes the list to add any batches that were added to the application</td>
</tr>
<tr>
<td></td>
<td>after you access it in Application Batch List view.</td>
</tr>
</tbody>
</table>
Managing Documents

Managing Unindexed Batches

Managing batches includes tasks such as changing batch names, deleting batches, changing batch status settings, and refreshing batch lists.

For more information, refer to the following topics:

- “Changing a Batch Name” on page 358
- “Viewing a Batch Memo” on page 359
- “Deleting a Batch” on page 359
- “Unlocking Batches” on page 360
- “Refreshing the Batch Index List” on page 361

Changing a Batch Name

To change the name of a batch:

1. If necessary, select the application from the Current Application list box. The list of batches for the selected application appears.
2. In the list of batches, find the batch you want to rename and highlight the batch.
3. Right-click to open the batch menu and click Rename The Batch Name dialog box appears.

   ![Batch Name Dialog Box](image)

   The current batch name appears in the Batch Name text box.
4. Highlight the current batch name.
5. Type the new batch name.

   **Note:** With the old name highlighted, it is deleted as soon as you make your first keystroke. You can also highlight the current name, press DELETE, and then type the new name.
6. Click OK. The Batch Name dialog box closes.
7. Click the Refresh button to refresh the list with the new batch name.

**Viewing a Batch Memo**

If you want to find out when a batch was imported, you can view the batch memo. The memo shows the date and time the import took place.

To view the memo for a batch:
1. If necessary, select the application from the Current Application list box. The list of batches for the selected application appears.
2. In the list of batches, find the batch you want to work with and highlight the batch.
3. Right-click to open the batch menu and click Memo. The Batch Memo dialog box appears.

![Batch Memo Dialog Box](image)

**Figure 219 Batch Memo Dialog Box**

The date and time the batch was imported is shown in the text box.

**Deleting a Batch**

If you have the appropriate user permissions, you can delete batches and their associated pages. Batches must be in an idle state for you to delete them.

To delete batches:
1. If necessary, select the application from the Current Application list box. The list of batches for the selected application appears.
2. Check the State column on the batch list to verify that the batches to be deleted are idle.
3. Click the selection check box for each batch you want to delete.
Managing Documents

4. Select Delete from the Edit menu or click the Delete batch button on the toolbar. A confirmation message appears.

![Delete Confirmation Message](image)

**Figure 220** Delete Confirmation Message

5. To continue with the deletion, click OK. The selected batches are deleted, and the confirmation message closes.

Unlocking Batches

The current status of batches is shown in the State column on the Batch Index List window. Batches can be in one of following states: Idle, Indexing, or Scanning.

If a user was working with the batch and then closed the browser without logging out, the batch is listed as being in an indexing state, even though no one is currently indexing the batch. The Scanning state indicates another user is importing pages into the batch. For other users to work with the batch, a user with AppXtender Administrator privileges must unlock the batch.

**Note:** If you need to unlock a batch to work with it but do not have administrator privileges, contact your AppXtender administrator.

To unlock a batch:

1. If necessary, select the application from the Current Application list box. The list of batches for the selected application appears.
2. In the batch index list, select the check box for the batch you want to work with.
3. Click Batch Status on the Batch menu or the Change batch status button on the toolbar. A confirmation message appears.

![Change Batch Status Confirmation Message](image)

**Figure 221** Change Batch Status Confirmation Message
4. Click OK. The confirmation window closes, the batch is unlocked, and the status of the batch is changed.

**Refreshing the Batch Index List**

To refresh the batch index list, click the Refresh Batch List button on the toolbar.
Modifying Document Index Field Values

Using ApplicationXtender Web Access, if you have the appropriate permissions, you can access AppXtender documents and modify their index field values.

**Note:** The procedure to use ApplicationXtender Web Access to index new documents when they are added to AppXtender applications is discussed in “Indexing Batches” on page 129.

To modify existing document index field values:

1. Run a query to access the document you want to work with, and then open the document in the Document Display window. (For more information about retrieving documents, refer to “Retrieving Documents” on page 185).

   **Note:** When Check In/Check Out functionality is selected, you must check the document out before you can modify its indexes. For information on checking out documents, refer to “Check In/Check Out Document Display Mode” in “Viewing Documents” on page 245.

2. On the Document Display window toolbar, click the Document Index button.

   ![Document Index Button](image)

   **Figure 222** Document Index Button

   The application index fields appear in Index view, with the index values for the current document.

   ![Index View with Index Data for Document](image)

   **Figure 223** Index View with Index Data for Document

   **Note:** For detailed information on Index view functionality, refer to “Indexing Batches” on page 129.
The current index values for the document appear in the index fields.

3. Click the Modify button to switch to Modify mode.

![Modify Button](Figure 224 Modify Button)

*Note:* If the application is configured with Select Indexes functionality or any automatic indexing functionality, buttons for those functions also appear in the Index view toolbar.

4. Make the necessary changes to the index data.

*Note:* If Enable Dual Data Entry is selected on the Document View page of the Settings dialog box, you must enter each new field value twice to validate the value. For more information about dual data entry, refer to “Working With Documents” on page 117.

5. To save the modified values, click the Save button. The modified index values are saved, and you return to the original Index view.

*Note:* If your AppXtender Administrator selected the Multiple Indexes Referencing a Single Document option when creating the application, when you modify indexes in AppXtender Web Access, ApplicationXtender Web Access creates duplicate entries that reference the existing document.

6. To close Index view and return to the Document Display window, click the Close Indexing button in the Document Display view toolbar.

![Close Indexing Button](Figure 225 Close Indexing Button)
Viewing the Signature History for a Page

Every time a page is digitally signed in ApplicationXtender Web Access, an entry is made in the signature history for that page. You can access the signature history for a page to view an audit of the changes that have occurred since the creation of the page.

In order to view the signature history for a page in an ApplicationXtender Web Access application, document signing must be selected for that application when the application is created in AppXtender. For more information on activating digital signatures for an application, contact your AppXtender system administrator. For more information on signing documents in ApplicationXtender Web Access, refer to “Adding Digital Signatures” on page 299.

To view the signature history for a document:

1. Run a query to locate the document for which you want to view the signature history.
3. On the viewer toolbar, open the Page button menu and select Digital Signature History. The Signature History dialog box appears.

   The Signature History dialog box provides information for each signature applied to the page. For a description of the details provided for each entry, refer to the following table.

<table>
<thead>
<tr>
<th>Item</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timestamp</td>
<td>The time at which the signature was applied to the page.</td>
</tr>
<tr>
<td>User</td>
<td>The user who applied the signature.</td>
</tr>
<tr>
<td>Machine</td>
<td>The machine on which the certificate used to sign the page is stored.</td>
</tr>
<tr>
<td>Comment</td>
<td>Comments provided by the user signing the document at the time of signature.</td>
</tr>
</tbody>
</table>

Table 71 Digital Signature History
Using E-Mail Functionality

With ApplicationXtender Web Access, you can e-mail selected documents either as inserted files or links. You can access e-mail functionality from query result set windows, the Thin Client Document Display window, and the Interactive Client Document Display window.

For more information, refer to the following topics:

◆ “Registering Your E-Mail Address” on page 365
◆ “Sending an E-Mail” on page 367
◆ “Changing Your Registered E-Mail Address” on page 369

Registering Your E-Mail Address

Before you can e-mail documents in ApplicationXtender Web Access, you must register your e-mail address in the system. If your address is not registered and you select the E-Mail function, the Email Address Registration dialog box appears.

To register your e-mail address:

1. In the E-Mail Address to Register text box, type your e-mail address in SMTP format (yourname@yourcompany.com).
2. Click OK.
   
   When your e-mail address has been processed and added to the system, a confirmation code is sent to that address.
3. Open your e-mail client and check for a message with the ApplicationXtender Web Access Email Registration ID. Open the message and copy the ID code from the message.
4. Go back to the Email Address Registration dialog box and paste the copied registration code into the ID Received From Your E-mail Account text box.

**Note:** If you accidentally delete the e-mail message before copying and pasting your ID confirmation number, click Resend ID via E-Mail to have the another ID number sent to you.

**CAUTION**

Always use the most recent registration ID you receive.

**Note:** If you do not want to register your e-mail address right away, you can select Cancel and then return to the Email Address Registration dialog box at another time. To do so, query an application and when Application Query Results view appears, select a document from the result set and then click the Email Document button on the toolbar.

5. After entering your ID code, click OK.

The E-Mail Selected Documents From Resultset dialog box appears.

![E-Mail Selected Documents From Resultset Dialog Box](image)

**Figure 227** E-Mail Selected Documents From Resultset Dialog Box
Sending an E-Mail

In AppXtender Web Access, you can e-mail documents from the query results set page and from both the Thin Client and Interactive Client Document Display view. On the query result set page, the e-mail button is located on the toolbar. For both the Thin Client and the Interactive Client, you can either select the Mail Document option from the Document menu or click the e-mail button in the Document Display window toolbar.

To e-mail selected documents:

1. From the query result set page, select the document you want to send and then click the e-mail button on the toolbar.

From the Thin Client or Interactive Client Document Display window, either click Mail Document on the Document menu or the e-mail button on the toolbar.

AppXtender Web Access opens the Email Selected Documents dialog box. Your e-mail address appears in the From line.

2. If you know the recipient’s e-mail address, type the address into the To text box.
Managing Documents

To select a recipient from the global address book, click the To link to open the address book.

Figure 229 Email Address Book

Select the addresses you need (To, Cc, Bcc) and then click OK to return to the Email Selected Documents dialog box.

3. Type the subject of the message in the Subject text box.
4. Select a message format from the Mail Format list box. You can choose either HTML or Text.

   **Note:** Plain text format may truncate URLs when mailing document or page hyperlinks.

5. Specify whether you are sending a range of pages or the entire document by selecting from the Attachments list box.
   
   If you select Range of Pages, the Page Range text box becomes available. Type the starting and ending page numbers for the range into the text box.

   **Note:** If you select to attach a document, the Page Range text box remains unavailable, which is the default.

6. To send document attachments as hyperlinks, select the Send Attachment as hyperlinks check box.

   **Note:** When you select Range of Pages from the Attachments list box, the check box is unavailable.

7. Type a message in the message box.
8. To send the e-mail and attachment, click Send.
Changing Your Registered E-Mail Address

If your e-mail address changes, you must update your registered e-mail address.

To change your registered e-mail address:

1. Run a query to retrieve one or more documents.
2. From the query result set, select one or more documents.
3. Click the e-mail button on the toolbar. The Email Selected Documents From Resultset dialog box appears.

   Note: You can also access this dialog box from the Document menu on both the Thin Client and Interactive Client Document Display windows.

4. Click the Change link to the right of the From: text box.
   The Email Address Registration dialog box appears with your current address in the text box.
5. Enter your new e-mail address in the text box.
6. Click OK.
Managing Documents

Linking AppXtender Documents to eRoom

Knowledge workers often need ways to collaborate on processes outside of e-mail messages or workflow-based business process maps. With the ApplicationXtender Web Access .NET eRoom Integration product, AppXtender Web.Net can be integrated with EMC Documentum’s eRoom to provide this collaborative process capability. When AppXtender Web.NET is integrated with eRoom, authorized users can add links to AppXtender documents to eRoom from the AppXtender Web.NET user desktop. As a result, knowledge workers can log into eRoom and access AppXtender documents during the collaboration process.

Note: This linking capability is not available with the ApplicationXtender Web Access J2 edition.

In systems integrated to eRoom, two additional buttons appear in the main toolbar.

![eRoom Document Link Icons in the AppXtender Web.NET Toolbar](image)

Figure 230 eRoom Document Link Icons in the AppXtender Web.NET Toolbar

- The Add Document Web Link button, which has a curved arrow in the lower right corner, adds the link as a web link.
- The Add Document Link as Database Row button, which has a database icon in the lower right corner, adds the links as a database row.

The following topic provides information on how to link AppXtender documents to an eRoom from the AppXtender Web.NET user desktop.

Note: For information on linking to AppXtender documents from within an eRoom, refer to the ApplicationXtender Web Access .NET eRoom Integration Administrator’s Guide.

- “Linking AppXtender Documents to eRoom” on page 371
Linking AppXtender Documents to eRoom

Authorized AppXtender Web.NET users can add links to a preconfigured eRoom folder from either Application Query Results view or Document Display view. There are two types of AppXtender Web.NET document links: web links and database row links.

Note: For information on differences between document web links and database row links, consult your AppXtender Web.NET system administrator or refer to the ApplicationXtender Web Access .NET eRoom Integration Administrator’s Guide.

To link an AppXtender document to the eRoom:

1. If necessary, access the documents to be linked by querying the application containing the documents. (For information on querying applications, refer to “Retrieving Documents” on page 185.)

   Note: If you have already accessed the document to be linked in Document Display view, proceed to step 3.

   When the query successfully finishes, if the results include multiple documents, Application Query Results view opens and the result set appears.

   Note: When only one document satisfies the query criteria, the document should automatically open in the Document Display document viewer. Proceed to step 3.

2. In the query result set, click the selection check box to the left of each document to be linked to the eRoom.
3. In either Application Query Results view or Document Display view, on the AppXtender Web.NET main toolbar, click the Add Document Web Link button or the Add Document Link as Database Row button.

![Add Document Web Link and Add Document Link as Database Row Buttons on Main Toolbar](image.png)

When the link is added to the eRoom, a confirmation message appears.

**Organization of Document Links in eRoom**

Document links that you add to the through AppXtender Web.NET are organized according to a predefined eRoom folder structure. This folder structure designates the data source and the AppXtender application where the documents for which links were added are stored.

---

**Note:** When AppXtender documents are linked using web links rather than database row links, after the links are created in the predefined eRoom folder, they can be moved to another location within eRoom.
The following figure shows AppXtender Web.NET document web links in a predefined eRoom folder.

![Figure 232 eRoom Folder With Web Links to AppXtender Documents](image)

This figure shows AppXtender Web.NET document database row links added to eRoom.

![Figure 233 eRoom Folder With Database Row Link to AppXtender Document](image)
This appendix explains how to work with Centera retention for ApplicationXtender Web Access.

- **Overview** .................................................. 376
- **Filing Documents for Centera Retention** .................. 378
- **Processing Documents for Centera Retention Hold** ........ 380
Overview

Centera retention is a licensed feature that protects documents from loss, whether accidental or malicious. The feature also ensures documents are retained in an AppXtender repository for a prespecified period of time, in accordance with legal, regulatory, fiscal, or operational requirements.

Note: Your retention administrator creates retention policies or classes that determine how long documents must remain in the AppXtender repository.

For more information, refer to:
- “Centera Retention Concepts” on page 376
- “Identifying Retention Applications” on page 377

Centera Retention Concepts

Web Access displays retention options if your AppXtender content management system is configured for Centera retention and your retention administrator has assigned retention privileges to your user account. The options allow you to file documents for retention or apply a retention hold to documents.

Documents that are filed for retention cannot be modified or deleted until the retention period expires. At the end of the retention period, your retention administrator determines if the document must be removed from the AppXtender repository or if the document should remain in the repository as a writable document. Contact your retention administrator if you need assistance with documents that have been filed for retention or placed on retention hold.
Identifying Retention Applications

A folder and clock icon ( ) appears next to applications that are configured for Centera retention. The following figure shows an application that is configured for Centera retention and an application that is not.

Figure 234 Web Access Application Folder Icons
Filing Documents for Centera Retention

Web Access allows you to file a document for Centera retention if your retention administrator assigned the retention user privilege to your AppXtender user account.

**Note:** Web Access does not allow you to file ApplicationXtender Reports Management documents for retention.

If you need to modify a document after you file it for retention, you must check out the document, modify it, and then check it into the AppXtender repository. Web Access saves the modified document as a new version.

To file AppXtender documents for Centera retention:

1. Query the application to locate the documents. Refer to “Retrieving Documents” on page 185 for more information.
2. Select the check box next to each document that you want to file for retention.
3. Click the File Selected Documents for Retention icon ( ) on the main toolbar. Web Access displays the Set Retention Options dialog box.

![Set Retention Options Dialog Box](image)

**Figure 235** Set Retention Options Dialog Box
4. Select a retention class or retention policy from the Retention Class or Policy list box.

**Note:** You must have retention administrator privileges to select a class or policy other than the default.

5. To apply the retention setting to previous versions of the document, enable File all previous document revisions.

**Note:** Web Access applies the retention setting to the current version of the document if you do not enable File all previous document revisions.

6. Click OK.

Web Access displays a document and clock icon ( ) next to the document in the Result view after the Centera storage device processes the request.
Processing Documents for Centera Retention Hold

The Centera retention hold feature allows you to apply and remove retention holds. A retention hold prevents users from deleting documents after the retention period expires.

Note: You must have retention administrator privileges to use the Centera retention hold feature.

For more information, refer to:
- “Applying Centera Retention Holds” on page 380
- “Removing Centera Retention Holds” on page 381

Applying Centera Retention Holds

To place a document on Centera retention hold:

1. Query the application to locate the document. Refer to “Retrieving Documents” on page 185 for more information.
2. Right-click the document to open the Web Access shortcut menu.
3. Select Place Retention Hold. Web Access displays the Retention Hold Options dialog box.

Note: To access the Retention Hold Options dialog box from document display view, click the Set Retention Hold icon on the main toolbar.

![Retention Hold Options Dialog Box](image)
4. Select a retention hold label from the Enter hold label list box.
5. To create a new retention hold label, click Create New, and then type the name of the new label (for example, W2).
6. Click OK. Web Access displays a retention hold status dialog box.
7. Click Close.

Web Access displays a retention hold icon (💧) next to the document in the Result view after the Centera storage device processes the request.

Removing Centera Retention Holds

Web Access allows you to remove a Centera retention hold from a single document or a set of documents. You cannot delete a document from the AppXtender repository until the retention period expires and the retention hold is removed from the document.

**Note:** You must have retention administrator privileges to remove a retention hold.

For more information, refer to:
- “Removing a Retention Hold from a Single Document” on page 381
- “Removing a Retention Hold from a Set of Documents” on page 382

Removing a Retention Hold from a Single Document

To remove a Centera retention hold from a single document:
1. Query the application to locate the document. Refer to “Retrieving Documents” on page 185 for more information.
2. Right-click the document to open the Web Access shortcut menu.
4. Click Yes. Web Access displays a retention hold status dialog box.
5. Click Close.

The Retention Holds page of the ApplicationXtender Web Access Administrator allows you to remove the retention hold setting from a set of AppXtender documents.

**Note:** You must have administrator privileges and retention administrator privileges to use the Web Access Administrator to remove the retention hold setting from a set of documents.

To remove a retention hold from a set of documents:

1. Select View > Retention Hold Documents from the Administrator menu bar, or click the remove retention hold icon (Removal) on the Administrator toolbar. Web Access displays the Retention Holds Admin dialog box.
2. Select the data source from the Data Source list box.
3. Select the application from the Select Application list box.
4. Select the retention hold label from the Select Label list box.
5. Click Display Docs to display the documents.
6. Click Remove Holds.
Records Manager for ApplicationXtender® (Records Manager for AppXtender) is a Department of Defense (DoD) compliant and certified records management module of ApplicationXtender. From either the AppXtender Document Manager or AppXtender Web Access desktop, users can transfer AppXtender documents into Records Manager for ApplicationXtender, where the documents become official corporate records and are no longer accessible through AppXtender Document Manager or ApplicationXtender Web Access.

Users can also use Records Manager for AppXtender to provide retention administration for documents in the AppXtender repository. Records Manager for AppXtender retention administration ensures that documents that have been filed for retention remain in the ApplicationXtender repository for a prespecified period of time.

**Note:** Retention and classification rules that the administrator configures determine this period of time and the conditions under which documents are retained and eventually archived or destroyed.

Depending on how your administrator has configured your AppXtender applications, you may be able to transfer documents to Records Manager for AppXtender for records management, file documents in Records Manager for AppXtender for retention administration for documents retained in AppXtender, or both.
Working with Records Manager for ApplicationXtender

There are several advantages for organizations using Records Manager for ApplicationXtender:

◆ Records in the Records Manager for ApplicationXtender filing system are protected from loss, whether accidental or malicious.

◆ Filing documents in Records Manager for ApplicationXtender for retention administration ensures that your organization meets all legal and policy requirements regarding how long to keep documents on file before disposing of them.

◆ In cases requiring supporting documentation, such as for litigation purposes, authorized users can quickly and easily find relevant retained records in Records Manager for AppXtender.

◆ Authorized users can access documents in Records Manager for AppXtender for retention administration regardless of which user originally transferred the document into the filing system. This means that you can access others’ documents from the Records Manager for AppXtender system and they can access your documents.

◆ Documents transferred to the Records Manager for ApplicationXtender system can provide valuable reference information for your organization.

The following topics are discussed in this section:

◆ Records Manager Concepts............................................................ 387

◆ Identifying Records Manager for ApplicationXtender Applications in AppXtender Web Access ............................................. 390

◆ Transferring AppXtender Documents for Records Management... 391

◆ Filing AppXtender Documents for Retention Administration . 393

◆ Working With AppXtender Documents That Are Filed for Retention .................................................................................. 395
Understanding how the Records Manager for ApplicationXtender system functions can help you when you transfer documents from AppXtender Web Access to Records Manager for AppXtender for records management, file documents for retention, or both.

**Note:** The Records Manager for ApplicationXtender authentication and authorization system controls which users can use AppXtender Web Access to transfer documents to Records Manager for AppXtender and access documents from Records Manager for AppXtender, as well as which users can log into the Records Manager server to perform procedures such as document deletion. If you have questions about your user privileges, consult your records administrator.

This topic includes information on the following concepts:
- “Filing Systems and File Plans” on page 387
- “Records Manager for ApplicationXtender Retention Administration” on page 389
- “Records Manager for ApplicationXtender Records Management” on page 388

**Filing Systems and File Plans**

Records Manager for AppXtender applications allow you to transfer AppXtender documents to the appropriate filing system and file plan in the Records Manager for AppXtender repository. Based on your organization’s specific requirements, your administrator designs and implements Records Manager for ApplicationXtender filing systems, file plans, and rules for records management and retention administration.

**Note:** ApplicationXtender Reports Management reports cannot be transferred to the Records Manager for AppXtender repository.

While multiple filing systems may be configured for each Records Manager for ApplicationXtender server, only one Records Manager for ApplicationXtender server may be configured per AppXtender data source group. The filing system may consist of one or more file plans, which hold official records and retained documents. There can be up to 20 levels of files in a file plan.
The following figure shows an example of a filing system called AXRM520 that has one file plan called Corporate_name and several file levels.

![Example of File Plans in a Filing System](image)

When you transfer an AppXtender document to Records Manager for ApplicationXtender for records management, Records Manager for AppXtender creates an official record using metadata from the AppXtender document. The official record for the document is filed in the specified filing system file plan in the Records Manager for AppXtender system, and the document index in AppXtender Web Access is deleted. Although the document contents (page files, annotation files, etc.) remain in the ApplicationXtender repository after the transfer process, once a document is transferred to Records Manager for AppXtender for records management, you cannot search for the document in AppXtender Web Access or make any changes to it.

**Note:** Since the index is deleted when a document is transferred to Records Manager for ApplicationXtender for records management, you can no longer access that document from AppXtender Web Access. For this reason, it is imperative to verify that you are working with the correct AppXtender document before starting the transfer process.
When you assign an AppXtender document to Records Manager for ApplicationXtender for retention administration, Records Manager for AppXtender creates a copy of the document and a document profile and files both in the selected Records Manager for AppXtender file plan for a pre-specified period of time. The exact amount of time is based on legal, regulatory, fiscal, or operational requirements relating to the type of document. The document contents (page files, annotation files, etc.) and document index remain in the AppXtender system.

As long as a document is under retention administration in Records Manager for ApplicationXtender, Records Manager for AppXtender rather than AppXtender controls access to the document. Assuming you have the appropriate user privileges, you can use AppXtender queries to find the document in the repository. From the AppXtender Web Access Query Results list, you can then view the document in Document Display window or check the document out and make changes to the document in AppXtender Web Access or AppXtender. For information on retrieving retained documents, refer to “Working With AppXtender Documents That AreFiled for Retention” on page 395.

**Note:** Unless the Records Manager for AppXtender retention policy for a particular file allows deletion, you will not be able to delete the retained document in ApplicationXtender Web Access before the retention time period expires.

At the end of the retention time period, control of the document returns to the ApplicationXtender system. At this point, the document can be archived or deleted from both AppXtender and Records Manager for AppXtender.

**Note:** Only users with the appropriate Records Manager for AppXtender authentication and authorization privileges can delete documents from the Records Manager for AppXtender system.
Identifying Records Manager for ApplicationXtender Applications in AppXtender Web Access

Like other AppXtender applications, applications configured for Records Manager for AppXtender retention administration, records management, or both are represented in AppXtender Web Access by file folder icons. The appearance of the file folder icon indicates whether an application is a regular ApplicationXtender application, an application configured for retention administration, an application configured for records management, or an application configured for both retention administration and records management.

The following figure shows four types of application file folder icons that may appear on your desktop when you work with Records Manager for ApplicationXtender. The table that follows the figure describes what each type of application folder icon represents.

The following table describes the configuration each type of application folder in Application List view represents.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Folder]</td>
<td>Manila folders represent applications for which neither retention nor records management is enabled.</td>
</tr>
<tr>
<td>![Folder]</td>
<td>Blue folders represent applications with records management.</td>
</tr>
<tr>
<td>![Folder]</td>
<td>Manila folders with a clock icon on the lower right corner represent applications with either RM retention administration or Centera retention.</td>
</tr>
<tr>
<td>![Folder]</td>
<td>Blue folders with a clock icon on the lower right corner represent applications with both records management and RM retention administration.</td>
</tr>
</tbody>
</table>
Transferring AppXtender Documents for Records Management

You use the Classify and Transfer function from the AppXtender Documents menu to transfer documents from AppXtender Web Access to the Records Manager for ApplicationXtender system for records management. During this procedure, you select the file plan from the Records Manager for AppXtender filing system to which the document should be transferred.

**CAUTION**

Once AppXtender documents are transferred to the Records Manager for AppXtender system for records management, they can no longer be accessed in ApplicationXtender Web Access.

To transfer one or more AppXtender documents to the Records Manager for AppXtender system for records management:

1. From the AppXtender application configured for records management, search for the AppXtender documents to be transferred. For information on using AppXtender Web Access queries to retrieve documents, refer to “Retrieving Documents” on page 185.

   When the query results list appears, a column of icons appears to the right of the selection check boxes. Two types of icons may appear in this column.

   - An icon of a page with an arrow head to the right means the document is not yet in the Records Manager for AppXtender system.
   - An icon of a page with a clock face and an arrow head to the right means the document is currently filed for retention in the Records Manager for AppXtender system.

2. From the query results, click the arrowhead on the icon for the document you want to transfer. A shortcut menu appears.

3. From the shortcut menu, click Classify And Transfer.

   If this is the first time in any AppXtender Web Access session that you have selected to access the Records Management system, the Records Management login dialog box appears.
Note: You only need to log into the Records Management system once from AppXtender Web Access. From then on, when you select to classify and transfer an AppXtender document, the Records Manager for AppXtender login dialog box is bypassed. This applies not only to the current AppXtender Web Access session but to future sessions as well.

4. Enter your Records Manager user name and password.

CAUTION
If the Records Management system is configured with a single filing system or, when multiple filing systems are available, you use the same user name and password to log into all of the systems, you can select to save default credentials when you log in. If two or more filing systems are available but you have a different login user name and password for each one, leave this option unchecked.

Note: If you have questions about your Records Manager password, consult your system administrator.

5. Click Login. The Select File Plan dialog box appears.

6. Find the filing system file plan to which the documents should be transferred by clicking the plus signs (+) to the left of the filing system and file plan names until the destination file plan appears.

7. Click on the destination file plan folder. This enables the OK button in the lower part of the dialog box.

8. Click OK to transfer the AppXtender documents to the selected file plan. The Select File Plan dialog window closes, and the transferred document is removed from the AppXtender Web Access query results list.

Note: Once an AppXtender document has been transferred to Records Manager for AppXtender, you can no longer access it from either AppXtender or AppXtender Web Access.
Filing AppXtender Documents for Retention Administration

You use the File for Retention function to file AppXtender documents with the Records Manager for ApplicationXtender system for retention administration.

To file one or more AppXtender documents for retention administration by the Records Manager for AppXtender system:

1. From the AppXtender application configured for retention administration, search for the AppXtender documents to be filed. For information on using AppXtender Web Access queries to retrieve documents, refer to “Retrieving Documents” on page 185.

When the query results list appears, a column of icons appears to the right of the selection check boxes.

An icon of a page with an arrow head to the right means the document is not yet in the Records Manager for AppXtender system.

Documents currently filed for retention in the Records Manager for AppXtender system have a similar icon but with a clock face on the page.

2. From the query results, click the arrowhead on the icon for the document you want to file for retention. A shortcut menu appears.

3. From the shortcut menu, click File for Retention.

If this is the first time in any AppXtender Web Access session that you have selected to access the Records Management system, the Records Management login dialog box appears.

Note: You only need to log into the Records Management system once from AppXtender Web Access. From then on, when you select to file an AppXtender document for retention, the Records Manager for AppXtender login dialog box is bypassed. This applies not only to the current AppXtender Web Access session but to future sessions as well.

4. Enter your Records Manager user name and password.
CAUTION

If the Records Management system is configured with a single filing system or, when multiple filing systems are available, you use the same user name and password to log into all of the systems, you can select to save default credentials when you log in. If two or more filing systems are available but you have a different login user name and password for each one, leave this option unchecked.

Note: If you have questions about your Records Manager password, consult your system administrator.

5. Click Login. The Select File Plan dialog box appears.

6. Find the filing system file plan to which the documents should be filed by clicking the plus signs (+) to the left of the filing system and file plan names until the destination file plan appears.

7. Click on the destination file plan folder. This enables the OK button in the lower part of the dialog box.

8. Click OK to file the AppXtender document to the selected file plan. The Select File Plan dialog window closes. The icon on the query results changes to the filed for retention icon.
Working With AppXtender Documents That Are Filed for Retention

When you need to view or modify an AppXtender document that is filed for retention in Records Manager for ApplicationXtender, you query the corresponding AppXtender application for the document using the same query methods that you normally use to retrieve AppXtender documents. These methods include index value, wildcard, expression range, and list of values queries, searching by ODMA attributes, and using compound queries. For information on setting up queries, refer to “Retrieving Documents” on page 185.

**Note:** When you query for retained documents from Records Manager for ApplicationXtender, the query results may include non-AppXtender documents such as documents added directly via the Records Manager for AppXtender client. The icons for these documents in the AppXtender Web Access Query Results differ from the Records Manager for AppXtender icons. You cannot view non-AppXtender documents in ApplicationXtender Web Access.

After viewing the retrieved document, if you need to modify it, before you can start, you must check the document out of Records Manager for AppXtender so that you can access it in edit mode. When you finish modifying the document, you check it back into Records Manager for AppXtender.

**Note:** If you check a document out of Records Manager for AppXtender and then find you do not need to work with it, you can cancel the checkout.

The procedures to check retained documents out, check them back in, and to cancel checkout when working with RM for AppXtender are the same as those normally used in ApplicationXtender Web Access. For information, refer to the following topic:

- “ApplicationXtender Operational Modes” on page 49
This glossary contains terms and definitions found in this guide.

**A**

**annotation**  
An annotation is a note or a shape added to a document or batch page, typically to focus attention on a particular part of the page. Users can use annotations to comment on the contents of a page, block areas of the page from view, or highlight important information. When a user creates an annotation, it is associated with the AppXtender document page on which her or she created it. Annotations are edited and stored separately from the image, but they are displayed along with the image in ApplicationXtender. The types of annotations available include text, highlighting, lines, arrows, shapes, and rubber stamps.

**annotation group**  
AppXtender administrators use annotation groups to create associations between users, groups, and specific annotations. The administrator can specify which users and groups can view or modify specific annotations and which users and groups can hide or modify specific redactions.

**append**  
Attach one or more pages to the end of a document.

**application**  
An AppXtender application is an index-driven data storage structure where documents can be stored and retrieved. An AppXtender application is based on an index that is composed of one or many fields. AppXtender applications are created in ApplicationXtender Application Generator (AppXtender AppGen).
application security profile

Application security profiles allow an AppXtender administrator to grant a particular set of privileges to a user or group of users. Each application can be set up with its own set of privileges.

audit trail

The Audit Trails feature allows AppXtender administrators to track user activity within the AppXtender system. System-wide activities, such as the creation, modification, and deletion of applications, users, and groups can be tracked. Administrators can also track user activity in applications by tracking items such as the creation and deletion of documents, the addition of pages, and the modification of index information for documents.

authentication

Authentication requires all users to enter a valid user name and password to access software modules. Authentication ensures that each user is who he or she claims to be.

authorization

Authorization is the granting of specific access privileges according to the user name. Security profiles contain information pertaining to a user’s specific privileges within the AppXtender system.

auto index import

The ApplicationXtender Auto Index Import function allows users to automatically populate indexes using data imported from records in the AppXtender Auto Index Import table. Once data has been exported from the record to populate index fields, the record is deleted from the AppXtender Auto Index Import table. AppXtender Auto Index Import is ideal for the import of index records that are applicable to only one document.

batch

A group of electronic files for one or more documents, each of which has one or more pages.

check in/check out mode

When AppXtender is in check in/check out mode, use of revision control with AppXtender documents is mandatory. Users must check out a document in order to modify it. If they do not check the document out, it is opened in read-only mode and cannot be modified.
COLD  COLD (computer output to laser disk) data is report data generated for existing applications. COLD data can be added to AppXtender as documents through the use of ApplicationXtender Reports Management™ (AppXtender Reports Mgmt).

data source  A data source is the means by which ApplicationXtender accesses data from a database. When a data source is defined, an OLE DB data provider is configured to access the database. All of these characteristics in combination – where the data is stored, the format of the stored data, and the data provider used to access the data – comprise the data source.

database  A database is a collection of data tables of a particular database format (such as Oracle or Microsoft SQL Server). ApplicationXtender uses databases to store application information. When an application is created, details such as the field definitions and security information are stored in database tables. Once documents are added to an application, index information is stored in a table, as are the pointers to the location of the documents.

digital signature  The Digital Signature features allow authorized users to electronically sign pages in AppXtender documents from Document Display view. If the document is modified later, the existing digital signature is invalidated and a new digital signature must be applied.

document  A document is a page or group of pages stored in an application and identified by index information. Each page of a document is comprised of a single object such as a scanned image file or a word processing document. To create a new document, users add an object to an application and attach index information to it. Subsequent objects can be added as additional pages of the same document.

Document Level Security  Document Level Security (DLS) pinpoints user access within an AppXtender application. With DLS, the administrator can deny a group of users access to any classified or sensitive documents without restricting access to other documents in the application. DLS can also be configured to grant a group of users access to only a specific set of documents in an application.
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### Glossary

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<th>Description</th>
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<tr>
<td><strong>Index Server</strong></td>
<td>The ApplicationXtender Index Server is an optional module that adds full-text indexing and OCR functionality to ApplicationXtender systems.</td>
</tr>
<tr>
<td><strong>installed components</strong></td>
<td>Third-party components that users can download to use while working with ApplicationXtender. This includes software for a scanning component required for interactive control, viewing and printing components for PDF files, and a KeyView component required for rendering foreign files.</td>
</tr>
<tr>
<td><strong>&quot;just-in-time&quot; compilation</strong></td>
<td>The first time a user accesses a page, ApplicationXtender 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 it is accessed.</td>
</tr>
<tr>
<td><strong>Key Reference</strong></td>
<td>The ApplicationXtender Key Reference function allows users to automatically populate indexes using data imported from records in the AppXtender Key Reference table. The record from which data has been exported to populate index fields remains in the AppXtender Key Reference table—it is not deleted. For this reason, ApplicationXtender Key Reference indexing is useful in populating index information that will be used to describe multiple documents and that may need to be changed frequently. Any change made to a record in the AppXtender Key Reference table is reflected in the indexes of all documents described by that record.</td>
</tr>
<tr>
<td><strong>Last Index</strong></td>
<td>The Last Index function allows users to populate the index fields for one record with the index values used for the previous record.</td>
</tr>
<tr>
<td><strong>list of values query</strong></td>
<td>A query in which multiple index values can be specified for each search criteria index field. This allows users to retrieve documents matching multiple index values in a single search.</td>
</tr>
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</table>
OCR
Users can process both bi-tonal and color images using optical character recognition (OCR). This process converts an image of text into text. After a user processes an image using OCR, it can then be submitted to the ApplicationXtender Index Server for full-text searching.

OLE DB
OLE DB is a programming interface for accessing data and is a fundamental building block for storing and retrieving data using Microsoft’s Data Access Components (MDAC). OLE DB provides flexible data architecture that offers applications like AppXtender efficient access to databases. Data is accessed through OLE DB data providers.

page
The word "page" typically implies a single entity. Since AppXtender supports multiple object types, the term “page” is redefined within AppXtender to mean a single object. A very long word processing file is considered a page to AppXtender. A page could also be, for example, a single scanned image, a 30-minute video clip, or an audio recording. Each page of a document has the same index record attached.

privileges
Privileges govern the ability of a user or group of users to access functions in AppXtender.

range query
A query in which users can search for documents with index values that match one or more values in a specified range of values. This allows users to narrow a search within a single index field to get more concise and accurate results.

reason audit mode
When the AppXtender administrator selects the Reason Code option for ApplicationXtender, all document creation, printing, e-mail, and export actions are audited. With Reason Code selected, when printing, e-mailing, and exporting documents, users are required to enter a comment explaining the reason for the action and to indicate which function they intend to use.
**redaction**  
A redaction is a filled and opaque annotation shape, which can be used to secure or hide portions of image and text document pages. Users can apply redaction to all available shapes: lines, freehand lines, arrows, rectangles, rounded rectangles, and ovals. When applied, the area of the page behind the redaction is not visible.

**security**  
Security is the combination of authentication and authorization.

**security provider**  
Security providers implement authentication, which requires all users to enter a valid user name and password to access most modules. ApplicationXtender offers two pre-packaged security providers (CM and Windows) to ensure that each user is who he or she claims to be.

**configuration option settings**  
Settings available from the Settings dialog box that allow authorized users to configure ApplicationXtender functionality based on their specific work requirements. Configuration option settings are saved on the ApplicationXtender server as part of the user profiles.

**wildcard query**  
A query in which a single asterisk (*) is used as a wildcard in search criteria to match one or more characters. This allows users to control the number of documents returned in a result set by narrowing search results.

**write paths**  
Write paths are used to instruct ApplicationXtender where to store documents, annotations, OCR output, and the ProIndex full-text database for a particular AppXtender application.
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