opentext™

OpenText™ ApplicationXtender®
Web Access

Version 16.6

User Guide

Legal Notice

This documentation has been created for software version 16.6.
It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at https://knowledge.opentext.com.

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Preface

This guide provides instructions about using ApplicationXtender Web Access to create and manage ApplicationXtender documents. For more information about hardware and software requirements, see the *OpenText ApplicationXtender Release Notes*.

Revision history

Revision date	Description
April 2019	Initial publication

Chapter 1

Getting Started

ApplicationXtender Web Access enables you to create, index, retrieve, and manage ApplicationXtender documents.

ApplicationXtender Web Access uses the ApplicationXtender security profiles. When you log in with an ApplicationXtender username and password, the ApplicationXtender access privileges and restrictions are in effect throughout the ApplicationXtender Web Access session. The access privileges that are granted to your user account control the documents that you can access within ApplicationXtender Web Access and the functionalities that are available when you work with documents.

Understanding ApplicationXtender concepts and terms can help you use ApplicationXtender Web Access more effectively. For more information, see the *OpenText ApplicationXtender Administration Guide*.

Common features of ApplicationXtender Web Access

ApplicationXtender Web Access provides you with many functionalities to work with content. These functionalities enable you to:

- Scan documents to create new or add to existing documents or batches, using Captiva Cloud Toolkit.
- Add electronic files to the ApplicationXtender repository as individual documents, batches, and individual pages.
- Index documents by specifying information in the application-specific index fields. Indexing enables you to organize, search, and retrieve documents efficiently. You can also index batches that have been added to applications by using other ApplicationXtender products.
- Retrieve documents by using various search methods, such as index value searches, multiple application searches, and document property searches. You can also select documents to view, edit, and print, and you can email documents and pages as attachments or links.
- Attach annotations or redactions to highlight important information, comment on the contents of the page, or block areas of the page from view.
- Modify index field values and export document indexes.
- File documents for retention to protect them from accidental losses.

Document storage and display

You can store any type of file in ApplicationXtender. Depending on the type, ApplicationXtender stores files as supported or unsupported file types. When you capture electronic files, ApplicationXtender first verifies the file type, and then stores the file as the identified type (such as image, text, foreign file format). The functions available are file-type dependent. Features that are available with one file type might not be available in another. Also, supported and unsupported files types are displayed in different ways.

Supported files

The ApplicationXtender Web Access Document Viewer displays the content of supported file types. Natively supported file types include: text files, Computer Output to Laser Disk (COLD) documents, Enterprise Report Management (ERM) files, image files (JPEG, GIF, TIFF, Windows Bitmap, PCX, DCX, and TGA), Rich Text Format (RTF) files, Hypertext Markup Language (HTML) files, Extensible Markup Language (XML) files, and Adobe Portable Document Format (PDF) files.

You can add annotations to image, text, and PDF files, and you can process image files and image-only PDF files by using Optical Character Recognition (OCR). (OCR requires an optional purchase.)
You can also print, email, and export these files.

Note: Non-image PDF and non-text PDF files will not be OCRed by the index agent.

Image files

Image files are stored in common formats such as TIFF, JPEG, GIF, and Bitmap. The Render Server renders all other image formats, including TIFF, into one of these formats to enable proper display of image files in different platforms and browsers.

By default, ApplicationXtender Web Access stores images in their native format (for example, a TIFF file is stored as a TIFF file). It can also store image files in a different format if ApplicationXtender supports that format. When you store an image file in a specific image format, ApplicationXtender ignores the original format and stores all images in the selected format.

Note: Progressive JPEG files are not supported. These files are imported as foreign files.

COLD, ERM, and text files

COLD data is the report data that is generated from existing applications, which are indexed by using an extraction process, and downloaded into ApplicationXtender applications. After the import, the files are stored in the compressed text file format that is proprietary to ApplicationXtender.

Form overlays that are added (from ApplicationXtender Reports Management) to these documents enable you to view the report data in the context of a standard form. You cannot add form overlays to PDF documents from ApplicationXtender Reports Management. The Render Server renders COLD and ERM documents with form overlays.

Note: Usually, text files display as text files; otherwise, they display as foreign files. ASCII, EBCDIC, and EBCDIK are the supported text formats.

Rich Text Format, Hypertext Markup Language, and Extensible Markup Language files

ApplicationXtender stores RTF, HTML, and XML files as foreign files. A web page is typically in HTML format. If you have access to the Index Agent for full-text indexing, you can submit RTF and HTML files for full-text indexing.

Portable document format files

The Render Server renders PDF files as images.

You can add annotations to a PDF file and also perform functions such as printing, exporting, and emailing.

If the software cannot extract text from a PDF file, the pages are processed for text content by using OCR. If you have access to the Index Agent for full-text indexing, you can submit PDF files for full-text indexing.

Note: Non-image PDF and non-text PDF files will not be OCRed by the index agent.

Unsupported files

Unsupported files are stored in ApplicationXtender in their native format and include foreign files and Object Linking and Embedding (OLE) files.

Foreign files

When you import files that are not natively supported in ApplicationXtender, it stores them as foreign files, in their native file format.

Pages that are imported as foreign files are represented as a link. To view the contents of the page and page information, first export the foreign file and then open it in a third-party viewer. Annotation buttons, zoom controls, and the rotate function are not available for foreign files.

You can perform functions such as printing, exporting, and emailing for foreign files. If you have access to an Index Agent for full-text indexing, you can submit foreign files to the Index Agent.

OLE objects

When you insert a file that is not supported as an object, through ApplicationXtender Document Manager, ApplicationXtender uses OLE to embed the file. The OLE objects are stored in their native file format. You can view only the page information of these objects in ApplicationXtender Web Access. You cannot submit OLE objects for full-text indexing.

Operational modes

Your access to different functionalities also depends on the ApplicationXtender operational modes: check-in/check-out mode, normal mode, and reason audit mode. For more information, see the *OpenText ApplicationXtender Administration Guide*.

ApplicationXtender Web Access Document Viewer

ApplicationXtender Web Access Document Viewer is a cross-platform and cross-browser compatible module of ApplicationXtender Web Access. The viewer supports Microsoft Internet Explorer, Microsoft Edge, Mozilla Firefox, Apple Safari, and Google Chrome. It enables you to view images that are rendered by the Render Server.

Document types supported by Document Viewer

You can display the following document types in Document Viewer. These document types are a subset of the supported document types that ApplicationXtender supports.

Document type	Comments
Image	Preset zoom ratios are provided. Annotation viewing and editing are supported.
COLD	Zoom ratios and color bars are supported. You can configure font settings and color bar settings in the **User Settings** page.
COLD with Text Form Overlay	By default, displays the document as specified in the **User Settings** page. However, you can change the current view of a document by turning the Text Form Overlay option on or off from the **Page** menu of the document. Color bars are not supported when the TextForm Overlay option is turned on.

Document type	Comments
COLD with Image Form Overlay	COLD documents with the Image Form Overlay option are rendered as image files by the Render Server. You can turn the Image Form Overlay option on and off from the **Page** menu.
Foreign File	Foreign files appear as links. You can download the files by accessing the links.
PDF File	You can view a PDF file either: • As an image, which enables you to perform annotations and zoom operations • In a new tab or inline in the viewer or a new window of the browser , if the browser can display PDF files in their native format

Note: Not all documents automatically open in the Document Viewer. To view a foreign file, such as a Word document, click the link in Document Viewer to access the document in its native application or to render it so that it opens in another window. For information about how to view foreign files within Document Viewer, see Viewing foreign files, page 61.

Logging in to ApplicationXtender Web Access

Provide credentials to log in to the default data source when you launch ApplicationXtender Web Access. The procedure to provide your credentials depends on the security provider that is configured for the data source and the authentication mode that is configured for ApplicationXtender Web Access.

These security configurations are available:

- CM security
- Windows security
- Active Directory Federation Services (ADFS)
- Central Authentication Service (CAS)

For more information, see the *OpenText ApplicationXtender Administration Guide*.

Logging in by using CM security configuration

1. Type the web address (for example, *https://<webServer>/AppXtender*) for ApplicationXtender Web Access in a browser.
2. In the login dialog box, select the name of the data source from the list box.
3. Type your ApplicationXtender login username and password in the corresponding text boxes.

   If you have not been assigned a username and password, contact the ApplicationXtender system administrator to obtain an ApplicationXtender user account.

4. To enable the full-text search capability during the session, select **Request Full-Text Search Support**.

   After you select this option, the option remains enabled so that you have full-text search support each time you log in. You can cancel this support, if required.

   Note: If your ApplicationXtender user account does not include full-text privileges, or if you have full-text privileges but the maximum number of full-text licenses has been exceeded, the full-text criteria section does not appear when you create or edit a search criterion.

5. Click **SIGN IN**. ApplicationXtender Web Access displays a list of applications.

Logging in by using Windows security configuration

If the ApplicationXtender system administrator has not enabled automatic login for Windows security, log in to a Windows security data source in the same way that you log in to a CM security data source.

The ApplicationXtender system administrator can enable automatic login when configuring Windows security. The system administrator can also request full-text license support at the time of automatic login. For Internet Explorer or Chrome browsers, the Windows security provider automatically authenticates users logging in to ApplicationXtender Web Access, without the need to go through the application login dialog box. If the Windows account is invalid for the data source, the login attempt fails.

Note: For the Firefox browser, or if the deployment is not configured for the Internet Explorer or Chrome browsers, a dialog box prompts you for your Windows credentials to log in to ApplicationXtender Web Access.

For information about security configurations, see the *OpenText ApplicationXtender Administration Guide*.

Logging in by using ADFS, CAS, or OTDS

ADFS, CAS, and OTDS provide Single Sign-On (SSO) authentication services. The ApplicationXtender administrator must configure ADFS, CAS, or OTDS information in the `web.config` file to enable ApplicationXtender Web Access to support ADFS, CAS, or OTDS. The ADFS, CAS, or OTDS servers must be configured to be able to return the user information to ApplicationXtender Web Access for validation. To enable validation, the user information must be added into the ApplicationXtender data source in advance.

1. Click the **CAS LOGIN** ,**ADFS LOGIN**, or **OTDS LOGIN** button on the login page.

   The web browser redirects you to the CAS/ADFS/OTDS server login page.

2. Type your CAS, ADFS, or OTDS server login user name and password.

One of these events occurs:

- The CAS/ADFS/OTDS server verifies the credentials, and, if found invalid, waits for you to type the correct credentials.
- The CAS/ADFS/OTDS server verifies the credentials, and, if found valid, redirects the browser to ApplicationXtender Web Access, along with the user information (login credentials). ApplicationXtender Web Access compares the user information with the data available in the AX data source. If it finds a match, the ApplicationXtender Web Access home page appears.
- If ApplicationXtender Web Access fails to find a matching record in the ApplicationXtender data source, it displays an error message and redirects you to its login page. Try the SSO login again or log in by using CM or Windows credentials.

Switching between multiple data sources

After you log in to a data source, you can see the current data source name and your login name on the title bar. If multiple data sources are available, you can select any of the other available data sources within ApplicationXtender Web Access. This feature enables you to work with applications from two or more data sources during a single session. You must have security rights to access the data sources.

To switch to another data source, select a data source from the list box next to the data source name on the title bar. When you select a data source, one of these events occurs:

- If you have already logged in to the selected data source, you are automatically switched to it.
- If you have not yet logged in to the selected data source, the login dialog box appears. The login depends on the security provider for the data source and the authentication mode that is configured for ApplicationXtender Web Access.

For information about logging in to a data source with CM, Windows, ADFS, and CAS security configurations, see Logging in to ApplicationXtender Web Access, page 13.

Changing your password

At any time during the ApplicationXtender Web Access session, you can change your password for any active data source that is configured with CM security. When you change your password for a data source, your ApplicationXtender password for that data source also changes.

Note: If the ApplicationXtender administrator configures ApplicationXtender by using the Windows NT security model, you cannot change your password within ApplicationXtender Web Access. Instead, you can change your password by using Windows NT. Your ApplicationXtender/ApplicationXtender Web Access password automatically changes to the password you set by using Windows NT.

For more information, see the *OpenText ApplicationXtender Administration Guide.*

To change the password for a data source:

1. In the Application List view, click your login name on the title bar and select **Change Password** from the list box.

2. In the **Change Password** dialog box, type your current password and then a new password.
3. To confirm the change, type the new password again.
4. Click **CHANGE**.

Application List view

The Application List view consists of a tree structure that lists the applications you can access from the data source. When you click an application from the tree view on the left, the list of queries that are configured for the application appears in the right panel. You can create new queries and run existing queries for an application from this view. The new and saved queries also appear under the respective applications in the Application List view.

Keyboard Shortcuts

ApplicationXtender Web Access includes keyboard shortcuts to perform certain functions, such as uploading documents and batches, managing batches, and working within documents. Press the question mark key to display a menu that describes the available keyboard shortcuts for the view.

Logging out of ApplicationXtender Web Access

When you finish working with ApplicationXtender Web Access, log out correctly to ensure that the license assigned to you is available to another user.

To log out, click the **Log Out** icon on the right-most of the title bar.

If you logged in by using the SSO feature, click your login name on the title bar and select **SSO Logout** from the list. You are now logged out of both ApplicationXtender Web Access and the external authentication server.

Automatic logout

The ApplicationXtender system administrator can configure ApplicationXtender Web Access to enable automatic logout. If automatic logout is configured, you are automatically logged out when you close the browser window.

Note: You are also automatically logged out when you perform a refresh or type another address in the address bar. When you perform an automatic logout, a pop-up window appears to send the logout request to the server. If you have blocked the pop-up window in the browser setting, the automatic logout function does not work.

Session expiration

If ApplicationXtender Web Access remains in an inactive state longer than the predefined period, your session expires. The system administrator configures this period. You are redirected to the login page when you try to perform an operation. After successful login, you can then perform the operation.

For more information, see the *OpenText ApplicationXtender Administration Guide*.

Chapter 2

Customizing Your System

User settings are configured at these two levels, each independent of the other:

- **Data Source**: Configure settings that belong to a data source.
- **Application**: Configure settings that belong a specific application.

Your configuration option settings are saved in the ApplicationXtender server as part of your user profile. Depending on the ApplicationXtender security privileges that are granted to your profile, you might not have access to, or be able to view, all the options. These settings stay in effect for your ApplicationXtender Web Access sessions, regardless of which workstation you are working on or which browser type you use to log in. You can change the configuration settings at any time to meet your requirements.

For more information about configuring user profiles, see the *OpenText ApplicationXtender Administration Guide*.

Configuring data source user settings

1. Click your login name on the title bar and select **User Settings**.
2. In the **Data Source** tab of the **User Settings** page, specify the following details:

Section or field	Description
Search/Result Set	
Display Document in Separate Popup Window	Opens each document in a separate browser window. **Note:** This setting applies only when you open documents from the **Query Results** page. It does not affect document display during batch import or document indexing.
Show Document ID	Includes ApplicationXtender document IDs in the query results.
Show Previous Document Version	Displays the previous document revisions in the query results.

Section or field	Description
Document ID Sort Order	Sets the sort order (the order in which a result set is sorted and displayed, based on the document ID) for documents in the query results.
Query Results Page Size Limit	Limits the number of results per page in the query result. Type any number from 1 to 500.
Enable Document Properties Search	Configures the search criteria page to include document properties as well as document index values.
Document Index Export Format	Sets the format for exporting document index values.
Enable Preview Thumbnails for Each Document in Query Results	Enables you to specify whether to preview thumbnails for each document in query results.
Page Index of Preview Thumbnail	Sets which page will be used in thumbnail preview.
Document View	
Prompt for Checkout	Prompts you to check out the document when you open it from the **Query Results** page.
Show Page Thumbnails	Displays page thumbnails for an open document.
Enable Inline Rendering of Foreign Files	Enables HTML export of foreign files on the server side.
Use Browser to Display PDF Files	Provides a link to view the PDF files in a new browser tab or window if the browser can display PDF files in their native format. You can also install Adobe Acrobat Reader to view PDF files.
Use Browser to Display Secured PDF Files	Provides a link to view the secured PDF files in a new browser tab or window if the browser can display PDF files in their native format. You can also install Adobe Acrobat Reader to view PDF files.
Enable Inline Viewing of PDF Files	Enable inline viewing of PDF files inline in Viewer instead of a PDF file link while using a browser to display PDF files or secured PDF files.
View Native Images	Display Bitmap, GIF, JPEG, PNG images in Viewer in native format without Render Server capability.

Section or field	Description
The Number of Pages to Pre-render	Set the number of pages to pre-render after current page is loaded. Its valid value is from 0 to 5 and its default value is 3. Sets 0 means turns off pre-render function.
Thumbnail Number Limit	Limits the number of thumbnails for a document to help improve rendering performance.
Open Office Documents with Office Online Server	Enables viewing and editing Microsoft Office Documents using Office Online Server (OOS).
Display DPI of PDF/Image file in viewer	Sets the display DPI of PDF and Image files in the viewer. The value range is 72-999. The default value (-1) is the original DPI. This option can be configured by the administrator only.
Index	
Show Index View	Enables you to specify whether to display index fields for an open document.
Check for Matching Index	When you index a new document, checks for duplicate index entries for documents in the current application and provides an error message if a matching index is found.
Enable Dual Data Entry	Enables you to set dual data entry as the required method for entering document indexes. Selected by default.
Ignore Date Stamp	Ignores the date stamp field for the matching index check.
Index Results Page Size Limit	Limits the number of indexes displayed on a page.
Import	
Enable Scanning	Scan feature can create a new AX document or a new AX batch. It can also scan documents into an existing AX document or AX batch.
Scan File Type	Sets the scanned file format to AutoDetect, TIFF, JPEG, PDF, or PNG.
Scan Feed Mode	Sets the scan feed mode to Auto or Single.
Display Batch in Separate Popup Window	Opens the batch in a separate window.
Import Email Attachment as New Page	When importing email (.msg) to AX, the attachment(s) will be split as new page(s) in the document.
Start New Document from a temporary Batch	Create a document from batch (legacy way by default) or new document directly.
Export	

Section or field	Description
Use PDF Format if Possible	Exports documents in the PDF format, if applicable. **Note:** If you select this option, you cannot set the image format for black and white, 4-bit and 8-bit color, and true-color images.
Black and White Images	Sets the image format for black and white images. Available values are: Windows BMP, TIFF, and Compressed TIFF.
4-bit or 8-bit Color Images	Sets the image format for 4-bit or 8-bit color images. Available values are: Windows BMP, Compressed Windows BMP, GIF, TIFF, and Compressed TIFF.
True-Color Images	Sets the image format for true-color images. Available values are: Windows BMP, GIF, JPEG, TIFF, and Compressed TIFF.
JPEG Quality Factor	Sets the quality factor when you select JPEG as the **True Color Image** format. Type any number from 1 to 100.
Text	Specifies whether you want to export textual data as text or as an image.
Use Multipage Files	Enables the export of multipage documents.
Export in Archived Format	Enables the export of documents in the archived format.
COLD Form Overlay for Export	Sets the type of COLD overlay you want to use when you export documents. Available values are: None, Text, and Image.
COLD	
Default View COLD Form Overlay	Specifies the type of COLD overlay to use when you open documents. Available values are: None, Text, and Image.
Show Color Bars	Turns on the color view.
Color Bar Lines (1-6)	Sets the width of color bar bands. Use a number from 1 to 6. The default is 3.
Color Bar Color	Sets the color that is used for the color bar bands. When you view documents in ApplicationXtender Web Access Document Viewer, the background is composed of alternating bars of a selected color and white.
Text Font Name	Sets the name of the font to use for text data.

Section or field	Description
Text Font Size	Sets the point size to use for the selected font. This is a required field. Type a font size from 6 points to 24 points.
Text Font Bold	Displays text in **bold** typeface.
Text Font Italic	Displays text in *italic* typeface.
Print	
Print Original Size	Prints documents in their original size.
Fit to Page	Prints the contents of a document on a single page. Selected by default.
Print DPI	Prints documents in the selected DPI (dots per inch). Available values are: 75, 100, 150, 200, 300, 400, and 600.
COLD Form Overlay for Print	Sets the type of COLD overlay you want to use when you print documents. Available values are: None, Text, and Image.
Page Size / Paper Size	Prints documents based on the selected size of the page or the paper.
Page Width (Inches)	Displays the page width, depending on the **Page Size / Paper Size** option you select. For **Custom (Enter values)**, specify a width of your choice.
Page Height (Inches)	Displays the page height, depending on the **Page Size / Paper Size** option you select. For **Custom (Enter values)**, specify a height of your choice.
Page Margin - Top and Bottom (Inches)	Sets the space for the top and bottom page margins.
Page Margin - Left and Right (Inches)	Sets the space for the left and right page margins.
Endorse Printed Pages	Configures printing so that printed documents are endorsed. For more information, see Using the Endorsement feature, page 26.
Endorsement Position	Sets the endorsement position, if you select **Endorse Printed Pages**. Available values are: LeftTop, LeftBottom, RightTop, and RightBottom.
Endorsement Text (Maximum of 70 characters)	Specifies the text to appear in an endorsement, if you select **Endorse Printed Pages**. This field also supports predefined macros. You can type up to 70 characters, including spaces.

Section or field	Description
Page Fetch Retry Enabled	If an error occurs, sets the application to continue its attempts to retrieve a page as many times as you specify in the **Page Fetch Retry Count** field. Selected by default.
Page Fetch Retry Count (1-10)	Sets the number of attempts that the application makes to retrieve a page if an error occurs. Applicable only if you select **Page Fetch Retry Enabled**.
Show Print Log	Displays the log when the print operation ends.
Email	
Use PDF Format if Possible	Sets the format for email attachments to PDF.
Use XPS Format if Possible	Sets the format for email attachments to XPS. **Note:** You can choose either the PDF or XPS format. If you select these options, you cannot set the image format for black and white, 4-bit and 8-bit color, and true-color images.
Black and White Images	Sets the image format for black and white images. Available values are: TIFF, Windows BMP, and Compressed TIFF.
4-bit or 8-bit Color Images	Sets the image format for 4-bit or 8-bit color images. Available values are: Windows BMP, Compressed Windows BMP, GIF, TIFF, and Compressed TIFF.
True-Color Images	Sets the image format for true color images. Available values are: Windows BMP, GIF, JPEG, TIFF, and Compressed TIFF.
JPEG Quality Factor	Sets the quality factor when you select JPEG as the **True Color Image** format.
COLD Form Overlay for Email	Sets the type of COLD overlay you want to use when you email documents. Available values are: None, Text, and Image.
Display Text as	Indicates the display of textual data as text or image. **Image** is selected by default.
Use Archive File Format	Enables you to use the archive file format for email messages.
Use Multipage Files	Enables you to email multipage documents. Selected by default.
Send Attachments as Hyperlinks	Enables you to use hyperlinks for email attachments. Selected by default.
Merge Selected Documents into One	Combines the selected documents from a query results list into a single document.

Section or field	Description
Mail Message Format	Specifies the format for email messages. HTML is selected by default.
Client Email Format	Specifies the format for email messages that are saved to the desktop client. **MSG** is selected by default.
Registered Mail Address	Specifies the default mail address of a user. This option can be configured by the administrator only.
Full-text	
Enable Full-Text Search	Configures the search criteria page for full-text search. The option is selected by default. Select **Request Full-Text Search Support** on the login page when you log in to a data source to enable this feature. **Note:** Disabling this option does not release the full-text license that was assigned to you when you logged in to ApplicationXtender Web Access.
Thesaurus	During queries, includes a thesaurus search for words that are related to the search criteria.
OCR Language	Sets the default language to submit documents for OCR indexing.
Prompt Submitting Full-Text Index/OCR Dialog	If selected, each time you submit documents for full-text or OCR indexing, a dialog box appears to enable you to select an OCR language from a list box. If not selected, no dialog box appears. The value set in the **OCR Language** field is the default.
Others	
Show Checked Out Documents in Home Page	Allows user to specify whether to show currently checked out documents in home page.

Section or field	Description
Only Show Recently Created Documents by Current User	Shows only the recently created documents by the current logged in user in the application page.
Job Manager (only in Administrator)	Maximum Count of Backend Print/Export/Email Job – When enabled, changes long-running print/export/email jobs to the backend from the WebAccess UI. It improves user experience by allowing other WebAccess operations simultaneously. This item defines the maximum job count of a user.

3. Click **SAVE**.

Configuring user settings for an application

1. Click your login name on the title bar and select **User Settings**.
2. Select the **Application** tab of the **User Settings** page.
3. From the list of applications, select an application that you want to configure.
4. From the list of index fields for the selected application, select a value to designate as the title of all documents that belong to the application.
5. Click **SAVE**.

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** field.

The endorsement feature supports these predefined macros:

Macro	Output
%DS	Displays the short form of the date, such as 3/2/2016, on which the page is printed.
%DL	Displays the long form of the date, such as Friday, March 02, 2016, on which the page is printed.
%T	Displays the time when the page is printed.
%DT	Displays the document title.
%U	Displays the user who printed the page.

Macro	Output
%P	Displays the current page number.
%DC	Displays the total page count of document pages.

ApplicationXtender prints the endorsement on every page in the location that you have selected from the **Endorsement Position** list box. The location of the macro output in the endorsement depends on the location of the macro in the text string.

Chapter 3

Creating Documents

ApplicationXtender Web Access enables you to store and organize many types of information as documents. The documents are organized in applications for easy retrieval. Authorized users can scan or upload electronically formatted files into ApplicationXtender Web Access. An ApplicationXtender document can contain one or more electronically formatted files. A document can have one or more sets of indexes that you can use to search for the document.

Enabling the scanner

Before scanning any documents, the scanner must be enabled.

1. Click <**User Name** > **User Settings** in the upper right corner.
2. In the left side list, click **Import**, and then check the box for **Enable Scanning**.
3. Click **Save**.

Configuring the scanner

Scanners can be configured from the AX Web Access application.

1. Click the plus (**+**) symbol in the upper right corner, then **New Document**.
2. Click the **Scanner** icon.
3. Select the scanner you want to configure from the list presented and click **OK**.
4. Click the down arrow beside the **Scanner** icon to configure the settings. You can also click the **Settings** icon and open the **Advanced Settings** dialog for more configuration options.

Importing and scanning documents

1. Select the application that you want to add a document to.
2. Perform either step:
   a. Click the file cabinet drawer icon in the toolbar and select **New Document** or click the **NEW DOCUMENT** button.

b. Drag and drop the electronic file or files from your desktop into the main panel.

   Note: If you enabled the thumbnails view in the **User Settings** page, you can also drag and drop the electronic file or files from your desktop into the thumbnails view.

   Drag and drop files to the inline render frame of a foreign file to add pages is not supported, but you can drag files to the outside area of the frame, such as the thumbnail.

3. A blank document is created. You can browse and select one or more files or scan the page(s) to the document. If you enabled the thumbnails view in the **User Settings** page, you can use the page thumbnails that appear on the left to navigate through the pages.

   If you have selected more than one file, the pages are appended sequentially.

4. If you checked the user setting **Start New Document** from a temporary Batch under Import, you can choose whether you want to index the document now or later:

   - To index immediately after the upload, specify relevant values in the index fields that are available for the selected application, and then click **SAVE**.
   - To continue without indexing, click **CANCEL**.

     A message indicates that the document is not indexed. Click **DELETE** to delete the unindexed document or **KEEP** to continue without deletion. The document is added to the **Uploaded Batches** list as a temporary batch to be indexed later. By default, the document is saved with a name that includes your login ID and the date and time you uploaded the document. For example, `SYSOP - 8/1/2015 7:02:01 PM`.

     For more information, see Indexing batches manually, page 36.

Note: When applying the default import setting (un-check **Start New Document from a temporary Batch**), an imported file will be lost if the user creates a new document without saving the index. If the user setting **Start New Document from a temporary Batch** under the.Import category is checked, the unsaved document will be kept as batch in the same application.

Creating documents in batches

In addition to adding documents individually, ApplicationXtender Web Access enables you to create and index documents in batches.

Note: If you enabled **Display Batch in Separate Popup Windows** under **Index** in the **User Settings** page, the batch index opens in a pop-up window. This occurs when you create a new document or a new batch, or drag and drop files to create a new document or a new batch.

Uploading batches

1. Select the application that you want to add a document to.
2. Click the file cabinet drawer icon in the toolbar and select **New Batch** from the list box or or click the **NEW BATCH** button on the application home page.
3. In the **New Batch** dialog box, specify the following details:

Field	Description
Application	The name of the ApplicationXtender application that you want to upload the batch into. The name of the selected application appears by default. You can select a different application from the list box.
Name	A name for the batch.
Description	Any specific comment, if required.

4. Click **CONTINUE**. A blank batch is created. You can browse and select one or more files or scan the page(s) to the batch. If you have selected more than one file, the pages are appended sequentially. The batch is added to the **Uploaded Batches** list and is available for indexing. You can continue to add more files to the batch after is it created.

   For more information, see Adding pages to batches, page 33.

Note: You must have the Batch Scan privilege to upload batches.

Working with batch lists

The **Manage Batches** page lists the batches and documents that are uploaded into an application. To access this page, click the file cabinet drawer icon in the toolbar and select **Manage Batches**. This page provides options to index and manage batches. If batches exist for the selected application, information about those batches appears in the list.

The following information appears about each batch or document:

Column	Description
Name	The name of the batch.
Description	The description of the batch, if any.
Create Time	The date and time the batch was uploaded into ApplicationXtender.
Created By	The name of the user who uploaded the batch into ApplicationXtender.
Pages	The number of pages in the batch.
State	The status of the batch (**Idle**, **Indexing**, or **Scanning**).

Batch list menu and toolbar options

When you select a batch or document from the **Uploaded Batches** list, a toolbar appears with these options:

Option	Description
FORCE DELETE	Deletes the selected batches. Batches must be in the idle state for you to be able to delete them. When a confirmation message appears, click **DELETE** to proceed with deletion.
RESET TO IDLE	Resets the status of the selected batches (in scanning or indexing states) to **Idle**.

The status of a batch is shown in the **State** column of the **Uploaded Batches** list. Batches can be in one of these states: Indexing, Scanning, and Idle. If a user working with a batch closes the browser without logging out, the batch is listed as being in the **Indexing** state, although no one is indexing the batch. The **Scanning** state indicates that another user is importing pages into the batch.

The **context menu** enables you to perform operations at a single batch or document level. Select a document and click the adjacent down-arrow icon to view the context menu.

Option	Description
Index	Indexes a document or batch from the list. When you open documents to index them, the batch status changes from **Idle** to **Indexing**.
Import	Adds pages to batches. When you open documents to import pages, the batch status changes from **Idle** to **Scanning**.
Edit	Changes the name of the batch. When you click **EDIT**, the **Batch Information** dialog box appears where you can specify a new name for the batch and a description, if required.

Unlocking batches

For other users to work with the batch, a user with ApplicationXtender Administrator privileges must unlock the batch. To unlock batches that are in the **Indexing** and **Scanning** states, click **RESET TO IDLE** on the toolbar to change the batch status to **Idle**. Unlocked batches are in the **Idle** state and available for use.

Note: If you must unlock a batch but do not have the Administrator privilege, contact the ApplicationXtender system administrator.

Refreshing the uploaded batches list

To refresh the **Uploaded Batches** list, click the refresh icon on the toolbar.

Managing batches

ApplicationXtender Web Access provides several ways to manage batches. You can add pages to ApplicationXtender documents or batches. The pages can be of the same object type or of a different object type. You can also switch between different states, move or copy pages, delete batches or batch pages, and so on.

Note: If you enabled **Display Batch in Separate Popup Windows** under **Index** in the **User Settings** page so that the batch index opens in a pop-up window, ensure that you click the **Close Window** icon to close the batch. Otherwise, the batch lock is not released until the session expires.

Adding pages to batches

1. From the **Uploaded Batches** list, select a batch, and then click **Import** on the context menu.

   The first page of the selected batch appears in the Document Viewer. The **Uploaded Batches** list displays the status of the batch as **Scanning**.

2. Perform either step:

   a. Click the **Add Page** icon on the **Page** toolbar. In the **Add New Page** dialog box, select the file that you want to add and then click **UPLOAD**.

   b. Drag and drop the electronic file or files from your desktop into the main panel.

   The files are appended to the end of the current document. The page thumbnails also appear in the appropriate location.

Switching between importing and indexing states

You can switch between the importing (scanning) and indexing states when adding (importing) pages to a batch. The batch is in the **Scanning** state during an import. To switch to the **Indexing** state, click the **New Document** icon on the **Batch** toolbar. To switch back to the **Scanning** state, click **CANCEL** on the index panel on the right.

Copying or moving batch pages

ApplicationXtender Web Access enables you to copy or move batch pages between ApplicationXtender applications. It processes the pages as a new batch in the target application. You must have the Batch Scan privilege for the target application to copy and move batch pages.

1. From the **Uploaded Batches** list, select a batch, and then click **Import** on the context menu.

   The selected batch opens in the Document Viewer.

2. Click the **Copy Move Pages** icon on the **Batch** toolbar.

3. In the **Copy or Move Pages to New Batch** dialog box, specify the following:

Field	Description
Document Pages	The page number of the batch pages you want to move or copy. To specify a continuous page range, insert a hyphen between the first and last page. Example: 1-4. To specify separate pages, insert a comma between each page. Example: 2,4.
Target Application	The application to which you want to move or copy the pages.
Batch Name	The name of the batch.
Index New Document	Indexes the batch immediately after copying or moving the pages. If you do not select this option, select the batch from the **Uploaded Batches** list when you are ready to index the batch.

4. Click **MOVE** if you want to move the selected batch pages from the source application.
5. Click **COPY** if you want to leave a copy of the batch pages in the source application.

Indexing

After you upload an electronic file or a set of electronic files into ApplicationXtender applications, you must index the files and the individual files in each batch to save them as ApplicationXtender documents. Authorized users can use the index data to retrieve them from the ApplicationXtender database.

ApplicationXtender document indexes

The ApplicationXtender system administrator specifies the data that is required to retrieve documents that belong to a particular application. This set of data is known as the *index* of the document. Different applications have different types of index data.

The administrator can also configure the index fields for dual data entry so that an index field has two input fields instead of one. The information that you type in both fields must match. If it does not, an error message appears when you try to save the index. Dual data entry provides data validation when you specify index information during document creation.

Note: You have the option to change the dual data entry configuration that the administrator has defined. You can change this setting when you define a profile in the **User Settings** page.

Indexing types

The ApplicationXtender administrator sets up index fields and specifies their characteristics when creating and configuring an application. The indexing options depend on whether the selected application is configured for automatic or manual indexing.

Manual indexing

During manual indexing, you can specify the values for the index fields one at a time, select an existing index record, or copy the index data of another document and paste them into the relevant index fields of the current document.

For batch pages, you have two options:

- Select an existing document index and append the batch pages to the corresponding document.
- Copy an existing index to create new ApplicationXtender documents.

Auto indexing

You can use the Auto Index function to specify data in one or more index fields. You can click the auto index icon on the top left of index panel and it will find a match, select the data from the record in the Auto Index table.

Note: If the ApplicationXtender system administrator configures to retain the Auto Index record, the record remains in the table, even after you select it.

For instructions, see Using the Auto Index feature, page 39.

Key Reference indexing

The Key Reference indexing feature operates similarly to automatic indexing. The Key Reference feature is useful for automatically populating the index information, changing the index information frequently, or both.

Note: When you modify document indexes that are created by using the Key Reference feature, updating index field data on one document might 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, ApplicationXtender 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, ApplicationXtender modifies only that document; all other documents having the original key value remain unchanged.

Example 3-1. Key Field Versus Data Field

Assume that for the HR application, the ApplicationXtender system administrator has configured *Employee ID* as the key field and *Employee Last Name* as a data field. If you modify the *Employee ID* field for an index record, the other documents with the same employee ID are not affected. However, if you modify the *Employee Last Name*, the value changes in all other documents with the same *Employee ID*.

Note: The *Auto Index* or *Key Reference* functionalities are available for indexing only if the ApplicationXtender system administrator configures the ApplicationXtender applications with fields enabled for Auto Index or Key Reference.

For more information, see Using the Auto Index feature, page 39 and Using the Key Reference feature, page 40.

Indexing batches manually

You can index batches when you upload them, or later, by selecting the batches from the list of uploaded batches for an application.

1. Depending on when you decide to index a document, perform one of the following:
    a. To index a document immediately after you upload it, click the **New Document** icon on the **Batch** toolbar.
    b. To index a document from the list of uploaded batches:
        i. Select the relevant application.
        ii. Click file cabinet drawer icon and select **Manage Batches**.

            On the **Manage Batches** page, you can view the list of **Uploaded Batches** for the selected application. The batch state indicates the status of the batch. Batches that are available for indexing show a status of **Idle**. When a batch is selected for indexing, its status automatically changes to **Indexing**.
        iii. Select a batch from the list and then click **Index** on the context menu.

            Note: The batch state automatically changes from **Idle** to **Indexing** (you can view the state in the **Uploaded Batches** list). This state prevents other users from accessing the batch.
2. For the first page that appears in the Document Viewer, type the appropriate information from the document into each index field.

    You can also use the Select Index option to populate the index fields. For instructions, see Using the existing index data, page 38.

    Note: It is recommended that you populate all the fields for which data is available to make the document index as complete as possible.

    To clear the index information and retype new data in the fields, if required, click the **Clear Index** icon on the index panel toolbar.
3. After you finish providing the relevant data, click **SAVE**.

    Note:

    - If you have indexed a document, all the pages in the document inherit the index data. The ApplicationXtender repository stores the electronic file and its index information.
    - If you have indexed a batch, the current page is indexed and saved as a new ApplicationXtender document, and the next page in the batch appears in the Document

Viewer. You can attach more batch pages to this document or create a new ApplicationXtender document to index the remaining pages.

You can modify the index data after the Save operation, if required. Click **MODIFY** to edit the index fields. Modify the values in the index fields as necessary, or use the **Select Index** feature or the **Copy/Paste Index** option to use an existing index data.

For more information, see Using the existing index data, page 38 and Additional operations for a batch, page 37.

Attaching batch pages to documents

Attaching batch pages to the current ApplicationXtender document enables you to index the rest of the pages without having to reenter the index information.

If only a few batch pages are part of the current document, you can attach the additional pages one page at a time. If all pages are part of the current document, you can attach all the pages simultaneously.

To attach the current page to the current ApplicationXtender document:

1. From the **Page** toolbar, click the **Attach Current Page** icon.

   The current page is removed from the batch and appended to the current ApplicationXtender document. The next page in the batch appears in the viewer.
2. Repeat step 1 to attach additional pages to the current document.
3. After attaching the last batch page that belongs to the current document, click the **New Document** icon to create a new ApplicationXtender document for indexing the remaining pages.
4. Type the necessary information in the index fields and click **SAVE**.

   ApplicationXtender Web Access saves the indexed page as a new ApplicationXtender document. You can continue to attach more pages to this document or create another document. If there are no more pages in the batch, a message indicates that all the batch pages have been indexed.
5. Select the next operation from the message dialog box.

To attach all batch pages to the current document:

1. Perform either step:

   a. From the **Page** toolbar, click the **Attach All Pages** icon.

   b. Drag and drop the electronic file or files from the thumbnail panel.

   All the remaining batch pages are attached to the current ApplicationXtender document, and the document is saved.

   A message appears that indicates all the batch pages have been indexed.
2. Select the next operation from the message dialog box.

Additional operations for a batch

During batch indexing, you can use the toolbar options to perform additional operations.

Option	Operation
Show/Hide Thumbnail	Shows or hide the thumbnails view when multiple pages are present
Cancel Indexing	Cancels batch indexing
Scan	Scan documents and append them to the current AX document or AX Batch.
Scanner	Select a scanner. After a scanner is selected, users can set the basic settings or the advanced settings of the scanner.
New Document	Creates a new document
Last Indexed Document	Opens the last indexed document
Delete Batch	Deletes a batch
Delete Page	Deletes a page from the batch
Copy Index	Copies the current index data
Paste Index	Pastes the copied index data
Last Modified Indexes	Copies the information from the last modified index into the fields of the current page
New Index	Creates new index data for a document **Note:** This option is available only if the ApplicationXtender administrator has selected the **Multiple indexes referencing a single document** option for an application.
Close Window	Closes the browser window if you enabled the **Display Batch in Separate Popup Window** under **Index** in the **User Settings** page.

Using the existing index data

The **Select Index** feature enables you to search for and use the existing index information when you are indexing document or batch pages. When you select an existing index, you can either attach the current batch page to the ApplicationXtender document to which the selected index belongs or create a new ApplicationXtender document by using the same index data.

1. Click the **Select Index** icon on the index toolbar.
2. From the **Select Index** dialog box, click the record whose index data you want to copy.

3. Perform one of the following:

   a. To create a new document, click **SELECT** and then click **SAVE** in the index panel.

      If you have indexed a document, all the pages inherit the index data and are saved as a single ApplicationXtender document. For a batch, only the current page is indexed and saved as a new ApplicationXtender document. For more information, see Indexing batches manually, page 36.

   b. To append the batch pages to the existing ApplicationXtender document, click **ATTACH**.

      If you have indexed a document, all the pages inherit the index data and are appended to the existing ApplicationXtender document. For a batch, only the current page is indexed to the existing ApplicationXtender document. You can continue to attach additional pages or create a new document to index the remaining pages. For more information, see Attaching batch pages to documents, page 37.

Selecting a task after batch indexing

When you index and save the last page in a batch, ApplicationXtender Web Access automatically exits the batch indexing mode and displays a message that indicates that all batch pages have been indexed.

In addition to the message, the dialog box also provides options to perform the following tasks:

- Index another batch
- Import a new batch
- Return to the Application List page
- View the most recently indexed document
- Log out of ApplicationXtender Web Access

Using the Auto Index feature

1. From the list of applications, select the required application, click file cabinet drawer icon in the toolbar, and then select **Manage Batches**.

   In the **Manage Batches** page, you can view the list of **Uploaded Batches** for the selected application.

2. Select a document or a batch from the list and then click **Index** on the context menu. The first page in the batch appears in the Document Viewer.

3. Specify adequate index data to limit the number of matches from the Auto Index table to one or few records.

4. Click the **Auto Index** icon on the index toolbar.

   Note: If you do not specify any data, ApplicationXtender Web Access retrieves all the records from the auto index table.

5. From the **Auto Index Result** dialog box, click the record whose index information you want to use, and then click **SELECT**.

The index fields are populated with data from the selected Auto Index record. If only one matching record is found, ApplicationXtender Web Access populates the remaining index fields with the relevant data. If no matching records are found, an error message appears.

If you want to delete document indexes from the **Auto Index Result** dialog box, highlight the relevant records and then click the **Delete** icon.

6. Click **SAVE**.

   After the Save operation, you can modify the index data, if required.

Using the Key Reference feature

1. From the list of applications, select the required application, click the file cabinet drawer icon in the toolbar, and then select **Manage Batches**.

   In the **Manage Batches** page, you can view the list of **Uploaded Batches** for the selected application.

2. Select a document or a batch from the list and then click **Index** on the context menu. The first page in the batch appears in the Document Viewer.
3. Specify a value in the key index field, and then press the **Tab** key.

   ApplicationXtender Web Access retrieves the data from the Key Reference table and populates the remaining index fields. No action occurs if a matching key reference value is not found.

4. Click **SAVE**.

Full-text indexing

Full-text indexing makes ApplicationXtender Web Access documents retrievable by using a full-text query. To enable this, first submit the documents to a full-text queue on the ApplicationXtender Index Agent for full-text indexing. After a document has been indexed, you can search for the document by using words within the document text.

The ApplicationXtender system administrator configures the full-text engine information in ApplicationXtender Administrator and ApplicationXtender Index Agent. At least one full-text queue must be active to submit documents for indexing. New document can be automatically submitted for full-text indexing.

Chapter 4

Retrieving Documents

ApplicationXtender Web Access provides a variety of robust search and retrieval methods that include search by index, search by wildcard, search by a list of values, expression search, full-text search, and combination search.

If the Document Properties Search is enabled, you can also search for document properties such as the name of the author, date, and keywords. You can even combine search options to retrieve the most relevant documents.

The ApplicationXtender Index Agent, an add-on module for ApplicationXtender, supports full-text indexing. This enables you to run searches that are based on full-text data. If you have a full-text license and full-text permission, the **Search Criteria** page appears with the **Full-Text Search Criteria** section whether you have full-text data or not. The ApplicationXtender Index Agent uses the xPlore full-text engine to submit documents to the full-text database. The xPlore full-text engine enables you to perform queries that are based on a thesaurus as well. Queries can also include *both* the index and the full-text search values.

Note: The full-text search feature is enabled if you select the **Request Full-Text Search Support** option on the login page.

If you have the *Report View* privilege, in addition to searching applications for documents, you can also query the applications for reports that are generated by ApplicationXtender Reports Management.

For more information, see Viewing ApplicationXtender Reports Management reports, page 61.

After you retrieve a document, you can view, print, annotate, add and delete pages or documents, and modify index and document properties.

Query functionality

You can search either one application or across multiple applications simultaneously, if the applications reside within the same data source. The query functionality enables you to create a new query, edit an existing query, and run a query. Saved queries appear under the application to which they belong.

Single-application searches

ApplicationXtender Web Access enables you to use several different methods to set search criteria for searching a single application.

Creating queries

1. From the list of applications, select the required application.
2. Click **New Query**.
3. In the **New Search** page, specify the search criteria by using the index fields and other available options.

   Note: For more information, see Using advanced index value search criteria, page 42.
4. Select **Include previous document revisions**, if you want the search to retrieve both current and previous versions of documents that meet the search criteria.

   Note: This option is automatically checked if you selected **Show Previous Document Version** under **Search/Result Set** in the **User Settings** page. If you clear this selected option, the specification in the profile settings is not affected.
5. Perform one of the following actions:
   - Click **RUN** to run the query without saving it for future use.
   - Click **SAVE** to be able to run the query at any time.
     1. In the **Save Search** dialog box, specify a name for the query.
     2. Select **Available to all users** to share the query with other users (public query).

        If you do not select this option, the query is considered a private query that only you and the users with the Administrator privilege can access.
     3. Click **SAVE**.

        The query is saved under the relevant application and in the navigation panel. You can click a saved query in the navigation panel to execute the query.

Using advanced index value search criteria

In addition to specifying index values for a basic index name search, you can use advanced index value search methods to search for a wider range of documents. You can use these search methods:

- Wildcards
- List of Values
- Expressions

To use the wildcard character:

1. In the **New Search** page, specify the index data by using the asterisk character in at least one field. For example, specify `SM*` to search for documents with a name that begins with the characters "SM."
2. Click **RUN** to begin the search process. ApplicationXtender Web Access searches the active application for all records that match the specified criteria. If matching documents are found, a list of those documents appears in the **Query Results** page.

To use the search list:

1. In the **New Search** page, select the index field for which you want to specify a list of values, and then click the **Search list** icon that is next to the field.
2. In the **List Search** dialog box, specify a value for the index field.
3. Click **Add** to add the value to the list.
4. Repeat steps 2 and 3 for each value that you want to include in the list.

   To edit the values, you can replace a value from the list with a new value, delete a value, or delete the list.
5. Click **OK**.
6. Click **RUN** to start the search.

To use expressions:

1. In the **New Search** page, select the index field for which you want to specify a range, and then click the **Search range** icon that is next to the field.
2. In the **Range Search** dialog box, select the type of comparison you want to use.

   Note: The **DATE** and **TIMESTAMP** fields support two additional expressions. The **Within** and **Older Than** expressions enable you to specify a number of days from the time of execution, rather than specify a date. For example, a value of 60 for the **Older Than** type of comparison indicates a search for documents that are older than 60 days.
3. Specify a value for the selected index field.

   Note: If you select **Between**, also type a value in the **And** text box.
4. Click **OK**.

Note:

- Ensure that you use the correct format to specify an expression syntax. If the expression syntax is incorrect, an error message appears.
- An expression search does not return any null index values. To search for a null index value, use **{Null}** or **<Null>** as the search criteria.

Using full-text queries

There are four types of full-text searches: All Words, Any Words, Exact Phrase, and Expression. The thesaurus feature enables you to search for words that are related to the search criteria. It contains a list of synonyms or keys for possible words to be used in a search. You can also query for different versions of a document.

For information about the thesaurus feature, see the *OpenText Documentum xPlore Administration and Development Guide*.

To use the full-text query criteria:

1. In the **New Search** page, select a **Search Type** for the full-text query.
2. Type the search criteria.
3. Select **Thesaurus** to search for synonyms.

   ApplicationXtender Web Access searches the thesaurus for synonyms or keys for words in the search criteria.

   Note: This option is available only when the xPlore full-text engine is used to submit documents to the full-text database. For more information, see the *ApplicationXtender Administration Guide*.
4. If you want to run the query without saving it for future use, click **RUN**.

   If the query retrieves only one document that includes the search criteria, the document opens in Document Viewer. Otherwise, you can select a document from the **Query Results** page, which lists the documents that include the search criteria.

   The Document Viewer opens to the page that includes the first instance of the search criteria, or **hit**. Each hit in the page is highlighted. Also, a **Full-Text Search Results** pop-up window indicates the number of hits on the current page and the total number of hits in the document. The pop-up window also enables you to move between the pages that include hits.

   Note: For unsupported files, the Document Viewer opens to the page that includes the first instance of the search criteria and the **Full-Text Search Results** pop-up window, however, the hits are not highlighted.
5. If you want to run the query at any time, click **SAVE**.
   a. In the **Save** dialog box, specify a name for the query.
   b. Select **Available to all users** to share the query with other users.
   c. Click **SAVE**.

   The query is saved under the relevant application and in the navigation panel.

Note:

- If the full-text search option is **All Words**, **Any Words**, or **Exact Phrase**, the characters &@#$%^_~`:-+=\/\[]{}!,;() in the full-text search criteria are replaced with a blank space. Quotation marks or single quotation marks must appear in pairs in the search criteria.
- If the full-text search option is **Expression**, the characters &@#$%^_~`:-+=\/\[]{}!,; in the full-text search criteria are replaced with a blank space.

Using expression search operators

Expression operators enable a focused document search. You can build a query by combining words or text strings with expression operators such as *and* and *or*. You can also combine operators for more complex searches.

Note: By default, ApplicationXtender Web Access interprets search expressions from left to right, one search operator at a time, and narrows the results with each subsequent search.

The following table describes the expression operators with examples:

Operator	Example	ApplicationXtender finds documents with
ftand	`'AEX' ftand 'Simon'`	Both AEX and Simon
ftor	`'AEX' ftor 'Simon'`	Either AEX or Simon
ftnot	`'AEX' ftand ftnot 'Simon'`	AEX but not Simon
?	`'A?X' with wildcards`	A string of three consecutive characters, in which the first must be A, the second can be any character, and the last must be X
*	`'S*' with wildcards`	Any string that begins with S
()	`'AEX' ftand ('Simon' ftor 'Schiff')`	Either Simon or Schiff first, and of those documents, ApplicationXtender retrieves the ones that also have AEX

Using document retention query options

If an application has the retention feature enabled, you can choose query options to search for documents based on their retention and retention hold status.

In the **New Search** page, specify document retention status from the **Show** list box.

For more information about retention query options and limitations, see Chapter 8, Working with Document Retention.

Searching document properties

ApplicationXtender Web Access enables you to search for documents based on document properties. These properties include title, author, subject, owner, comment, and keywords. Select the **Enable Document Properties Search** option in the **User Settings** page to use this feature. The document property index fields appear below the application index fields. Each property index field name is enclosed within square brackets.

You can create a query by specifying the values for the document property index fields available in the **New Search** page. For more information, see Creating queries, page 42.

Multiple application searches

You can use the Multiple Application Search functionality to create and run queries. These queries search multiple ApplicationXtender applications for the selected index information, full-text information, or both. For example, by using a multiple application search, you can search three different applications for information about the Social Security number 111-22-3333. Or, you could search for all documents containing the text "most recent software releases."

Multiple application searches must be configured to search applications that are within the same data source.

Note: You cannot query for reports that are generated by ApplicationXtender Reports Management across multiple applications.

Configuring multi-application searches

1. From the list of applications, select the application that you want to create a multiple application search for.
2. Click the Search icon in the toolbar and select **New Multi-Application Search**.
3. In the **Configure Multiple Applications Search** dialog box, select the applications that you want to include in the query and click the **Add** icon, which is in between the two text boxes, to add the selected applications (along with the associated index fields) to the **Query Applications** list.
4. Configure the index fields for the multi-application query. The fields that are not used in a search criteria are identified by an **X** next to the field. You have the following choices for each field:
   - Click a field once to make it displayable. A check mark appears next to the selected field to indicate that it appears in the search results, but is not used as a search criterion.

     Note: If an index field that is made displayable is not common to the other selected applications, the field appears in the query results, but does not show any information for documents that are retrieved from those applications.
   - Click a field twice to make it searchable. A search symbol appears next to the selected field to indicate that it is used as a search field for querying documents.

     Note: Each application participating in a cross-application query must have at least one searchable field.
5. Type a name for the multiple application search.
6. Select **Available to all users** to share the query with other users (public query).

   If you do not select this option, other users are restricted from using this query and the query is considered private.
7. Click **SAVE**.

   The **Edit Search** page displays the index fields that were configured as searchable.
8. Specify the search criteria and save the query.

You can use wildcards, expressions, full-text, and combination queries to define the search criteria. For more information, see Creating queries, page 42.

Using multi-application searches

The maximum number of results that are displayed in the **Query Results** page cannot exceed the number that the administrator configures in the ApplicationXtender Web Access `web.config` file.

ApplicationXtender/ApplicationXtender Web Access security affects cross-application queries at the application and document security level. For example, if the application security setting restricts you from viewing an application that is part of a multi-application query, the documents from the application do not appear in the query results. Similarly, if document level security restricts you from viewing certain documents, such documents are not retrieved when you run a multi-application query.

Working with saved searches

You can use saved queries multiple times. When you save a query, you can make it available to all users. Otherwise, it is a private query that only you and the users with the Administrator privilege can access. The saved queries are available under the application for which they are created. A locked-padlock icon next to the query name indicates that the query is private. An unlocked-padlock icon indicates that all users can access and run the query. The query owner and the users with the Administrator privilege can edit a query to change:

- A private query to public, after which the query becomes available in the list of queries for all users and is preceded by the unlocked padlock icon
- A public query to private, after which the query becomes unavailable in the list of queries for all users and is preceded by the locked padlock icon

Note: Even if a multi-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 multi-application query, the query results do not show matches from the applications that are restricted.

From the list of queries for an application, select a query and open the context menu to view the list of operations you can perform on a query:

Option	Operation
Run	To run a query
Edit	To edit the search criteria
Delete	To delete a query
Configure	To configure a multiple application search

Note: A saved query is also available under the application in the navigation bar. You can click the saved query to run the query from the navigation bar.

Working with query results

The index fields that are used in the search criteria appear as column headers in the query results. You can customize the query results view by rearranging columns, removing columns, or both, according to your requirements.

When you select a document from the query results, a toolbar appears. Assuming you have the necessary privileges, you can use the toolbar menu to delete documents, export COLD documents, email and print documents; and submit for full-text indexing, OCR indexing, and to a business workflow. To perform these operations on a single document, select a document and then click the adjacent down-arrow icon to access context menu.

Exporting selected documents

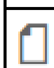
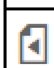
You can export selected document(s) from query results.

1. From the Query Results Page, select the documents you want to export and then click **Export > Export Selected Document(s)** on the toolbar.
2. In the Export Document dialog, select which item you want to export:
   - Document Content(s): includes two sub-options: Use PDF Format and Hide Annotations.
   - Document Index(es)
3. Click **EXPORT** to start export.

After the export, the browser window displays the name of the downloaded document(s). The Export Document dialog box displays the log. The file is automatically downloaded to the downloads folder. You can save the file in another location, if required. If the documents being exported are large and the progress is slow, you can click **Run job in backend** in the export dialog. You can continue working in Web Access and do not need to wait for the export job to complete. When the export job is finished, a notification is displayed on the floating icon.

Document display from query results

After you run a query, you can select documents from the query results to view them in the Document Viewer. Icons to the left of the document names indicate either the document version (previous, latest, or final) for each document or whether the document has been checked out. Page icons are also used to represent documents that are available for retention filing. Depending on the requirement, you can file the document for retention. For more information, see Filing documents for retention, page 80.

Icon	Description
	Latest version of the document.
	Previous revision of the document.
	Checked-out document.

Icon	Description
	Latest version of the document under retention.
	Previous version of the document under retention.
	Latest version of the document on retention hold. Documents under retention can be on retention hold and this status overwrites the retention period. The documents are not deleted from the system but only have read-only access.
	Previous version of the document on retention hold.

To display a document from the query results, select a document and then click **OPEN** on the context menu. The selected document opens in Document Viewer. You can then use the menu options and toolbar buttons to perform different tasks.

If you have selected **Display Document in a Separate Popup Window** under **Search/Result Set** in the **User Settings** page, you can open and view multiple documents simultaneously. Each document appears in a separate window.

Printing selected documents

1. From the **Query Results** page, select the documents that you want to print and click **Print** on the toolbar.
2. In the **Print** dialog box, select the pages that you want to print:
   - All pages
   - A range of pages
3. Select **Hide Annotations** to avoid printing the document annotations.
4. Click **More Options** to specify additional print options.

   Note: For more information, see Configuring data source user settings, page 19.
5. Click **PRINT**.

   The selected pages are rendered as a PDF file and appear in a new browser window or tab. If one of the selected documents is not rendered successfully, the entire print job fails.

   Note: Your browser must have a PDF reader plug-in, such as Adobe PDF Reader, installed. Otherwise, the browser downloads the rendered PDF file rather than display it in a browser window or tab.
6. Click the **Print** icon on the browser toolbar to select a printer and print the PDF file.

Note: If the document being printed is large, it may take some time to complete. In this case, you can click **Run job in backend** in the print dialog. The print dialog will disappear and a floating icon will appear on the right-bottom of the screen instead. You can continue working in Web Access and do not need to wait for the print job to complet. When the print job is finished, a notification is displayed on the floating icon. You can click the floating icon to open the job manager dialog from which you can see the printed PDF result. The **Run job in backend** function can also be used for email and export functions.

Exporting selected COLD documents

PDF files (excluding secure PDF files), Plain Text, and Compressed Text are considered Computer Output to Laser Disk (COLD) documents. You can export any one of these types.

From the **Query Results** page, select the documents you want to export and click **Export > Export COLD** from the toolbar.

To export a single document, select **Export COLD** on the context menu.

Note: When ApplicationXtender Web Access processes the export request, it picks up the file type that it encounters first and skips the rest. For example, assume that you have selected two PDF documents and one text file for export. During processing, if ApplicationXtender Web Access encounters the PDF documents first, it merges the two PDF documents and exports them as a single PDF document. It skips the text file.

After the export, the browser window displays the name of the downloaded document. The **Export Document** dialog box displays the log. The file is automatically downloaded to the downloads folder. You can save the file in another location, if required.

Emailing selected documents

You can email documents, pages, and links with ApplicationXtender Web Access documents and pages. To enable these options, first register your email address. For details, see Registering email addresses, page 63.

1. From the **Query Results** page, select the documents that you want to email.
2. Click **Email** on the toolbar.

   Note:

   - If the email server is not configured correctly, the **Email Status** dialog box displays an error message.
   - If the **Mail Registration** dialog box appears, configure your email address before you send an email.

3. In the **Mail Document** dialog box, select the following:

Field	Description
To	The address of the email recipient. You can select email addresses from the **Select Contact** dialog box or type the email addresses of multiple recipients.
Cc and Bcc	Optional recipients, if required.
Subject	The subject of the email.

Field	Description
Message Format	The format in which the email must be sent: • HTML • Text
Attach	The type of attachment: • Entire Document • Page Range If you select a range of pages, type the starting and ending page numbers as <#>-<#> in the text box.
Send Attachments as Hyperlinks	Enables you to include attachments as hyperlinks that appear in the message body. **Note:** • Reports from ApplicationXtender Reports Management *must* be emailed only as hyperlinks. • The recipients of emailed hyperlinks must have the appropriate permissions within the ApplicationXtender system and ApplicationXtender Web Access to view the documents.
Merge Selected Documents Into One	Generates a new file that contains all the pages of the selected documents.
Archive Documents Into One Zip File	Includes the selected documents in a Zip file format.
Hide Annotations	Hides the annotations and redactions in the selected documents before emailing them.
Email Document Title	The title of the selected documents appears in the email body.

4. Type the message in the text box.
5. Click **EMAIL**.
   A confirmation message appears that indicates that the email was sent successfully.

   Note: If your browser times out, the email is sent from the server.

Exporting document indexes

You can export document indexes to a web browser for online viewing, or to a file that can be imported into a spreadsheet application, such as Microsoft Excel.

1. From the list of queries for an application, select a query and run it.
2. From the **Query Results** page, select one or more documents, and then click **Export** on the toolbar.
3. Select a method for exporting the indexes:
   - To export all the index values from the query results, click **Export All Indexes** from the list.
   - To export only a chosen set of indexes, select the required documents from the query results, and then click **Export > Export Selected Document(s) > Document Index(es)** from the list.

   ApplicationXtender Web Access saves the indexes as a Tab Separated Value (TSV) file or a Comma Separated Value (CSV) file.

Submitting selected documents to workflow

You can submit documents to a business workflow if the ApplicationXtender Workflow Integration Module is configured in ApplicationXtender Administrator.

Note: You must be granted permission to submit documents to a workflow.

1. From the **Query Results** page, select the documents that you want to submit.
2. Click **Workflow**.
3. Select a business process from the list.

   Note: The business processes are created in the ApplicationXtender Workflow Manager and ApplicationXtender Workflow Integration Module is used to connect to the workflow. Log in to ApplicationXtender Workflow Manager to check if the submission was successful.

Submitting selected documents for full-text indexing

1. From the **Query Results** page, select one or more documents, and then click **Submit** on the toolbar.
2. Click **Full-Text Index Job** from the list, and then select the appropriate **OCR Language**.
3. Click **SUBMIT**.

   A confirmation message appears that indicates a successful submission.

Submitting selected documents to process OCR

1. From the **Query Results** page, select one or more documents, and then click **SUBMIT** on the toolbar.
2. Click **OCR Job** from the list, and then select the appropriate **OCR Language**.
3. Click **SUBMIT**.

   A confirmation message appears that indicates a successful submission.

Deleting selected documents

1. Select the documents that you want to delete from the **Query Results** page.
2. Click **Delete** on the toolbar.
3. In the confirmation message dialog box, click **DELETE** to confirm the operation.

Performing Ad Hoc 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 or locate the text content by performing an ad hoc text search on the records in the result set.

1. Locate the text search section on the query result toolbar, then type the keywords in the text search input.
2. Click the **Text Search** icon to launch text search on selected documents in the query result. The Text Search dialog appears.
   - If there is no selected document, all documents in the current query result page are searched.
   - Alternatively, you can also perform a text search on a single document from the query result context menu **Ad Hoc Text Search**.
3. During a search, the progress is displayed at the bottom of the Text Search dialog.
   - Click the **Cancel** button to stop text searching while it is processing.
   - You can also search for other keywords from dedicated documents by entering keywords in the search input and clicking the **Text Search** button in the search dialog
4. Text search results are listed in the text search dialog. The text search results are organized as follows:
   - The first four hit pages for each hit document are listed by default. Click the **More hit pages** link to view more hit pages.
   - Hit words are highlighted for each page. To show more hit words, click the **More hits** link.
   - If specified keywords are not found in any document, the message **The specified text was not found** is displayed.
5. To view any document in the list of text search hits, click the **Page#** link or the hit word highlighted for the document you want to view.

The difference between xPlore and non-xPlore Applications

If an Application is using xPlore full-text engine, the text search is based on xPlore. Web Access submits the text search criteria to xPlore, gets the hit information and then shows the UI. Besides text document and the documents have OCRed text file, PDF, Office documents and other documents supported by xPlore can be searched via text search. The text search result on query result always displays text result with hit information for both texture file and other files. But when opening the document from the text results or doing a text search on an opened document, it shows highlighted information based on the document types like full-text search highlighting.

If no full-text engine is configured for an Application, Web Access does a text search on the text content of the document. The text content could be:

- The original page content is a text file or compressed text file
- The page has OCRed text content

Web Access uses a simple search algorithm to perform text searches. It tries to find keywords by exact match but does not perform word searching.

Wilcard support

Wildcard Character	Finds	xPlore Application	non-xPlore Application
*	Any characters	Supported	Supported
?	Any single character	Supported	Supported
@	Any single numeric character	Not supported, will be replaced by space.	Supported
#	Any single numeric character	Not supported, will be replaced by space.	Supported
!	Any single non-space character	Not supported, will be replaced by space.	Supported

Customizing the Query Results view

1. In the **Query Results** page toolbar, click the **Customize Query Results** icon on the toolbar.

   In the **Customize Query Results** dialog box, by default, all the index fields are selected for display in the query results.
2. Select a row and click the **Move Up** icon or the **Move Down** icon, depending on how you want to reorganize the index columns.
3. Select the index fields that you want to appear in the query results.
4. Click **SAVE**.

Chapter 5

Viewing Documents

Effective data storage and retrieval is vital to a useful document imaging system. When a document is retrieved from storage, however, the focus shifts from your ability to access data to your ability to manipulate data. Displaying a retrieved document in a way that highlights important data ensures efficient data processing.

ApplicationXtender Web Access provides different viewing modes. In addition to viewing a document, you can also view specific details such as the revision history, document versions, image details, and document properties.

Using Thumbnails

Thumbnails are links to individual pages in a document that enable you to locate and display a page from a large document quickly. When you view a document in the Document Viewer, the page thumbnails appear to the left of the document image.

1. If the thumbnails view is not enabled, select the **Show Page Thumbnails** option under **Document View** in the **User Settings** page.
2. In an open document, click the **Show/Hide Thumbnail** icon on the left of the toolbar to hide or view page thumbnails.
3. In the thumbnail view, click the down-arrow at the upper right to show the thumbnail view toolbar, which is hidden by default.
4. Select a single page thumbnail, or press:
   - **Ctrl** and then select multiple page thumbnails.
   - **Shift** and select a beginning page thumbnail and an ending page thumbnail to select a range.
   - **Ctrl** +**Shift** and then select page thumbnails and retain any previously selected page thumbnails.

   The selected page thumbnails include a check mark on the upper left.

   You can then perform these tasks:
   - Drag and drop selected page thumbnails to reorder pages.
   - Cut and paste selected page thumbnails to move pages.
   - Delete selected page thumbnails to delete pages.

- Email, export, or print only the selected page thumbnails.
- Change the page thumbnail size by using the slider on the thumbnail view toolbar.

  Note: You cannot cut, paste, or delete page thumbnails in read-only documents or in documents for which you do not have permission. You cannot cut, paste, or drag and drop page thumbnails in a batch thumbnail view.

5. Optionally, drag an electronic file (or files) from your desktop into the thumbnails view and hover over the page thumbnail before which you want to place the file. Then, drop the file to insert it into the document.

Operation modes

ApplicationXtender Web Access has four modes of operation: normal mode, check-in/check-out mode, read-only mode, and reason audit mode. The normal and check-in/check-out modes of operation enable the use of revision control in ApplicationXtender. Revision control keeps track of which user 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 record the reason that they are performed.

Normal mode

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

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

Note: The reverse is also true. If another user checks out a document, you cannot modify the same document until the user checks it in. To prevent accidental data loss, it is strongly recommended that you check out documents before you modify them.

Check-in/check-out mode

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

For example, assume that you are editing a document and have added a few pages of new data. You have not checked out the document. Another user opens the same document, without seeing the changes that you have made (because 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, their changes are saved, overwriting your work. All of your changes are lost. If you had checked out the document *before* making changes, the other user would have been able to open the document only in read-only mode and could not have made any changes until you checked in the document.

If the ApplicationXtender system administrator has enabled the check-in/check-out mode on the ApplicationXtender Web Access server, or if you have selected the **Prompt for Checkout** option under **Document View** in the **User Settings** page, you are prompted to specify whether you want to check out the document or open it as read-only. The prompt does not appear if you open the following types of documents:

- A previous revision of the document
- The final revision of a document
- A checked-out document; the document opens as read-only if checked out by another user and continues in checked-out mode (resume check-out mode) if checked out by the current user

  Note: A resumed checkout might fail for a user who works on multiple workstations. If a user opens the document that is checked out on workstation A and then tries to do the same on workstation B, the resumed checkout fails on workstation B, and the document opens as read-only.

If you do not select **Prompt for Checkout**, you can open the document and then check it out by selecting **Check Out** from the **Document** menu.

When you check out a document, a copy of the document as it exists in the ApplicationXtender repository is created and this copy becomes your working copy. Even when you close a document, you can keep the document checked out to continue working on it.

If you have selected the **Prompt for Checkout** option for the application that you are using, you can check in the final revision of a document. After you check in the final revision, users can open the document only in the read-only mode.

Note: Users with the deletion privilege can delete the final revision of a document from the ApplicationXtender repository.

You can also cancel the checkout by selecting **Cancel Checkout** from the **Document** menu. When you cancel the checkout, the working copy is deleted and ApplicationXtender considers the document revision in the repository as the current revision. The changes that you made to the working copy are discarded.

When you finish your changes, you can choose to check the document back into the repository. You can check in a document by selecting **Check In** from the **Document** menu. When you check in a document, identify the status of the document revision. You can assign the revision as minor, major, or a replacement for the current revision.

The following table lists the three document revision types and describes their functions:

Option	Description
Check in as a minor revision	Creates a new 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 1.0 becomes version 1.1).
Check in as a major revision	Creates a new 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 1.0 (for example, version 1.0 becomes version 2.0).
Replace the current revision	Replaces the revision that was retrieved when the document was checked out and checks in the new document.
Final Revision	Marks the document as final. The final version of a document can be opened only in the read-only mode; you cannot check out or modify it. **Note:** You can mark a document as final only if the **Prompt for Checkout** option is selected for the application.

Read-only mode

In the read-only mode, you cannot modify documents; you can only read them. There are many circumstances when you might work with documents in the read-only mode:

- If you have already checked out a document and then open another instance of the same document
- If you select **Read Only** in the **Document Version Control** dialog box (appears only if the **Prompt for Checkout** option is selected for the application)
- If you open:
  - A document that someone else has checked out
  - The final version of a document
  - A document that is under retention

You cannot add or delete new pages or page revisions, add annotations or redactions, or modify the document index for a read-only document. If you open a document as read-only and then decide to make changes to the document, assuming that another user has not checked out the document, you can check out the document by selecting **Check Out** from the **Document** menu.

Reason Audit mode

The ApplicationXtender system administrator configures the Reason Audit mode at the application level to facilitate compliance with the Health Insurance Portability and Accountability Act of 1996 (HIPAA). If configured, when you select to view, print, export, or email one or more documents, ApplicationXtender Web Access displays the **Reason Code Required** dialog box. In this dialog box, select a task that you want to perform and describe the reason for performing the task.

Document Viewer toolbar and menu options

The Document Viewer toolbar includes buttons that enable you to manipulate document images, print document pages, and display information about images, among other things. If you have the proper permissions, you can use other buttons to make annotations and redactions including lines, arrows, highlights, and text annotations. You can use the buttons to show or hide annotations, save or delete annotations, and position annotations with reference to a document or batch page.

The **Document** and **Page** menus also provide options to perform a wide range of operations on an open document. The **EMAIL**, **PRINT**, and **EXPORT** options enable you to perform these operations directly from the browser. For more information, see Printing selected documents, page 49, Emailing selected documents, page 50 and Exporting selected COLD documents, page 50.

Note: If **Enable Inline Rendering of Foreign Files** under **Document View** is selected in the **User Settings** page and **Render foreign files as HTML** is enabled on the server, foreign files are 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 appears as a link that you can use to download the file.

Viewing subpages

If there is more than one subpage in a page (for example, in an Information and Content Exchange (ICE), TIFF, DCX, or PDF page format), you can use the **Next Subpage** and **Previous Subpage** buttons to navigate through the subpages.

Viewing versions of a page

If more than one version of a page exists, ApplicationXtender displays the latest version by default. You can use the **Previous Page Version** and **Next Page Version** buttons to navigate through all the versions of a page. You can also add a new page version, delete the current version, and delete all previous versions by using the appropriate buttons on the **Page Version** toolbar.

Displaying image information

You can view the image information for a displayed document by selecting **Display Image Information** from the **Page** menu on the toolbar.

Adding annotations

When you work with documents, several types of annotations are available. You can add text annotations that can be viewed as actual text or as an icon. All annotations, including text, can be placed within documents in the 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.

For more information, see Chapter 7, Annotations.

Viewing document properties

The **Document Properties** page enables you to view information about an active document. To view this information, select **Document Properties** from the **Document** menu on the toolbar.

You can view basic information such as the name of the application, revision number, name of the person who created and the date of creation, and the login ID of the person who has checked out the document, including the date and time of checkout. These are system properties assigned by ApplicationXtender Web Access. You cannot change them.

You can specify the following additional information:

- Title of the document
- Subject of the document
- Author of the document
- Relevant keywords related to the content of the document
- Comments about the document

After specifying the details, you can save the properties or reset the properties to their original values. You can retrieve documents by using these document properties in a search criteria.

Viewing revision history

When you create multiple versions of a document, ApplicationXtender creates a record of the revision history. It lists the revisions that have been made, the user who has checked in each revision, the date the revision was made, and the check-in comment. You can also open or delete a specific revision.

To view the revision history, select **Revision History** from the **Document** menu on the toolbar.

Using text view

During the OCR process, a scanned image of a document or a page is converted into actual text. Text view shows the OCR result of the image. To view the actual text, select **Text View** from the **Page** menu on the toolbar.

Performing a text search

1. Click the **Text Search** button to perform a text search in the opened document. The Text Search dialog appears.
2. Enter keywords in the search input filed and click the **Text Search**button to begin searching.
3. If the keywords are found, the viewer navigates to the first hit page and highlights the hit words.

   If the keyword are not found, the viewer displays **The specified text was not found**.
4. Click the **Previous Hit Page** or **Next Hit Page** button in the Text Search dialog to navigate to other hit pages.

Viewing foreign files

The ApplicationXtender Web Access administrator determines the method that ApplicationXtender Web Access uses to processes foreign files.

The HTML versions of foreign files are displayed if the administrator has configured the system for this feature and you have selected **Enable Inline Rendering of Foreign Files** for **Document View** in the **User Settings** page.

If you do not select **Enable Inline Rendering of Foreign Files**, the name of the foreign file appears as a link in the Document Viewer. You can download the file or render it to open in another window. To open or save the foreign file, click the download link. If the native application of the file is installed on your workstation, you can view the file in that application. If the native application is not installed, you can only save the file.

Viewing ApplicationXtender Reports Management reports

You can retrieve reports from the ApplicationXtender Reports Management module by creating a report specific query.

To create a new report query:

1. From the list of applications, select the application for which you want to create a query.
2. Click the Search icon on the toolbar and select **New Report Search** from the list.
3. Specify the search criteria to locate the reports you want to retrieve.

Note: There are only three fields: TIMESTAMP, DESC (Description), and RPTTYPE (Report Type). You can use all the index field query methods on these fields. For more information, see Single-application searches, page 42.

4. Click **RUN** to run the query.

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

5. In the **Query Results** page, select the report that you want to view and then click **Open** on the context menu.

   The report appears in the Document Viewer.

You can navigate through the pages of the report and then email them.

Viewing and editing Microsoft Office files

You can use ApplicationXtender Web Access to view and edit Microsoft Word, Microsoft PowerPoint, and Microsoft Excel documents.

1. In ApplicationXtender Web Access user profile settings, select the **Open Office documents in Office Online Server** check box.

2. Open a Microsoft Office document from the query result set or upload a new document. The document content is presented within the embedded Office Online Server (OOS) viewer.

3. To edit the document, click **Edit in Browser**.

4. To stop editing, click **View** > **Document Views** > **Reading View**. The modified document is uploaded to a temporary storage location.

5. When you are finished, click the **Save to AX** icon. The document is saved as a new page version.

   Note: You can edit only one Microsoft Office document at a time in OOS. When editing a document, you cannot open another ApplicationXtender document, page, or page version. If you choose to navigate to another document, you will receive a prompt to stay and save or leave the document without saving.

   OOS only supports editing of OpenXML format (.docx, .xlsx, .pptx), not binary format (.doc, .xls, .ppt).

6.

7.

Chapter 6

Managing Documents

A full range of document management functionality is available in ApplicationXtender Web Access, including the ability to print, email, delete, and export documents and pages. You can also modify the index field values of documents.

Using the email functionality

You can email selected documents either as inserted files or links. You can access the email functionality from the **Query Results** page or within Document Viewer.

Note: You can save email messages in MSG or EML format and open them in an email client such as Outlook. You do not need to register your email address in this mode. The ApplicationXtender system administrator enables the **Save Mail to Client** setting to enable you to use this mode.

Caution: If your WX server has Outlook x64 installed, the client email for MSG format will not work due to compatibility issues. To resolve this, perform one of the following actions.

- Uninstall Outlook 64bit and install Outlook 32bit.

or

- Uninstall Outlook 64bit and rerun the Web Access Installer. It will install the CDO component.

Registering email addresses

Before you can email documents, register your email address in the system.

1. In the **Mail Registration** dialog box, type your email address in the SMTP format (yourname@yourcompany.com).
2. Click **OK**.
3. After the system processes and adds your email address into the repository, it sends a confirmation code to the registered email address.
4. Open your email client and check for a message with the ApplicationXtender Web Access Email Registration ID. Open the message and copy the confirmation code from the message.

5. Return to the **Mail Registration** dialog box and paste the confirmation code in the corresponding text box.

   Note:

   - If you accidentally delete the email message before copying confirmation code, click **Resend confirmation code to the supplied email address** to have another confirmation code sent to the registered email address.
   - Always use the most recent confirmation code.

6. Click **OK**.

   The **Mail Document** dialog box appears where you can specify the details for emailing documents.

For more information, see Emailing selected documents, page 50.

Changing the registered email address

If your email address changes, update your registered email address with the new address.

1. From the **Query Results** page, select the documents that you want to email.
2. Click **Email** on the toolbar.
3. In the **Mail Document** dialog box, click the **Change** link.
4. In the **Mail Registration** dialog box, replace the current email address with your new email address.
5. Click **OK**.

Saving email

You can save unsent email messages as MSG or EML files. You can then open the saved messages in an email client application and send it at a later time.

1. From the **Query Results** page, select the documents or pages that you want to email.
2. Click **Email** on the toolbar.
3. Select **All Pages** or specify a page range.
4. Type a subject and the body of the message.
5. Select the email options.
6. Select either **MSG Format** or **EML format**.
7. Click **EMAIL**.

Creating new page versions

ApplicationXtender Web Access enables you to save up to 255 versions of a single document page.

1. Locate the document to which you want to add pages, by querying the corresponding ApplicationXtender application.
2. From the **Query Results** page, select the document and then click **Open** on the context menu.

   The first page of the document appears in the Document Viewer.
3. Select a page by using the page thumbnails, click the **Page** menu on the toolbar and then select **New Version**.
4. In the **New Page Version** dialog box, browse and select an electronic file.
5. Click **UPLOAD**.

   ApplicationXtender Web Access displays the new version of the page. If you have uploaded more versions, you can view the total number of versions for the page and also move from one version to another.

Moving or copying document pages

ApplicationXtender Web Access enables you to move or copy document pages between ApplicationXtender applications. It processes the pages as a new batch in the target application. You must have the *Batch Scan* privilege for the target application and the *Delete Page* privilege for the source application to move pages. The *Batch Scan* privilege for the target application is sufficient to copy pages.

1. Locate the document to which you want to add pages, by querying the corresponding ApplicationXtender application.
2. From the **Query Results** page, select the document, and then click **Open** on the context menu.
3. Select the document page by using the page thumbnails, click the **Document** menu on the toolbar, and then select **Copy or Move Pages**.
4. In the **Copy or Move Pages to New Batch** dialog box, specify the following:

Field	**Description**
Document Pages	The page number of the page you want to move or copy. To specify a continuous page range, insert a hyphen between the first and last page. Example: 1-4. To specify separate pages, insert a comma between each page. Example: 2,4.

Field	Description
	To specify different page ranges, insert a comma between each range. Example: 1-2, 5-9.
Include Page Versions	Move or copy all versions of the selected pages. **Note:** If you move or copy multiple versions of a one-page document, ApplicationXtender Web Access converts the page versions to separate pages in the target application.
Target Application	The application to which you want to move or copy the pages.
Batch Name	The name of the batch.
Index New Document	Index the batch immediately after moving or copying the pages. If you do not select this option, select the batch from the **Uploaded Batches** list when you are ready to index the batch.

5. Click **MOVE** if you want to move the selected pages from the source application.
6. Click **COPY** if you want to leave a copy of the pages in the source application.

Exporting documents

1. Open a document from the **Query Results** page.
2. Select **Export Document** from the **Document** menu.
3. In the **Export Document** dialog box, select the pages that you want to export: all pages, current page, or a range of pages.
4. Select **Hide Annotations** to avoid exporting the annotations on the page.
5. Click **EXPORT**.

After the export, the browser window displays the name of the downloaded document. The **Export Document** dialog box displays the log. The file is automatically downloaded to the downloads folder. You can save the file in another location, if required.

Adding pages to ApplicationXtender documents

1. Locate the document to which you want to add pages, by querying the corresponding ApplicationXtender application.
2. From the **Query Results** page, select the document, and then click **Open** on the context menu.
3. To append new pages to the end of the document, drag and drop the electronic file or files from your desktop into the open document area.

4. To insert the new pages before or after a particular page in the document:
   a. Select the page thumbnail. The page appears in the Document Viewer.
   b. From the **Page** menu, select **New Page**.
   c. In the **Add New Page** dialog box, browse and select the electronic file that you want to append to the document.
   d. Select the position where you want to add the new pages.
   e. Click **UPLOAD**.

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

When you add a mail file (.MSG format) to a document, you can choose to add the mail attachment as new pages. When you do so, the new uploaded file will be split into several pages, depending on how many attachments the file has. The user setting **Import Email Attachment as New Page** enables or disables this function.

Scanning pages to documents

You can also add pages to batches by scanning (New Page, Replace Page and New Version).

For New Page operation, you can scan and insert the scanned pages before or after the current page, or append to the current document.

For Replace Page , you can scan and replace the current page with the scanned page (only the first page scanned is used to replace the current page).

For New Version , you can scan and create a new page version for the current page (only the first page scanned is used to replace the current page version).

Field masking

ApplicationXtender administrators can use a **validation mask** to specify the exact format (character pattern) required for each text index field that is associated with an application. If the administrator selects the **Validation Mask** option for a text field (in ApplicationXtender Administrator), ApplicationXtender performs a character-by-character validation of each value that you specify for an index field during the document indexing process. This action ensures that data is stored in the database in the designated format.

ApplicationXtender extends the concept of field masking to enable administrators to mask field **display** values. This feature prevents you from viewing confidential data in index fields.

You can view the index fields when you view documents from the **Query Results** page. The masked field values are not visible in the ApplicationXtender Web Access user interface, regardless of user permissions. An asterisk (*) appears in place of each masked character in the index field. You can modify the index values for masked fields, but you cannot view the original value.

Modifying index field values

If you have the appropriate permissions, you can access ApplicationXtender documents and modify their index field values. For information about indexing instructions, see Indexing batches manually, page 36 and Using the Auto Index feature, page 39.

1. From the list of applications, select an application and run a query.
2. From the **Query Results** page, select the document, and then click **Open** on the context menu.

   The first page of the document appears in the Document Viewer. If you have selected **Show Index View** under **Index** in the **User Settings** page, the current index values for the document also appear in the index fields. Otherwise, click the arrow icon on the center right of the page to open the index view.
3. Click **MODIFY**.
4. Make the necessary changes to the index data.

   Note: If you have selected **Enable Dual Data Entry** under **Index** in the **User Settings** page, type the relevant field values twice to validate the value.
5. Click **SAVE**.

Batch deleting documents

If you have **Delete Doc** and **Retention Administrator** permissions on an application, you can batch delete the documents in that application.

1. Select an application from the list.
2. Click the plus (**+**) symbol in the upper right corner, then **Retention Administration**.
3. In the **SELECT MODE** tab, select **Dispose of documents from the application** then click **NEXT**.
4. In the **SEARCH DOCUMENTS** tab, input the query criteria and click **NEXT**.

   Note: The default maximum number of query results retrieved per query is 1000. You can change the value of **MaxQueryResults** in the file `web.config` to change the maximum number of query results retrieved per query.
5. In the **SELECT DOCUMENTS** tab, select the radio button **Process all documents found** or select the documents you want to delete and click **RUN**.
6. In the **PROCESS RESULT** tab, click **FINISH** or **RESTART** to end the process.

Chapter 7

Annotations

ApplicationXtender Web Access enables authorized users to attach annotations to ApplicationXtender 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 PDF files.

Note: If your user account includes annotation group options but does not give you individual annotation privileges, set the annotation group as the default to be able to use the annotation features. The ApplicationXtender system administrator can specify this setting for your user account in ApplicationXtender Administrator.

You can customize annotation properties to create the effects that you want. For example, you can change the line width and colors of annotations. Or you can use the filled setting with the redaction feature to make annotations opaque to block sections of a document from view. A show/hide feature enables you to view or hide annotations with a click. You can also save or delete annotations.

There is no limit to the number of annotations you can place on a page; however, many annotations might slow or distort page rendering.

In addition to placing multiple annotations on an image, you can overlap annotations, extending one annotation over another. A new annotation, if added to overlap an existing one, is placed on the top or front “layer” of the page. The existing annotation is placed on the bottom or back “layer” of the page.

Note: When overlapping annotations, create the annotations by using the redaction feature so that the colors appear opaque. Otherwise, the colors appear transparent and you might be unable to distinguish between the two annotations.

Annotation types

There are five types of annotations that you can add to ApplicationXtender documents:

- **Line annotations**: These include the straight line, the freehand line, the arrow, and the polyline.
  - You can use the freehand line feature to draw curved lines, straight lines, and combination lines (lines with curved parts and straight parts).
  - A polyline consists of a series of straight 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. You cannot fill color to a shape that you create with the polyline annotation. To create a custom shape by using straight lines and a fill color, use the polygon shape annotation.
- **Shape annotations**: These include the rectangle, the rounded rectangle, the oval, and the polygon.

A polygon consists of a series of connected straight lines that form a closed shape. You can fill polygon annotations with color. This option also enables you to create asymmetrical shape annotations with a number of user-defined sides. The nodes that define the polygon do not have to be in alignment.

Shape annotations have a fill color and a line color.

- **Highlight annotations**: These are similar to rectangle annotations, except that they have no fill color and you cannot configure the default color.
- **Text annotations**: These have both fill color and line color configuration options, and can be displayed as either text or icons.
- **Rubber stamp annotations**: These include rubber stamp annotation attributes such as type (text or image) and content (text string or embedded bitmap) as well as the standard annotation attributes.

  Note: Rubber stamps become available for use only after the ApplicationXtender system administrator creates and configures them.

Annotations can be transparent or nontransparent (opaque). Lines, shapes, highlights, and rubber stamps are transparent by default. Text annotations are nontransparent by default. You must have *redaction privileges* to create and modify nontransparent annotations.

Creating line and shape annotations

Before you create the line and shape annotations, configure their properties by using the format settings available on the toolbar.

Configuring annotation properties

The first step to create 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. You can also modify the default line width, by making it broader or narrower.

Note: Default colors for text annotations are set separately. For more information, see Creating text annotations, page 73.

You can	Description
Set line width settings for line and shape annotations	Click the **Line Width** icon on the **Format** toolbar and select a width of your choice.
Set shape line and fill colors for line and shape annotations **Note:** Set the default colors before creating the annotation.	Click the **Line Color** icon on the **Format** toolbar to select the line color. Click the arrow next to the **Change Fill Color** icon on the **Format** toolbar to open the color palette and select the fill color.

You can	Description
Change the color for highlight annotations after you create them	The default color for highlight annotations is yellow. You cannot change this setting. After you create a highlight annotation, you can change the highlight color from the **Annotation Properties** dialog box.
Set the fill property	This property enables you to fill an annotation with a selected color, rather than using only a line color to show the outline of the annotation. **Note:** You can change the default line width settings from the **Annotation Properties** dialog box. For more information, see Modifying annotations, page 74.
Set the redaction property	This property enables you to hide parts of a document by changing the view from transparent to opaque. **Note:** You can change the default line width settings from the **Annotation Properties** dialog box. For more information, see Modifying annotations, page 74.

Adding annotation types

After configuring annotation properties, you can add different types of annotations to an ApplicationXtender page. You can apply text, line, shape, or highlight annotations that emphasize a specific area of the image. You can also apply rubber stamp annotations created by the ApplicationXtender Administrator.

You can add	Description
Line annotations	Click the **Line** icon on the **Annotation** toolbar. To select a different line, click the down-arrow icon next to the **Line** icon and choose a line from the list box. **Note:** When a polyline is complete, double-click to complete the action.
Shape annotations	Click the shape icon (for example, the **Oval** icon) on the **Annotation** toolbar. To use a different shape, click the down-arrow icon next to the shape icon and select a shape from the list box. **Note:** When a polygon shape is complete, double-click to complete the action.

You can add	Description
Highlight annotations to emphasize or bring attention to a particular area of an ApplicationXtender document	Click the **Highlighter** icon on the **Annotation** toolbar and drag the mouse pointer from a starting point to an endpoint. As you drag the pointer, a new annotation appears on the page. New highlight annotations appear in yellow by default.
Fill annotations	You can set the default fill color for shape annotations. When you create an annotation shape without selecting the filled setting, only the outline of the shape appears on the page. When you fill shape annotations with color, the fill color is transparent; you can see the page through the color. If you click both the **Fill Color** and the **Redaction** icons on the **Format** toolbar before creating the annotation, the fill color appears opaque, hiding the part of the page underneath the shape.
Redactions	The redaction feature causes colors to appear opaque instead of transparent. If you click the **Redaction** icon on the **Format** toolbar before you create a line or shape annotation, the line or shape outline appears opaque. You can add redactions along with the fill color option to block areas of images or text pages.

After you add annotations, click the **Save Changes** icon on the **Actions** toolbar.

Interaction between redactions and OCR/full-text

When applying redaction annotations, keep these 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 Index Agent.
- If you use an annotation with redaction to hide text in a PDF file and then submit the PDF file to Index Agent for full-text indexing, the text that is hidden behind the redaction is not removed. 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 the search criteria.

  Note: Redaction on PDF files is not supported.

Creating text annotations

When you attach text annotations to documents, the text appears on the document page inside a box. Both the text and the box are nontransparent by default.

Note:

- You must have redaction privileges to create and modify nontransparent text annotations.
- You must have the *Global Annotations* privilege to view or modify a text annotation that another user creates.

To create a text annotation

1. Open the document that you want to annotate and click the **Text** icon on the **Annotation** toolbar.
2. Click the location on the image where you want to place the comment.
3. In the **Add Text Annotation** dialog box, specify the following:

Field	Description
Annotation Text	The text that you want to use as the comment.
Font	The font size, color, and other properties you want to apply to the text.
Display as Icon	Displays the textual comment as an icon.
Set as Default	Saves the current specifications as the default setting.

4. Click **OK**.

Rubber stamp annotations

Rubber stamp annotations are predefined annotations that you can use to describe certain events. For example, you can have a rubber stamp that says “Added by <Username> on <Date>” where *Username* and *Date* are populated by your name and the date on which you have added the annotation. Some rubber stamps can be composed of an image so that you can place a signature, or other relevant graphic images, on a document page.

Note: The ApplicationXtender system administrator must create and configure rubber stamps before they are available for use. Only users with appropriate privileges can control rubber stamp annotation features.

Adding rubber stamp annotations

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. Open the document that you want to annotate and click the **Rubber Stamp** icon on the **Annotation** toolbar.
2. From the **Select a Rubber Stamp from the list** dialog box, click the rubber stamp that you want to use.
3. Click **OK**.
4. Point the cursor to the location in the open document where you want the rubber stamp to appear and click.
5. Click the **Rubber Stamp** icon on the **Annotation** toolbar to cancel the rubber stamp function.

Hiding annotations

For security reasons, you might want to hide annotations when you display, print, email, or export annotated documents. When you complete one or all of these activities, you might want to reveal the hidden annotations.

Only users with appropriate privileges and appropriate annotation group options can hide annotations. The annotation group to which you are assigned must be set as the default for you to be able to use the annotation features. Users with annotation groups options can hide only those annotations that are assigned to the group.

Note: For information about assigning privileges to a user profile, see the *OpenText ApplicationXtender Administration Guide*.

To hide annotations when	Click
Viewing a document	The **Show/Hide** icon on the **Actions** toolbar. To display the hidden annotations, click the **Show/Hide** icon again.
Printing a document	**Print** on the menu bar. To hide the annotations, select the **Hide Annotation** option in the **Print** dialog box. Then click **Print**
Emailing a document	**EMAIL** on the menu bar. To hide the annotations, select the **Hide Annotation** option in the **Mail Document** dialog box. Then click **Send**
Exporting a document	**Export** on the menu bar. To hide the annotations, select the **Hide Annotation** option in the **Export Document** dialog box. Then click **Export** For more information, see Exporting selected COLD documents, page 50.

Modifying annotations

You can modify the properties of an annotation after it has been added or saved on an image or a document. Only users with appropriate privileges can modify annotations.

Note: If you have created and saved annotations while the CM security provider was in use and you are now using the Windows security provider, you must have both the *Global Annotations* and *Edit Annotations* privileges assigned to your profile before changing the security provider.

To	Click the Select icon on the Annotation toolbar and
Select annotations	Click the annotation.
Change the location of annotations	Click the annotation and then drag the annotation to a new location. To move multiple annotations, press the **Ctrl** key and then click the relevant annotations.
Resize any type of annotation	Select the annotation, and then use the mouse pointer to resize the annotation.
Modify annotations	Select the annotation, right-mouse click, and then select **Properties**. The **Annotation Properties** or the **Edit Text Annotation** dialog box (depending on the annotation type that you are modifying), displays the properties associated with the annotation. Changes the properties of the annotation as applicable. **Note:** The dialog boxes also provide information about annotation. If the annotation is assigned to an annotation group, the name of the annotation group is provided. If the ApplicationXtender system uses the Windows security provider, the domain name is also provided along with each username.

After you modify annotations, click the **Save Changes** icon on the **Actions** toolbar.

Deleting annotations

If you have the appropriate privileges, you can remove annotations from a page by deleting them. To remove an annotation, select the annotation, right-click, and then select **Delete**.

Note: If you have created and saved the annotations while the CM security provider was in use and you are now using the Windows security provider, you must have both the *Global Annotations* and *Edit Annotations* privileges assigned to your profile before to the change in the security provider.

Managing annotation security

You can manage the security for ApplicationXtender rubber stamp annotations in ApplicationXtender Web Access or ApplicationXtender Document Manager. All other annotation security functions are performed in ApplicationXtender Administrator and ApplicationXtender Document Manager.

For more information, see the *OpenText ApplicationXtender Administration Guide*.

Configuring rubber stamp security

If you are an ApplicationXtender system administrator and have access to the _RSTAMP application, you can edit the name, application, user or group access, and description for rubber stamp annotations.

Note: You must have the Administrator privilege in your ApplicationXtender security profile to be able to access the _RSTAMP application.

To configure rubber stamp security:

1. From the list of applications, select _RSTAMP.
2. Click **New Query**.
   - To search for a particular rubber stamp, add the search criteria to the index fields.
   - To view all available rubber stamps, do not specify any search criteria.
3. Click **Run**.
4. From the **Query Results** page, select the rubber stamp that you want to configure, and then click **Open** on the context menu.

   The document opens in the Document Viewer in the index view.
5. Click **MODIFY** and change the index fields as needed. This table describes each index field and its effect on rubber stamp annotations.

Index field	Description
NAME	A name for the annotation, the way it must appear in the **Name** column of the **Select a rubber stamp from the list** dialog box. The actual content of rubber stamps must be changed within ApplicationXtender Document Manager.
DESC	A description for the annotation, the way it must appear in the **Description** column of the **Select a rubber stamp from the list** dialog box.
APP	The name of the specific application for which the rubber stamp is created. If you do not specify a name, the rubber stamp is used in all applications. To enable global usage, the ApplicationXtender system administrator must configure the **APP** field as non-required within the _RSTAMP application. For information about modifying applications, see the *OpenText ApplicationXtender Administration Guide*.

Index field	Description
USER	The names of the individual users or user groups who can use the rubber stamp. Do not specify the names if you want to allow all users to access the rubber stamp. To enable global usage, the ApplicationXtender system administrator must configure the **USER** field as non-required within the _RSTAMP application. For information about modifying applications, see the *OpenText ApplicationXtender Administration Guide*.
DOMAIN	If the underlying ApplicationXtender system uses the Windows security provider, indicates the name of the domain associated with this rubber stamp. Do not specify a value of if you want to make the rubber stamp available to all domains. If the ApplicationXtender system uses the CM security provider, leave this field blank. For more information about security providers, see the *OpenText ApplicationXtender Installation Guide*.

6. Click **SAVE**.

Chapter 8

Working with Document Retention

ApplicationXtender Software Retention Management is a licensed feature that protects documents from loss, whether accidental or malicious. This feature also ensures that documents are retained in an ApplicationXtender repository for a specified period, in accordance with legal, regulatory, fiscal, and operational requirements.

Note:

- The retention administrator creates retention policies that determine the duration for which documents must remain in the ApplicationXtender repository and also manages documents under retention.
- You cannot file documents that are imported from ApplicationXtender Reports Management for retention in ApplicationXtender Web Access.
- You cannot file a document for retention if it is checked out.

Retention concepts

ApplicationXtender Web Access displays the retention options if your application is configured for ApplicationXtender software retention and Retention Administrator or Retention User permission is granted to your user account.

Note: You do not need Retention Administrator or Retention User permission to query a retention-enabled application for documents by retention status or by retention hold status. To search for documents under retention, select an option from the **Show** list box in the search page.

You cannot modify or delete the documents that are filed for retention until the expiry of the retention period. After the end of the retention period, the retention administrator determines whether to remove the document from the ApplicationXtender repository or to retain the document in the repository as a writable document.

Documents under retention are in the read-only mode. You cannot check the documents out of the ApplicationXtender repository to change, however, you can use these ApplicationXtender features to create a new copy of the document:

- The *Copy or Move Pages* feature. For more information, see Moving or copying document pages, page 65.
- The *Export* and *Import* features. For more information, see Exporting selected COLD documents, page 50 and Adding pages to batches, page 33.

Note: You can modify a copy of a document because retention configuration information that is associated with the original document is not preserved in the copy.

ApplicationXtender also provides a **retention hold** feature, sometimes called a litigation hold, that lets you further protect a document that is under retention. A retention hold prevents a file from being deleted from the ApplicationXtender repository, even if its retention period has expired. In effect, a hold acts like an indefinite retention of a file. Users cannot delete an expired file until the hold is removed

Filing documents for retention

You must be granted Retention Administrator or Retention User permission to file documents for retention.

1. From the **Query Results** page, select the document or documents that you want to file for retention.
2. Click **Retention > File For Retention** on the menu bar.

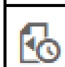
   In the **Retention** dialog box, you can view the ID of the selected documents and the retention expiration date of the default policy.
3. Select a retention policy from the list box.

   The expiration date of the retention policy changes according to the policy that you select.

   Note: If multiple retention policies have been configured, you can select a policy other than the default value only if **Override Default Retention Policy** is selected in the Retention Management Configuration Utility wizard or your user account has the Retention Administrator permission.
4. To apply the retention setting to previous versions of the document, select **File all previous document revisions**.

   The document along with its previous versions are added to the retention table.
5. Click **FILE**.
   - If you have filed the latest version of a document for retention, the status of the document changes to indicate that it is now the latest version under retention.
   - If you have filed a previous version of a document for retention, the status of the document changes to indicate that it is now the previous version under retention.

   The retention icons in the **Query Results** page identify the document status.

Icon	Description
	Specifies that the latest version of the document is under retention
	Specifies that the previous version of the document is under retention

Managing documents under retention

While a document is under retention, you can change the retention period or place a retention hold. A retention hold status overwrites the retention period. You must be granted Retention Administrator permission to manage documents that are under retention.

1. From the **Query Results** page, select a document or documents under retention.
2. If you want to extend the retention period, click **Retention > Change Retention Period** and select a new retention policy.
3. If you want to place a retention hold, click **Retention > Place Retention Hold** and type a hold label for the selected documents.
4. If you want to remove a retention hold, click **Retention > Remove Retention Hold**.

The retention icons in the **Query Results** page identify the document status.

Icon	Description
	Specifies that the latest version of the document is on retention hold.
	Specifies that the previous version of the document is on retention hold.

Retention Administration wizard

The Retention Administration wizard enables you to manage multiple documents in a retention-enabled application. You must be granted Retention Administrator permission to use the wizard.

1. From the list of applications, select the application for which you want to manage documents.

   Note: If you select an application that has no saved queries, the **New Search** page appears. Either run a query or cancel the **New Search** page to have access to links or to the main panel of the view, both of which enable you to perform document, batch, and query operations.
2. Click the file cabinet drawer icon in the toolbar and select **Retention Administration**.
3. In the **SELECT MODE** page of the wizard, specify an action that you want to perform.

Option	Description
Dispose of documents from the application	Permanently deletes the contents of selected documents from the application. The disposed content is not recoverable.
Remove hold on retention hold documents	Returns documents that are on retention hold status back to under retention status.
Clear retention setting on documents under retention that have expired	Resets the status of expired documents so that they are no longer under retention and can again be edited and deleted.

Option	Description
Dispose documents under retention that have expired	Permanently deletes the contents of documents with an expired retention period from the application. The disposed content is not recoverable.
Export and dispose of documents under retention that have expired	Exports and then deletes the contents of documents with an expired retention period from the application. The disposed content is not recoverable. Options include: • The UNC path to save the exported files to • Specifies whether to delete the contents of the selected documents permanently after export. The option is enabled by default. • Specifies whether to generate the Index Image Import script file for exported documents. The option is disabled by default.

4. In the **SEARCH DOCUMENTS** page of the wizard, specify the query criteria to search for the documents on which you want to perform the operation.

   Some query options are overridden and set to a fixed value.

If you selected:	Then the query criteria is set to:
Dispose of documents from application	All documents, except for those documents on retention
Remove hold on retention hold documents	Only documents that are on retention hold
All other options	Only documents that are on retention, but are not on retention hold

5. In the **SELECT DOCUMENTS** page of the wizard, review the query results and specify selected documents or all documents to process.
6. In the **PROCESS RESULT** page of the wizard, click either:
   - **FINISH** to return to the application page
   - **RESTART** to return to the **SELECT MODE** page of the wizard