



**END USER  
MANUAL FOR  
SERIES 6**



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## **INTRODUCTION TO SERIES 6**

## WHAT IS SERIES 6?

Series 6 is an Electronic Document Management System (EDMS), which manages all documents and communications arriving on your desk; paper, e-mails, web pages, faxes and electronic files. Using Series 6 you can rapidly scan, import, file, retrieve and track all these documents via an easy-to-use and simple mode.

Whether access is required to customer files, invoices, correspondence or to solve a compliance problem, Series 6 provides the answer to all kinds of administrative requirements. The product is based on the most up-to-date technology providing both huge scalability and future integration options.

## GUIDE INTRODUCTION

This guide is intended to introduce Series 6 and help get you started.

You will learn how to:

- Switch to different Series 6 view Modes
- Navigate the system
- Understand the concepts
- Bring documents into Series 6
- File documents away
- Quickly and effortlessly retrieve documents through Search and Explore
- View the contents of a selected document
- Make changes to a selected document

## **GETTING STARTED**

## ACCESSING SERIES 6

### Open Series 6

To launch Series 6 double click the Icon which will be located on the desktop.



You will be automatically login to Series 6.

### Close Series 6

Click the button in the top right corner of window/toolbar (applies to all modes).

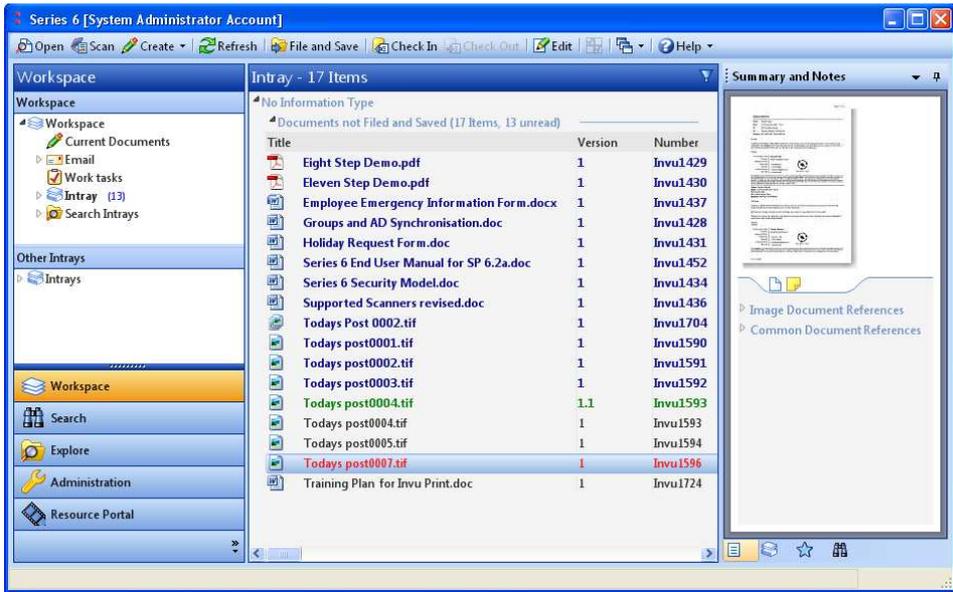
## THE SERIES 6 MODES

When you open Series 6 you will be presented with one of three modes. Depending on the privileges given by the System Administrator you may have them all or just one. The three modes are:

- Simple
- Standard
- Advanced

| Mode Name | Screen Shot |
|-----------|-------------|
| Simple    |             |

The Simple mode provides a simplified way of working with Invu. Search, My Work, Scan, Create and Resource Portal are the 5 main functions which are displayed as tabs across the top of the screen and each, in turn, has been uncomplicated with minimal options to confuse. A Simple Mode user does not have the ability to Explore or configure Series 6 through Administration in this mode.

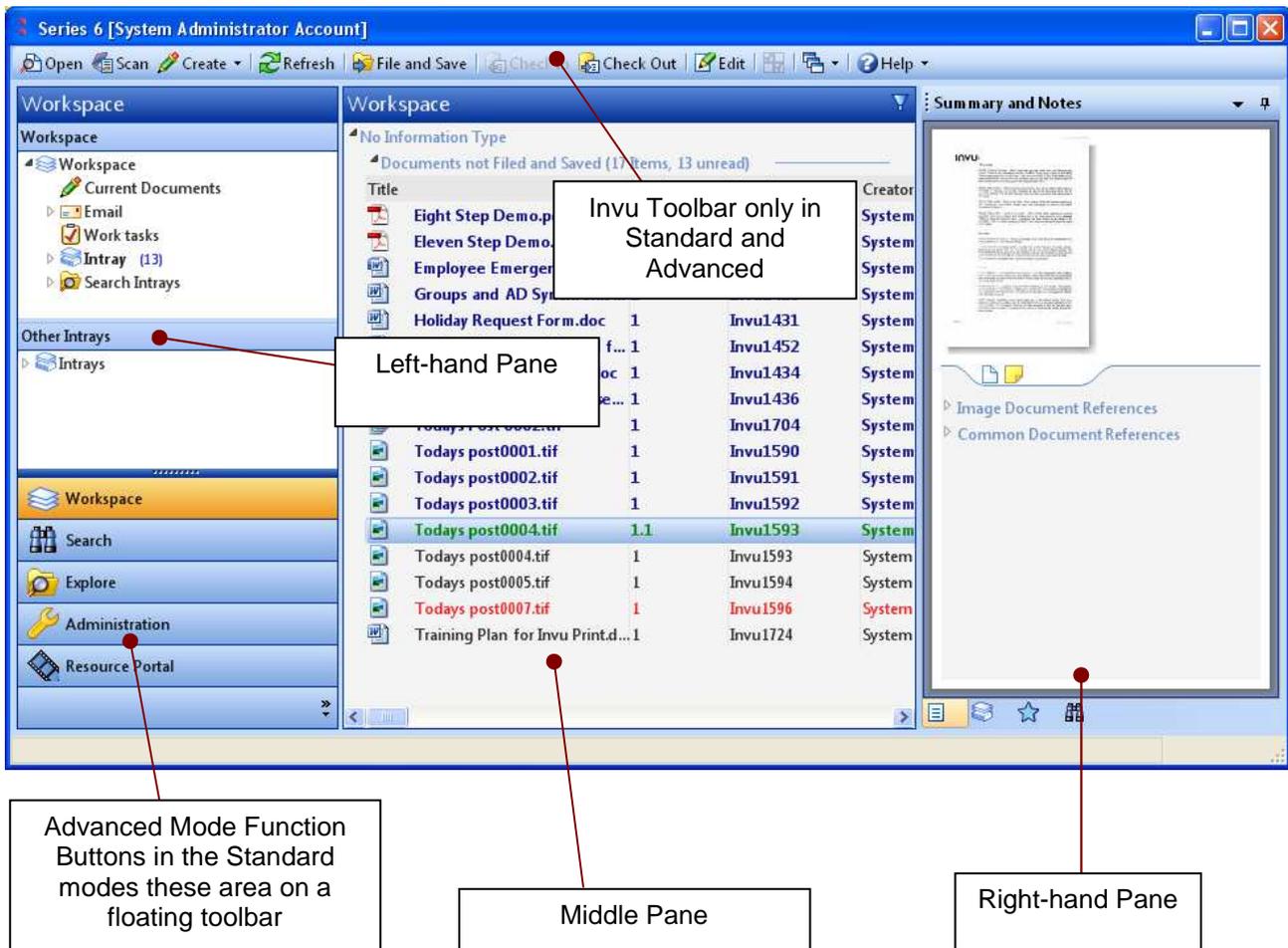
|                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                     |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| <p>Standard</p>                                                                                                                                                                                                                                                                                                                                                                                |    |
| <p>The Standard mode has been provided with a floating toolbar. Full functionality is available in the Standard mode Workspace, Search, Explore, Administration and Resource Portal. Each Icon is presented in its own independent window.</p>                                                                                                                                                 |                                                                                     |
| <p>Advanced</p>                                                                                                                                                                                                                                                                                                                                                                                |  |
| <p>The Advanced mode is contained within a single window. The style of the window has a similar feel to Microsoft Outlook giving you an environment that you may be familiar with. Full functionality is available in the Advanced mode Workspace, Search, Explore, Administration and Resource Portal. These Five functions are displayed as buttons on the left-hand side of the screen.</p> |                                                                                     |

## Switching Modes

Depending on the privileges set by the System Administrator you may be able to switch between Simple, Standard and Advanced Modes.

Click the arrow to the right of the **View options**  icon and choose the mode to switch to. The view will then change accordingly. The mode you choose will be remembered as your chosen start mode.

## SERIES 6 SCREEN LAYOUT



**Invu toolbar** - enables the user to choose what action to carry out on a selected document such as View or Scan. In the Simple Mode you can get access to these options via the right click menu.

**Left-hand pane** - shows the areas you can browse and if in the Search window, options on where and what to search on will be displayed. The Other Intrays section is only available in the Standard and Advanced mode and if you have the correct privileges.

**Middle pane** - allows the user to view results from a search and browse documents which can then be Viewed, Edited etc.

**Right-hand pane** - this will allow the user to browse the File and Save information of a document, list favourites, view In tray shortcuts and when using the Search function, the location pane to locate a document.

**Function Buttons** - enables the user to switch between functions within the Advanced mode. In Standard mode these are displayed as a floating toolbar.

## Using the Right-hand pane

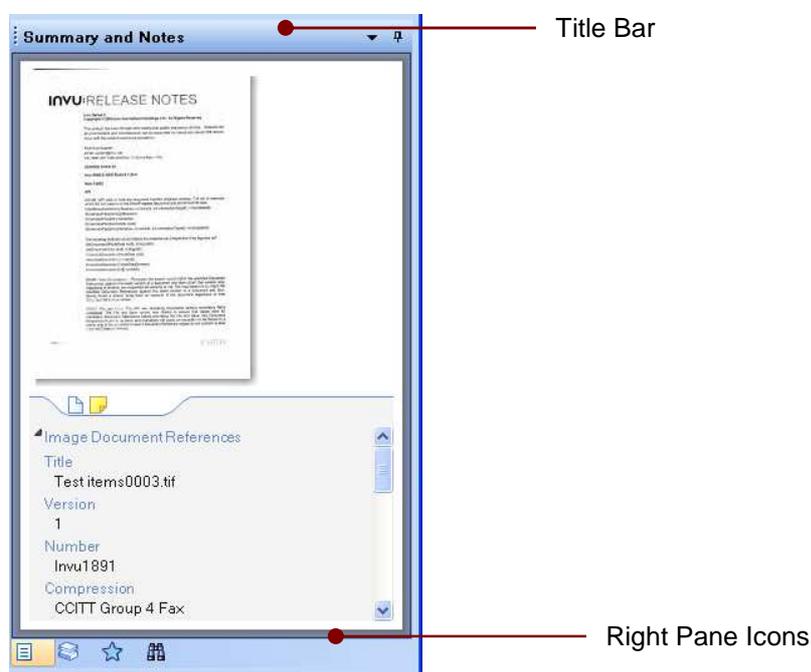
The Series 6 Right-hand pane enables the user to display information and notes on selected documents, view shortcuts to both user & folder Intrays and shows the user's favourites. The Right-hand pane is available in all 3 modes Simple (through the 'Search' and 'My Work' tabs), Standard and Advanced in all functions apart from Administration.

There are four different panes to choose from as follows:

- **Summary and Notes**
- **Intray**
- **Favourites**
- **Location**

Below these are explained in turn in this section.

### The Pane Layout



### The Title Bar

The Title Bar within the Right-hand pane displays the name of the pane which is open i.e. Summary and Notes Pane.



 The Right-hand pane menu will allow the user to select which pane to display.

 The **Auto Hide** icon enables the user to choose if the pane remains open permanently (pinned) or automatically hides when not in use. By default the Auto Hide icon is switched off, which means the Right-hand pane always remains open.

To hide the pane click the **Auto Hide**  icon (unpin) and the Right-hand pane will hide straight away leaving a small pane of controls.

To view a pane in Auto Hide mode move the mouse pointer directly over any Right-hand pane icon required this will automatically slide out. It will also Auto Hide when not in use by sliding back.

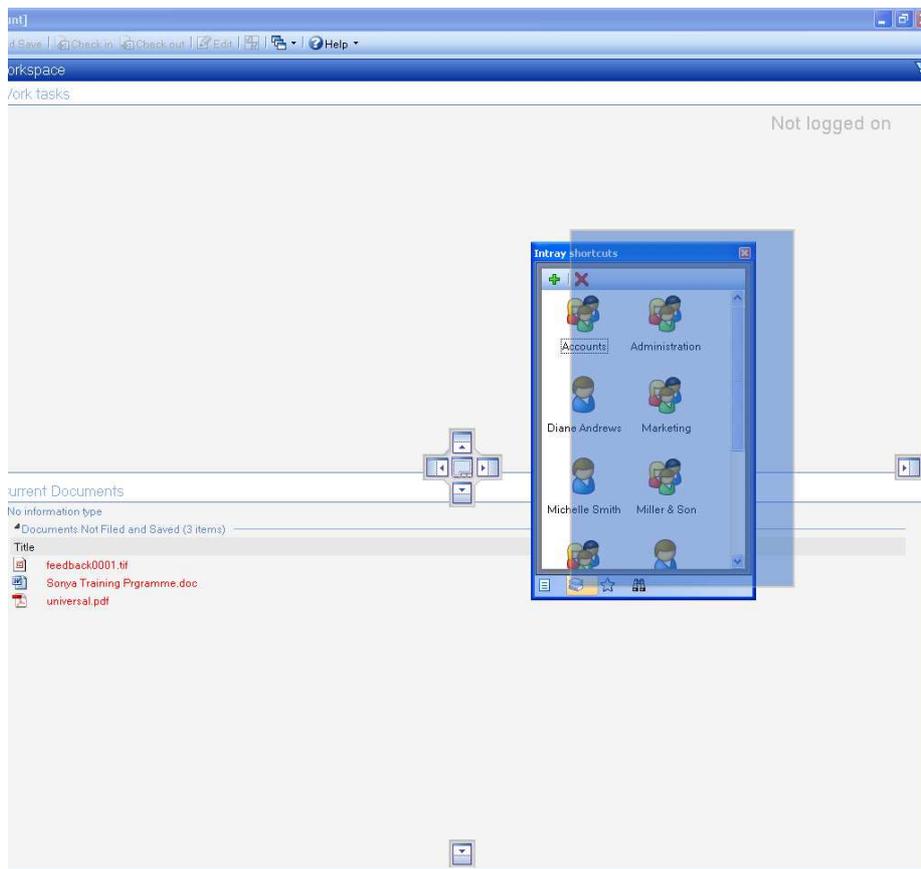
To turn off Auto Hide click the  icon.

### To move the Right-hand pane

The Right-hand pane can be placed to the bottom, right or as a floating window in Invu.

This pane by default will appear on the Right-hand side. To move the pane to another position on the screen, move the mouse to the title of the pane i.e. Summary and Notes

Click on the heading and drag the mouse pointer and the screen will change as below.



Move the mouse over the appropriate marker and release the mouse. The pane will then snap to its new position.

## Summary and Notes Pane



Click the Summary and Notes icon, here you will be able to view information and notes on a selected document.

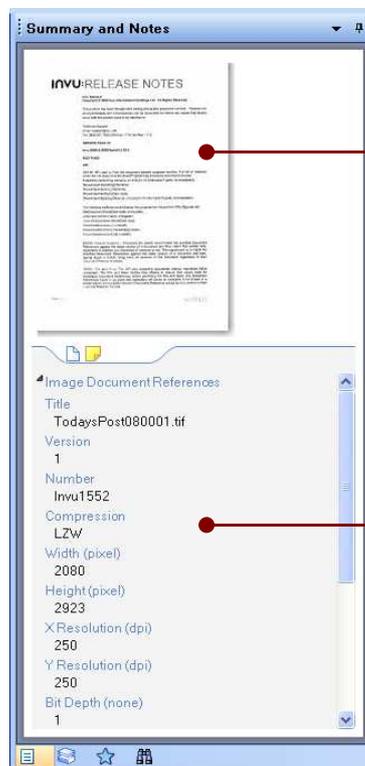
The Summary and Notes pane has two main options which are located under the Thumbnail image or image icon:

- **Summary**
- **Notes**

## Summary Pane



Click the **Summary** information icon to show the detail of a document selected such as a **Thumbnail** image (depending on the document) and **Document Reference** information such as File and Save information (if the document has been filed away) and also a set of other document references. The information may change depending on the document selected and its location.



Thumbnail or  
Icon image

Document  
References

## The Thumbnail

A thumbnail will show a mini picture of the first page of the file. The thumbnail is generated when the file is brought into Series 6 depending on the format and settings. If a thumbnail is not generated for a file then an icon image is shown instead. Below is how Series 6 determines whether a thumbnail should be created or not.

Images files such as **.jpg**, **.tif**, **.bmp** etc will always have a thumbnail.

Email files **.msg** will not have a thumbnail instead an icon picture  will be displayed.

Text (**.txt**) or delimited (**.csv**) file types will not have a thumbnail instead an icon picture will be displayed. PowerPoint files will always display a thumbnail image.

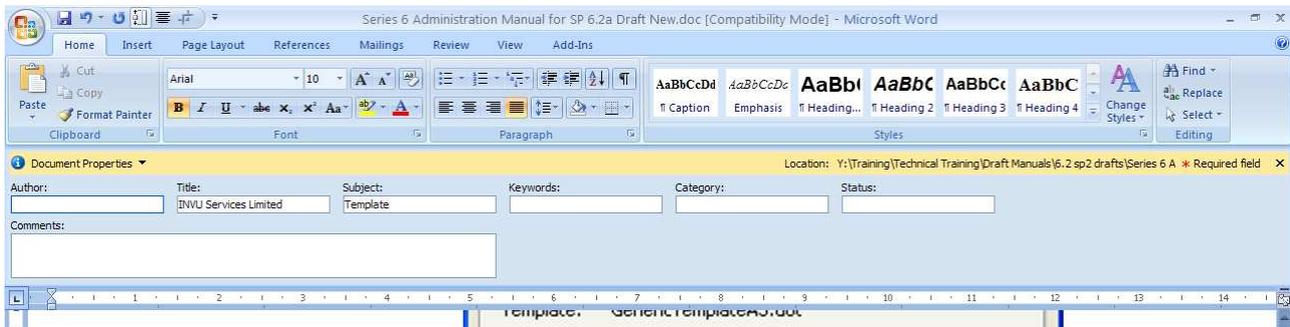
Office documents Word and Excel will only show a thumbnail if the Office properties are set to show a preview picture.

To turn on the Preview picture option in 2003, open the Word or Excel file then click the **File** menu and select **Properties**.

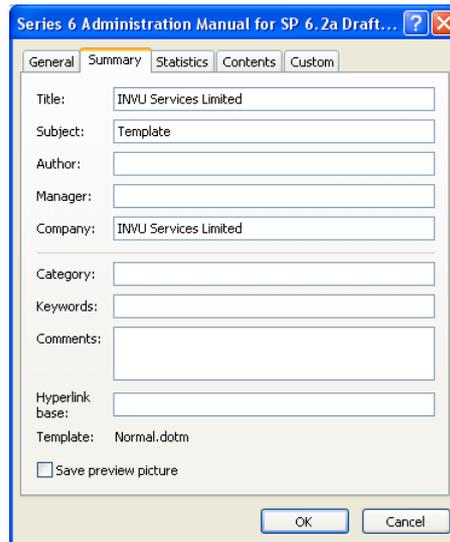


Tick the **Save preview picture** option and click the **OK** button. This can be done before the Word or Excel file is brought into Series 6 or after.

If using Office 2007 then click the  button and from the menu select **Prepare** then **Properties**.



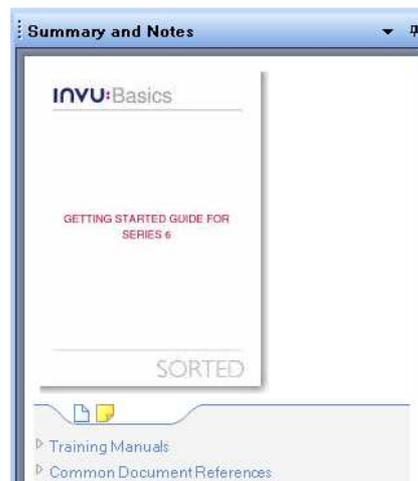
The Document properties area will be displayed under the main tabs click the arrow beside the heading **Document Properties** and select **Advanced Properties**...



Click the '**Summary**' tab. If you would like a thumbnail then tick the **Save preview picture** check box.

### The Document References

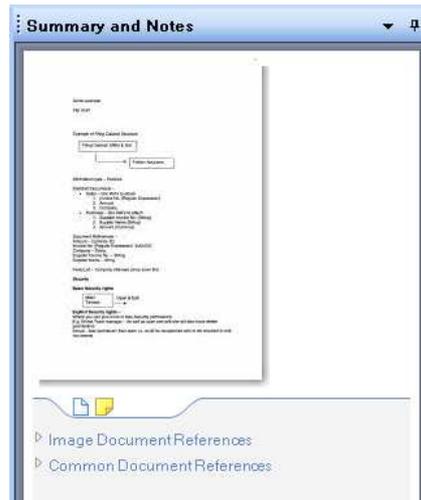
The Document Reference information is gathered from the file properties (there are four sets of these) and File and Save information entered in Series 6 (the picture below shows Training Manuals this is file and save information). Depending on the file these may differ. To view any of the document references click the white arrow to expand and the black arrow to collapse.



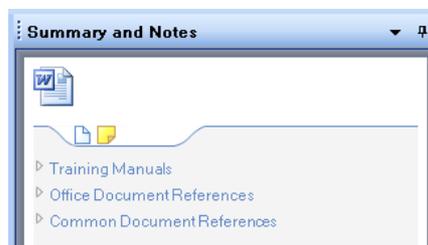
Every file brought into Series 6 will have the **Common Document References** this information is obtained from the file properties which you would look at through Windows Explore.

Some files may have another set of Document References as below:

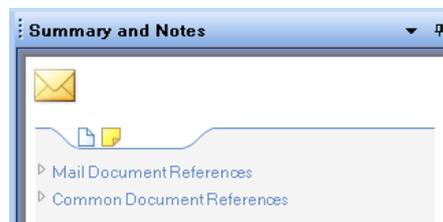
**Image Document References** - are created if the file is an image format such as .jpg, .tiff, .gif etc.



**Office Document References** - are created if the file is of Microsoft Word or Excel format. This information is obtained from the properties within office.



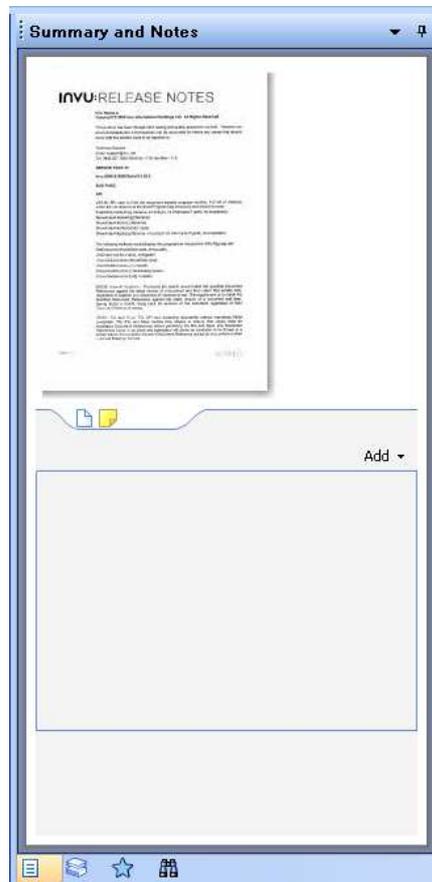
**Mail Document References** - are created if the file is of an .msg format. The information will show the subject, who the email was to and from etc.



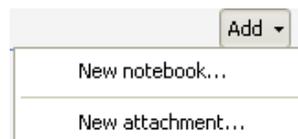
## Notes Pane

A notebook can contain many sections which could have multiple pages.

Click the Notes  icon to View, Create, Edit and Delete notebooks or attachments.



## Create a Notebook



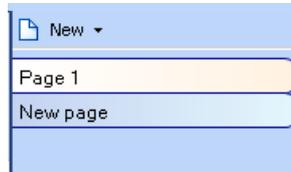
To create a new note click the **Add** menu and from the menu choose **New notebook...** the following will be displayed:

Enter the **title for the notebook** and then enter the **title for the first section**. Click the **OK** button to create the Notebook and the following will be displayed as shown on the next page:



## Create a New Page

To create a new page, on the right side of the 'Notebook' screen click the  **New** option and from the menu choose the **Page** option or click the **Notebook** menu then **New...** and then select the **Section** option.

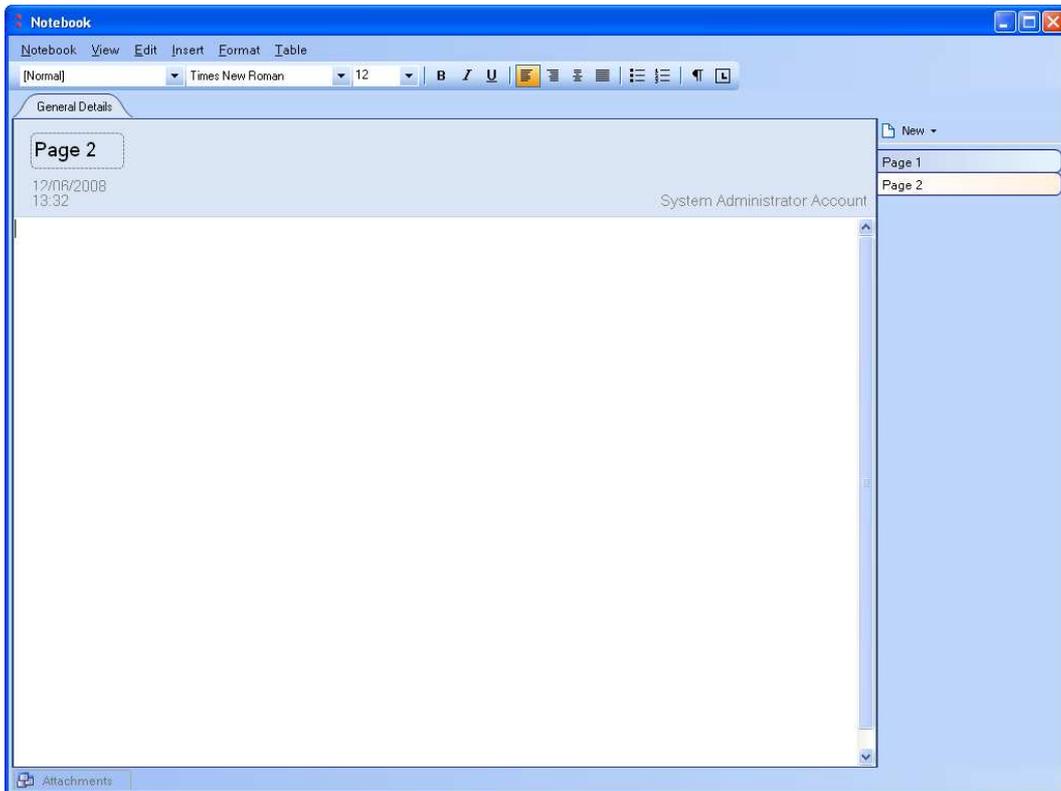


A new page will be displayed as shown above. Click the **New page** text to open the page.

To name the page, click into the dotted area with the text **New Page** just below the toolbar.



Remove the text and enter the new name. The name of the page will be displayed on the right side of the 'Notebook' screen as shown below:



You can switch between the pages. To switch click the Page Title on the right of the 'Notebook' screen.

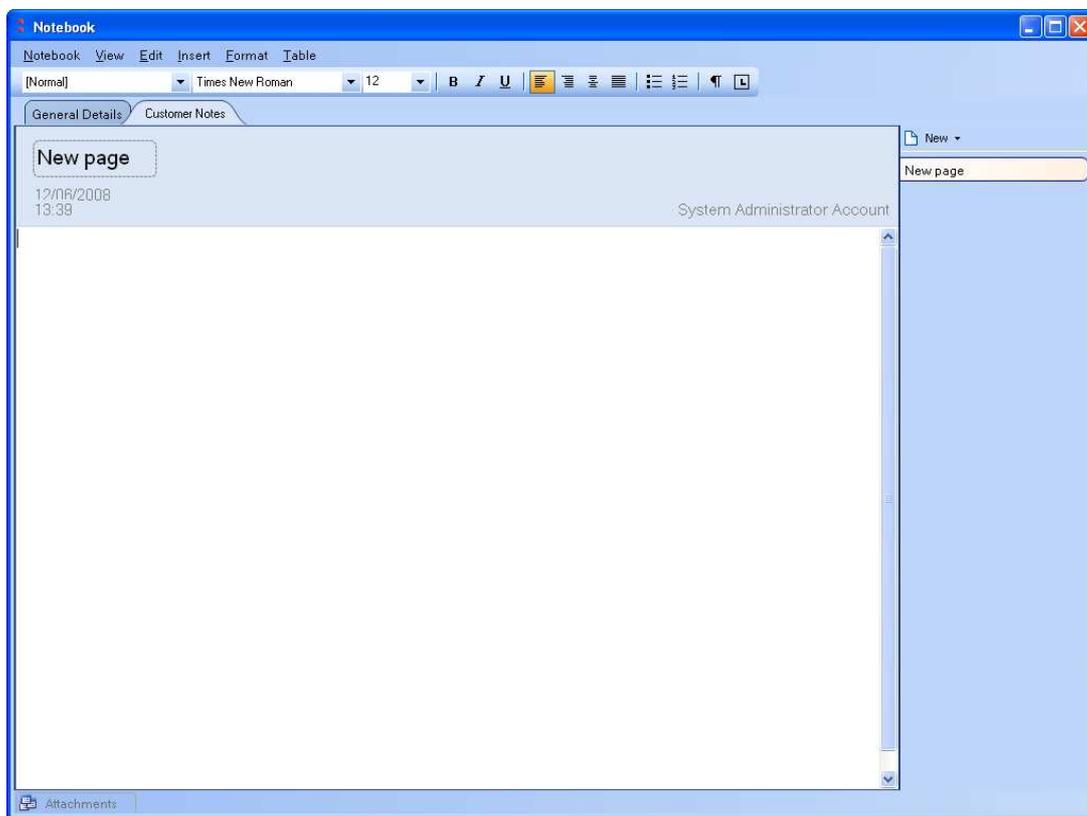
## Add a New Section

A Notebook can have many sections. To create a new section, on the right side of the 'Notebook' screen click the **New** option and from the menu choose the **Section** option or click the **Notebook** menu then **New...** and then select the **Section** option.

The following screen will be displayed:



Enter the name of the new section then click the **OK** button. A new tab will be displayed as shown below:

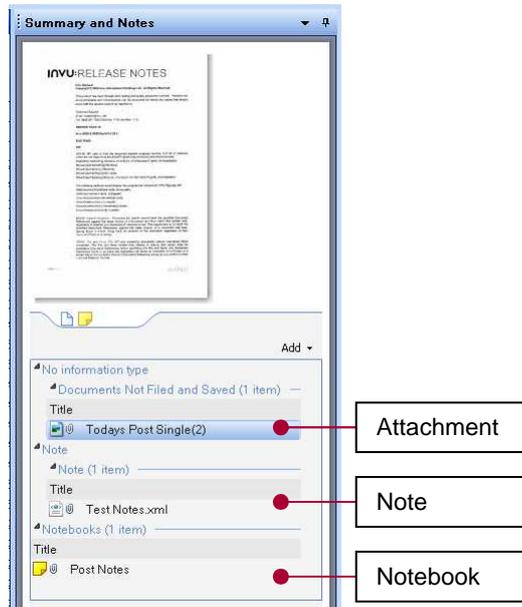


Click the tab title to switch between multiple tabs.

Once your notebook is completed, click the **X** in the top right corner of the 'Notebook' screen. The following message will be displayed:



Click the **Yes** button to save the changes. The note created will be displayed in the **Notes** pane as shown below:



Notebooks are not the only thing you can use the **Notes** pane for, you are also able to view Notes (created through the right click menu **Create - Note**). Notes are created as an XML file and cannot be edited (for more information on the **Create - Note** option please see page 99.)

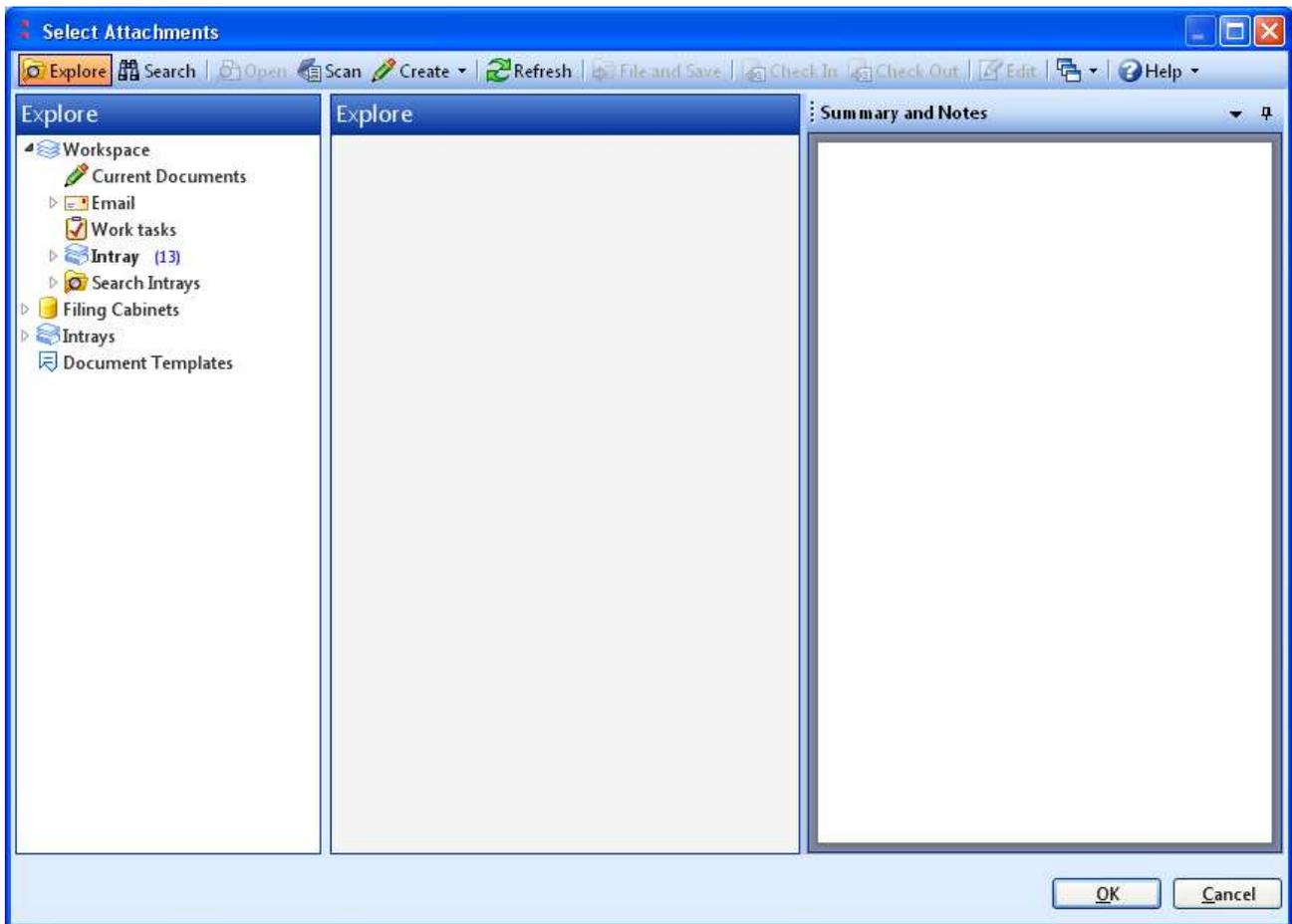
When a Notebook or an attachment is added to a selected document a symbol will appear beside the title of the document.

|                                                                                                                                                                                               |   |       |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-------|
|   Todays Post Single(1) | 1 | Invu1 |
|  TodaysPost080001.tif                                                                                      | 2 | Invu1 |
|  JamesGTheory.tif                                                                                          | 1 | Invu1 |
|   JamesGTheory.tif      | 1 | Invu1 |
|  Home Page.mht                                                                                             | 1 | Invu1 |
|  Home Page.htmzip                                                                                          | 1 | Invu1 |
|   Reply1joesmith.doc    | 1 | Invu1 |

If the document has something attached then a  paperclip symbol will appear. If the document has a Note or Notebook then a  page symbol will appear. Both the symbols can appear together see the image above.

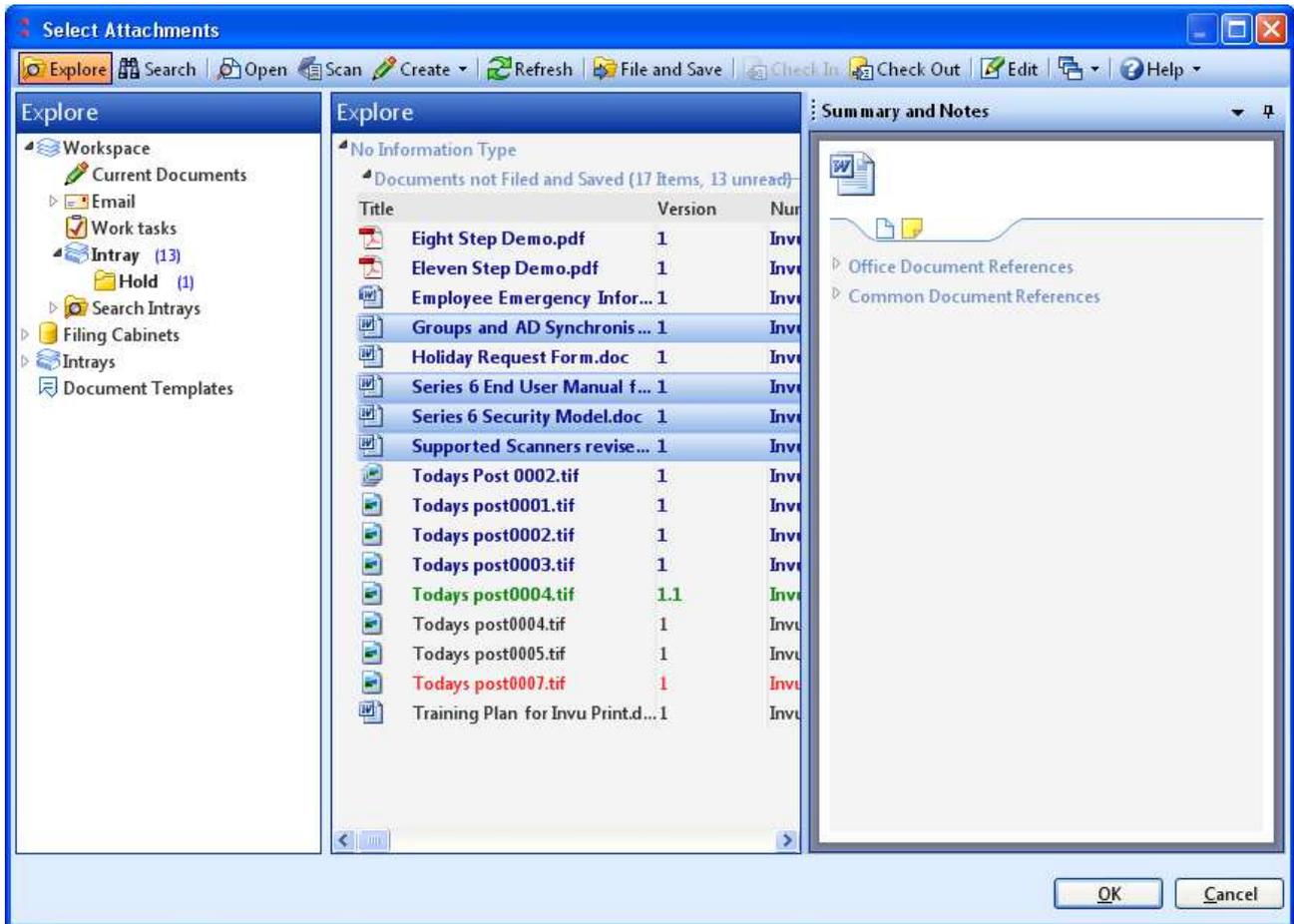
## To Create an Attachment

To create a new attachment click the **Add** menu and from the menu choose **New Attachment...** the following will be displayed:



Browse to the document you wish to attach, this can be located in your Intray or a filing cabinet location.

Highlight the document to be attached as shown on the next page:

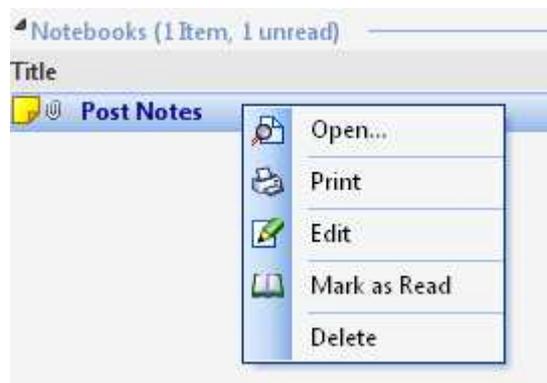


If you want to select multiple documents highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to select are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

Once the document(s) have been highlighted, click the **OK** button to attach the document(s).

### View any Note or attachment

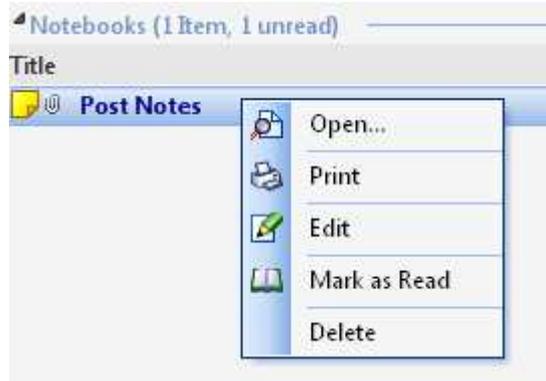
Any Note, Notebook or attached document can be viewed from the **Notes** pane. To open a Note, Notebook or attachment double click the name or right click the title of the Note, Notebook or attached document. From the menu select the **Open...** option.



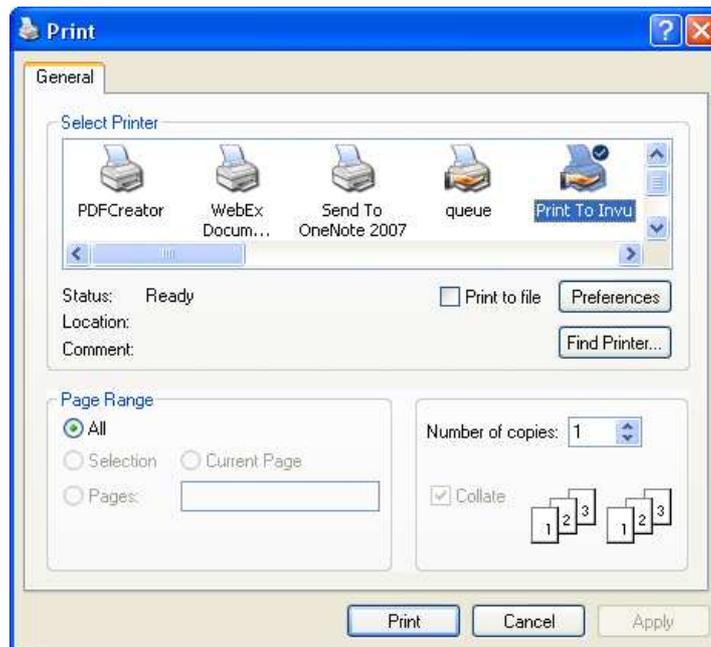
The Note, Notebook or Attachment will then be opened to view. When finished click the **X** in the top right corner of the screen to close.

## Print a Notebook, Attachment or Note

To print a Notebook, Attachment or Note, right click the title of the Notebook, Attachment or Note



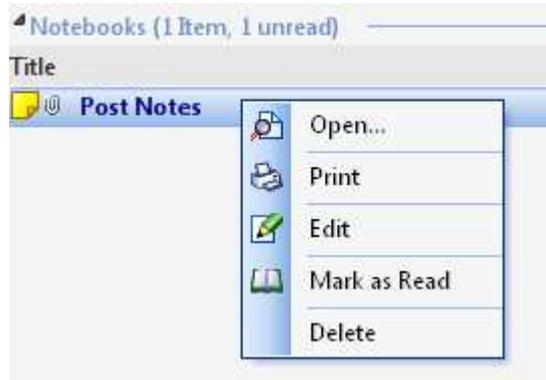
From the menu select the **Print** option. The following will be displayed:



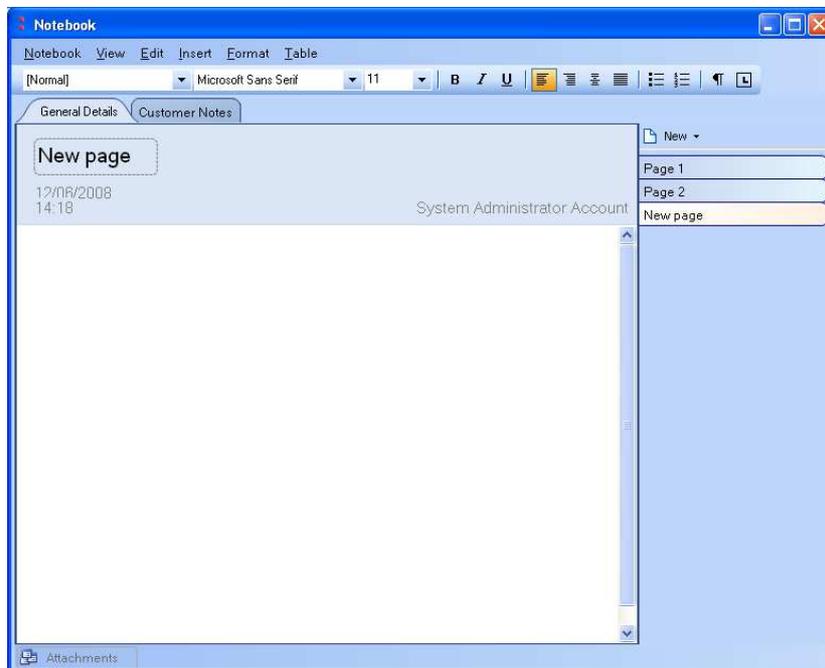
Select the printer and number of copies then click on the **Print** button. The document will then be printed.

## Edit a Notebook

To edit a Notebook right click the title of the Notebook.



From the menu choose the **Edit...** option and the 'Notebook' screen will be displayed.



You cannot add or change the text on existing pages. To create a new page, on the right side of the 'Notebook' screen click the **New** option and from the menu choose the **Page** option or click the **Notebook** menu then **New...** and then select the **Section** option.

A new page will be displayed as shown above. Click the **New page** text which is displayed to the right of the screen to open the page.

To name the page, click into the dotted area with the text **New Page** just below the toolbar.



Remove the text and enter the new name. The name of the page will be displayed on the right side of the 'Notebook' screen.

When you have added the text to the new page, click the **X** in the top right corner of the 'Notebook' screen.

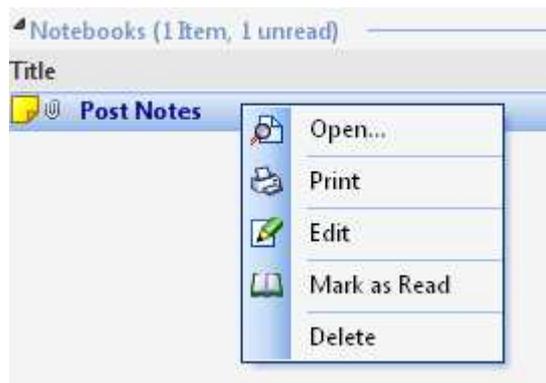


Click the **Yes** button to save the changes to the Notebook.

## Mark as Read

When you create a new Notebook it will mark it unread (it will appear bold and in blue) if added to a document in an Intry.

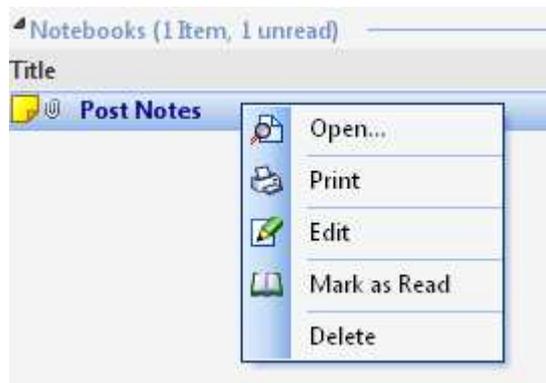
To mark a note as read, right click the note as shown below.



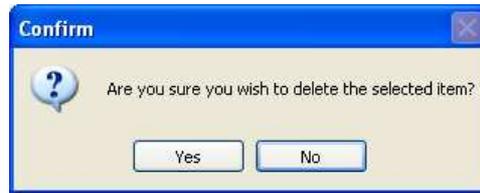
From the menu select the **Mark as Read** option. The note text will change to none bold black text.

## Remove a Notebook

To remove a Notebook, Attachment or Note, right click the title of the Notebook, Attachment or Note



From the menu select the **Delete** option. The following message will be displayed:



Click the **Yes** button to delete the selected file.

## Intray Shortcuts Pane



Click the Intray Shortcuts icon, this pane allows you to create shortcuts to other user's and folder Intrays. This gives users the facility to move and/or copy documents into another user's Intray.



There are three types of Intray you can create a shortcut to:



**User Intray** – each user will have an Intray for documents that are brought into Series 6. So you are able to setup a shortcut and send colleagues copies or move documents to their Intray.



**Group Intray** – these are a group of users within Series 6 but only show if your administrator has created them. These are great as if you send a document to a Group Intray all members of that group can see it.



**Folder Intray** – These are basically linked to the Folders in the filing cabinets. If a document is send to a folder Intray all users who are a member of that folder will be able, at least to see the document.

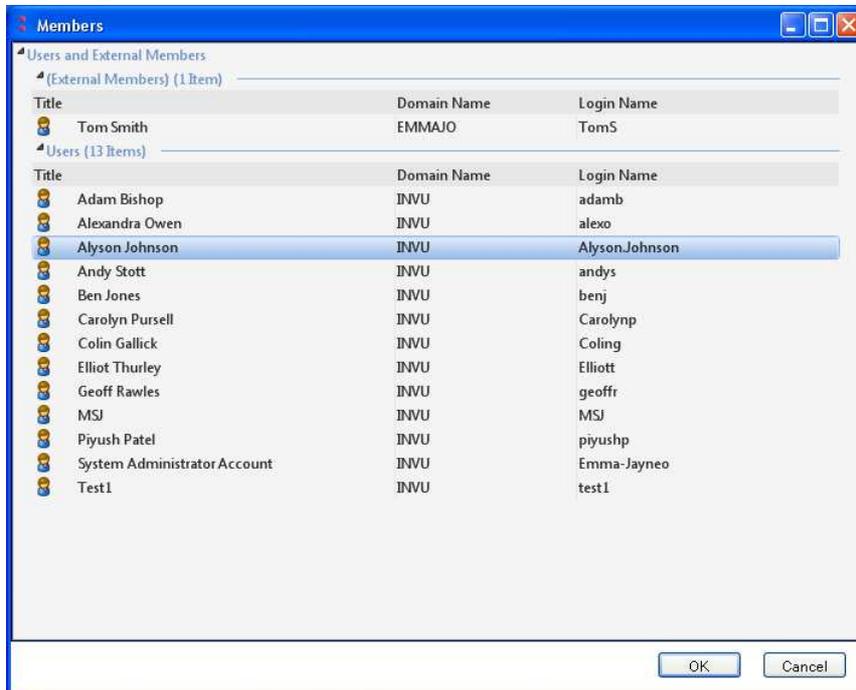
You can create an Intray shortcut to any Intray and send shortcuts to documents or even move the document to another user's Intray.

## To create a new shortcut:

Click the arrow beside the **Add**  icon and from the menu choose one of the following options:



A screen will be displayed with a list of Users or Groups or Folders depending on the option chosen from above the screen:



Expand the sections and then highlight the User\Group\Folder Intray and click the **OK** button. Multiple shortcuts can be created by holding down the **CTRL** key and mouse click to select multiple users/folders.

## To remove an Intray shortcut:

Highlight the shortcut to be deleted as shown below:



Click the  Delete icon and the shortcut will be removed.

## To Change the Inray Shortcuts View:

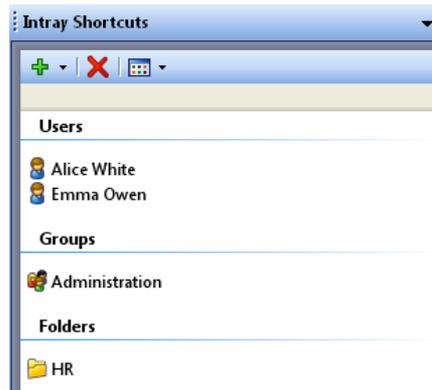
Click the arrow beside the  icon and the following menu will be displayed:



The **All**, **Users**, **Groups** and **Folders** options will allow you to choose which types of Intrays you would like to see. You can also choose to view the Inray Sortcuts as **Large Icons** (default) or **Small Icons** (as shown below).



If you choose the **Group By Type** option the Intrays will be group by type as shown below:

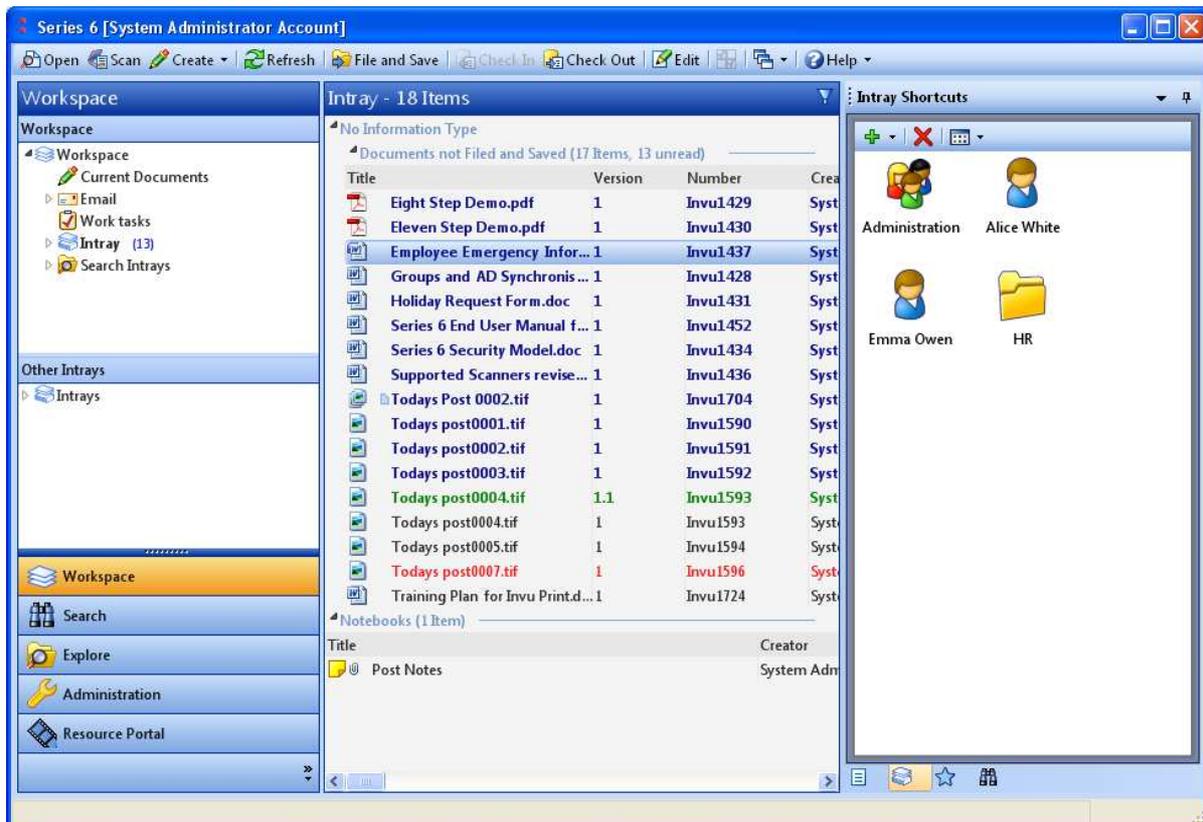


The **Group By Type** option can also be used when viewing Inray Shortcuts as **Large Icons**.

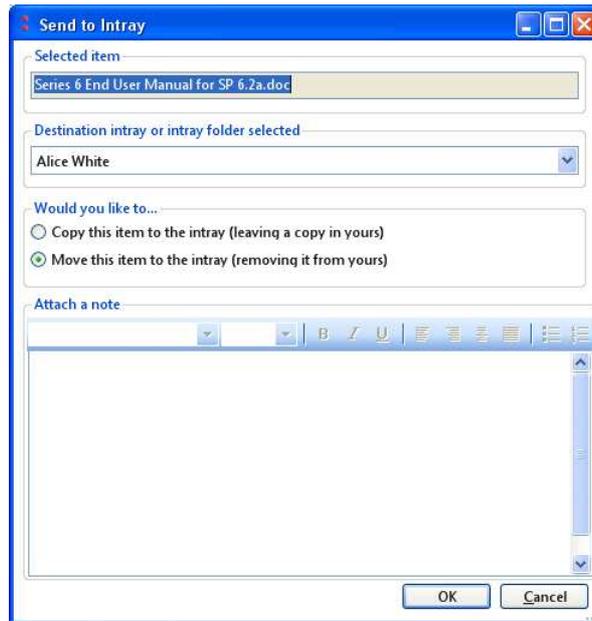
### Move or Copy a document to another Inray:

Copies (shortcuts) to documents can be added from the Filing Cabinets folders or your Inray.

Highlight the relevant document. If you wish to select multiple documents then click the first document as normal then hold down the **CTRL** key and click each subsequent document you require or if you wish to select a block click the first document then hold down the **SHIFT** key and click the last document in the block.



Move your mouse pointer over the highlighted document then click and drag the selected document over the Inray shortcut within the Inray shortcuts pane and release your mouse. The screen shown on the next page will be displayed:



Within the area called **Would you like to...** choose **Copy this item to the Intray (leaving a copy in yours)?** option, this will create a shortcut in the destination Intray but the user viewing the shortcut must have access to the Intray or folder where it originally came from. Choose **Move this item to the Intray (removing it from yours)?** option, this will move the original from your Intray to the destination Intray and is not available when dragging a document from a folder.

Type a note into the area below the toolbar, if required, and then click the **OK** button.

**NB:** Within the Simple mode users will not have access to folder or Other User's Intrays. However a user will still be able to drag and drop documents into the Intray Shortcuts Pane from their own Intray. Within the Standard and Advanced modes you will be able to browse folders and other user's Intrays depending on the permissions set by an Administrator.

## Copy a document to Multiple Intrays:

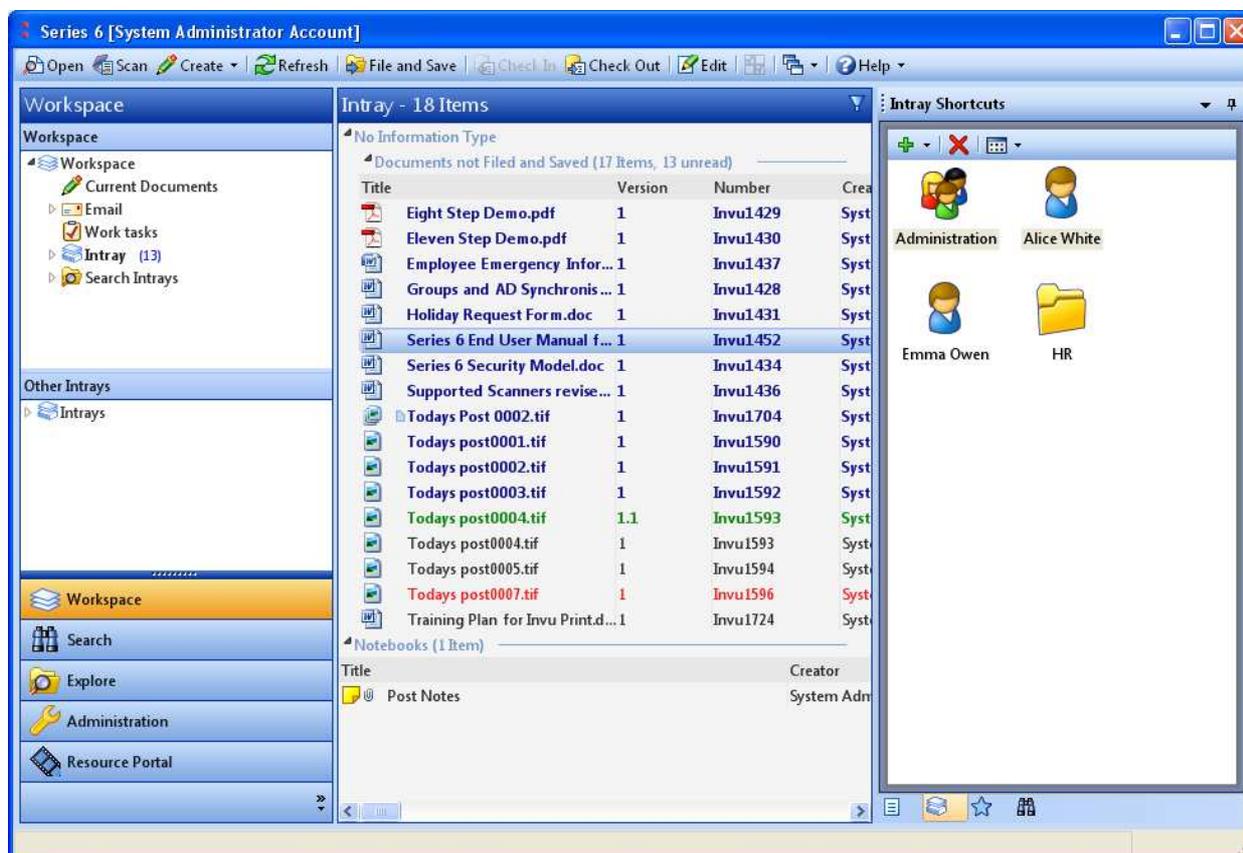
You can also copy a selected document(s) to multiple Intrays.

First you will need to select the Intrays.

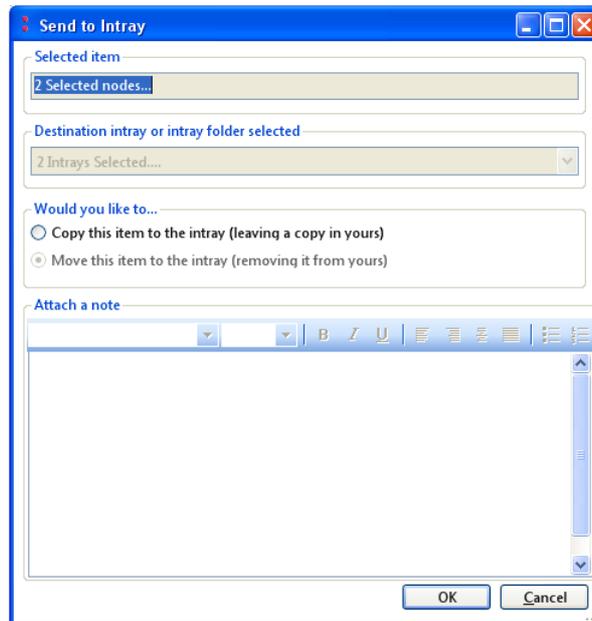


To select multiple Intrays click the first as normal then hold down the **CTRL** key and click each subsequent Intray you wish to select.

Highlight the relevant document. If you wish to select multiple documents then click the first document as normal then hold down the **CTRL** key and click each subsequent document you require or if you wish to select a block click the first document then hold down the **SHIFT** key and click the last document in the block.



Move your mouse pointer over the highlighted document(s) then click and drag the selected document(s) over the highlighted Intray shortcuts within the Intray shortcuts pane and release your mouse.



You can only copy a selected document to multiple Intrays, enter a note if required then click the **OK** button.

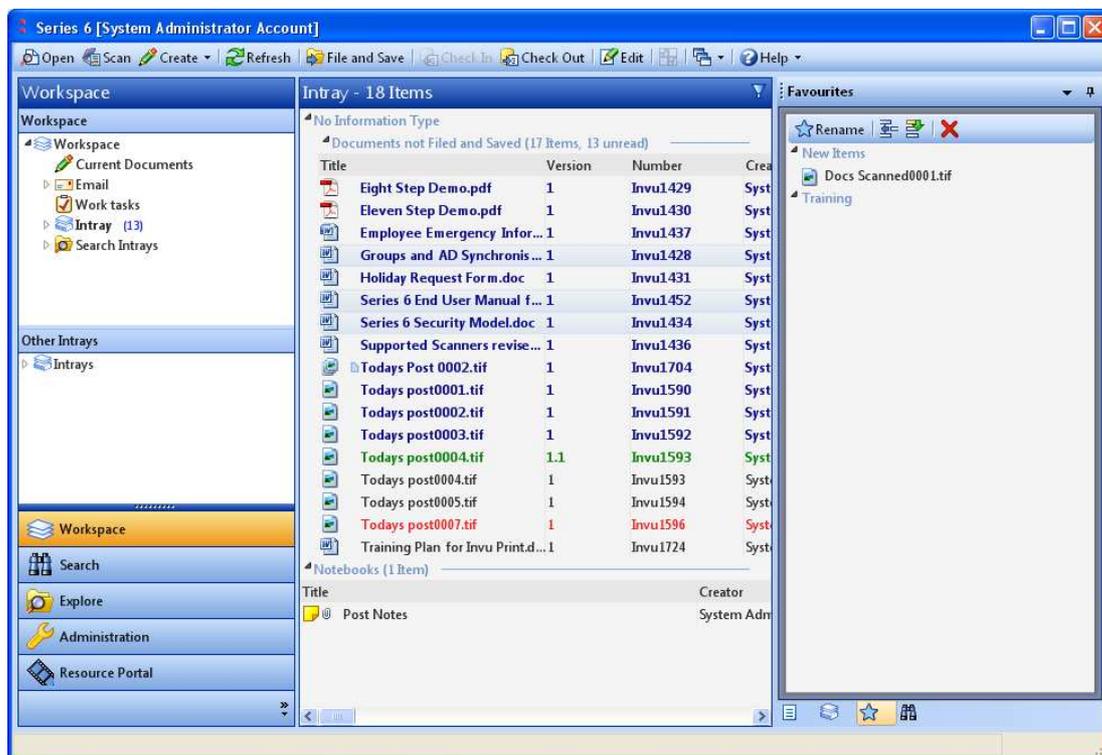
## Favourites Pane

 Click the Favourites icon, and here you will be able to create shortcuts to documents. This makes it easier for the user to find and open documents that are used on a frequent basis. These favourites can be split into sections to make it even easier to manage.

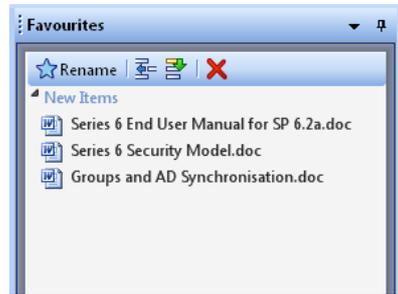


### To add a document to Favourites:

Highlight the document(s), in the Middle pane in any mode, to be added to Favourites as shown below:



Right-click the highlighted document and from the menu select **Send To** then click the **Favourites** option. The shortcut will then be created in the pane under the section **New Items**.



Within the **Favourites** pane you can create new sections, rename a section or shortcut, move shortcuts to different sections and delete shortcuts.

To view a document, double-click the required shortcut in the **Favourites** Pane.

### To create a new section:

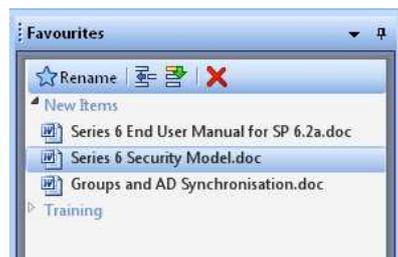
Click the **Create** a new section  icon and following dialogue will be displayed:



Enter the new section name into the text box and then click the **OK** button.

### To move a shortcut to a different section:

Highlight the required document in **Favourites** pane as shown below:

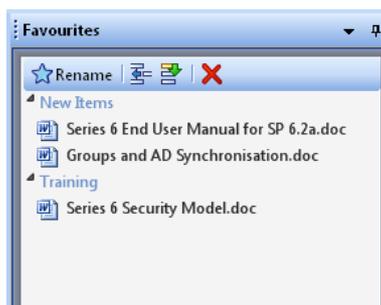


Then click the  icon and the following will be displayed:



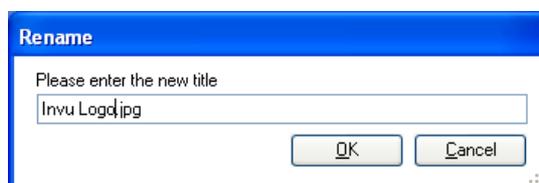
Type in the name of the section the shortcut should be moved to but ensure you enter the exact spelling and case. If the section does not exist, a new section will be created automatically.

Click the **OK** button to move the document to a new section as shown below:



## To rename a shortcut or section

Click the section title or shortcut to be renamed in the **Favourites** pane and then click the  icon. The following dialogue will be displayed:



Enter the new name into the text box and click the **OK** button.

## To remove a shortcut or section

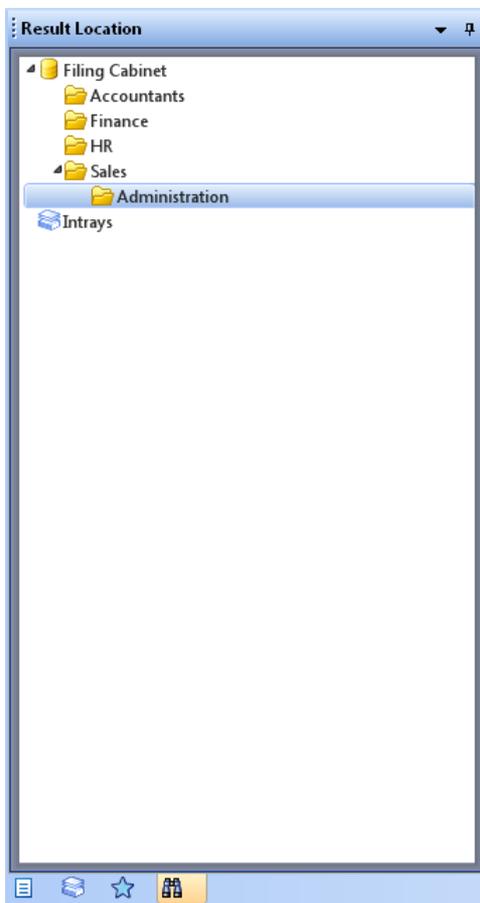
Highlight the required section or shortcut within the Favourites pane then click the  icon.

The shortcut or section will be removed.

**NB:** If you delete a section heading then any shortcuts under that section will also get deleted.

## Location Pane

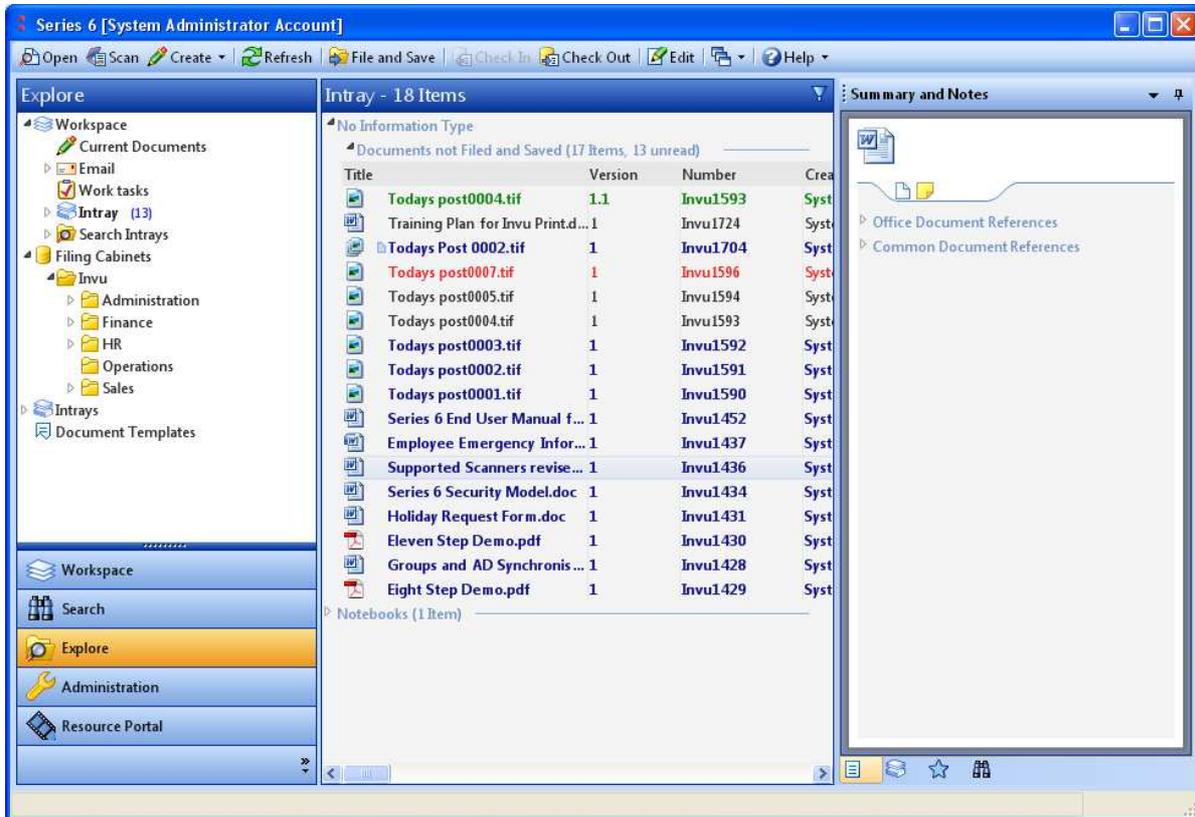
This pane is only available when using the Search function. A search would be performed then you would use the Location pane to find where the search results are located in the Filing Cabinet Folder or a user's Intray. To view the location of results in the Right-hand pane click the **Results Location**  icon and the following will be displayed:



To view the location of a document select the specific document in the Middle pane and the location pane will display where the document is in Series 6.

## The Middle Pane Views, Sorting and Columns

The Middle pane will display documents for a selected area. Each document is displayed showing a file type icon.



You can tell the difference between a single page .tif and a multiple page .tif files as shown below:



A single page .tif



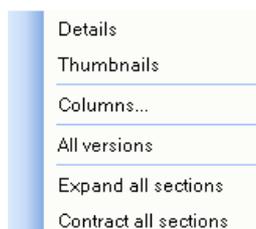
A multiple page .tif

### View menu

There are several ways in which to display documents within the Middle pane. To customise the way documents are displayed, right click in the Middle pane on one of the following areas;

- **Simple Interface** in **Search** or **My Work**
- **Standard & Advanced Interface** in **Explore**, **Workspace** or **Search**

In the right click menu select the **View** option and the following cascade menu will be displayed:



Click an option to activate showing a tick to the left of the text. Below are the details on each option:

## Details

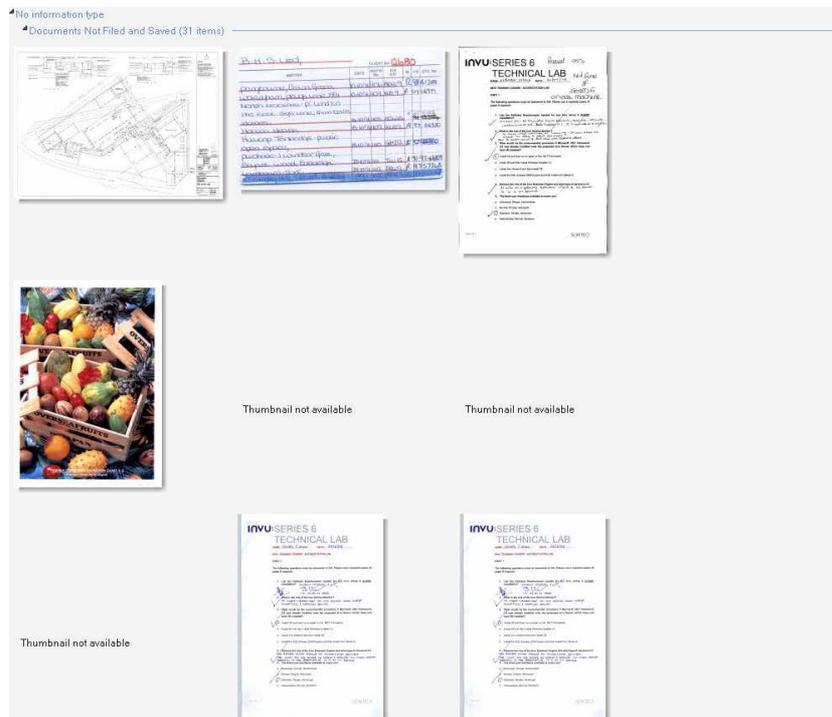
The **Details** option when selected displays details about each document such as Title, Version, Creator, Owner, Last Modified, Created etc these headings may change depending on the Information Type and Standard Document if the file is located in the filing cabinets rather than an Intry. This view is the system default.

To display the details view, right click on the Middle pane anywhere, from the menu select the **View** option and then click the **Details** option. Below is an example of the Details view in the Middle pane.

| Letter                             |         |          |                       |         |
|------------------------------------|---------|----------|-----------------------|---------|
| Order Confirmation Letter (1 item) |         |          |                       |         |
| Title                              | Version | Number   | Sales Order Reference | Creator |
| BHS.jpg                            | 1       | Invu1289 | 789                   | System  |
| Quote (1 item)                     |         |          |                       |         |
| Title                              | Version | Number   | Internal Order Number | Creator |
| Fruit.tif                          | 1       | Invu1290 | 158                   | System  |
| Welcome Letter (1 item)            |         |          |                       |         |
| Title                              | Version | Number   | Sales Order Reference | Creator |
| A0 Site Plan Two.tif               | 1       | Invu1288 | 875                   | System  |

## Thumbnails

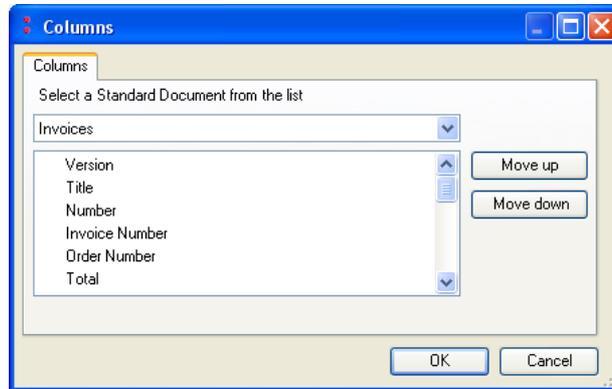
The **Thumbnail** option will change the view to show mini images of each document depending on the format.



To display the thumbnails view, right click on the Middle pane, from the menu select the **View** option and then click the **Thumbnails** option. The above picture shows an example of thumbnails view in the Middle pane, if a document has no thumbnail to display then the text '**Thumbnail not available**' is displayed.

## Columns

The **Column** option enables the user to choose the order of column headings for each Standard Document within Invu. Once selected the following screen will be displayed:



From the drop down list choose the Standard Document you wish to change the order of the heading for and a list of columns will be displayed. Highlight the column that needs to be moved and then click either the **Move up** or **Move down** buttons.

## Drag and Drop Columns

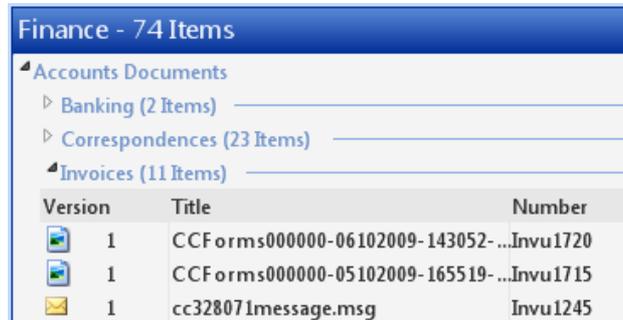
You are able to drag and drop the column headings to choose the order you wish to see in the Middle pane. Each Standard Document will have its own set of headings as shown below:

| Title                          | Version | Number   | Invoice Number | Order Number |
|--------------------------------|---------|----------|----------------|--------------|
| CCForms000000-06102009- 1... 1 | 1       | Invu1720 | 12992          | 0686         |
| CCForms000000-05102009- 1... 1 | 1       | Invu1715 | 12992          | 0686         |
| cc328071message.msg            | 1       | Invu1245 |                |              |
| Scan 16-06-2009 15-10-28.tif   | 1       | Invu1231 | DFR14405       | 123456       |
| CCForms000000-16062009- 1... 1 | 1       | Invu1217 | DFR14401       | 0676         |
| Scan 15-06-2009 16-06-20.tif   | 1       | Invu1199 | DFR14403       | 123456       |
| Scan 15-06-2009 15-53-40.tif   | 1       | Invu1198 | DFR14402       | 124676       |
| Invoice011.TIF                 | 1       | Invu1196 | DFR14407       | 124676       |
| CCForms000000-14062009- 1... 1 | 1       | Invu1183 | DFR14400       | 0098         |
| 6017.TIF                       | 1       | Invu1172 |                |              |
| 6010.TIF                       | 1       | Invu1165 |                |              |

Move the mouse pointer over the column heading you wish to move hold down the left click button and drag to new location, as you drag to the new location a grey box will appear with the name of the column as shown below:

| Title                          | Version | Number   |
|--------------------------------|---------|----------|
| CCForms000000-06102009- 1... 1 |         | Invu1720 |
| CCForms000000-05102009- 1... 1 |         | Invu1715 |

Hover over the title you wish to move the drag column to then release the mouse the drag column will be placed moving the existing column.



It will remember the columns moved the next time you log in.

### All versions

When a document is checked out and checked back in the version number will increment by default. Invu will only display the latest version of the document by default but if the user wishes to see all versions then in the Middle pane right click and from the menu select the **View** option and click the **All versions** option. If you select the same option again it will revert to showing the current version only.

### Expand all Sections / Contract all Sections

When using the Middle pane you can expand or collapse the document sections.

To expand and view all documents, right click in the Middle pane and from the menu choose the **View** option and then select the **Expand all sections** option.

To contract all sections right click in the Middle pane. From the right click menu choose the **View** option and then select the **Contract all sections** option.

## Sorting Documents

The Middle pane of **Explore**, **Workspace** and **Search** can be sorted into ascending/descending order.

4 No information type

Documents Not Filed and Saved (1 item)

4 Sales & Demonstration Documents

4 Demonstration Document (2 items)

| Title                    | Version | Number   | Title                | Primary Contact | Creator   | Last modified       | Loca |
|--------------------------|---------|----------|----------------------|-----------------|-----------|---------------------|------|
| new bridgeport Order.xls | 2       | Inwu1233 | New Bridgeport Order | Sales Team BDM  | Dean King | 26/07/2006 11:34:35 | Defa |
| new bridgeport Order.xls | 1       | Inwu1233 | New Bridgeport Order |                 | System    | 13/07/2006 17:30:55 | Defa |

4 Methodology Document (3 items)

| Title                     | Version | Number   | Title                           | Type of Document | Primary Contact | Creator   |
|---------------------------|---------|----------|---------------------------------|------------------|-----------------|-----------|
| Six Step demo Final.doc   | 1       | Inwu1435 | Six Step Demo Final             | Information      | Sales Team BDM  | System    |
| bible_Series 6 Frequently | 2       | Inwu1243 | Bible Series 6 Frequently Asked | Information      | Sales Team BDM  | Dean King |
| bible_Series 6 Frequently | 1       | Inwu1243 | Bible Series 6 Frequently Asked |                  |                 | System    |

4 Understanding Document (6 items)

| Title                     | Version | Number   | Author       | Title                            | Primary Contact | Creator   |
|---------------------------|---------|----------|--------------|----------------------------------|-----------------|-----------|
| Understanding Quality     | 2       | Inwu1267 |              | Understanding Quality Systems    | Sales Team BDM  | Dean King |
| Understanding Quality     | 1       | Inwu1267 |              | Understanding Quality Systems    |                 | System    |
| Understanding Engineering | 2       | Inwu1259 | Tim Winstone | Understanding Engineering        | Sales Team BDM  | Dean King |
| Understanding Engineering | 1       | Inwu1259 | Tim Winstone | Understanding Engineering        |                 | System    |
| Understanding Accounts    | 1       | Inwu1254 | Majid Nagra  | Understanding Accounts Resellers |                 | System    |
| Understanding Accounts    | 2       | Inwu1254 | Majid Nagra  | Understanding Accounts Resellers | Sales Team BDM  | Dean King |

You are able to sort each of the Standard Document Headings. In the picture above you could sort the Demonstration Documents by Version and the Understanding Documents by Author.

4 Understanding Document (6 items)

| Title                     | Version | Number   | Author       | Title                            | Primary Contact | Creator   |
|---------------------------|---------|----------|--------------|----------------------------------|-----------------|-----------|
| Understanding Quality     | 2       | Inwu1267 |              | Understanding Quality Systems    | Sales Team BDM  | Dean King |
| Understanding Quality     | 1       | Inwu1267 |              | Understanding Quality Systems    |                 | System    |
| Understanding Engineering | 2       | Inwu1259 | Tim Winstone | Understanding Engineering        | Sales Team BDM  | Dean King |
| Understanding Engineering | 1       | Inwu1259 | Tim Winstone | Understanding Engineering        |                 | System    |
| Understanding Accounts    | 1       | Inwu1254 | Majid Nagra  | Understanding Accounts Resellers |                 | System    |
| Understanding Accounts    | 2       | Inwu1254 | Majid Nagra  | Understanding Accounts Resellers | Sales Team BDM  | Dean King |

Expand the section to display the documents. The grey row below the Standard Document Heading displays the headings for the Document References. Click once on a heading. In the example on the next page the version heading was clicked.

4 Understanding Document (34 items)

| Title                         | Version | Number   | Author      | Title                 |
|-------------------------------|---------|----------|-------------|-----------------------|
| Bluffer's Guide To            | 1       | Inwu1430 | Joel Condon | Bluffers Guide to Ad  |
| Bluffer's Guide To            | 1       | Inwu1429 | Joel Condon | Bluffers Guide to Ac  |
| End User Manual SP1.pdf       | 1       | Inwu1402 |             | End User Manual S     |
| Bluffer's Guide To            | 1       | Inwu1400 | Joel Condon | Bluffers Guide to Ur  |
| Bluffer's Guide To            | 1       | Inwu1399 | Joel Condon | Bluffers Guide to Sc  |
| Bluffer's Guide To Road       | 1       | Inwu1398 | Joel Condon | Bluffers Guide to Rc  |
| Bluffer's Guide To Retail.pdf | 1       | Inwu1397 | Joel Condon | Bluffers Guide to Re  |
| Bluffer's Guide To Legal.pdf  | 1       | Inwu1394 | Joel Condon | Bluffers Guide to Le  |
| Bluffer's Guide To IFAs.pdf   | 1       | Inwu1393 | Joel Condon | Bluffers Guide to IF? |

A small blue arrow will be displayed to the right of the heading text this has now been sorted into ascending order. Click the heading again to sort into descending order.

Ascending order

Descending order

## The Function Buttons for Advance Mode



On the Left-hand pane of the Advanced mode are the buttons to switch between Workspace, Search, Explore and Administration. To switch functions, simply click on the required function. The buttons can be customised to suit the individual user.



To change the function buttons from text and image to image icons only move the mouse pointer over the dark blue bar above the buttons as shown in the picture above. A double headed arrow will be displayed. Hold the left mouse button and drag down until a small image icon bar appears as shown below:

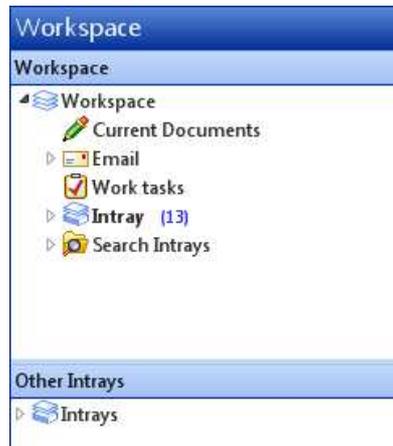


To change the functions button back to text and image, hold the left mouse button and drag up until the text and image icon bar appears.

## Workspace

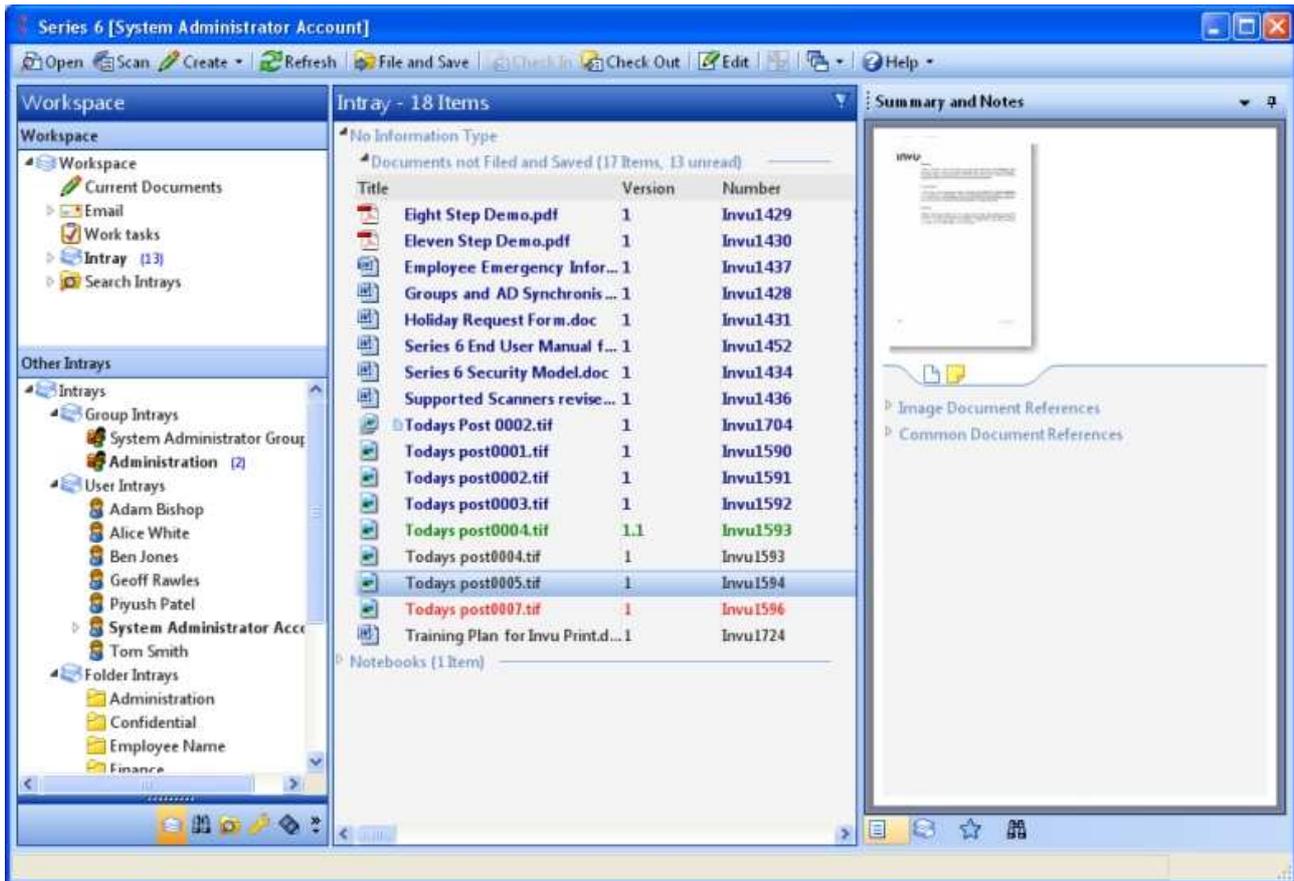
The Workspace brings together the user's In tray, Work Tasks, Email and Current Documents. It is intended to be the area where a user works with their documents on a daily basis.

In the Simple mode the Workspace area is known as **'My Work'**. Click the **'My Work'** tab to access the Workspace area. To access the Workspace in the Standard Mode click the  button on the floating toolbar or within the Advanced mode click the  button on the Left-hand pane.



Within the Left-hand pane the user can explore all areas within the Workspace. To do this, use the white arrows to expand and the black arrows to collapse areas.

If using the Simple mode you do not get the **Other In trays** area in the Left-hand pane.



## Current Documents

Current Documents will be displayed when you have documents checked-out. A user can also send documents from the Filing Cabinets to their own Current Documents, so that the document becomes easily available to them at a later date or Offline.

The Current Documents area is also available to the user 'off-line', so that these documents are accessible when they're not connected to the network (or Internet). The system detects if the network is available at the point of starting the system, if no network is available the system will work in off-line mode.

## Email

Invu can integrate with IMAP4 compliant email systems (such as MS Exchange) and the Email section of the **Workspace** screen will show the content of the user's mailbox (all mail folders). Emails can then be organised easily within Series 6.

## Work Tasks

Work Tasks will present the current tasks assigned to the user in an S650 system through the Workflow module.

## Intray

The In tray brings together documents which have been brought into the Invu system, but have not yet been filed and saved. A user has a personal In tray and have access to folder/group In trays in the Standard and Advanced Mode. If a document is sent from another user or other part of the system it will be placed into the In tray as unread and behave in a very similar way to Outlook.

Users can send documents from their In tray(s) to other users' In trays for review or collaboration (for example).

## Search In trays

The Search In trays area will allow you to see only unread documents in all In trays you have access to



Grouped by In tray types as shown above.

## Other In trays

The Other In trays section is only displayed in the Standard and Advanced mode but only if you have the right privileges applied. This section will allow you to see other  User In trays you have been given access to,  Group In trays you are a member of and also any  Folder In trays where you are a member of the Folder in the Filing Cabinet.

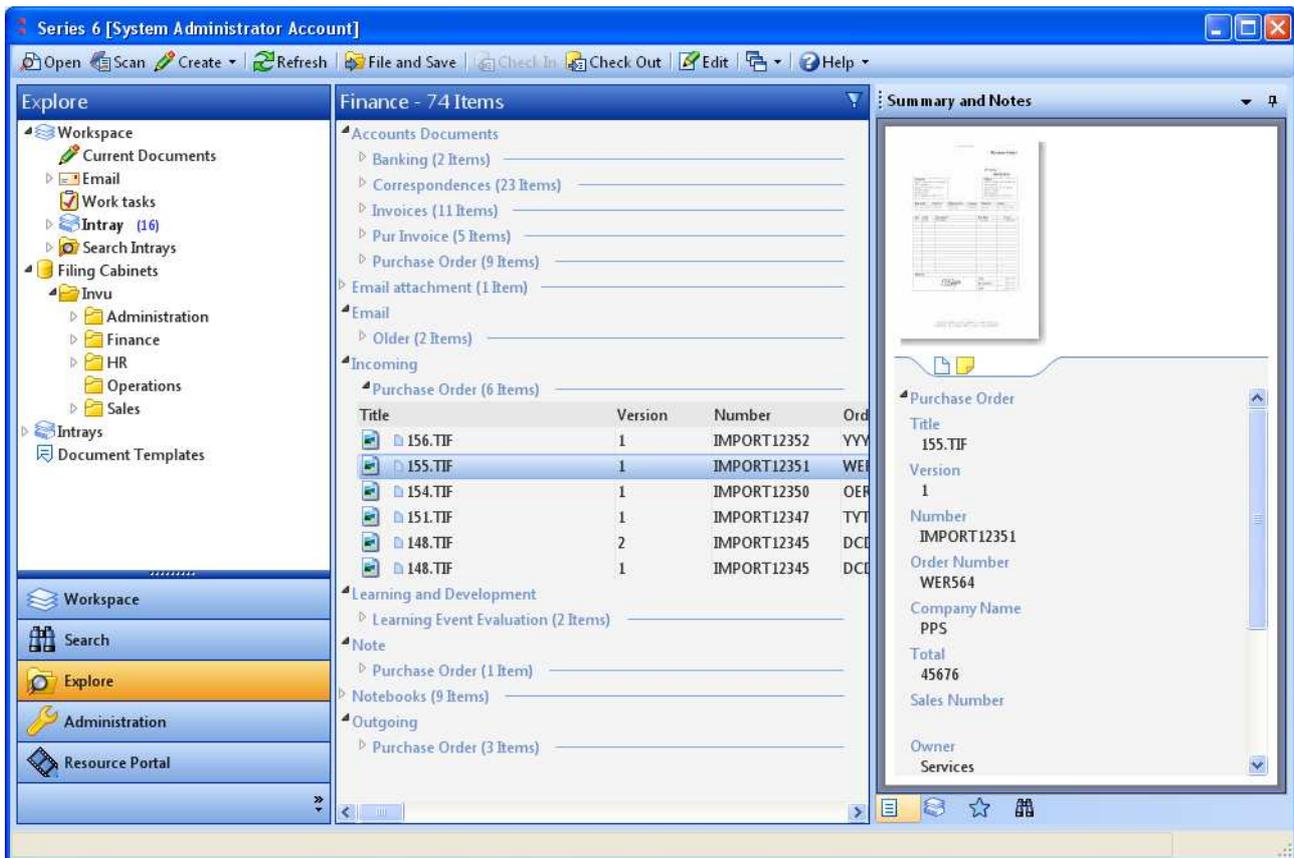
This section is only for viewing the contents of the In trays, if you wish to send a copy or move a document from your In tray to another then use the In tray Shortcuts Right-hand pane (please see page 28). You can work with the documents and even File and Save the document away if you have the right security applied.

## Explore

Series 6 enables the users to explore the system for documents and information. This provides the user with the ability to explore the Filing Cabinets, folders, any In trays available and their Workspace. It performs a similar function to MS Windows Explorer (*hence the name!*) and allows users to 'drill-down' within the Invu hierarchy and browse the contents of available locations. This provides an alternative method of accessing the electronic documents and information over searching, using criteria.

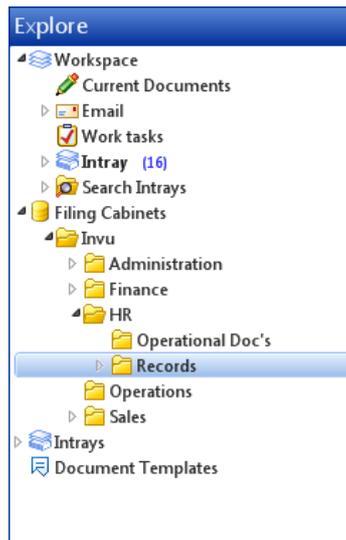
However the **Explore** function is only available within the Standard and Advanced mode.

To access the Explore in the Standard mode click the  button on the floating toolbar or within the Advanced mode click the  button on the Left-hand pane.

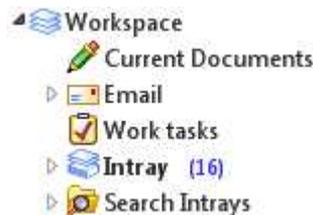


Within the Left-hand pane there are two different views available depending on how the System Administrator has set the system.

The first view is the Explore area which allows the user to see the Workspace and Filing Cabinets all located in one section as shown on the next page:

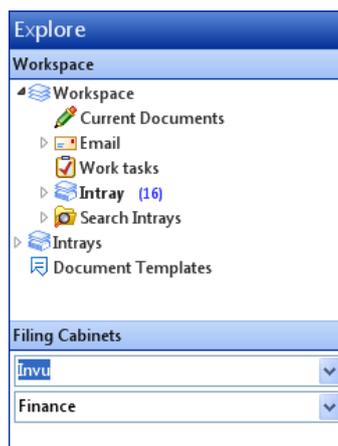


In the Left-hand pane the user can explore all areas they have access to. To do this, use the white arrows to expand and the black arrows to contract areas.



To view documents in a specific location, expand the Filing Cabinet and the relevant folder if applicable. Then click the folder and the documents will be displayed in the Middle pane.

The second view splits the Filing Cabinet and the Workspace into two sections. The Workspace section will allow the user to explore Current documents, Email, Work tasks and In tray. The Filing Cabinets will allow the user to explore Filed and Saved documents.



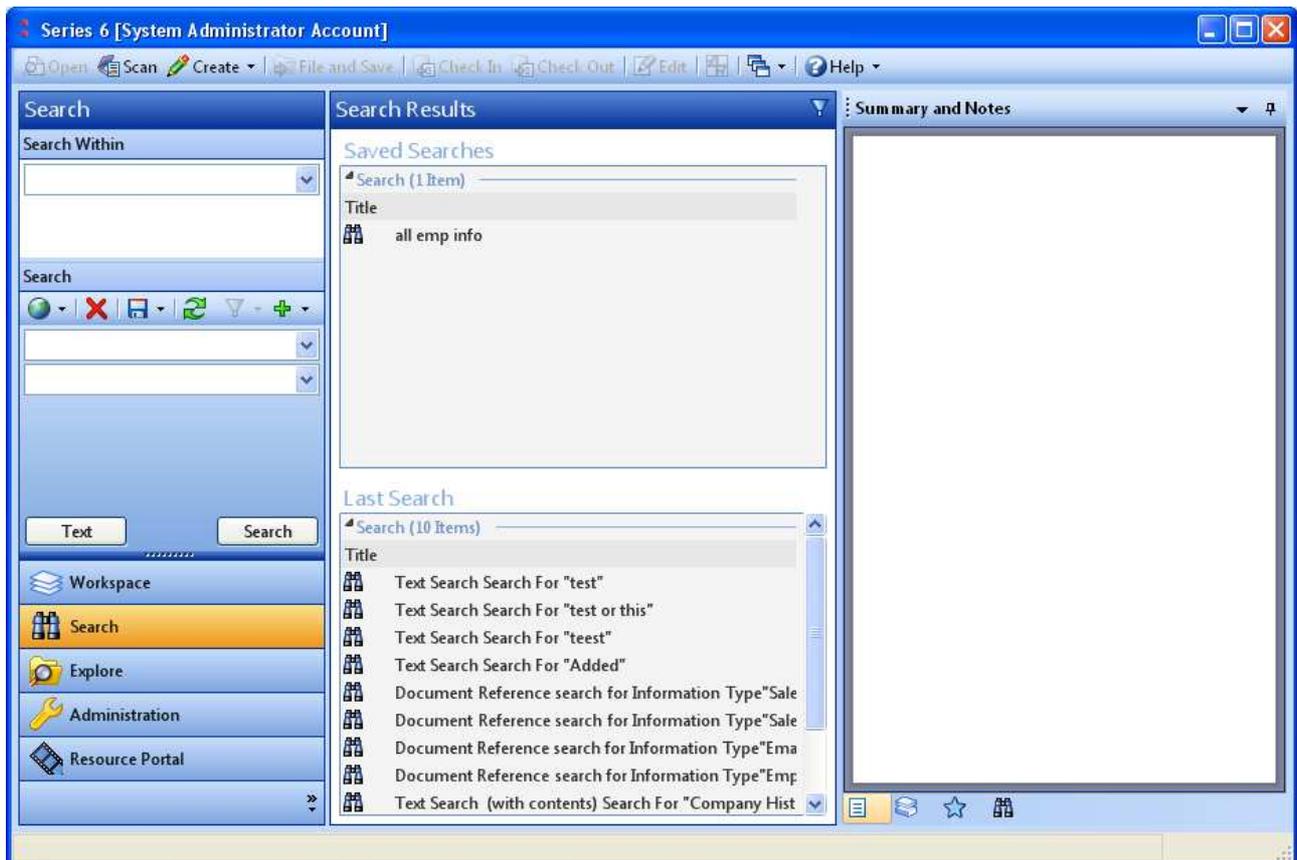
The Filing Cabinet section will allow the user to choose from drop down lists. The reason for this is to enable systems with larger tree structures to explore with ease (as shown in the picture above).

To view a certain folder within the Filing Cabinet click the first drop down and choose or start to type in the name of the required Filing Cabinet.

A second drop down will then be displayed, populated with all related folders. On the next level down, again choose or start to type the name of the required sub folders. If there are further levels in the Filing Cabinet another drop down will appear.

## Search

Series 6 allows you to search for documents in In trays and folders you have access to. Depending on the modes you have you will be able to search in specific folders or In trays, choose what you search for and also search the content or Document References relating to the document.



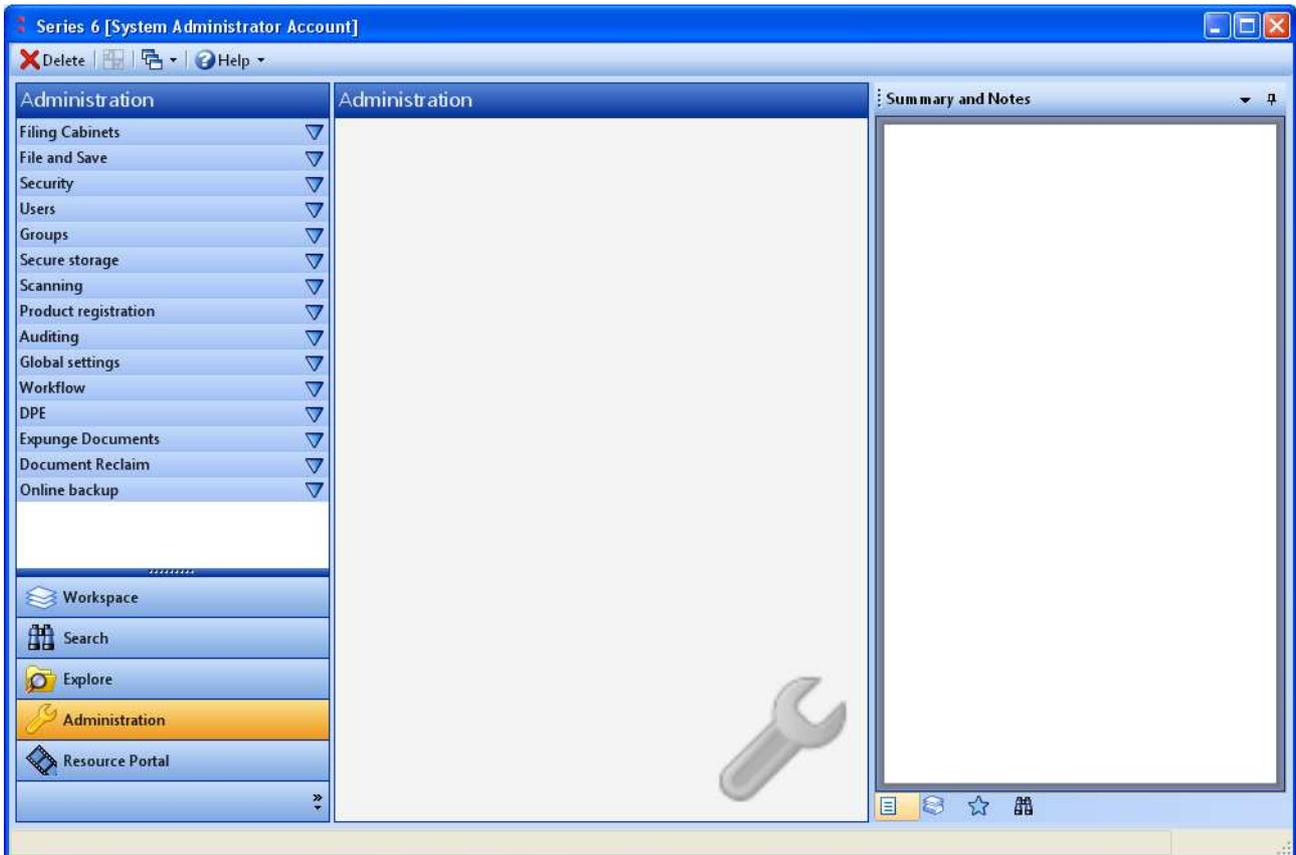
You can save a search and also view up to the last ten searches that have been performed. If using the Simple mode to search it is a very simple 'Google' style search bar but you do not get to choose where or how it searches.

## Administration

All configuration of the system is done via the Administration function, which is only available in the Standard and Advanced modes. Some users may not be able to view this function depending on the membership they may have and this is set by the System Administrator.

To access the Administration function, if using the Standard mode click the button  on the floating toolbar or if using the Advanced mode click the  Administration on the Left-hand pane.

In order to make changes to the Invu system the user has to be logged on as a user who is a member of the Administration group otherwise no changes can be made.



For more information on Administration of the Invu system please refer to the Administration Manual.

## Resource Portal

The Resource Portal will allow you to learn how to use Series 6 by means of Manuals, Videos Demonstration and Understanding.



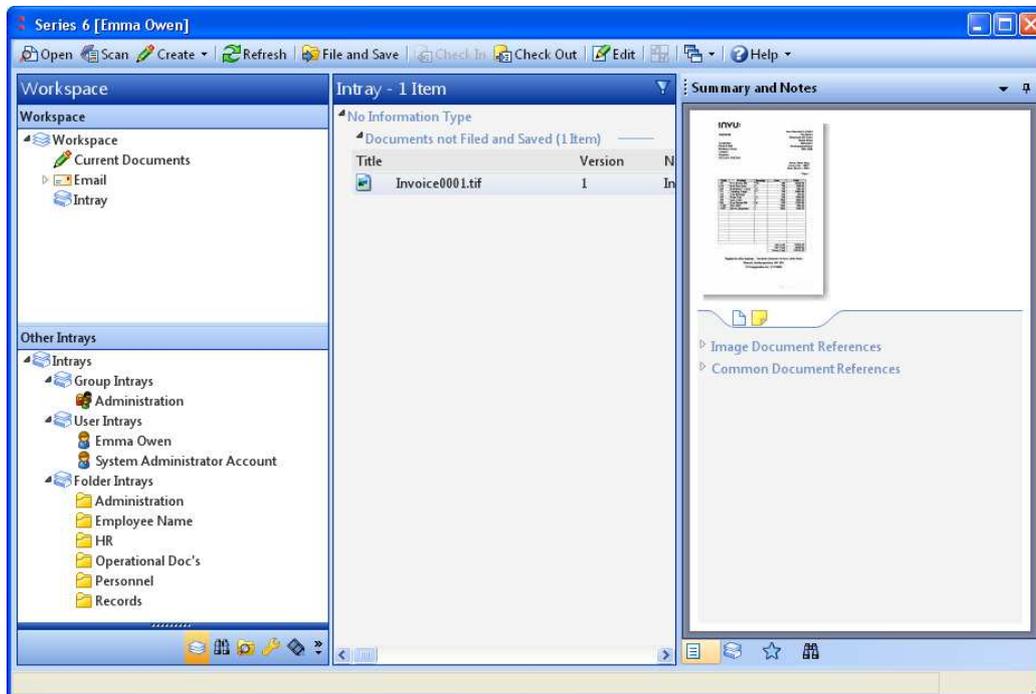
For more Information please visit the Resource Portal. Log into Series 6 as normal then click the  Resource Portal function if using the Advanced mode, if using the Standard mode click  icon on the Toolbar or if using the Simple mode click the **'Resource Portal'** tab.

## **USING THE INTRAY**

## USING YOUR INTRAY

### Accessing your Inray

To access your Inray click the  button. To view documents within the Inray, click the text or grey image  Inray in the Left-hand pane and the documents will be displayed:



When you bring files into Series 6 normally they would be displayed in your Inray. There are many different ways to bring a file into Series 6

### Unread and Read Documents

You have a unread/read feature on documents that are brought into any Inray you have access to. If you have unread documents the number will be displayed in brackets as shown below:



If a document is sent an Inray they will marked as unread and appear in **Blue and Bold** but, if checked out **Red and Bold** and if a draft then **Green and Bold**.

Unread documents will be displayed as normal black text.

If you have unread documents which you did not bring in then a popup is shown in your system tray notifying that you have unread items.

An icon is also displayed in your system tray as shown below:



If you hover your mouse over this icon a tool tip will appear with the number of unread items.

When a document has been viewed then it is marked as read. If you wish to manually mark a document as read then right click the document or if you have multiple documents click the first document and then hold down the **CTRL** key and select each subsequent document until all required are highlighted the right click one of the highlighted documents. From the menu select the **Mark as Read** option. If you wish to manually mark a document as Unread then right click a read document then from the menu select the **Mark as Unread** option. If you wish to make all documents in your In trays then right click the In trays name and from the menu select the Mark All as Read option.

You can also display only unread documents by using the Search In trays option which will show you all In trays you have access to grouped by type showing the number of unread documents in brackets as shown below:



If you do have access to other In trays then you will see the documents as unread even if the document has been read by the user who owns the In tray/or another user who has access, this applies no matter the In tray belongs to a User, Group or Folder. If you wish to make all documents in any of the Search In trays area then right click the type of In tray name and from the menu select the **Mark All as Read** option.

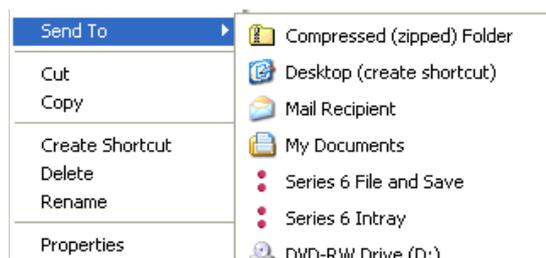
### Bring an Electronic Document into Invu

An electronic document can be placed into Series 6 by simply dragging and dropping the document into your In tray.

To drag and drop a file, first click the  In tray option within the Workspace area. In the top right corner of the window click the **Restore** button so the Windows desktop can be seen.

Click and drag the document into the Middle pane area of the In tray and release the mouse button. The document will be available to be filed and saved.

Another way to bring an electronic document into Series 6 is to right click a document on your **Desktop**, **Windows Explorer** or **My computer** and from the menu select the **Send to** option.

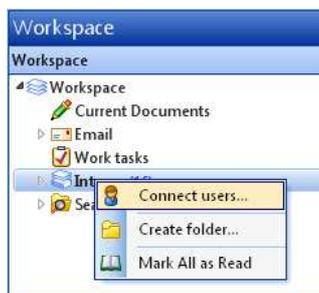


From the menu click the **Series 6 File and Save** option to send the document into Series 6 and File and Save it away or click the **Series 6 In tray** option to send the document directly to your In tray.

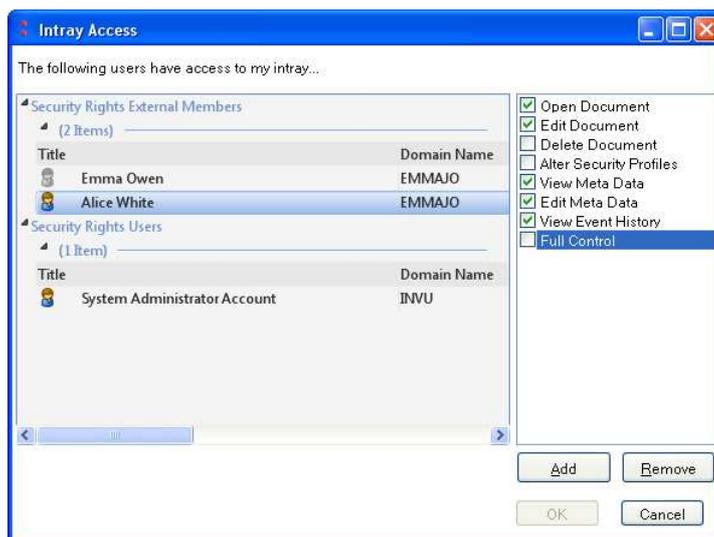
### Allow Other Users to Access Your In tray

You can enable other users to have access to your In tray; this is known as the **Connect Users** option. Users are able to then work with the documents in your In tray (depending on the permissions given).

To Connect Users, right click the In tray in the Left-hand pane.



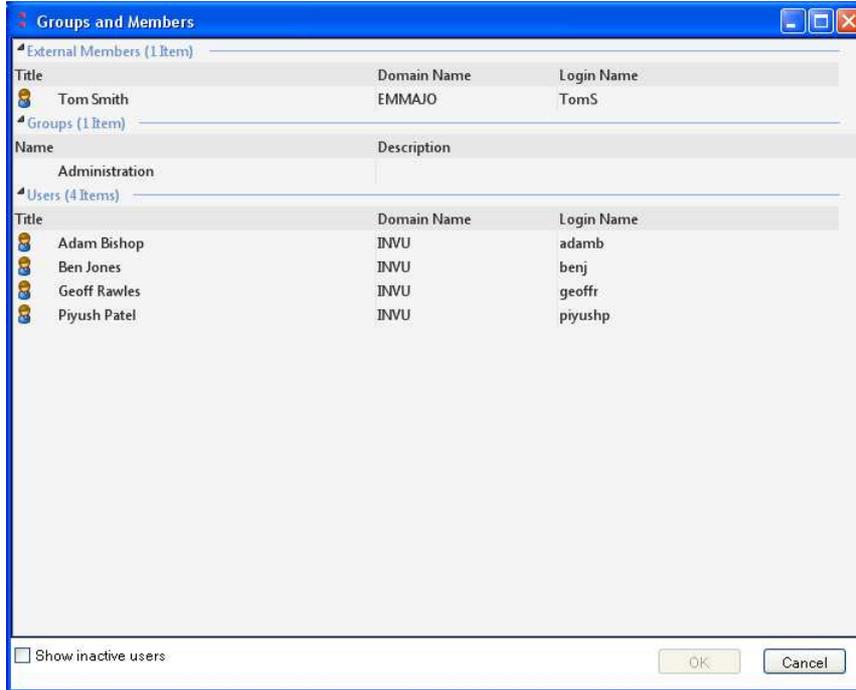
From the menu click the **Connect Users** option and the 'Intray Access' screen will be displayed:



This screen shows who has access to your Intray at present. More members can be added applying different access rights and also members can be deleted or have access rights changed.

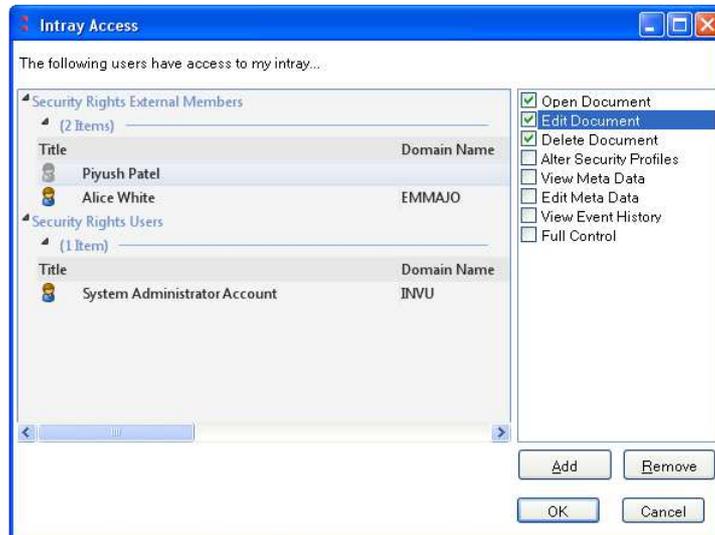
## To Add a Member and Assign Access Rights

Click the **Add** button and the 'Groups and Members' screen will be displayed as shown below:



Expand the section and highlight the member (user/group) who needs to have access. If multiple members are to have access highlight the first member, hold down the **CTRL** key and select each subsequent member.

Once the relevant members have been selected, click the **OK** button to return to the 'Intray Access' screen.



Once the members have been added to the list, rights will be given automatically to browse and open documents from the Intray.

To apply more access rights, highlight the member from the list. On the right side will be a list of member access rights, tick the relevant rights. The access rights are as follows:

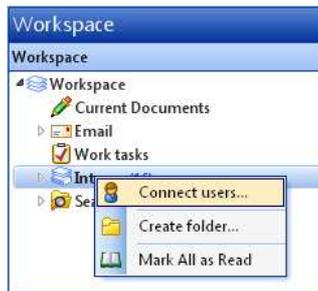
| Access Right     | Description                                                                                                                |
|------------------|----------------------------------------------------------------------------------------------------------------------------|
| OpenDocument     | Allows the members to open all documents with in the Intray they have access to.                                           |
| EditDocument     | Allows the user to make changes to the document in the Intray they have access to.                                         |
| DeleteDocument   | Allows the user to delete documents in the Intray they have access to.                                                     |
| ViewMetadata     | Allows the user to view all attributes associated to a document in the Intray they have access to.                         |
| ViewEventHistory | Allows the user to view what has happened to the document this feature is accessed from the right click menu - Properties. |
| Full Control     | Allows the user all above rights to Intray                                                                                 |

## Folders in the Intray

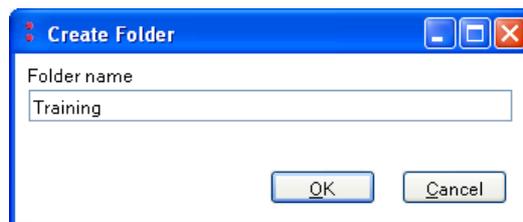
You are able to create folders within your Inray very much like in Windows explorer but this does depend on the privileges given by the System Administrator.

### Create Folder in your Inray

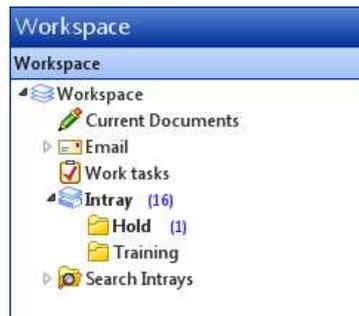
To create a folder, right click the Inray or an existing folder in the Left-hand pane.



From the menu click the **Create folder** option and the 'Create folder' dialog box will be displayed:

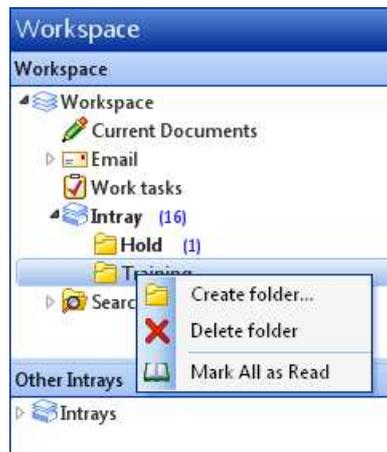


Enter the name of the new folder and click the **OK** button. The folder will be created and displayed below the Inray or folder. (As shown on the next page)

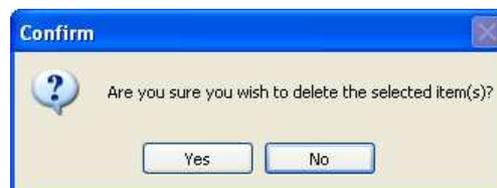


## Delete an Intrad Folder

To delete a folder, right click the folder:



From the menu select the **Delete folder** option and the following message will be displayed:



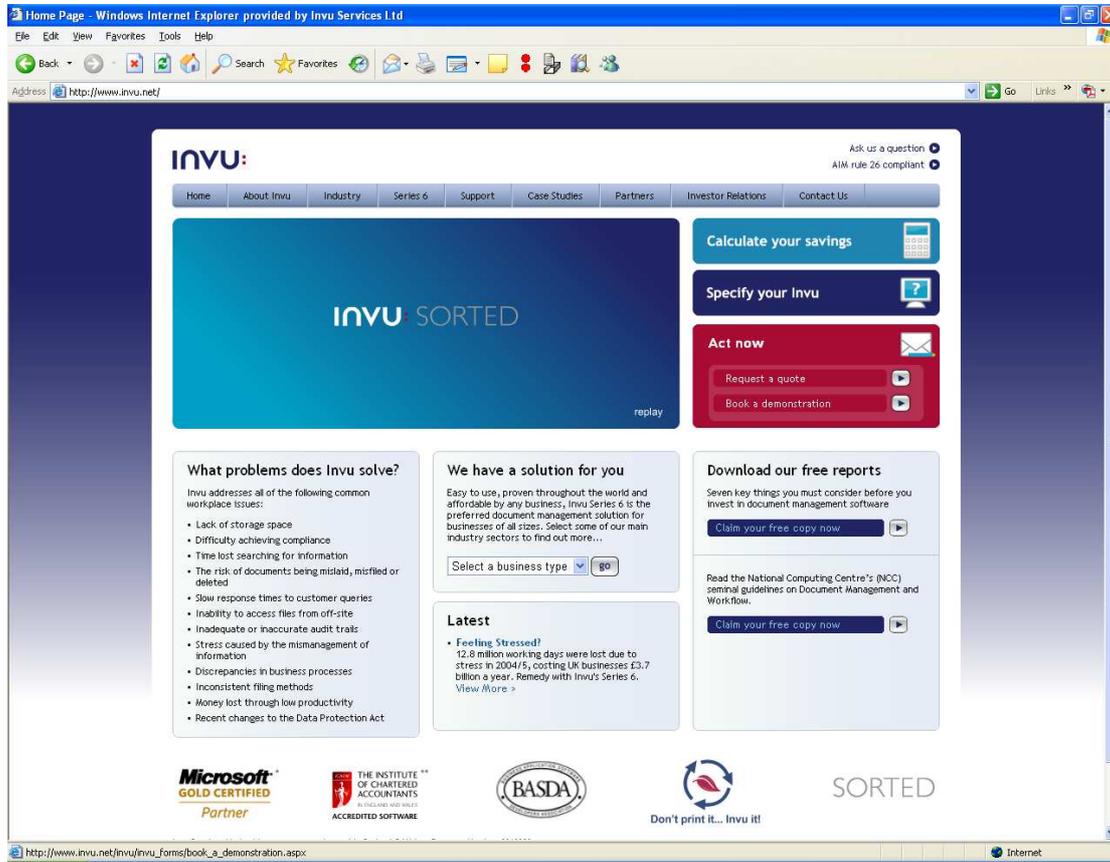
Click the **Yes** button to delete the folder. Click the **No** button to abandon deletion.

**NB:** Folders can also be added to existing folders.

## WEB PAGES INTO SERIES 6

When browsing the Internet Web pages can be placed into Series 6.

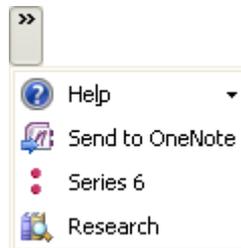
Open Windows Internet Explorer and browse to the desired web page.



Click the  icon

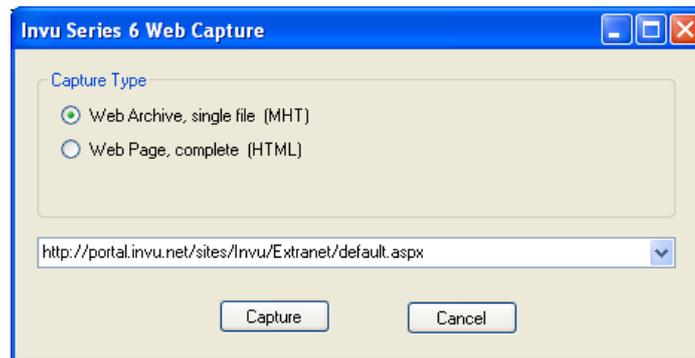
OR

If you are using Internet Explorer 7 then to access the click the  icon on the right side of the browser window in the tool bar area and the following will be displayed:

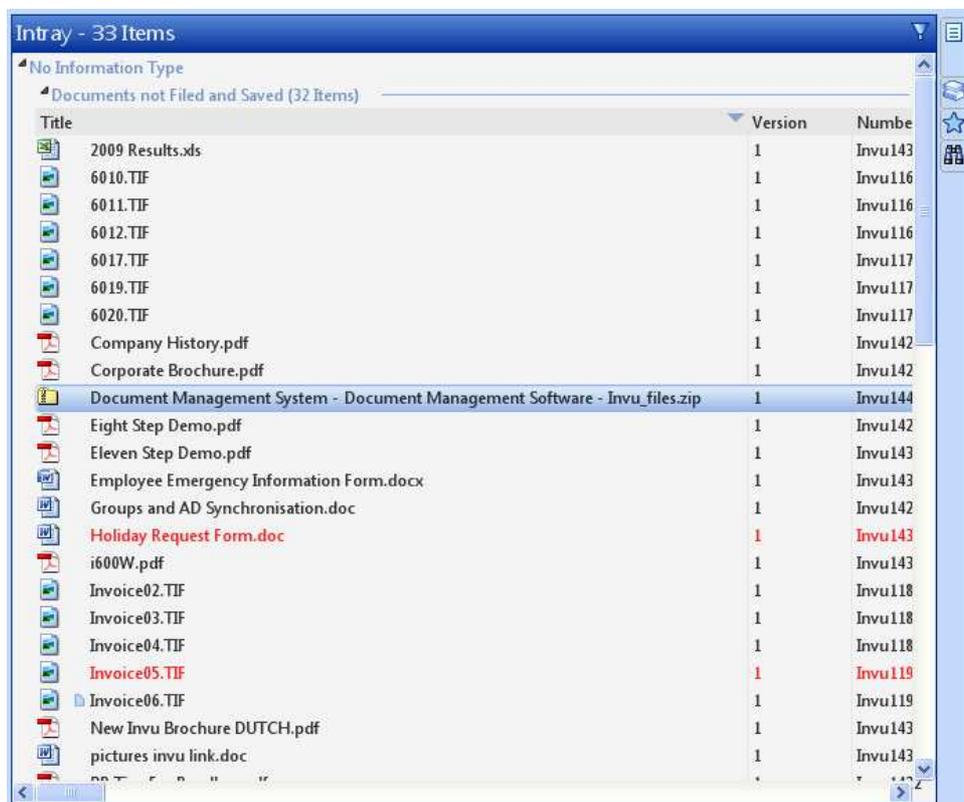


Click the Series 6 option.

No matter what version of Internet Explorer you are using the following dialogue box will be displayed:



In the area 'Capture Type' choose either **Web Archive, single file (MHT)** which will create one file with all images embed inside or **Web Page, complete (HTML)** which will create a html zip file this can consist of several files depending on the contents of the web page. The drop down list displays which page is selected ensure the right address is selected, and then click the **Capture** button. The web page is then brought into your Intray as shown below:





## **FILE AND SAVE**

## UNDERSTANDING FILE AND SAVE

A document when brought into Series 6 normally goes to your In tray. You will need to File and Save it into a Folder location in a Filing Cabinet in order for another user to be able to work with it. Before you learn how to file and save you need to understand the information required to do that.

- Location - Filing Cabinet and Folders
- Information Types
- Standard Documents
- Document References

### Filing Cabinet and Folders

Within the Filing Cabinets location separate filing cabinets can be created. These form the basis and structure for the Series 6 system and specifically the way in which documents are stored and organised.

Filing Cabinets are configured by an Administrator and are displayed in a folder hierarchy structure as shown on the right.



### Information Types

Information Types are the category of a document and are used when filing the documents/information away into the Filing Cabinets. An Information Type is defined by the Administrator and is used to categorise a type of document. An Information Type is associated with folder(s) within the Filing Cabinets, and this dictates the hierarchically where the document will be stored or referenced.

### Standard Documents

A Standard Document relates directly to an Information Type and is used to provide classification (sub category) for that variety of document.

As an example 'Letter' could be defined as an Information Type with 'Acceptance Letter', 'Inquiry Letter' and 'Letter of Complaint' being three related Standard Documents. A customer could also choose to work with 'Invoice' as an Information Type and categorise 'Purchase Invoice' and 'Sales Invoice' as Standard Documents. As an alternative, a more general approach could be taken and 'Purchasing Document' could be setup as the Information Type with 'Purchase Invoice', 'Credit Note', and 'Purchase Order' etc being defined as Standard Documents.

### Document References

Document References add further detail when filing the documents into the Filing Cabinets. Document References are associated with the Standard Documents, which means each Standard Document can have a differing set of Document References. There is no set number as to how many Document References should be associated with a Standard Document; one Standard Document may have five Document References, another nine and a third just one.

## FILE AND SAVE DOCUMENTS

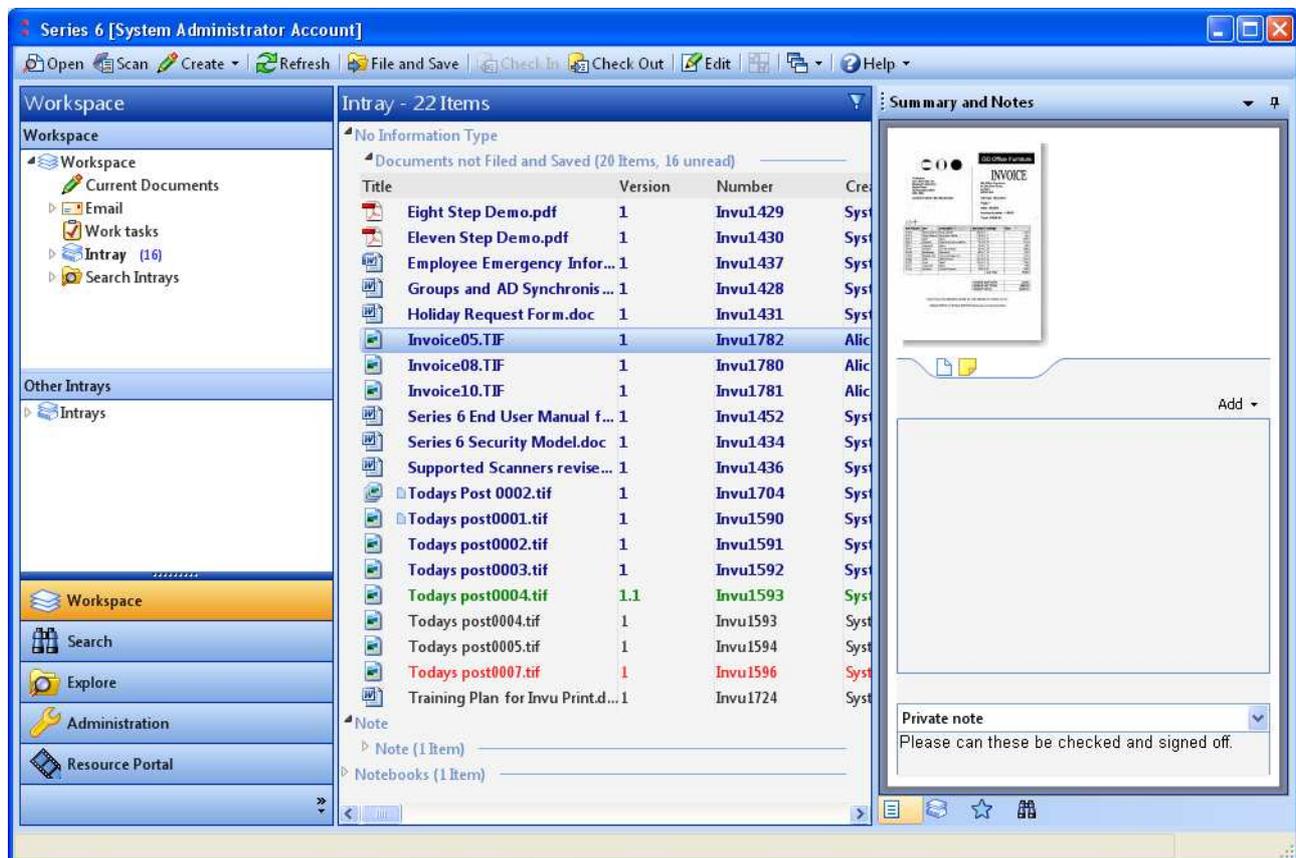
Once a document has been brought into Invu it can be placed into a user or folder Intray. A document in an Inray can only be accessed by you and the users you connect. In order to make the file available to a wider audience you must file the document into the Filing Cabinet this is known as **File and Save**. In any of the modes you are able to **File and Save** as long as you have the privilege to do so.

When you choose to **File and Save** you will need to specify the File and Save Information; what type of document it is (Information Type), where it will be stored in Invu, the Standard Document (sub category) and the Document References. For more information on File and Save Information please see page 64.

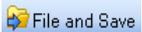
There are different ways to file and save a document depending on the mode.

### To File and Save a Document

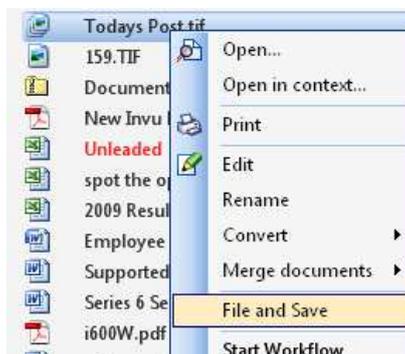
First you will need to select the document(s) you wish to file and save. To access your Inray click the  button. To view documents within the Inray, click the text or grey image  Inray in the Left-hand pane and the documents will be displayed. Highlight the document required by clicking the title once in the Middle pane no matter what mode you are working in.



Once the document has been highlighted you are ready to File and Save:

- If using the Simple mode click the  button in the Right-hand pane.
- If using Standard or Advanced mode, click the  icon on the toolbar which appears at the top of the screen.

- Using any of the three modes, right click the document in the Middle pane and from the menu select the **File and Save** option.



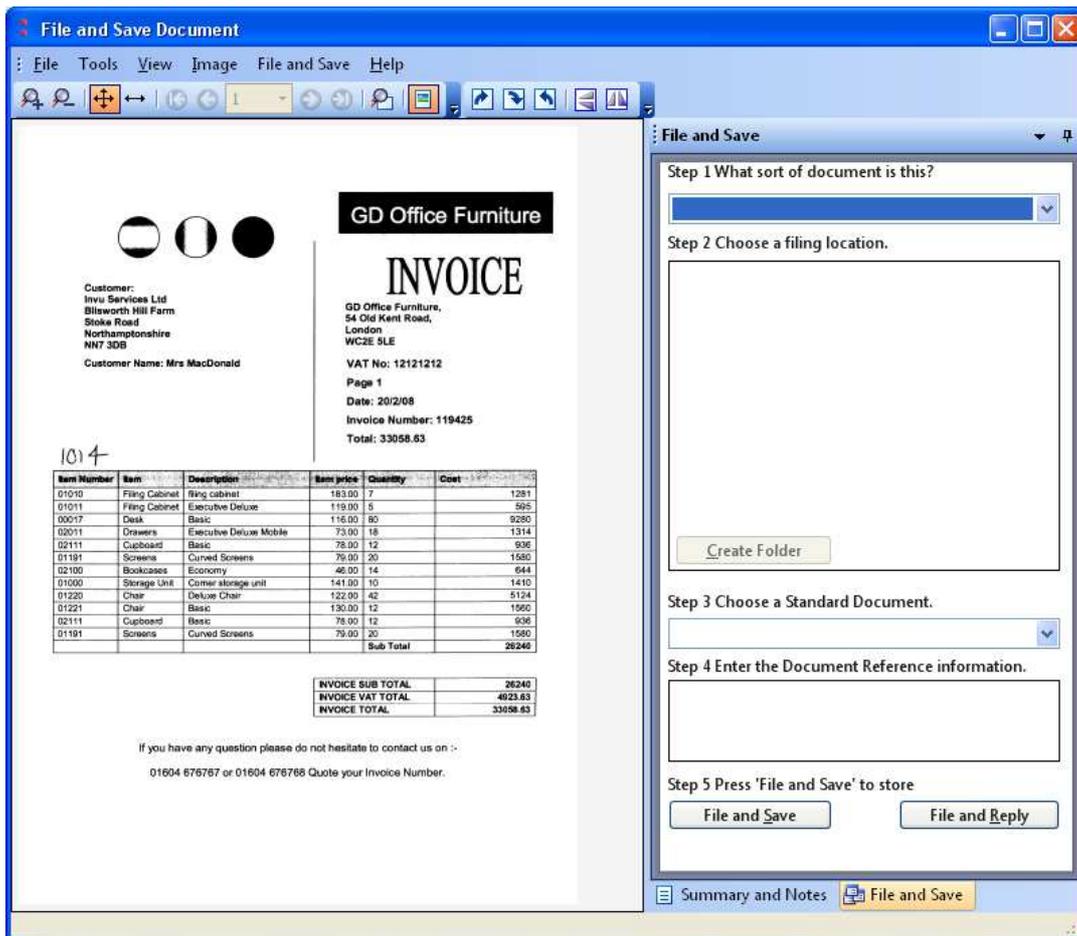
No matter which method is used the 'File and Save Document' screen will be displayed.

The file and save views are set by an administrator or a user with similar admin rights and can vary depending on the company's needs. There are two different ways to view the 'File and Save Documents' screen:

- Original File and Save screen (default)
- Customised Order and Text File and Save screen

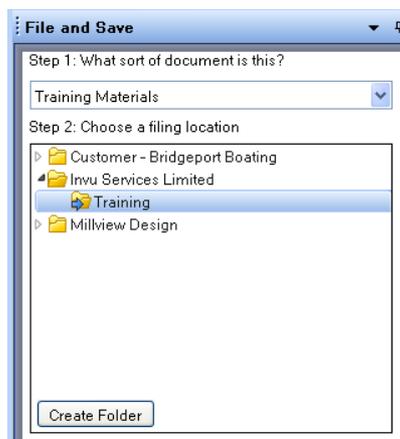
### Original File and Save Screen Right-Hand Pane

The document to be filed and saved is displayed along with the File and Save Right-hand pane. There are five steps to filing and saving a document away. If you wished to save a Training Outline document you would follow on the next page:

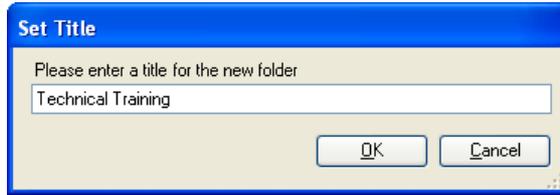


**Step 1 - What sort of document is this?** This is where the Information Type is selected. This could be Marketing Materials, Training Documents or Product Documents etc. Click the drop down list and choose the required Information Type.

**Step 2 – Choose a filing location for the document.** This is determined by what type (Information Type) of document has been selected in the previous step. I.e. If Training Material was selected the user would be able to place it in the Training filing location. To expand the relevant filing cabinet, click the white arrow. A list of available folders will be displayed, click the folder you wish to save the file into so it is highlighted as shown:



If the System Administrator has given you the privilege you are able to create folders using the **Create Folder** button. Click the **Create Folder** button and the following will be displayed:



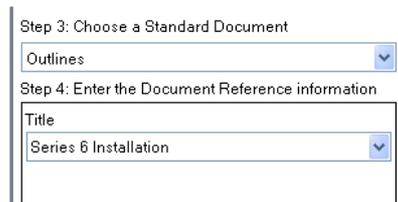
Enter the name of the new folder then click the **OK** button the folder will be created in this case under Training.



**Step 3 – Choose a Standard Document.** This is determined by what sort of document (Information Type) has been selected in Step 1. I.e. if Training Materials was chosen as the Information Type, then you would be able to choose from related Standard Documents such as Outline or Training Manual etc. Click the drop down list and choose the required Standard Document.

**NB:** If there is only one Standard Document then it will be selected automatically.

**Step 4 – Enter the Document Reference Information.** Once the Standard Document has been chosen the Document Reference information will be displayed (this can vary based on the Standard Document). I.e. If the Standard Document chosen was Outlines you may need to enter the Title only.



Fill in the Document References. If a field is mandatory a  symbol will be displayed to the right of the field. This means an entry must be made in order to continue filing and saving.

If you have a reference which starts with the word **List:** then that means you have to pick the value from the drop down list rather than entering it manually.



Also, if configured, you are able to search a Fixed list. You can type in **W** it will then display only a list of values in the list that contain the letter **W** as shown below:



This is very useful if you have very large lists to search through. If not configured the list will always appear in full no matter what has been typed.

If there are multiple fixed list in the file and save screen then a feature called linked lists can be used (if configured).

**Step 4 Enter the Document Reference information.**

The screenshot shows a form titled "Step 4 Enter the Document Reference information." It contains three vertically stacked dropdown menus. The first is labeled "List: Customer Number", the second "List: Company Name", and the third "List: Contact Name". Each menu is currently empty, showing only a vertical line in the input field and a downward arrow on the right.

For example choose the Customer Number and the Company Name and Contact will be completed automatically if only one value if linked thus saving time completed fields manually.

The screenshot shows the same form as above, but now the dropdown menus are populated. The "List: Customer Number" menu contains the value "2331", the "List: Company Name" menu contains "Niak Ltd", and the "List: Contact Name" menu contains "Alice White".

If the contact name did not complete there may be more than one contact to choose from for that customer number.

If you need to enter a date then you will need to click the drop down arrow and a calendar will be displayed:

The screenshot shows a date selection interface. At the top is a "Publication Date" label and a dropdown arrow. Below it is a calendar for "June 2008". The calendar has a header with days of the week: "Mon Tue Wed Thu Fri Sat Sun". The dates are arranged in a grid. The date "2" is highlighted in red. At the bottom of the calendar, it says "Today: 02/06/2008".

Click the date required and the field will be populated as shown below.

The screenshot shows the "Publication Date" dropdown menu now populated with the text "02 June 2008".

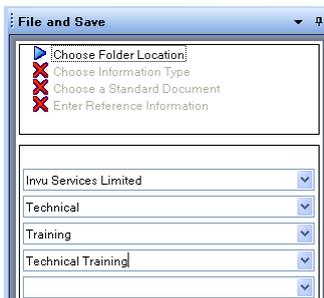
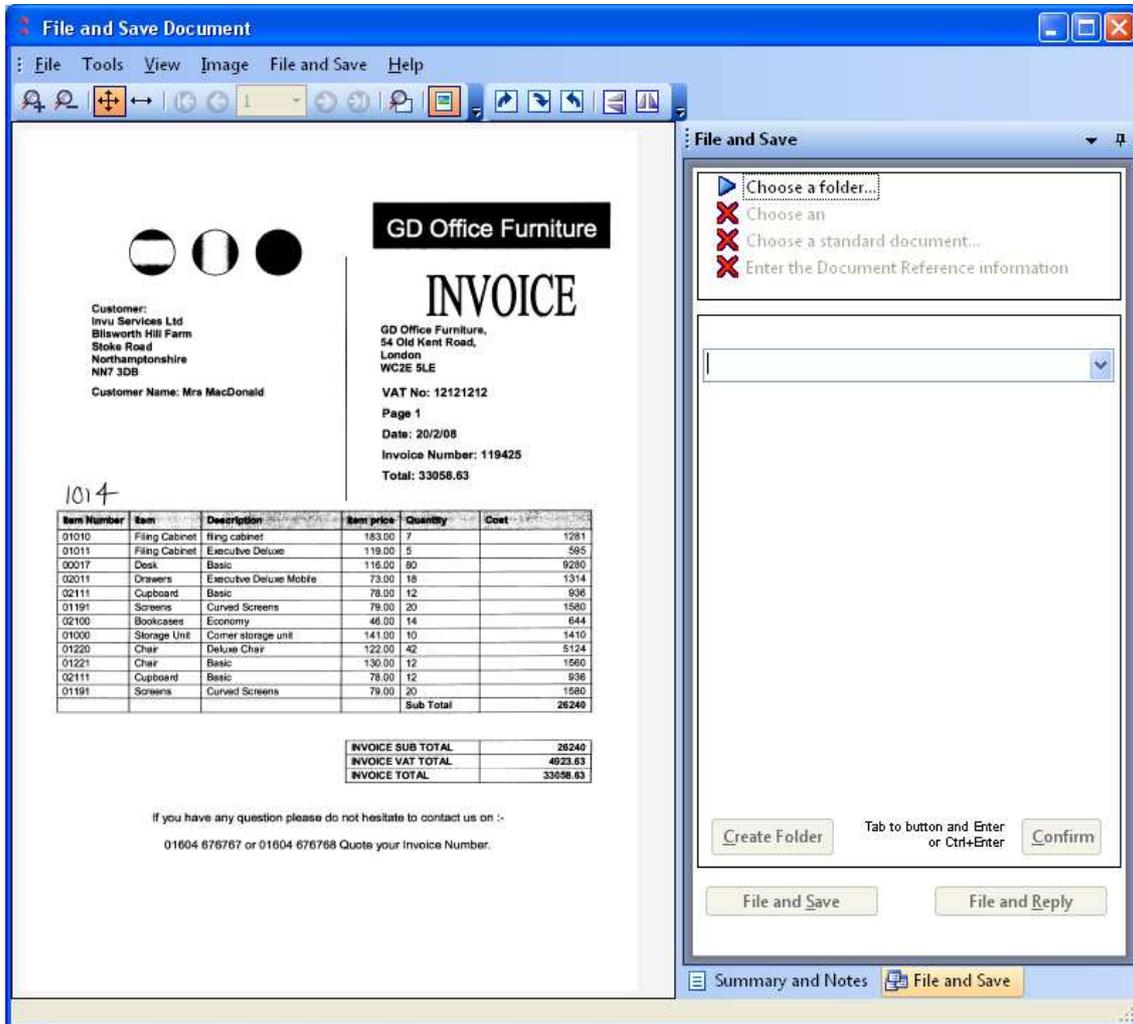
The screenshot shows a 'File and Save' dialog box with the following steps:

- Step 1: What sort of document is this?** A dropdown menu is set to 'Training Materials'.
- Step 2: Choose a filing location** A tree view shows folders: 'Customer - Bridgeport Boating', 'Invu Services Limited' (expanded), 'Training', 'Technical Training' (selected), and 'Millview Design'. A 'Create Folder' button is at the bottom.
- Step 3: Choose a Standard Document** A dropdown menu is set to 'Outlines'.
- Step 4: Enter the Document Reference information** A 'Title' field contains 'Series 6 Installation'.
- Step 5: Press 'File and Save' to store** Two buttons are visible: 'File and Save' and 'File and Reply'.

**Step 5 – Press 'File and Save' to store.** Once you have completed the File and Save Panel, click the **File and Save** button to move the document from the Intray into the selected folder.

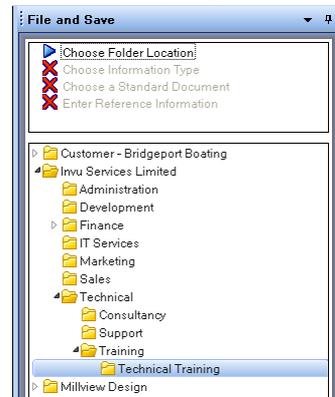
## Customised File and Save Screen Right-Hand pane

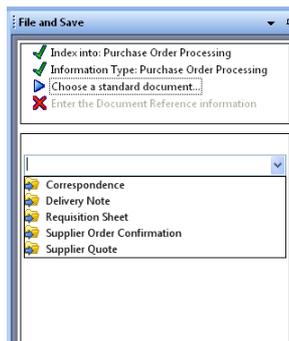
The document to be filed and saved is displayed along with the Files and Save Right-hand pane. In this File and save screen the steps are replaced by simple worded instructions which can differ depending what the administrator has set for the order and the wording but the principle is the same.



When choosing the Folder location you may choose from a tree structure showing yellow folders which you can expand by clicking the white arrows and collapse using the black arrow, then highlighting the Folder where you would like to store the document as shown to the right.

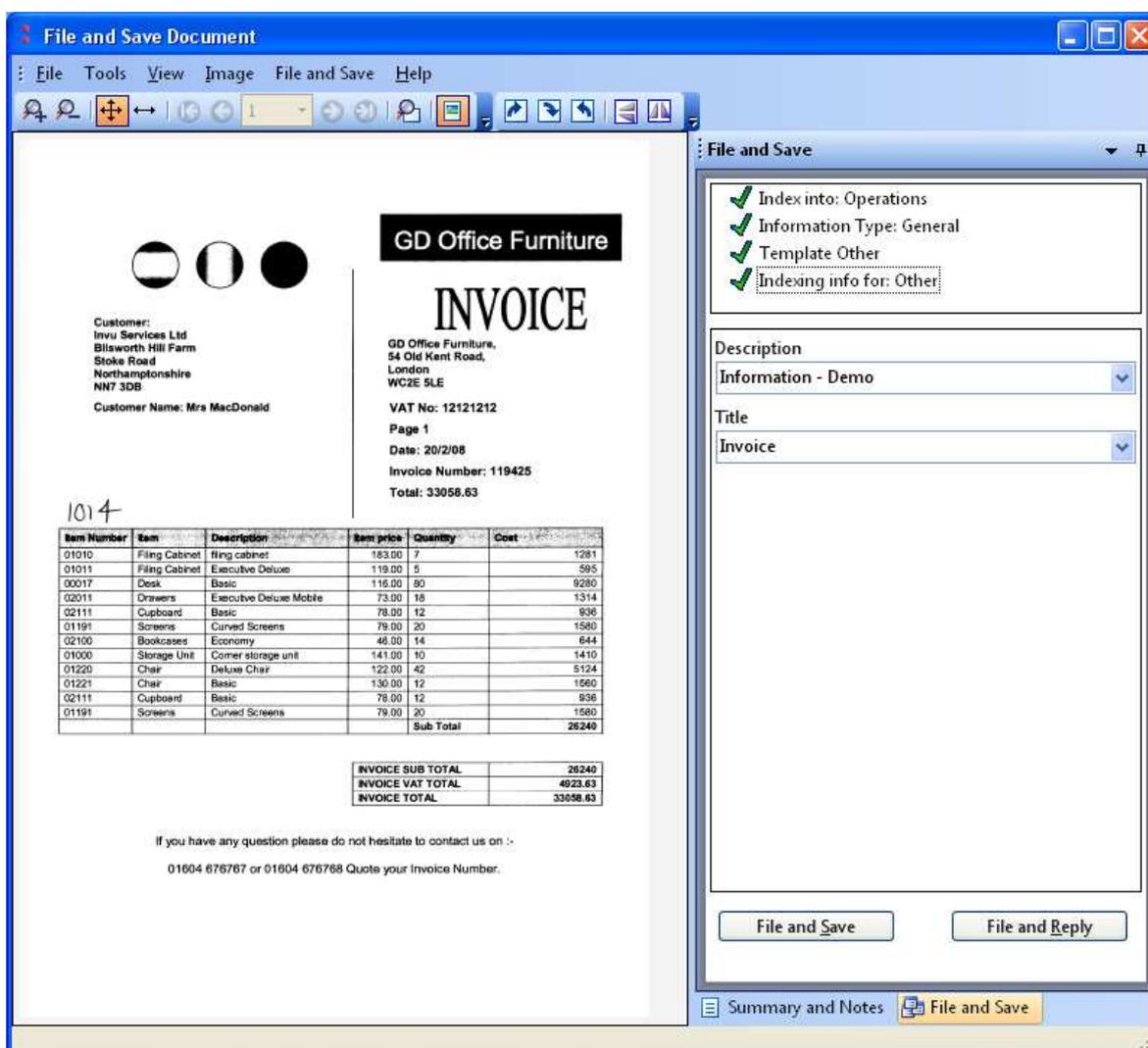
Or you choose from a drop down box the Filing Cabinet, and then in another drop down below choose the folder. Each time a folder is chosen another drop down may be displayed depending on the sub structure. The example to the left shows four drop downs to get to the final location of Technical Training. No matter how the folders are shown and selected click the **Confirm** button to move to the next set of instructions.





A green tick will appear beside each line as you have chosen the relevant option. In the example above The Information Type has been selected automatically as there was only one. If there is more than one then click the drop down and choose the relevant Information Type.

Then choose the Standard Document again from a drop down box and the Document References will automatically be displayed:



Fill in the Document References. If a field is mandatory a  symbol will be displayed to the right of the field. This means an entry must be made in order to continue filing and saving.

If you have a reference which starts with the Word **List:** then that means you have to pick the value from the drop down list rather than entering it manually.

List: Primary Contact

Also, if configured, you are able to search a Fixed list. You can type in **W** it will then display only a list of values in the list that contain the letter **W** as shown below:

List: Company Name

- J Whiley Ltd
- WWP

This is very useful if you have very large lists to search through. If not configured the list will always appear in full no matter what has been typed.

If there are multiple fixed list in the file and save screen then a feature called linked lists can be used (if configured).

List: Customer Number

List: Company Name

List: Contact Name

For example choose the Customer Number and the Company Name and Contact will be completed automatically if only one value if linked thus saving time completed fields manually.

List: Customer Number

List: Company Name

List: Contact Name

If the contact name did not complete there may be more than one contact to choose from for that customer number.

If you need to enter a date then you will need to click the drop down arrow and a calendar will be displayed:

Publication Date

June 2008

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----|-----|-----|-----|-----|
| 26  | 27  | 28  | 29  | 30  | 31  | 1   |
| 2   | 3   | 4   | 5   | 6   | 7   | 8   |
| 9   | 10  | 11  | 12  | 13  | 14  | 15  |
| 16  | 17  | 18  | 19  | 20  | 21  | 22  |
| 23  | 24  | 25  | 26  | 27  | 28  | 29  |
| 30  | 1   | 2   | 3   | 4   | 5   | 6   |

Today: 02/06/2008

Click the date required and the field will be populated as shown to the right.

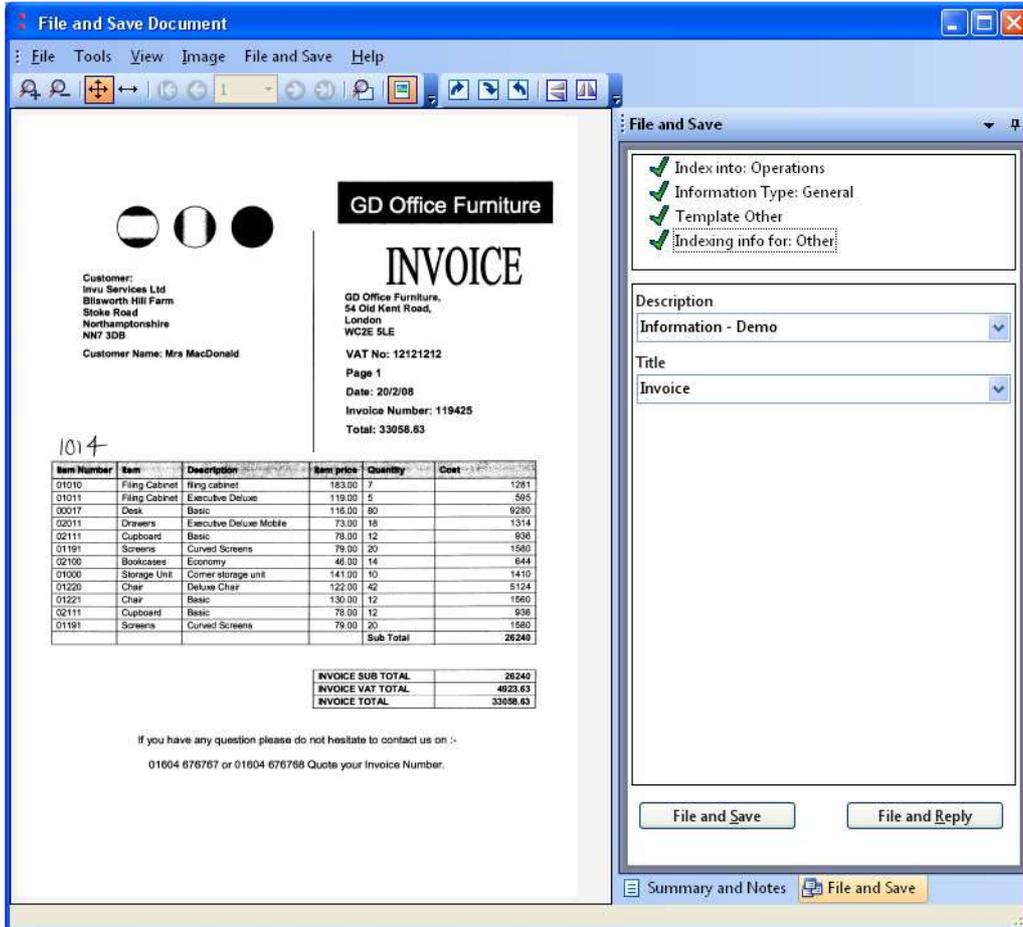
Publication Date

02 June 2008

**NB:** The above instructions can be in a different order depending on the configuration

Once the File and Save information is complete click the **File and Save** button to move the document from the Intry into the selected folder.

### File and Save Menu Options



No matter which file and save screen you are using you have the option to control what will be remembered for the next you wish to file and save a document. With the 'File and Save' screen click the **File and Save** menu at the top and you are able to:

- Retain Indexing Values
- Refresh Drop down Lists
- Retain Index folder

The **Retain Indexing Values** option will remember all of the options selected and text entered for the next time you want to file and save. This would be very useful if you were saving the same type of document on a regular basis.

To change the option you must be in the 'File and Save document' screen as shown to the right. Click the menu **File and Save** and from the list choose **Retain Indexing Values** a tick will appear beside the option so that you will know if it is switched on.

The **Refresh Drop Down Lists** option will refresh all drop down list for selected Document Type. This is very useful if other users have added new entries since you have opened the 'File and Save Document' screen.

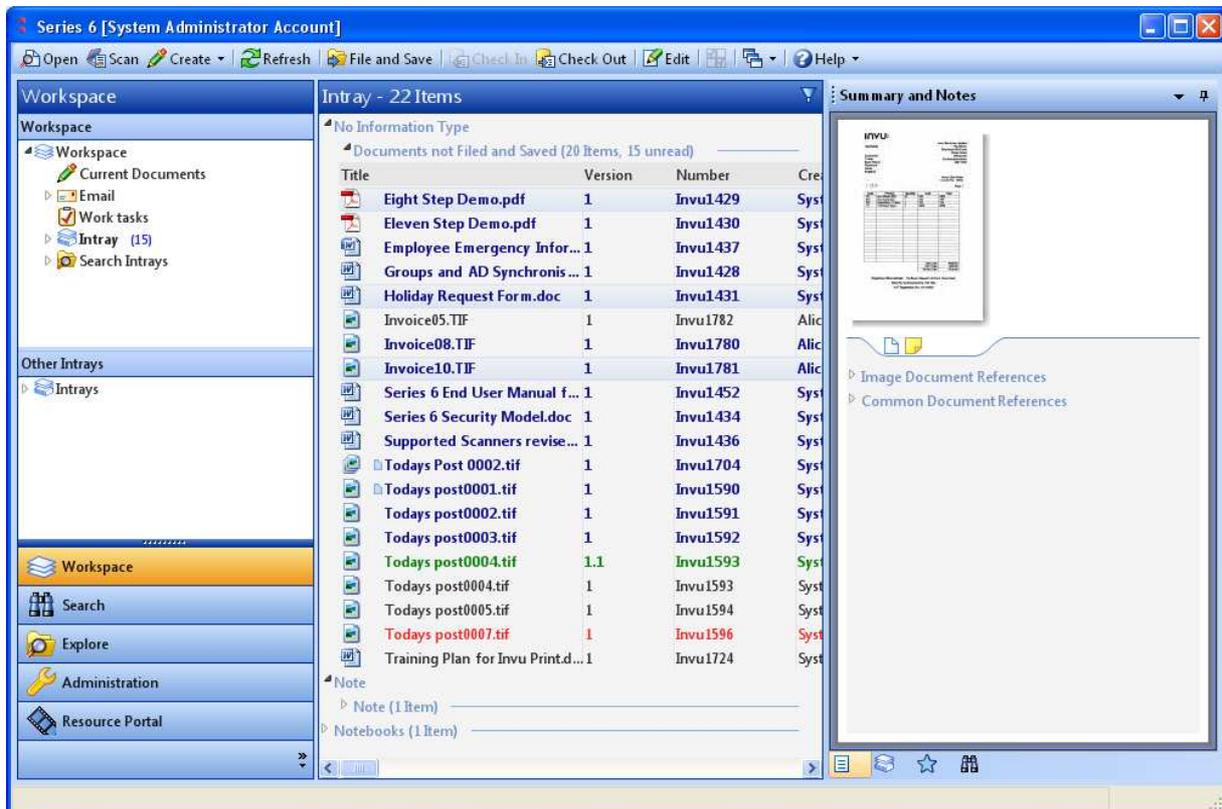
To change the option you must be in the 'File and Save document' screen as shown on the previous page. Click the menu **File and Save** and from the list choose **Refresh Drop Down Lists** this can be repeated as often as you need to.

The **Retain Index Folder** option will remember the folder location chosen for the next time you want to file and save. This would be very useful if you were saving documents into the same location on a regular basis.

To change the option you must be in the 'File and Save document' screen as shown on the previous page. Click the menu **File and Save** and from the list choose **Retain Index Folder** a tick will appear beside the option so that you will know if it is switched on.

## To File and Save Multiple Documents

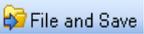
First you will need to select the document(s) you wish to file and save. To access your Intray click the  button. To view documents within the Inray, click the text or grey image  Inray in the Left-hand pane and the documents will be displayed as shown below:

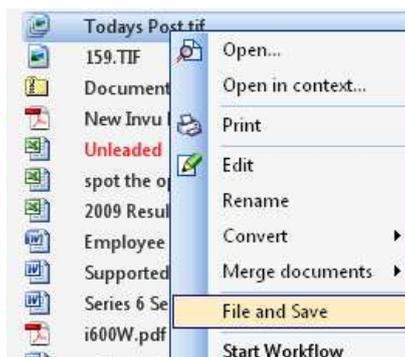


Click the first document required in the Middle pane then hold down the **CTRL** key and then click each subsequent document.

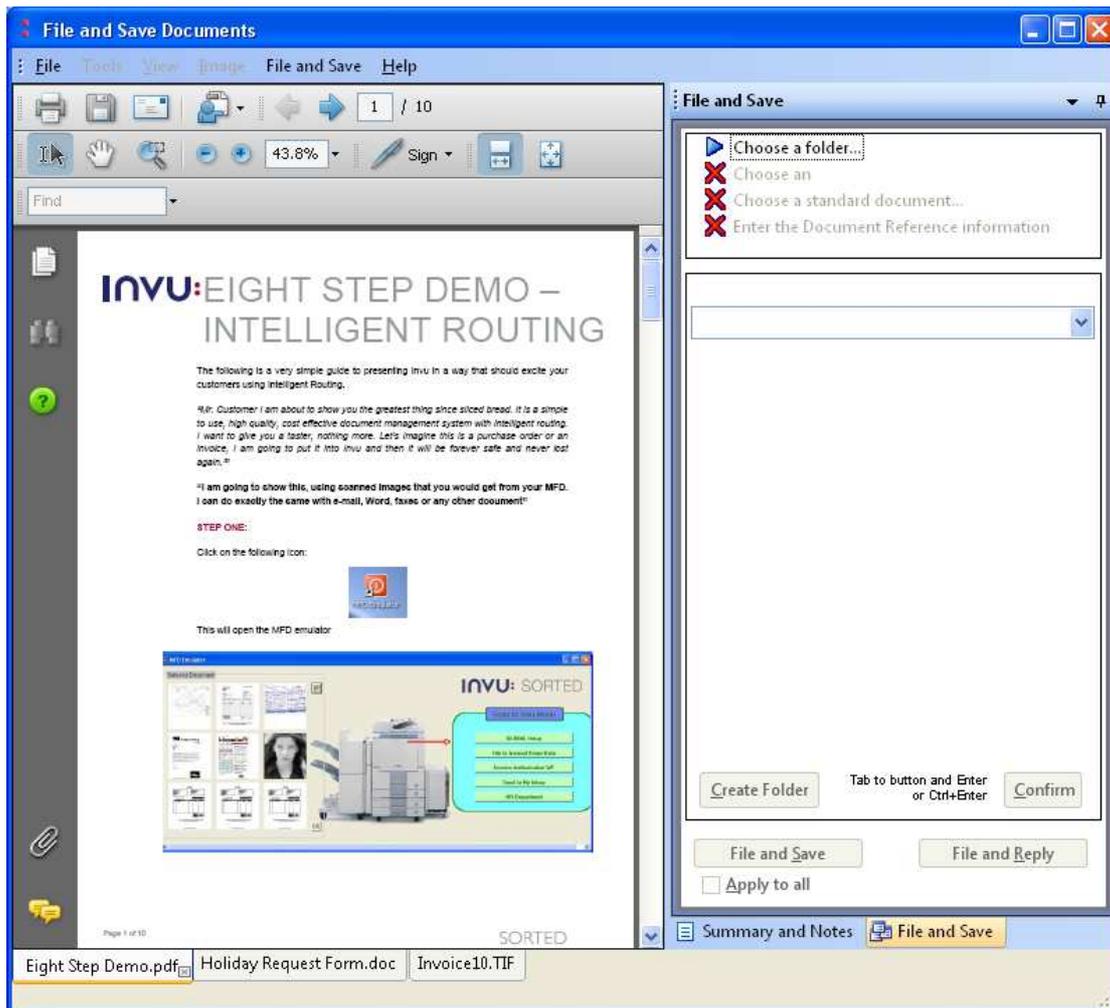
If you wish to highlight a group of documents click the first document then hold down the **SHIFT** key and click the last document in the Middle pane no matter what mode you are working in.

Once the documents have been highlighted you are ready to File and Save:

- If using the Simple mode click the  button in the Right-hand pane.
- If using the Standard or Advanced mode click the  icon on the toolbar which appears at the top of the screen.
- Using any of the three modes, right click one of the highlighted documents in the Middle pane and from the menu select the **File and Save** option.



No matter which method is used the 'File and Save Document' screen will be displayed as shown on the next page:



Each document selected will have a tab across the bottom of the 'File and Save Document' screen.



File each document away as normal, for more information on file and save see page 65. The tab will disappear showing the next document to be filed and saved. Once the last document has been filed and saved the 'File and Save Document' screen will disappear.

If you wish to file all the documents away using the same file and save information fill in the file and save pane.

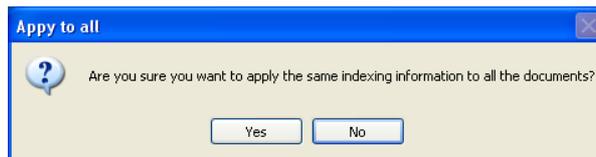
The screenshot shows the INVU software interface. The main window displays an invoice for 'Invu Services Limited'. The invoice includes a table with columns for Code, Product, Quantity, Cost, and Total. The table contains the following data:

| Code | Product              | Quantity | Cost        | Total   |
|------|----------------------|----------|-------------|---------|
| 101  | Invu Series 600      | 10       | 450         | 4500    |
| 010  | Invu Care 2yrs       | 1        | 750         | 750     |
| 020  | Installation .5 days | 1        | 750         | 750     |
| 111  | Training 3 days      | 1        | 3000        | 3000    |
|      |                      |          | Net Total   | 9360.00 |
|      |                      |          | VAT Total   | 1452.50 |
|      |                      |          | Gross Total | 9752.50 |

The 'File and Save' dialog box is open on the right side of the window. It contains the following fields and options:

- Index into: Finance (checked)
- Information Type: Accounts Documents (checked)
- Template Pur Invoice (checked)
- Indexing info for: Pur Invoice (checked)
- Order Number: 1234
- Invoice Number: 10664
- Company Name: Trader
- Contact Name: Ellis Smith
- Date: 13 October 2009
- Total: 9752.50
- Buttons: File and Save, File and Reply
- Checkbox:  Apply to all

Tick the **Apply to all** check box and the following message will be displayed:



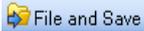
Click the **Yes** button to continue with apply to all or click the **No** button to cancel.

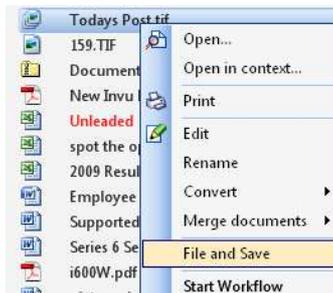
Once complete click the **File and Save** button. All documents will be filed and saved with the same information.

## File and Reply to a Document

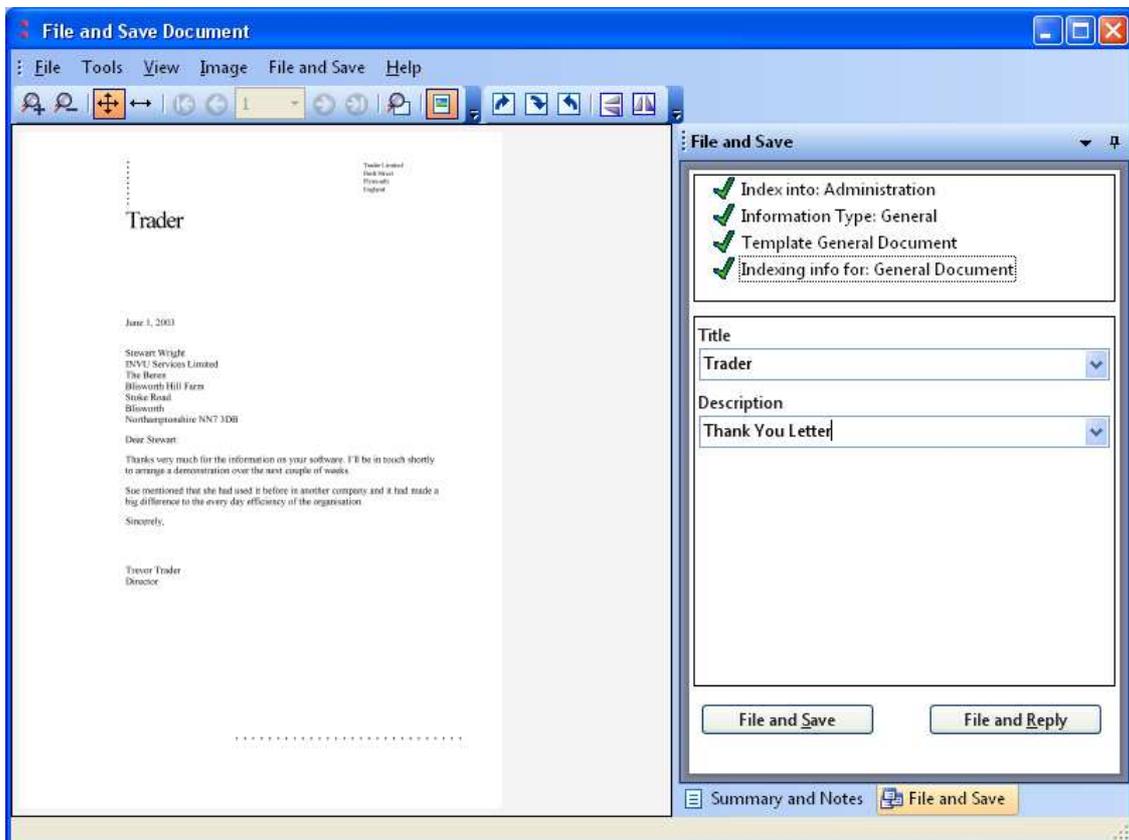
The File and Reply feature will allow you to File and Save the document then create a new document to respond and when finished attach the response to the originally filed and saved document.

Once the documents have been highlighted you are ready to File and Save:

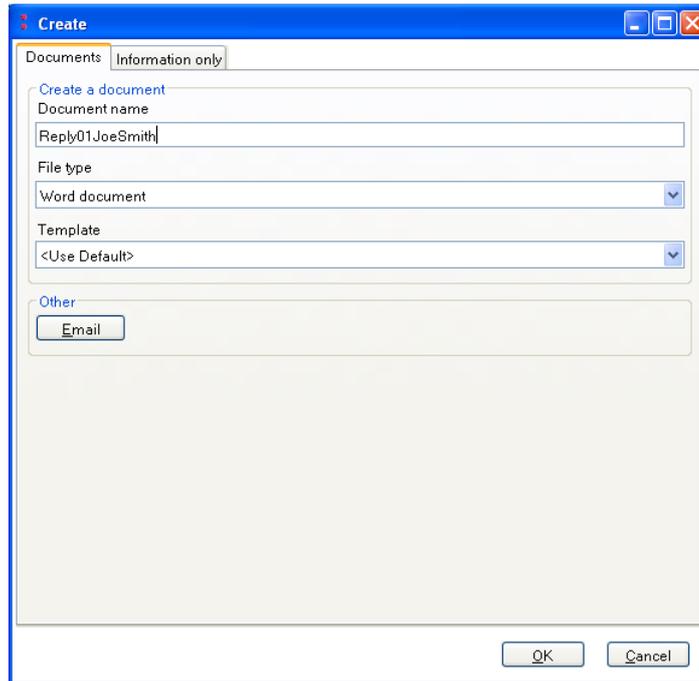
- If using the Simple mode click the  button in the Right-hand pane.
- If using Standard or Advanced mode, click the  icon on the toolbar which appears at the top of the screen.
- Using any of the three modes, right click the document in the Middle pane and from the menu select the **File and Save** option.



No matter which method is used the 'File and Save Document' screen will be displayed as shown below:



Once the file and save information is complete click the **File and Reply** button and the 'Create' screen will be displayed:



The '**Documents**' tab can create new documents (in many different file formats).

To create the reply document first, type the **Document Name** and click the drop down and choose the required **File type**.

If a **Template** is required when creating a document, click the drop down and choose a template from the list. If you want to create a blank document then leave the option **<Use Default>** selected.

Click the **OK** button and the document will be created in the chosen format.

Enter the text into the document in the normal way then close and save the file. The document will be brought into your In tray and the 'File and Save Document' screen will be displayed.

File and Save the document as normal and click the **File and Save** button. The document saved will then be attached to the original document responded to.



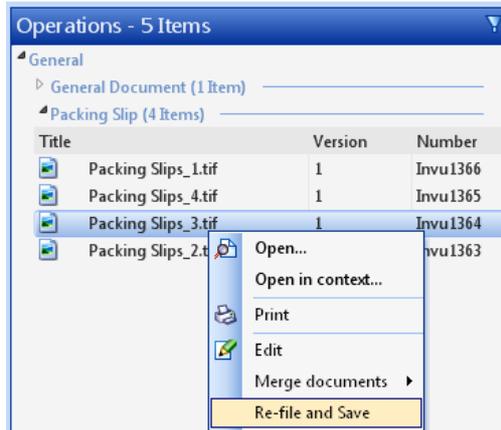
In the Standard or Advanced mode go to the **Explore** screen. At any time after the document has been saved it can be re-filed and saved. A small paper clip symbol will be displayed before the title of the document both on the original and the reply.

## Re-File and Save a Document

Re-File and Save is used to change the details after the initial File and Save. Depending on the 'File and Save Documents' screen different actions can be performed.

To re-file and save a document within Series 6 first find the document through the **Explore** screen (for more information on explorer please see page 83) or the Search (for more information on Search please see page 144) functions.

In the Middle pane click the document to highlight then right mouse click the highlighted document.



From the menu select the **Re-File and Save** option and the 'File and Save Document' screen will be displayed as shown on the next page:

When using the **Re-File and Save** option depending on which type of the 'File and Save Documents' screen you have, will control what you can do in terms of re-file and save but moving from folder to folder. The following pages will take you through the two screens and explain the options.

Re-File and Save in the Original File and Save screen Right-hand pane (default)

The screenshot shows the INVU: File and Save Document window. The main area displays an order sheet with the following details:

**INVU: ORDER SHEET**

**Customer:**  
Skeltons  
Stoke Road  
Weedon  
Northamptonshire  
NN7 5TT

**Invu Services Limited**  
The Beren  
Blisworth Hill Farm  
Stoke Road  
Blisworth  
Northamptonshire  
NN7 3DB

Name: Lee Johns  
Order No. 2347  
Page 1

| Code | Product         | Quantity | Cost         | Total       |
|------|-----------------|----------|--------------|-------------|
| 89   | Invu Series 650 | 5        | 500          | 2500        |
| 88   | Invu Care 4 yr  | 1        | 3000         | 3000        |
|      |                 |          | <b>Total</b> | <b>5500</b> |

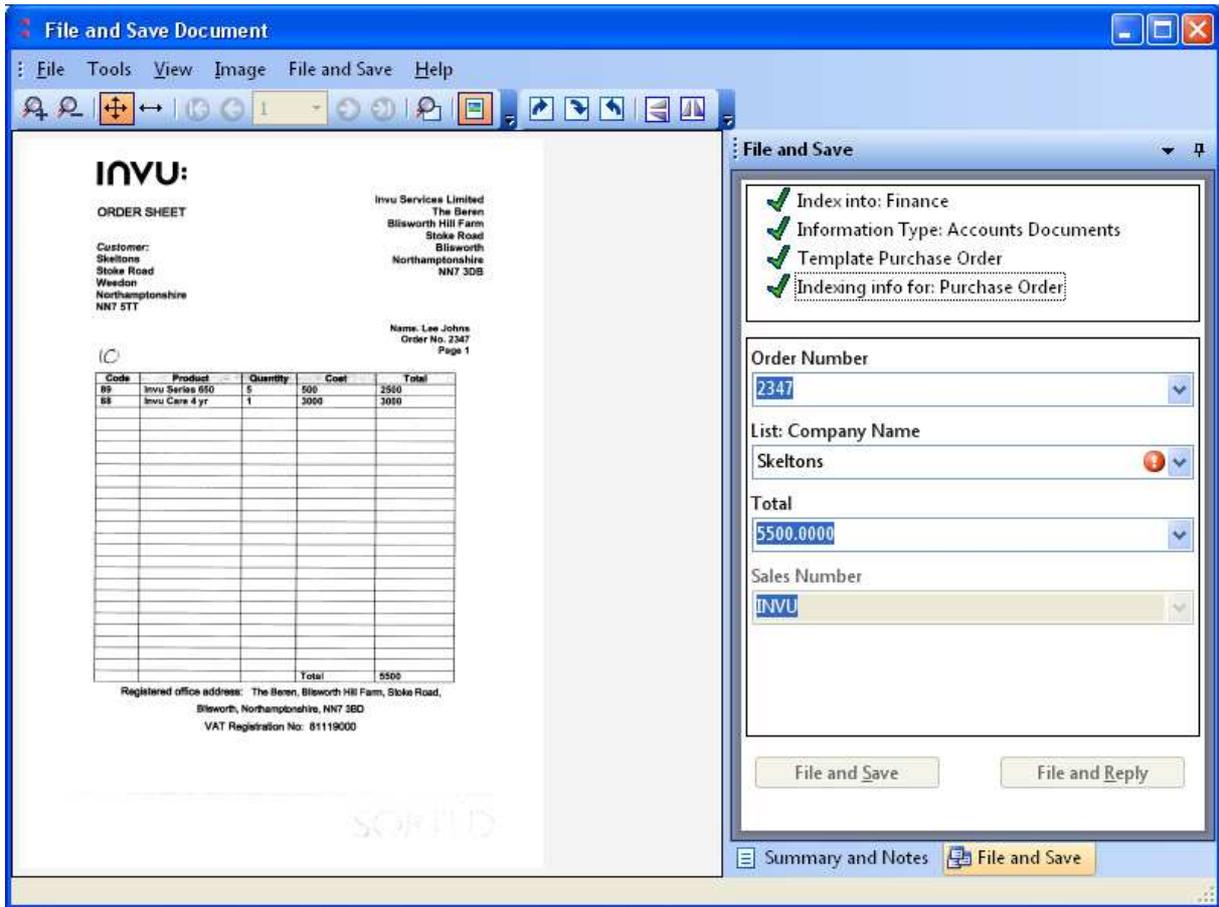
Registered office address: The Beren, Blisworth Hill Farm, Stoke Road,  
Blisworth, Northamptonshire, NN7 3BD  
VAT Registration No: 81119000

**File and Save** dialog box details:

- Step 1 What sort of document is this? Accounts Documents
- Step 2 Choose a filing location. Invu > Finance > Finance1
- Step 3 Choose a Standard Document. Purchase Order
- Step 4 Enter the Document Reference information.
  - Order Number: 2347
  - List: Company Name: Skeltons
  - Total: 5500.0000
- Step 5 Press 'File and Save' to store. Buttons: File and Save, File and Reply

You cannot change the Information type (**Step 1**) or the Standard Document (**Step 3**). You are able to change the location as long as the Information Type is attached to other folders and also the Document References as long as they are not greyed out.

## Re-File and Save using the Customised File and Save screen Right-hand pane



You are able to change the location as long as the Information Type is attached to other folders (Index into), the Information Types, the Standard Documents and the Document References as long as they are not greyed out.

No matter which 'File and Save Documents' screen you are using make the necessary changes to the File and Save information and then click the **File and Save** button.

### Explore Documents

Once a document has been filed away you may wish to browse them. Explore is only available in the Standard and Advanced mode and only if the System Administrator has given the privileges to see it.

To access the Workspace in the Standard mode click the  button on the floating toolbar or within the Advanced mode click the  button on the Left-hand pane.

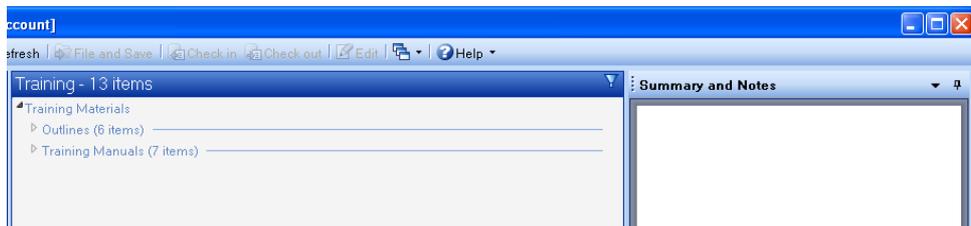
Click the white arrow   Filing Cabinets beside the Filing Cabinet option in the Left-hand pane to expand the folders underneath.

- ▲ Filing Cabinets
  - ▶ Customer - Bridgeport Boating
  - ▶ Invu Services Limited
  - ▶ Millview Design
- ▶ Intrays
- ▶ Document templates

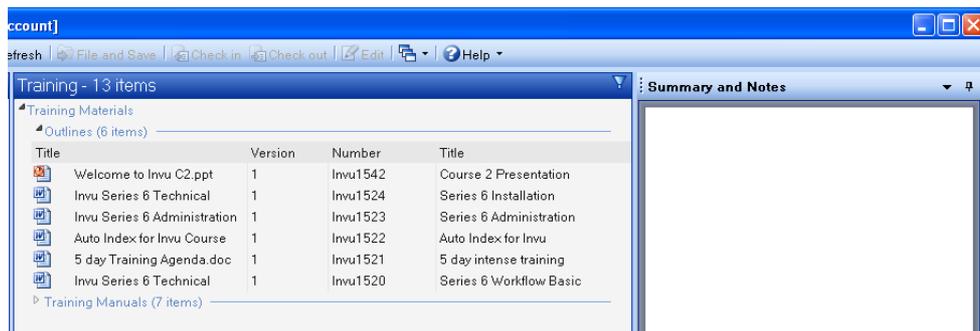
Click the white arrow beside the folder required in the Left-hand pane to expand the folders underneath.

To open the content of the folder click title of the folder and the contents of the folder will be displayed in the Middle pane.

To collapse the folders, click the black arrow beside any folder.



In the Middle pane again click the white arrow beside the text to expand and to collapse click the black arrow.



Click the file to view the summary within the Right-hand pane.

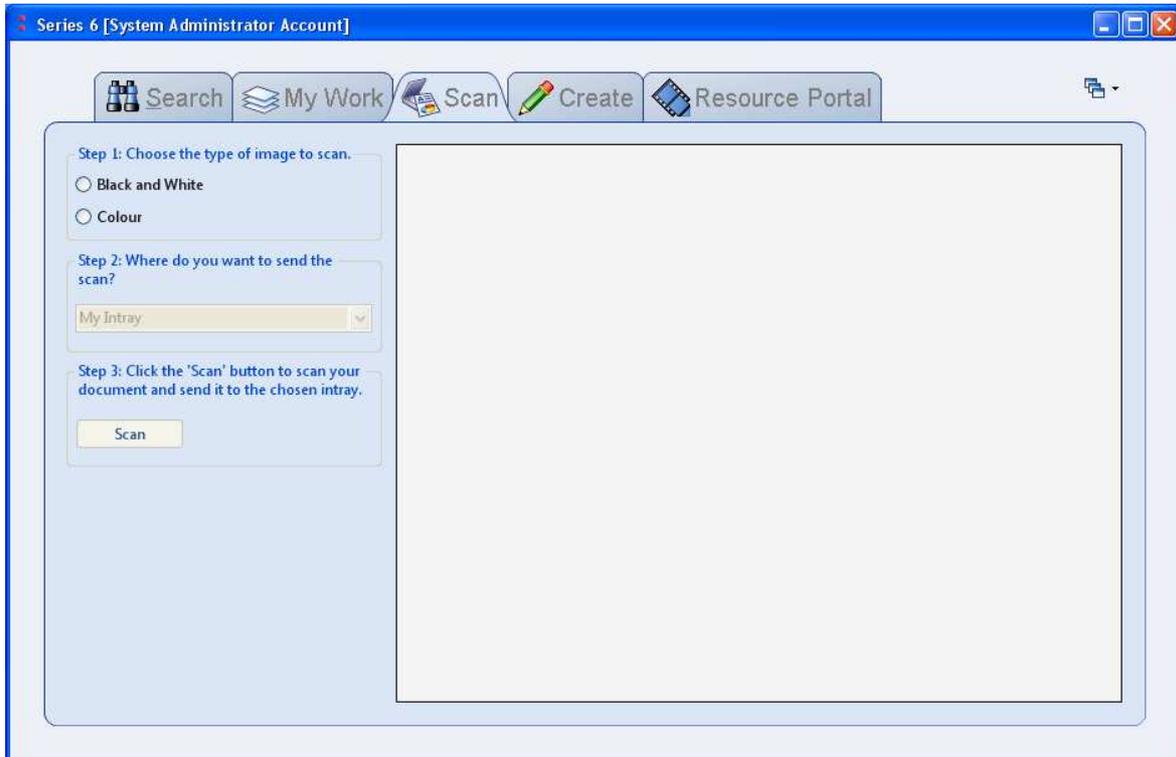
## **SCAN DOCUMENTS**

## INTRODUCTION TO SCAN A DOCUMENT

Series 6 provides a very simple way of scanning documents into Invu within all three modes using something called Scanner Presets. These are setup up by the System Administrator.

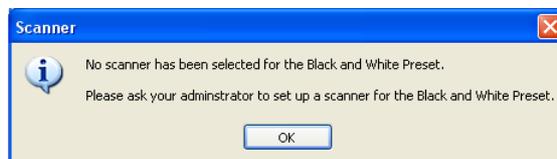
### Scan a Document in the Simple Mode

Within the Simple mode you are able to scan basic black & white or colour documents. To scan click the 'Scan' tab and the following screen will be displayed:



To scan a document into Invu there are 3 steps

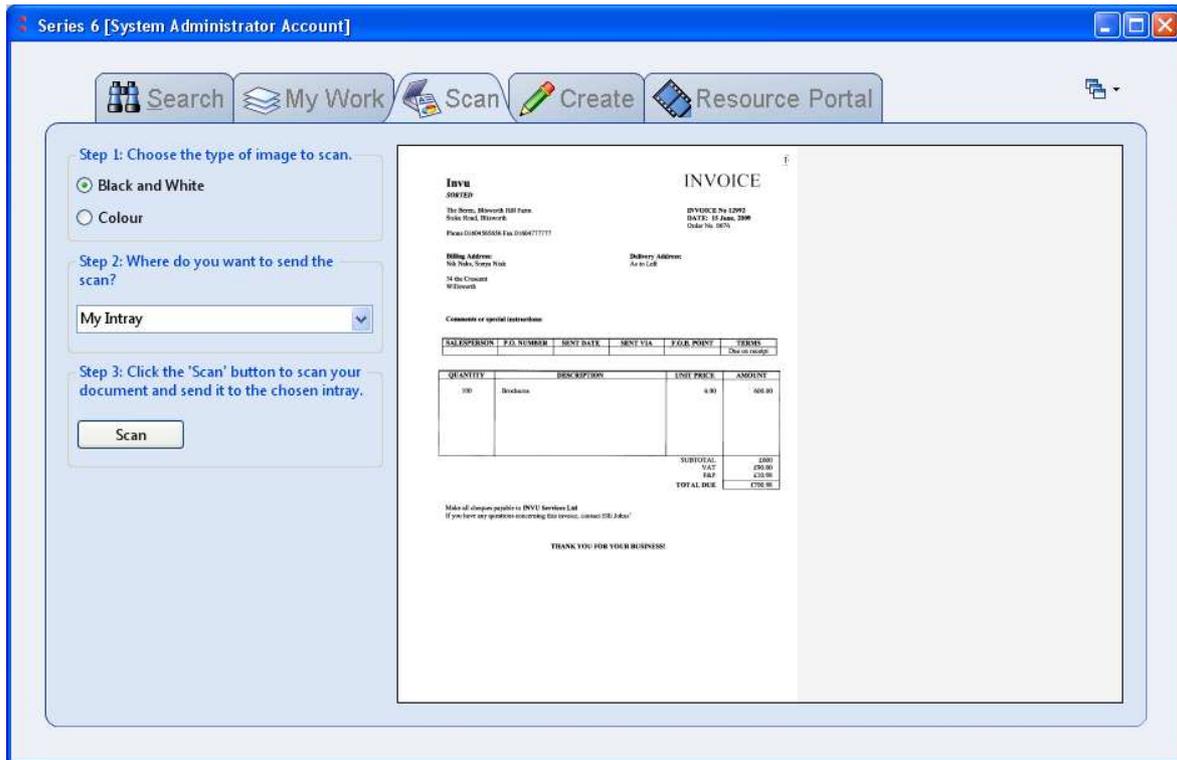
**Step 1: Choose the type of image to scan** - click the option to scan in **Black & White** or **Colour**. If you have not got one of these preset configured for your scanner the following message may be displayed when you select one of them.



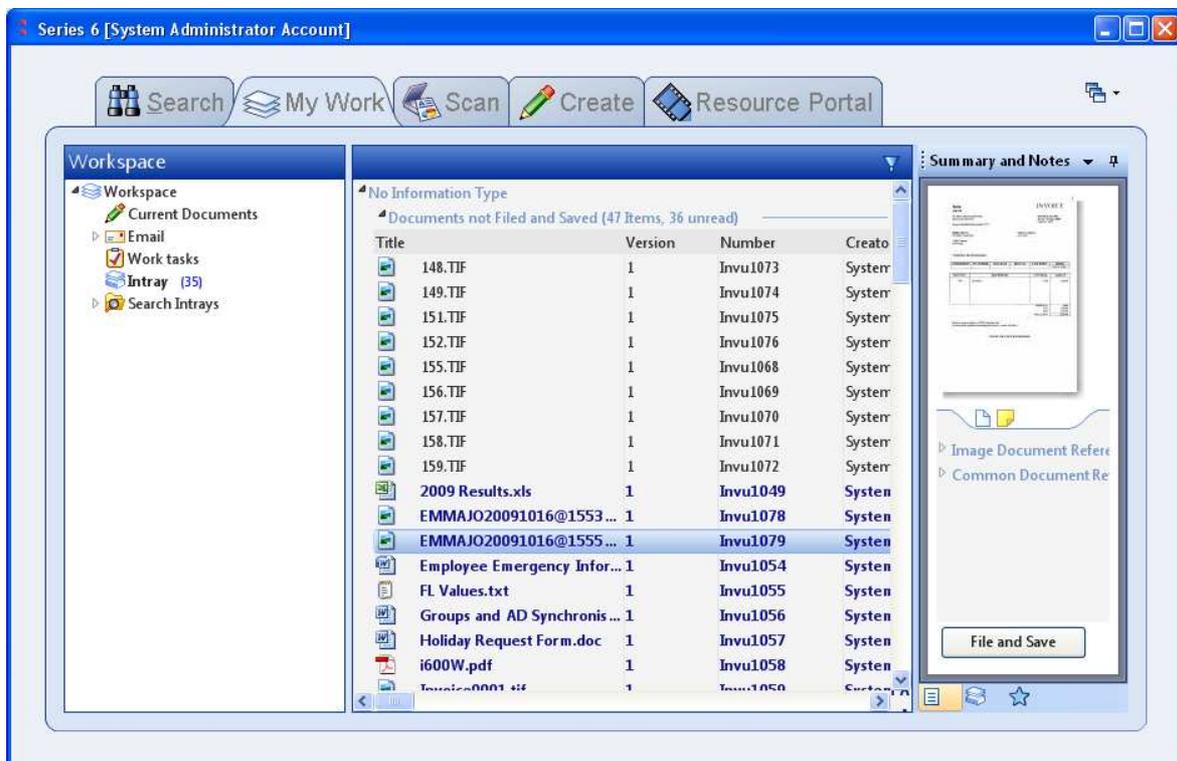
You will need to click the **OK** button and contact your Series 6 Administrator.

**Step 2: Where do you want to send the scan** - choose where the document should be placed after scanning. Click the drop down list and choose from the available list of user or folder Intrays. The default will always be My Intray (your own Intray).

**Step 3: Click the 'Scan' button to scan your document and send it to the chosen Intray** - Click the **Scan** button to start scanning. The document will be scanned and displayed in the preview area as shown on the next page.



The scanned document will be added to the chosen Intray. If you have scanned it to your own Intray or an Intray you have access to you can view it. To view a document which has been scanned, click the 'My Work' tab and the screen will be displayed:

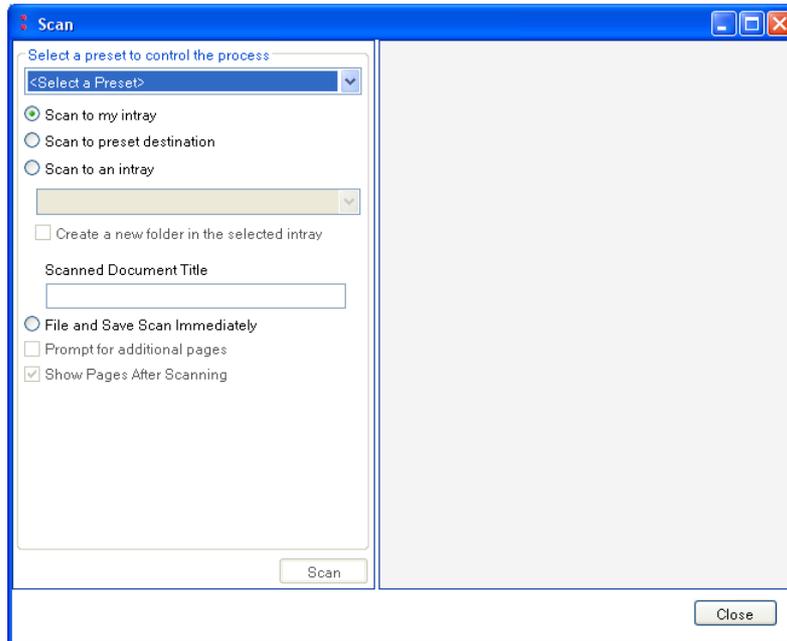


In the **Workspace** area select the Intray option in the Left-hand pane this will display all documents in the Middle pane.

To open, double click the selected document and the 'View document' screen will be displayed. For more information on the 'View Document' screen please see page 116.

## Scan a Document in Standard and Advanced Mode

When you want to scan documents in you are able to do so from the **Explore**, **Search** and **Workspace** areas within Series 6. Click the  icon on the toolbar and the following screen will be displayed.



In the drop down called **Select a preset to control the process** is a list of predefined scanning presets created by the System Administrator, such as scanning in black & white, colour, duplex (double sided) or even multiple page scanning. Click the drop down arrow and from the list choose the required preset. The list will only display presets which have been setup for your type of scanner and if there is only one preset configured for your scanner then it will be selected automatically.

Choose where the document will go once scanned in as follows:

- Choose the **Scan to my In tray** option to put the document into your own In tray.

**OR**

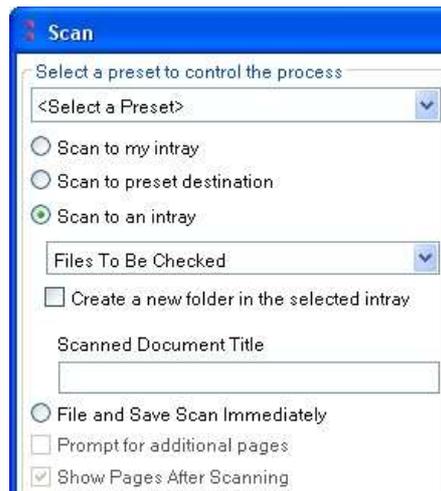
- Choose the **Scan to the preset destination** option to put the document into the predefined In tray set within the scan preset you have chosen.

**OR**

- Choose the **Scan to an In tray** option to put the document into a folder in an In tray selected from the drop down list. If you wish to create a new folder to place the scanned document then tick the **Create a new folder** check box in the selected In tray and the following screen will be displayed on the next page:



Enter a **Folder name** and then click the **OK** button. In the drop down the name of the folder will be displayed:



- If you choose the **File and Save the Scan immediately** option it will display the 'File and Save' screen to file and save the document straight away.

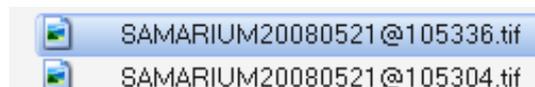
If the document you are scanning is large you could scan it in two stages. Tick the **Prompt for additional page** check box then scan the first part of the document, when the scanner has completed a message will be displayed asking for the next part of the document.

To preview the document in the 'Scan' pane after scanning tick the **Show pages after scanning** check box.

When scanning a document in by default if the **Scanned Document Title** field is left empty, a name will be assigned to each document scanned in. This name is:

**ComputerNameYearMonthDay@Hoursminutesseconds**

For example:



You can set the name for your scanned documents. To do this, enter the required name into the **Scanned Document Title** field as shown below:



When the documents are scanned in it will attach four digits starting with 0001 and incrementing by one each document.

Once scanning options have been chosen, click the **Scan** button.

When you access the 'Scan' screen again it will remember the setting you selected last time.

You will need to go to the Workspace area to view scanned in documents. In the Simple Mode the Workspace area is known as 'My Work'. Click the **'My Work'** tab to access the Workspace area. To access the Workspace in the Standard Mode click the  button on the floating toolbar or if within the Advanced Mode click the  button on the Left-hand pane.

Then click the In tray in the Left-hand pane to view documents. To view, double click the selected document in the Middle pane and the 'View document' screen will be displayed. For more information on the 'View Document' screen please see page 116.

If you click the  icon and you have no presets which match your scanner the following will be displayed:



Click the **OK** button to remove the message. You will need to contact your Series 6 Administrator.

## Using Barcode Separators

Series 6 has a barcode separator facility available for use with local scanners. There is no Licences of Privileges required for this.

There is no configuration for barcodes apart from to print out a barcode sheet, then place on at the front of the whole batch and then one in front of each new document in the batch. The Scanner Preset must be configured for a minimum of **200 dpi**, set to **multiple pages** and **Group 4 Tiff** file type. If your preset is not setup correctly then contact your Series 6 Administrator.

The Barcode sheet used can be obtained from the extranet or on the installation CD as shown on the next page:



## Invu document separator





## **OPEN DOCUMENTS**

## Open a Document

You can open documents from your **Intray**, **Explore** and **Search**.

Browse to the document you wish to open then either:

- Double click the required document in the Middle pane.

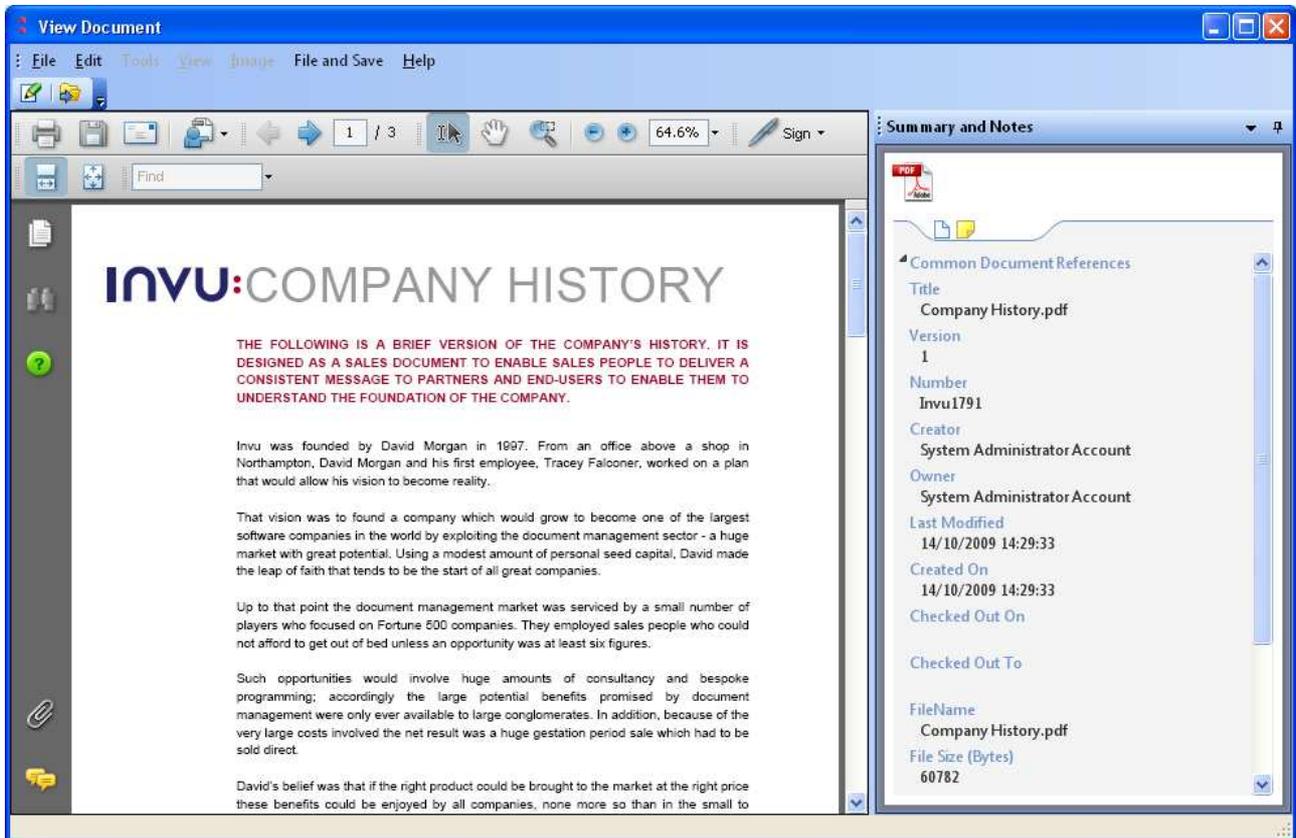
**OR**

- Right click the document in the Middle pane and from the menu select the **Open** option.

**OR**

- If using the Standard or Advanced Mode highlight the document in the Middle pane and click the  icon on the toolbar.

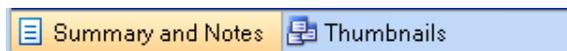
The document will then open in a new window in the 'View Document' Screen:



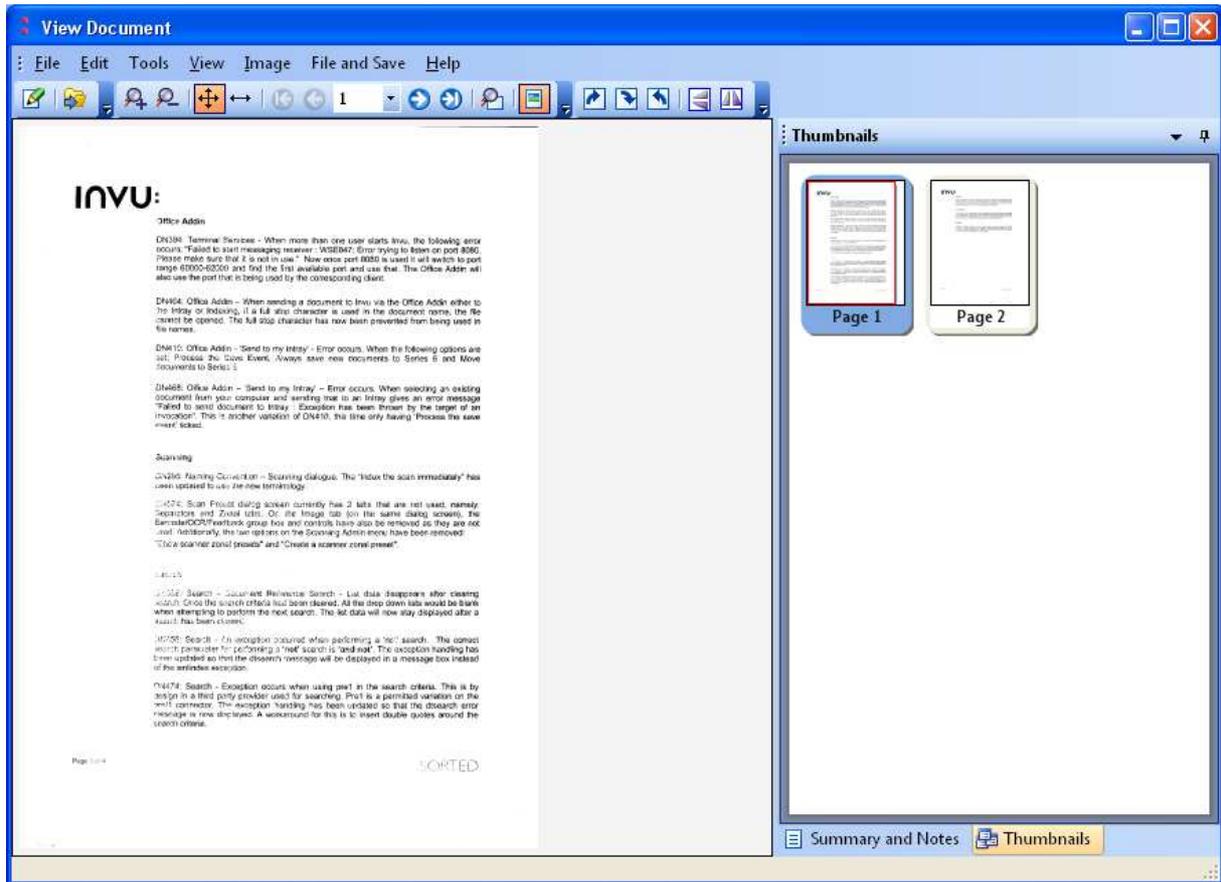
Within the 'View document' screen you are able to see the Summary and Notes in the Right pane and browse the document.

**NB:** For more information regarding the 'View Documents' screen please see page 116.

If the document has multiple pages and is an image based document such as a Group 4 tiff then within the Right-hand pane a **Thumbnails** option will appear.



Click the **Thumbnails** option to see the following:



Within the thumbnails area each page within the file will be displayed as a thumbnail. To change the page, click on the appropriate thumbnail. The thumbnail highlighted with a blue background is the current page.

**NB:** Depending on how your system is configured, when you open certain documents they may open in the original software they were created in i.e. if you opened a Word document it could open in Microsoft Word.

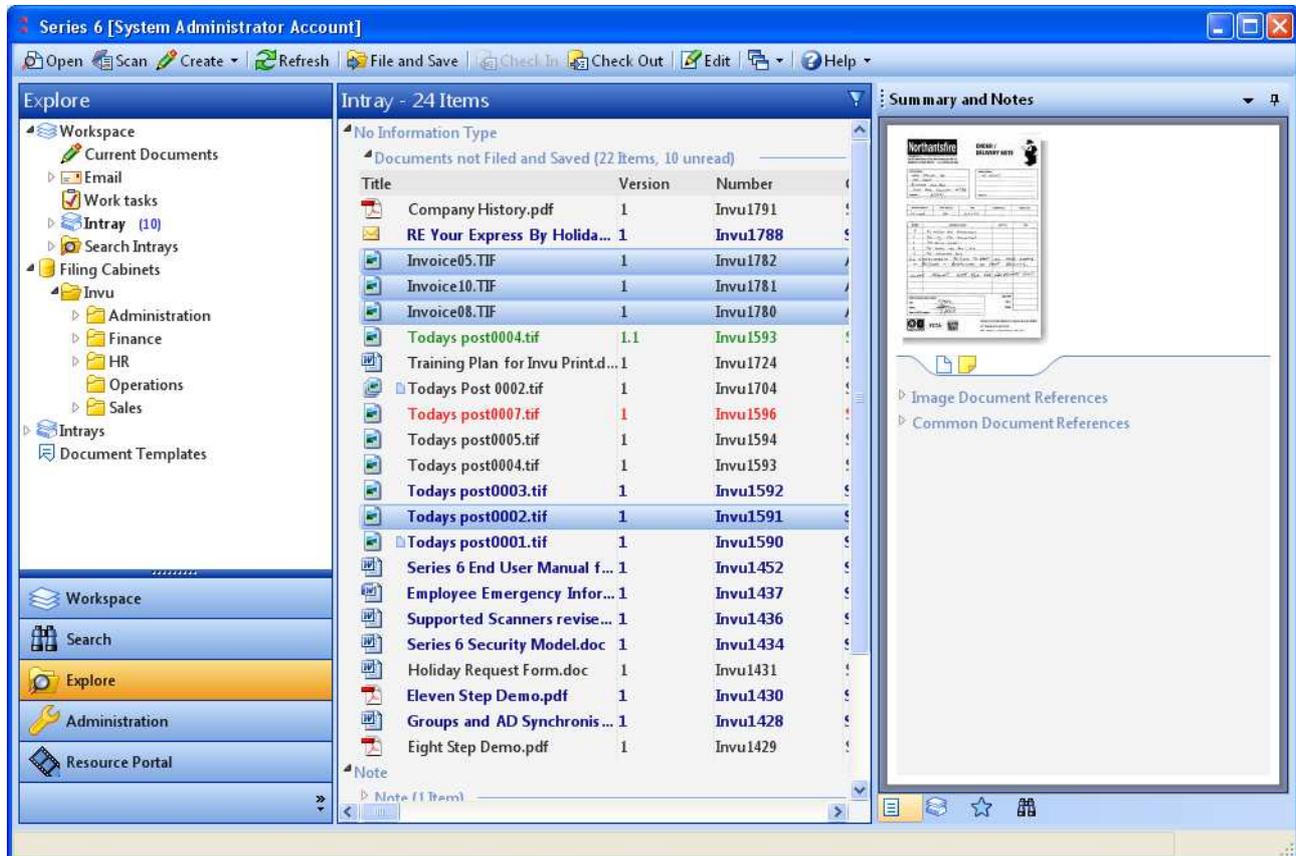
Once you have finished viewing the file, click **X** to close which appears in the top right corner of the 'View Document' screen.

**NB:** For more information regarding the 'View Documents' screen please see page 116.

## Opening Multiple Documents

You are able to open multiple documents in the 'View Documents' screen.

To view multiple documents highlight the first document as normal, hold down the **CTRL** key and then click each subsequent document.



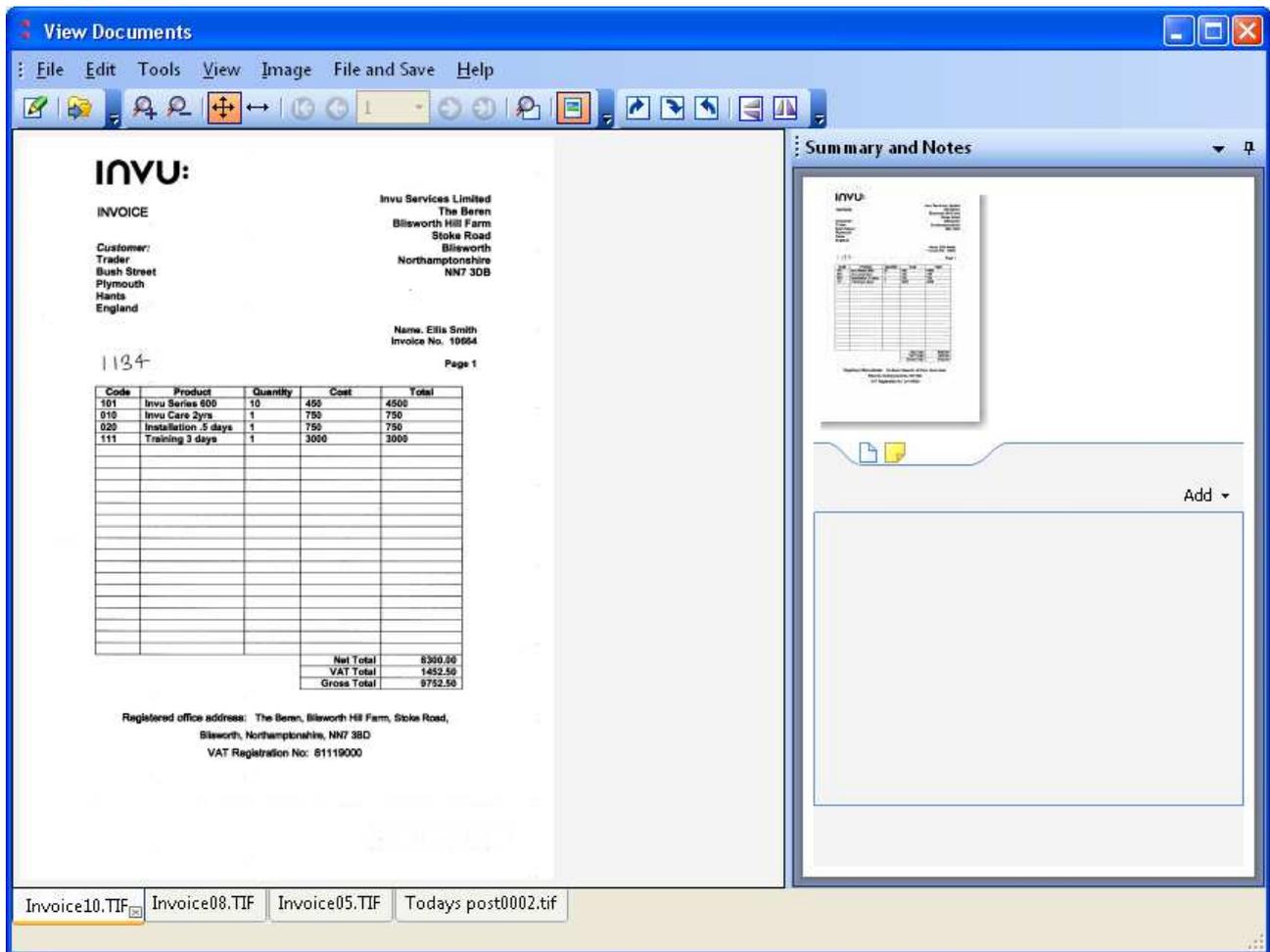
Once all the required documents are selected do one of the following:

- Hold the **CTRL** key and then right click the document in the Middle pane and from the menu select the **Open** option.

**OR**

- If using the Standard or Advanced mode highlight the document in the Middle pane and click the  icon on the toolbar.

This will open the 'View document' screen and the selected documents' title tabs will be shown along the bottom, enabling the user to quickly switch between them as shown on the next page.



The example shows the three documents open in the 'View Document' screen. One is a word document, a PDF and a Multiple page Tif.

To identify which document is in focus the tab is highlighted orange. To close any of the documents, simply click the  icon on the tab.

**NB:** For more information regarding the 'View Documents' screen please see page 116.



**CREATE DOCUMENTS AND INFORMATION**

## INTRODUCTION TO CREATE A DOCUMENT

Series 6 provides a very simple way in which to create new documents. These could be MS Word, MS Excel, Text documents or many more (depending on the system's configuration). Creating a document can be done in all three modes.

### Create a Document in Simple Mode

Click the 'Create' tab and the following screen will be displayed.

The screenshot shows a web application window titled "Series 6 [Wendy]". At the top, there is a navigation bar with five buttons: "Search", "My Work", "Scan", "Create", and "Resource Portal". Below the navigation bar, the main content area is divided into four steps for creating a document:

- Step 1:** "Please enter a title for your document." followed by a text input field.
- Step 2:** "Chose the type of document from this list." followed by a dropdown menu showing "Word document".
- Step 3:** "If you would like to base your document on a standard document, select one from this list." followed by a dropdown menu showing "<Use Default>".
- Step 4:** "Click the 'create' button to create your document." followed by a "Create" button.

To create a document through Series 6 there are four steps as follows:

**Step 1: Please enter a title for your document** - Enter in the name of the document.

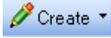
**Step 2: Choose the type of document from this list** - Choose what type of document you would like to create. Click the drop down list and choose the required file type i.e. Word Document.

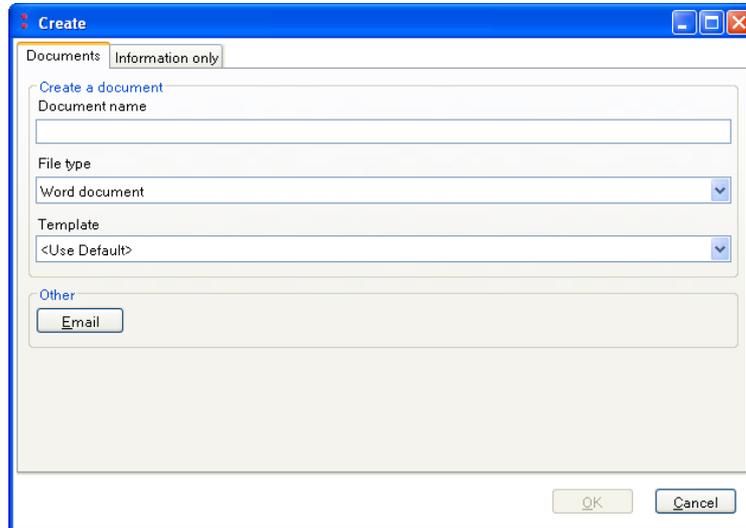
**Step 3: If you would like to base your document on a Standard Document, select one from this list** - If you would like to base your new document on an existing one, choose a template from the drop down list, if no special document template is required then select Default Template **<Use Default>**.

**Step 4: Click the 'Create' button to create your document** - Once you have completed the above steps, click the Create button. Series 6 will create the document in the chosen format.

The new document will be opened in its native application, when finished adding the content Close and Save the document. The document will then be saved into your Intry and the 'File And Save Document' screen will be displayed. File and Save the document as normal (for more information please see page 65).

## Create a Document in Standard and Advanced Mode

You can create a document from the Workspace, Explore or Search. On the toolbar click the arrow to the right of the  button and choose the **Documents...** option. The following screen will be displayed as shown below.



The '**Documents**' tab allows you to create new documents (in many different file formats).

To create a new document first, type the **Document Name**.

Choose a **File type** for the document that will be created. Click the drop down list and choose the required file type.

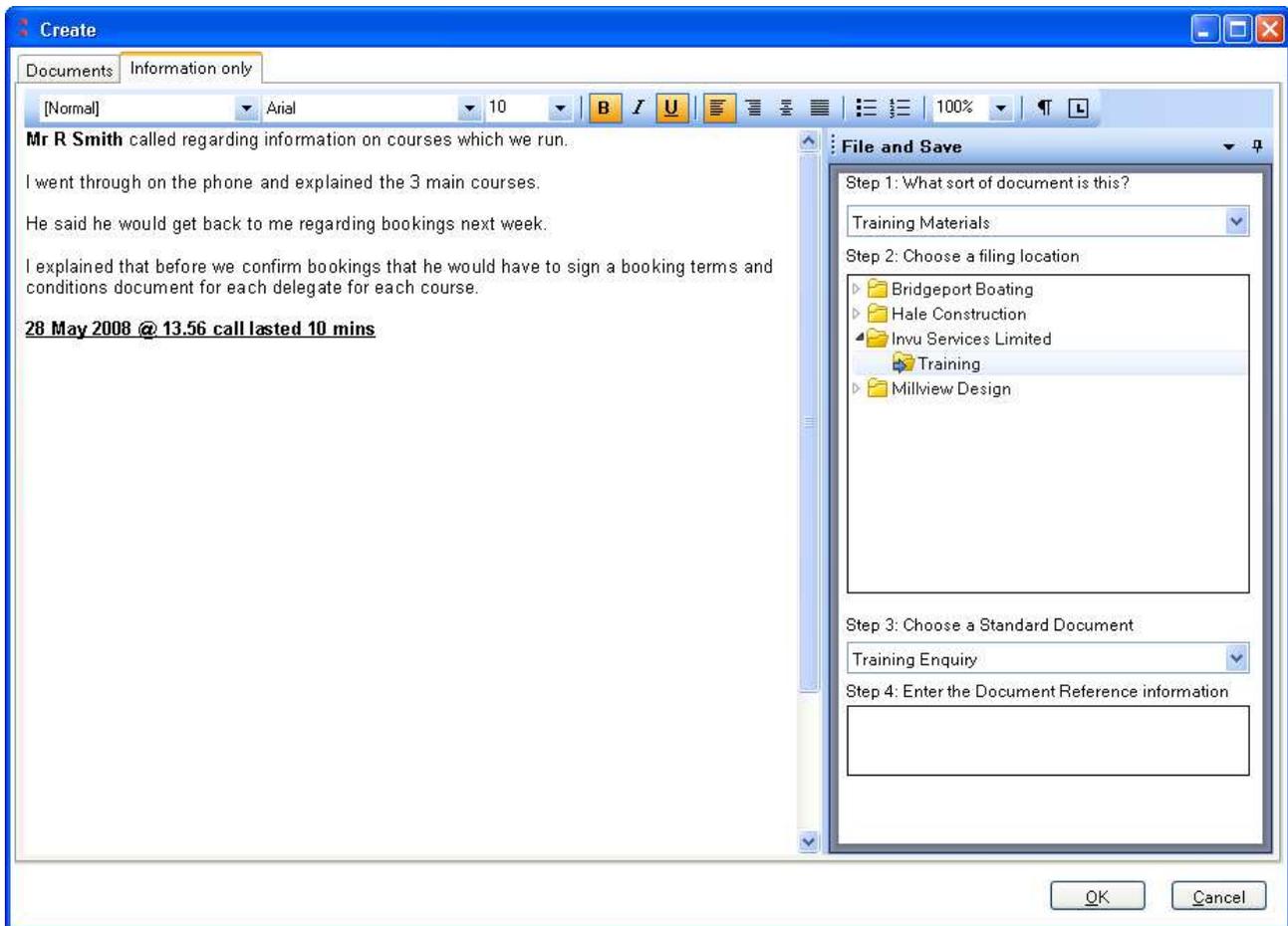
**NB:** This may vary depending on what has been setup by the System Administrator.

If you would like to base the document you create on an existing document you will need to choose a **Template**, click the drop down list and select from the available options. If the user wished to create a blank document then leave the **<Use Default>** selected.

Click the **OK** button and the document will be created in the chosen format. The new document will be opened in its native application, when finished close and save the document and application, if applicable; it will then be saved into your Intry in Series 6. The document can now be filed and saved (for more information please see page 65).

## Create Information Only in Standard and Advanced Mode

You can also create and file information such as details of a enquiry by phone. Click the arrow to the right of the  button and choose the **Information only...** option. The following screen will be displayed:



The **'Information Only'** tab is where you can add information in note form. The area to the left is a free text and you can also copy and paste text from other sources if required.

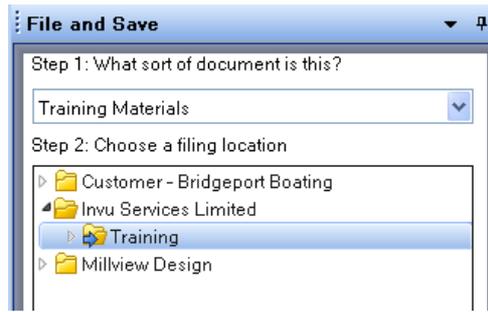
Also basic formatting options are available via the toolbar along the top, such as inserting text and images, font formatting, alignment, bullets and the option to undo/redo.



Once the text has been entered and formatted on the Right-hand side of the screen the File and Save pane there are four steps to file and save the information away.

**Step 1: Choose what sort of document it is?** - Here you would choose the Information Type (category). This could be Marketing Materials, Training Documents, and Product Documents etc...Click the drop down list and choose required Information Type.

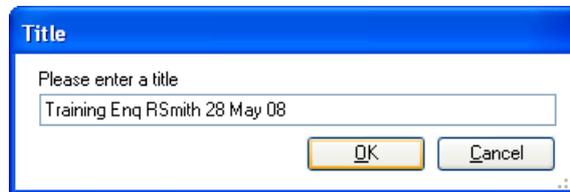
**Step 2: Choose a filing location** - This is determined by what Information Type has been selected in the previous tab. Click the white arrow to expand a folder and the black arrow to collapse a folder. When you have found the folder, click the text to highlight in blue.



**Step 3: Choose a Standard Document for the document** - This is determined by what Information Type has been selected in Step 1. If there is only one Standard Document then it will automatically be selected. Click the drop down list and choose the required Standard Document.

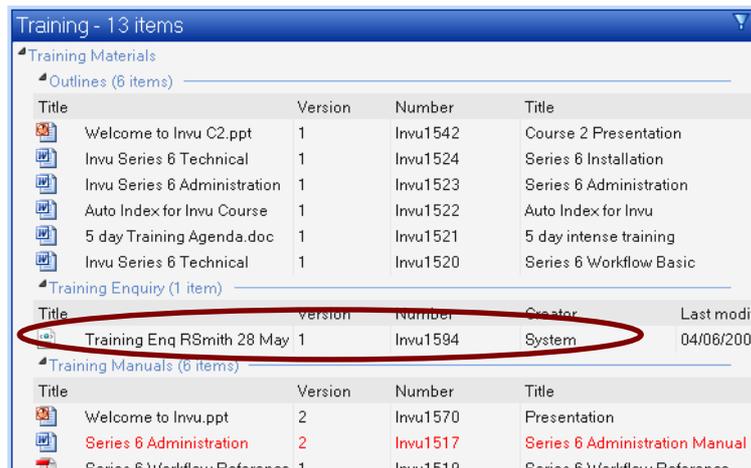
**Step 4: Enter the Document Reference information** - Once a Standard Document has been chosen, the Document References will be displayed (this can vary based upon the standard document).

Once the information has been entered click the **OK** button and the following dialogue box will be displayed:



The title will normally come from the first line of text entered but if required you overwrite this with a more suitable title. Click the **OK** button to continue.

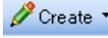
The Information (text) entered would then be created as an XML file and filed and saved into the chosen location. This can be viewed in the **'Explore'** tab. To access the Explore in the Standard mode click the  button on the floating toolbar or within the Advanced mode click the  button on the Left-hand pane.

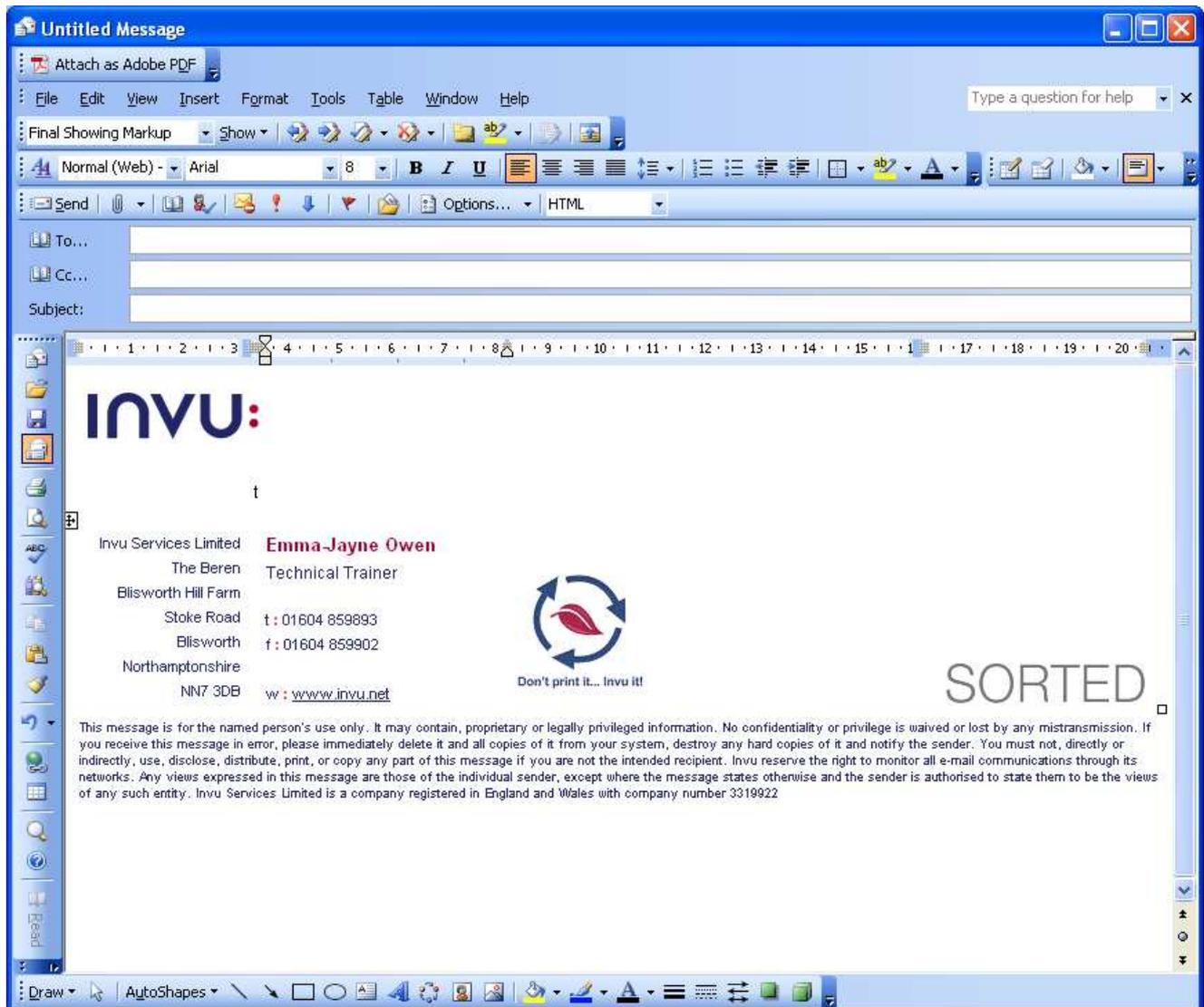


In the above picture is an example of what Information Only looks like when filed away.

**NB:** You cannot create and file Information only in the Simple mode.

## Create an Email in Standard and Advanced Mode

You can also create and send emails. Click the arrow to the right of  button and choose the **Email...** option. The following screen will be displayed:



A blank email screen will be displayed. Enter the email details as normal then send the email.

**NB:** You cannot create and send emails within the Simple mode.

## **DELETE DOCUMENTS**

## Deleting a Document

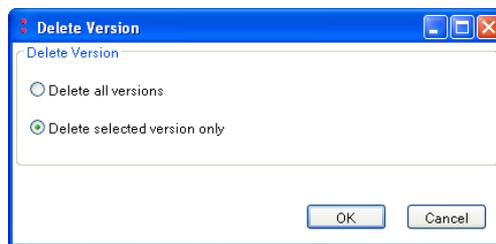
Any document can be deleted from Series 6 depending on the rights defined by the System Administrator.

You can delete documents from Workspace, Explore and Search. To delete documents, right click the selected document in the Middle pane.

If you wish to delete multiple documents then highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to delete are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

With multiple documents highlighted hold down the **SHIFT** or **CTRL** key when you right click otherwise the documents will deselect.

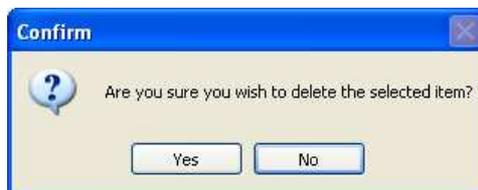
From the right click menu select the **Delete** option, if the document you wish to delete has more than one version the following will be displayed:



The **Delete all versions** option, if selected, will delete all versions of the documents. For example if you deleted version 1 but also version 2 and 3 existed they would be deleted too.

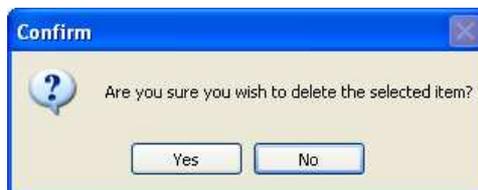
The **Delete selected versions only** option, if selected, will delete only the selected documents so if other versions exist they will not be deleted.

Once an Action has been selected, click the **OK** button to continue. The following will be displayed:



Click the **Yes** button to confirm deletion. Click the **No** button to stop deletion. Once the document has been deleted it cannot be retrieved.

If the document you wish to delete has only one version the following will be displayed:



Click the **Yes** button to confirm deletion. Click the **No** button to stop deletion. Once the document has been deleted it can be retrieved but only by your Systems Administrator.

**NB:** The action of deleting a document is audited, even though the document no longer exists in the folder/Intray.

## **EDITING DOCUMENTS**

## INTRODUCTION TO EDITING DOCUMENTS

Editing a document in Series 6 allows you to make changes. This can be done in any mode. You can edit documents which sit in your own Intray and also in Explore and Search but it does depend on your security set by the System Administrator.

When a document is edited Series 6 will automatically check out the document which means you will have exclusive access to make changes. However, other users are still able to search and view the document.

All users within Series 6 will immediately notice if a document has been checked out as it will appear in red text. All documents that are checked out will be listed in the area called 'Current Documents' within Workspace (for the user who has it checked out).

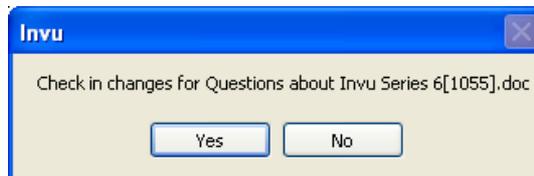
### Edit a Document

To edit a document, right click the required document in the Middle pane and from the right click menu select the **Edit** option or if using the Standard/Advanced mode click the  **Edit** button on the main toolbar.

The document will be opened in its native application or the Invu Viewer depending on the document and the systems configuration. Changes can then be made as normal.

**NB:** If you edit an image based document such as a .tif it will open in the 'Edit Document' screen for more information on using this screen please see page 211.

Once the changes have been made the document should be closed and saved. The following message will then be displayed:



Click the **No** button to leave the document checked out this can then be checked in at a later date.

**OR**

Click the **Yes** button to check in the document. For information on how to check in a document go to page 109.

**NB:** If editing a document which is not the latest version please see **Version and Check Out** on page 109.

### To Check Out a Document

If the document is to be worked on later or in 'offline' mode the Check out option can be used so that you can make the changes at your leisure. It will also allow you to work on the document when not connected to Series 6.

You can **Check In** documents from your Intray and current documents in Workspace, in Explore and Search but it does depend on your security set by the System Administrator.

When a document is checked out it will give you exclusive access to edit the document. While the document is checked out other users can not edit or check out this document.

However users on the system are still able to search and view the document, although they will not see the changes made to the document until it has been checked in again.

The document will be shown in red text and also be added to Current Documents in the Workspace.

To check out a document, in the Middle pane right click the selected document. From the right click menu select the **Check out** option. If using the Standard or Advanced mode highlight the document in the Middle pane and then click the  button on the toolbar.

When you check out a document it will be displayed in red text where ever it is located.



You can also see which documents you currently have checked out as they will be listed in the area 'Current Documents' within Workspace.

In the Simple Mode the Workspace area is known as 'My Work'. Click the **'My Work'** tab to access the Workspace area. To access the Workspace in the Standard Mode click the  button on the floating toolbar or if within the Advanced mode click the  button on the Left-hand pane. Then click the  option and the documents will be displayed:

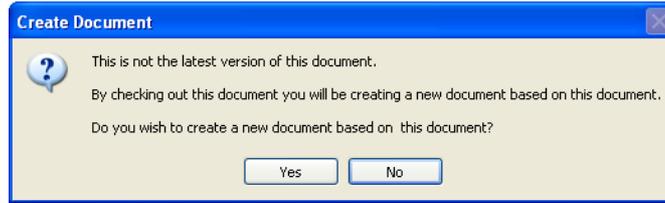


To edit a document that has been checked out. In  area, right click the document and from the right click menu choose the **Edit** option. If using the Standard or Advanced mode, highlight the document and click the  button on the main toolbar. The document will be opened in its native application.

Changes can be made as normal; close and save the document when finished.

## Version and Check Out

**NB:** If editing a document which is not the latest version i.e. if current version is **2** but the version being edited is **1** it will display a message as shown on the next page:

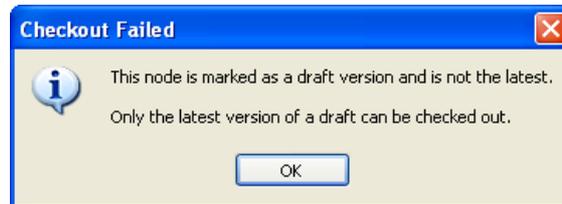


Because the document is not the current version the system will only allow you to create a copy which will be placed in your Intray and version will start from 1. Click the **Yes** button to create a copy. Click the **No** button to abort edit.

If a document is displayed in green text this is a draft document.

|  |                           |     |          |                       |                |
|--|---------------------------|-----|----------|-----------------------|----------------|
|  | INVU.wmv                  | 1   | Invu1413 | Invu Corporate Video  | Sales Team BDM |
|  | New Bridgeport Letter.doc | 2.1 | Invu1232 | New Bridgeport Letter | Sales Team BDM |
|  | New Bridgeport Letter.doc | 1   | Invu1232 | New Bridgeport Letter |                |
|  | New Bridgeport Letter.doc | 2   | Invu1232 | New Bridgeport Letter | Sales Team BDM |

You can edit a draft as long as it is the current version, if you edit a draft document and the following message is displayed:

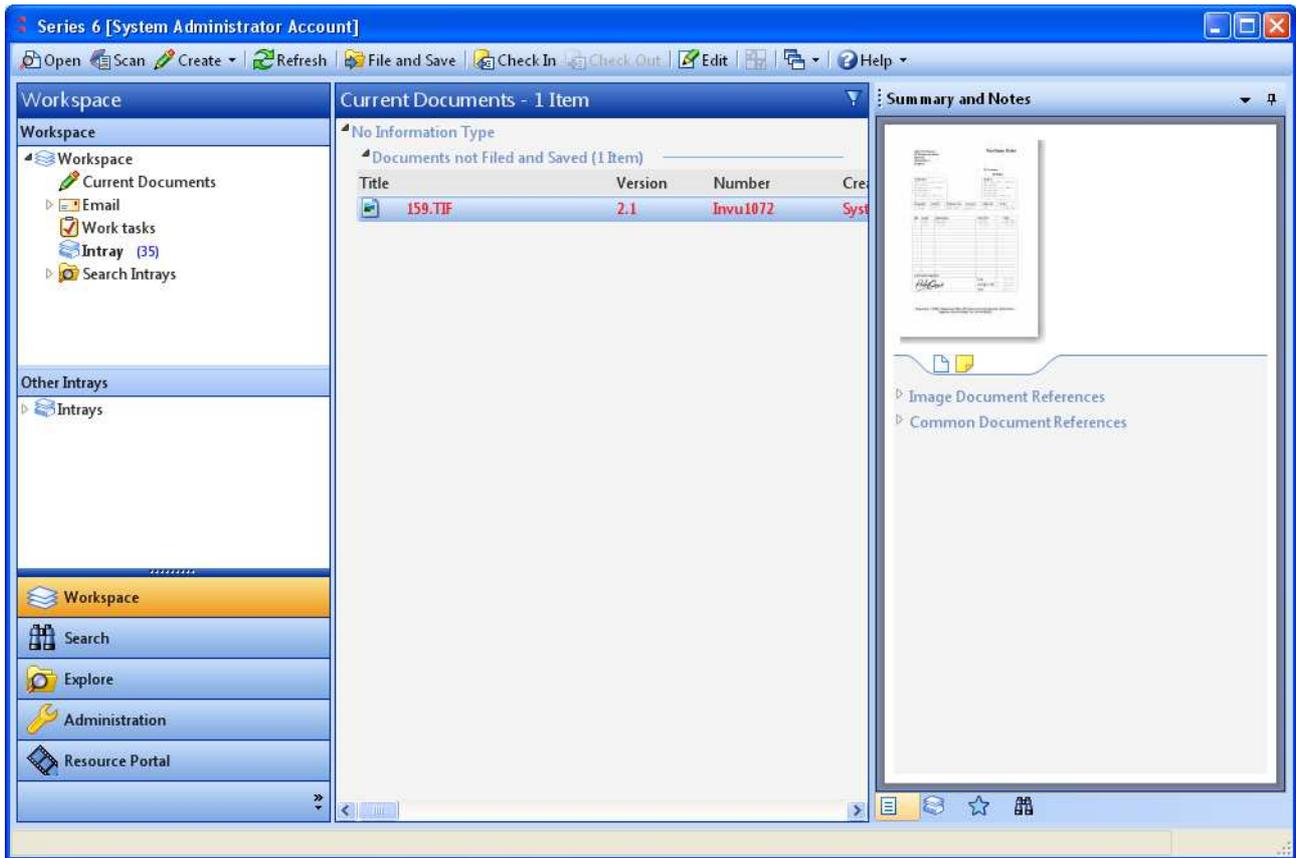


This would be because the draft is not the latest version the user is not able to check it out. Click the **OK** button to clear the message.

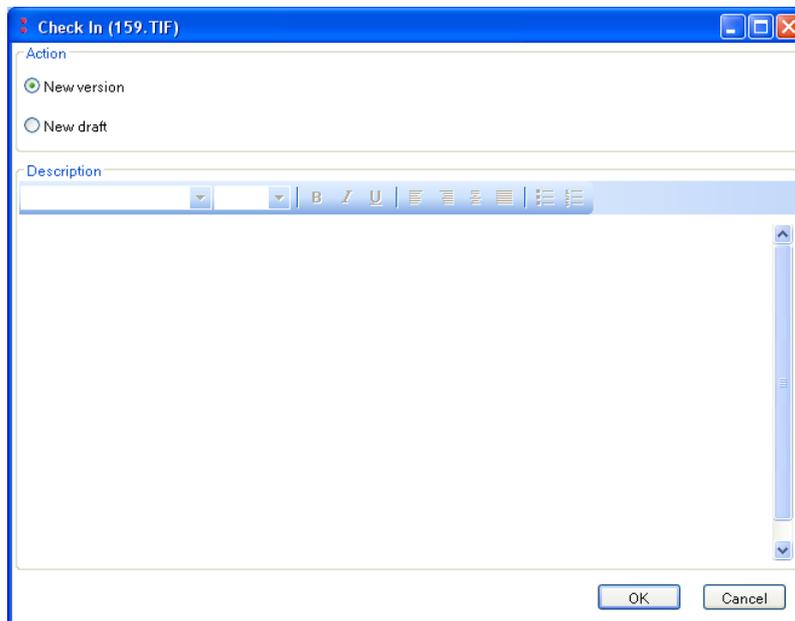
## To Check in a Document

When a document has been Checked Out or Edited it needs to be Checked In. The changes made will then become public.

To access your checked out document, in the Simple mode the Workspace area is known as 'My Work'. Click the **'My Work'** tab to access the Workspace area. To access the Workspace in the Standard mode click the button on the floating toolbar or if within the Advanced mode click the Workspace button on the Left-hand pane. Then click the Current documents option and the documents will be displayed as shown on the next page:



In the Middle pane right click the document and from the right click menu choose the **Check In** option. If using the Standard or Advanced mode click the  **Check in** button on the main toolbar and the following screen will be displayed:



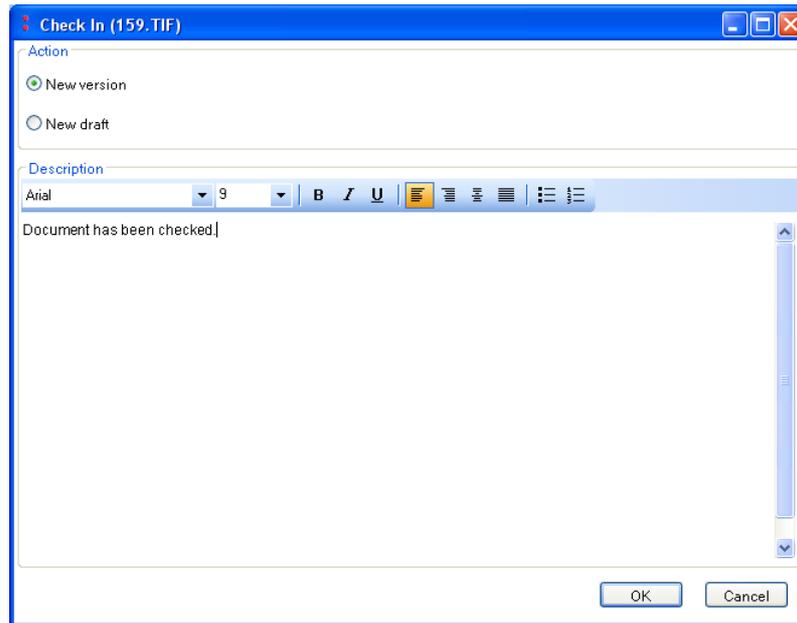
The 'Check In' screen allows you to specify the type of revision made to the document.

In the **Action** area choose from one of the following options:

**New version** – if selected creates a new version of the document. I.e. if the version number was **1** this will increment to **2**. of if the version number was **2.4** then the new version would be **3**.

**New draft** – if selected creates a draft (meaning the document is a work in progress not the finished revision). The draft number will be based on the version created from and increment by **.1**. I.e. if the version was **1** then draft would be **1.1** or if created from an existing draft **1.3** then new draft would be **1.4**. The document will be displayed in green text.

In the **Description** area, type brief notes of what was done to the document. This is for other users to review the comments made when checking in the revision.



The notes entered can have basic font and paragraph formatting applied using the toolbar above the notes area.

Click the **OK** button to check the selected document back in.

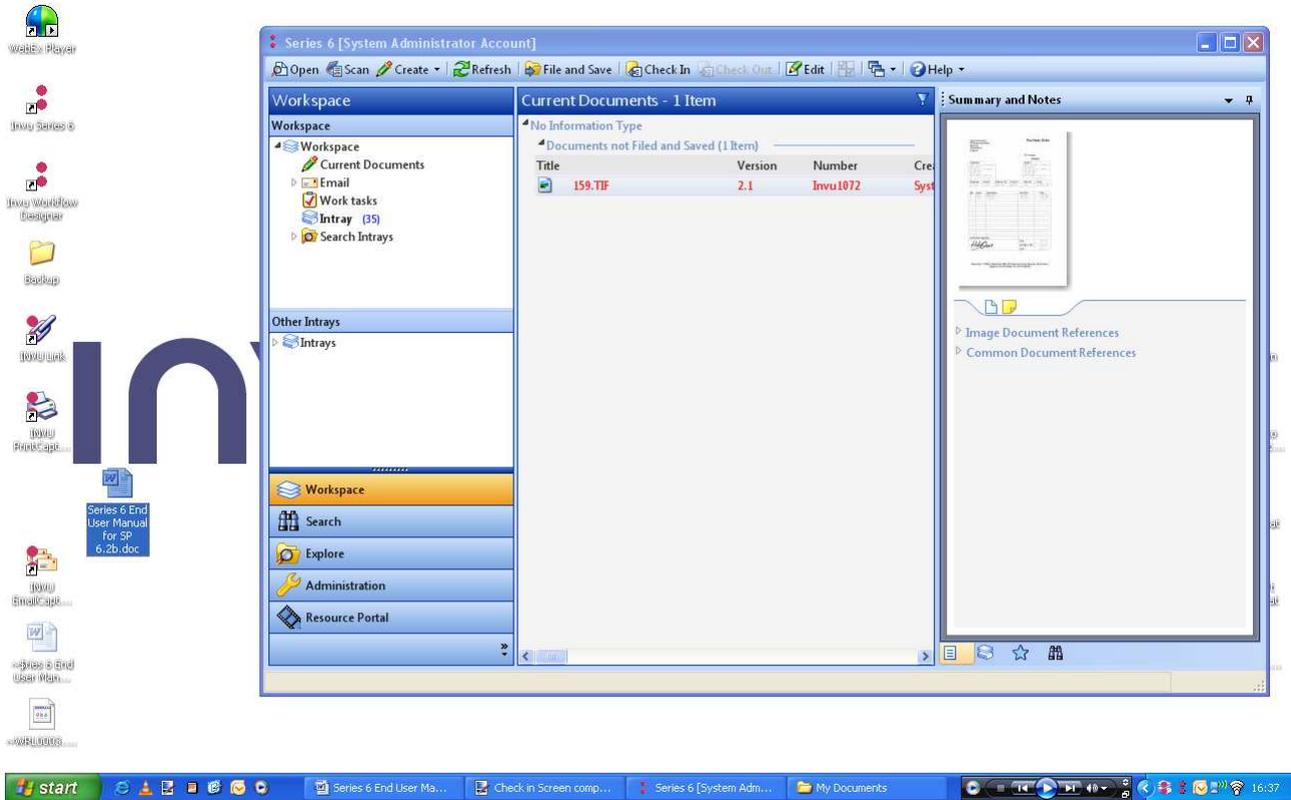
This will remove the document from the  **Current documents** area and the text will revert back to black (or green if a draft). The new version/draft number will be displayed in the version column in the Middle pane.

**NB:** The system will by default only show the current version. For information on how to view other versions of a document please see page 42.

## Drag 'n' Drop Check in

A new version or draft can be checked in by dragging over the version stored in Series 6 as long as it is the same type of document.

Move the mouse pointer over the document which you wish to check in as the new version.



Hold down the left mouse button and drag the document into Series 6 and over the document it should be the new version of (the mouse pointer should have a plus symbol) and then release the mouse button and the 'Check In' screen will be displayed.

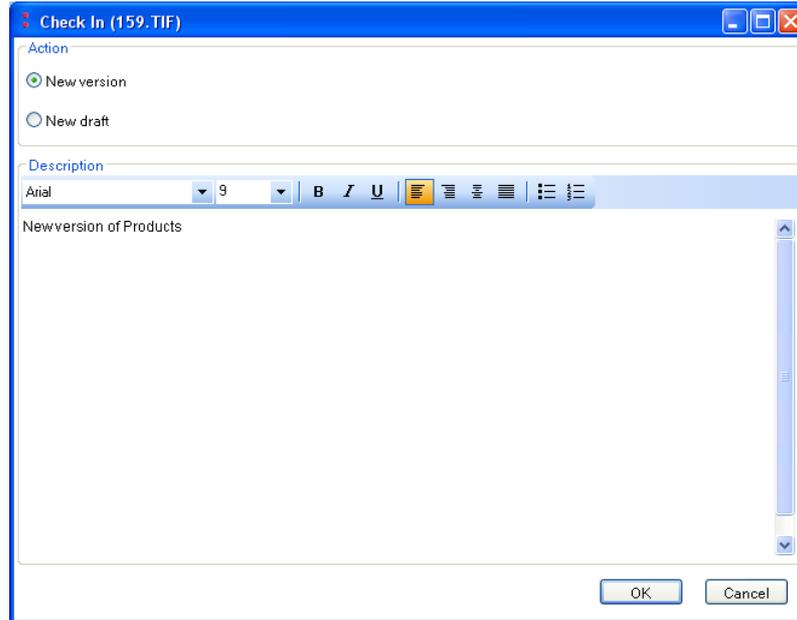
In the **Action** area choose from one of the following options:

**New version** – if selected creates a new version of the document. I.e. if version number was **1** this will increment to **2** or if the version number was **2.4** then the new version would be **3**.

**New draft** – if selected creates a draft (meaning the document is a work in progress not the finished revision). The draft number will be based on the version created from and increment by **.1**. I.e. if version was **1** then draft would be **1.1** or if created from an existing draft **1.3** then new draft would be **1.4**. The document will be displayed in green text.

In the **Description** area, type brief notes of what was done to the document. This is for other users to review the comments made when checking in the revision.

**NB:** If performing a 'Drag and Drop' check in make sure the document you are dragging the new copy over is not checked out other wise the feature will not work.



The notes entered can have basic font and paragraph formatting applied using the toolbar above the notes area.

Click the **OK** button to check the selected document back in.

This will remove the document from the  **Current documents** area and the text will revert back to black (or green if a draft). The new version/draft number will be displayed in the version column in the Middle pane.

**NB:** The system will by default only show the current version. For information on how to view other versions of a document please see page 42.

## Undo Check Out

When a document is checked out the normal process to place it back into the Filing Cabinet would be to check the document back in. In some cases the user may wish to 'revert' the checked out document back to the version before it was checked out, this is known as **Undo Checkout**.

When the Undo Check out option is selected it will revert to the version prior to being checked out and all changes to the document will be lost.

To undo a checked out document, first access your check out document, in the Simple mode the Workspace area is known as 'My Work'. Click the **'My Work'** tab to access the Workspace area. To access the Workspace in the Standard mode click the  button on the floating toolbar or if within the Advanced mode click the  **Workspace** button on the Left-hand pane. Then click the  **Current documents** option and the documents will be displayed.

In the Middle pane right click the selected document and from the menu select the **Undo Checkout** option.

This will remove the document from the  **Current documents** area and the text will change back to black (or green if a draft).

**NB:** If a document has been checked out by another user and you wish to undo the check out on that then as long as you have the correct privilege then you are able to undo check out for other user documents.

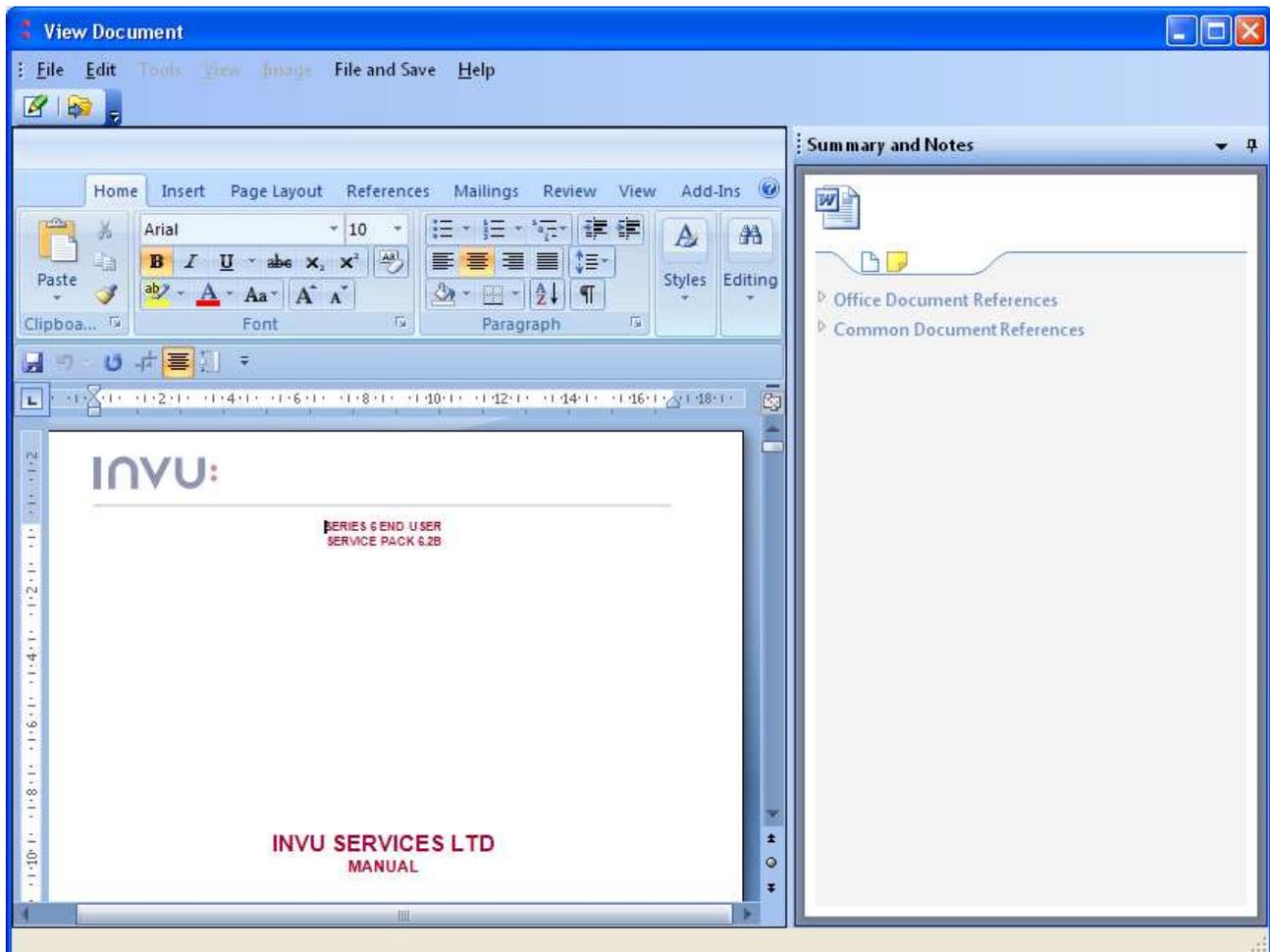
## **VIEW AND EDIT DOCUMENT SCREEN**

## THE VIEW DOCUMENT SCREEN

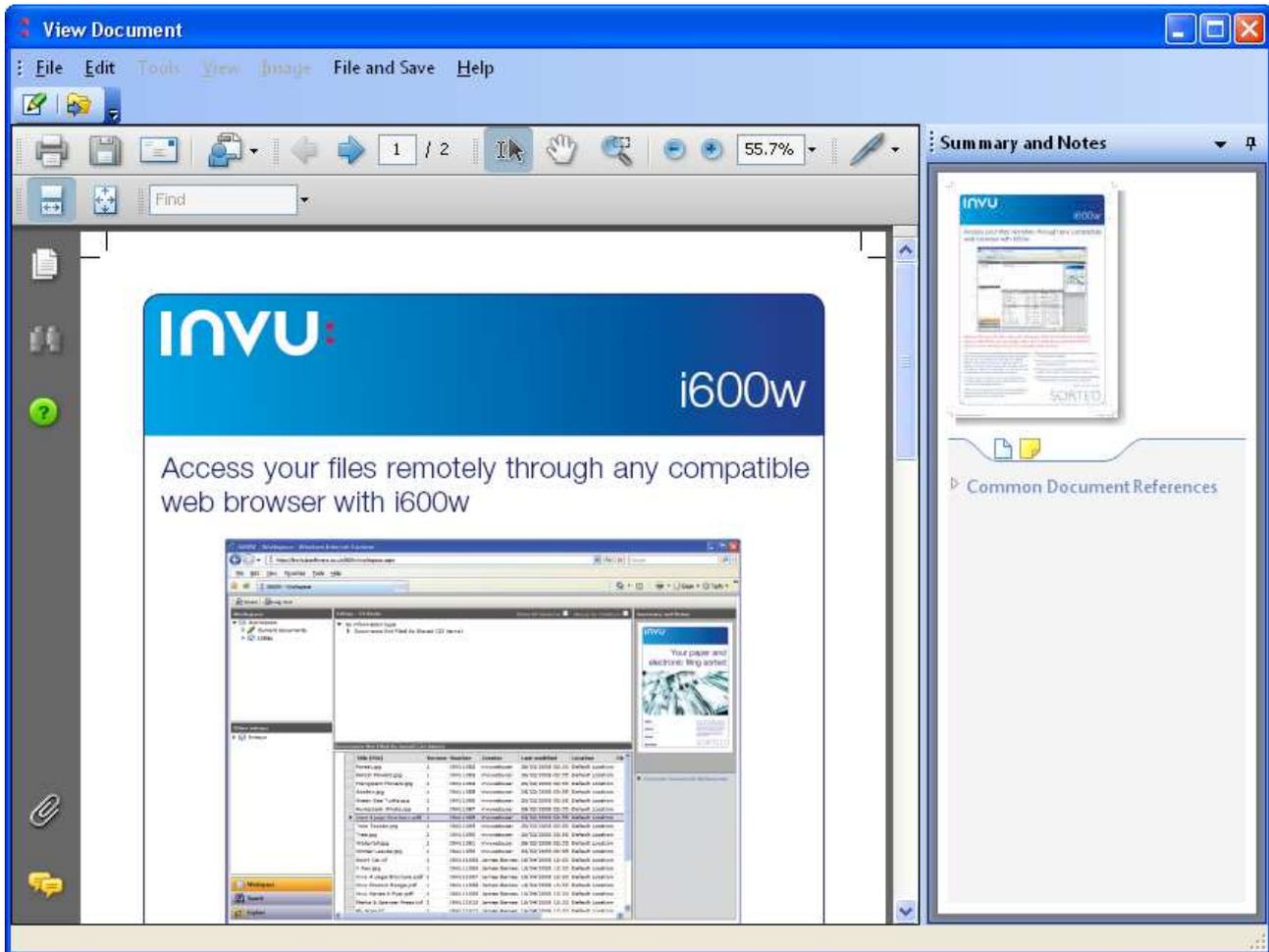
Once a document has been opened the 'View document' screen is displayed. Here you are able to use certain tools to view the document in a better way. (For more information on opening documents please see page 74.)

It enables the user to see the contents of a selected document and also the Right-hand pane which will display summary details (Document References) if filing and saving a document in the File and Save Pane.

Depending on the type of file open other toolbars may also be displayed. If opening a office or PDF document toolbars from the native application are displayed and the functionality of the View document screen are greatly reduced. Below is an example of a word and PDF document.



An open word document



An open PDF document

When working with Office and PDF documents there are only four options available:

- **File - Print** - you are able to print documents out (see page 120).
- **File - Close** – will close the View screen
- **File and Save** – **File and Save** the document
- **Help - Contents** - view the help for Series 6

If working with image based documents such as jpg or .tif then full functionality is available within the 'View Documents' screen as shown below:

The screenshot shows a software window titled "View Document" with a menu bar (File, Edit, Tools, View, Image, File and Save, Help) and a toolbar with various icons. The main area displays an invoice from "Invu" (SORTED) to "The Barn, Blisworth Hill Farm". The invoice includes a table of items and a summary of charges.

**Invoice Details:**

- Sender:** Invu, SORTED, The Barn, Blisworth Hill Farm, Stoke Road, Blisworth, Phone 01604365656 Fax 01604777777
- Invoice No:** 12492, **DATE:** 15 June, 2009, **Order No:** 0676
- Delivery Address:** As in List
- Billing Address:** Nik Nika, Sosya Nik, 34 the Crescent, Willsworth

**Comments or special instructions:**

| SALESPERSON | P.O. NUMBER | SENT DATE | SENT VIA | F.O.B. POINT | TERMS          |
|-------------|-------------|-----------|----------|--------------|----------------|
|             |             |           |          |              | Due on receipt |

| QUANTITY         | DESCRIPTION | UNIT PRICE | AMOUNT         |
|------------------|-------------|------------|----------------|
| 100              | Brochures   | 6.00       | 600.00         |
| SUBTOTAL         |             |            | £600           |
| VAT              |             |            | 290.00         |
| P&P              |             |            | £10.88         |
| <b>TOTAL DUE</b> |             |            | <b>£900.88</b> |

Make all cheques payable to INVU Services Ltd  
If you have any questions concerning this invoice, contact Eli Johns

**THANK YOU FOR YOUR BUSINESS!**

The right-hand panel, titled "Summary and Notes", contains a thumbnail of the invoice and two expandable sections: "Image Document References" and "Common Document References".

In the following sections the menus and icons are explained.

## The File Menu

You can print out documents from Series 6. The print options are found in the **File** menu.

## Print Preview

To preview the image based document before printing, in the 'View Documents' screen click the **File** menu and then select the **Print Preview** option so the 'Print' screen will be displayed. Click the **OK** button and the 'Print Preview' screen will be displayed.

**Print preview** window showing two pages of a document.

**Page 1 (Left): ORDER SHEET**

**INVU:**

**ORDER SHEET**

**Customer:**  
 Trader  
 Bush Street  
 Plymouth  
 Hants  
 England

**Invu Services Limited**  
 The Beren  
 Blisworth Hill Farm  
 Stoke Road  
 Blisworth  
 Northamptonshire  
 NN7 3DB

**Name:** Ellis Smith  
**Order No.** 2344  
**Page 1**

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| Code | Product              | Quantity | Cost         | Total       |
|------|----------------------|----------|--------------|-------------|
| 101  | Invu Series 600      | 10       | 450          | 4500        |
| 010  | Invu Care 2yrs       | 1        | 750          | 750         |
| 020  | Installation .5 days | 1        | 750          | 750         |
| 111  | Training 3 days      | 1        | 3000         | 3000        |
|      |                      |          | <b>Total</b> | <b>8300</b> |

**Registered office address:** The Beren, Blisworth Hill Farm, Stoke Road, Blisworth, Northamptonshire, NN7 3BD  
**VAT Registration No:** 81119000

**Page 2 (Right): PURCHASE ORDER**

**Willis Stationers**

**PURCHASE ORDER**

**Company:**  
 Invu Services Ltd  
 Blisworth Hill Farm  
 Stoke Road  
 Northamptonshire  
 NN7 3DB

**Supplier:**  
 Willis Stationers Limited  
 57 Buckland Road  
 Leyton  
 E10 6QS  
 VAT: 18526529

**Contact Name:** Josh Weston  
**Order Number:** 1123  
**Page 1**

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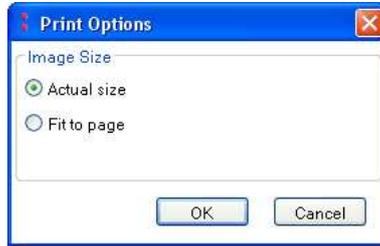
| Prod No | Description        | Quantity                        | Item          | Total  |
|---------|--------------------|---------------------------------|---------------|--------|
| 354     | Rolodex Pen Holder | 100                             | 5.88          | 588.00 |
|         |                    | <b>Total Order (excl VAT) £</b> | <b>588.00</b> |        |

**Registered office address:** 57 Buckland Road, Leyton, E10 6QS

Here you can zoom in and out and browse multiple pages using the toolbar. Click the **Close** button to exit the screen.

## Print Options

To change the print options before printing, in the 'View Documents' screen click the **File** menu and then select the **Print Options** option and the following screen will be displayed.



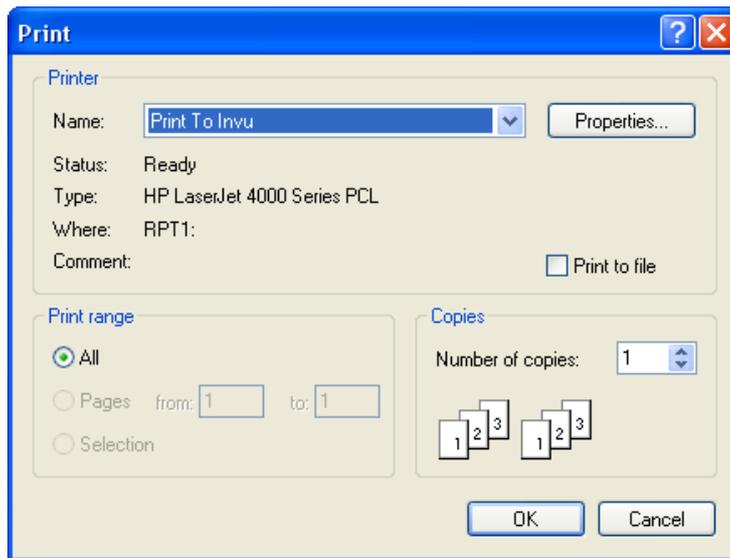
The **Actual size** option will make sure that when the document is printed it will print in full size no matter how many pages it will span.

The **Fit to page** option will ensure that each page fits to the paper size chosen.

Click the **OK** button to save the changes.

## Print

Choose the **File** menu then select the **Print** option and the screen on the following page will be displayed:



Choose appropriate options and then click the **OK** button to print.

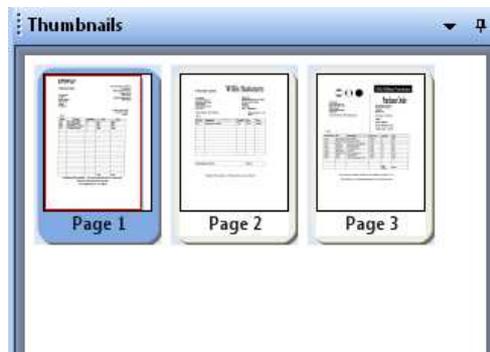
## Send - Pages by Email

You are able to send selected pages as an attachment on an email using the Thumbnails pane within the 'View documents' screen.

To send selected pages by email, open a document.

If a one page document then click the **File** menu then select the **Send** and then click the **Pages by Email** option.

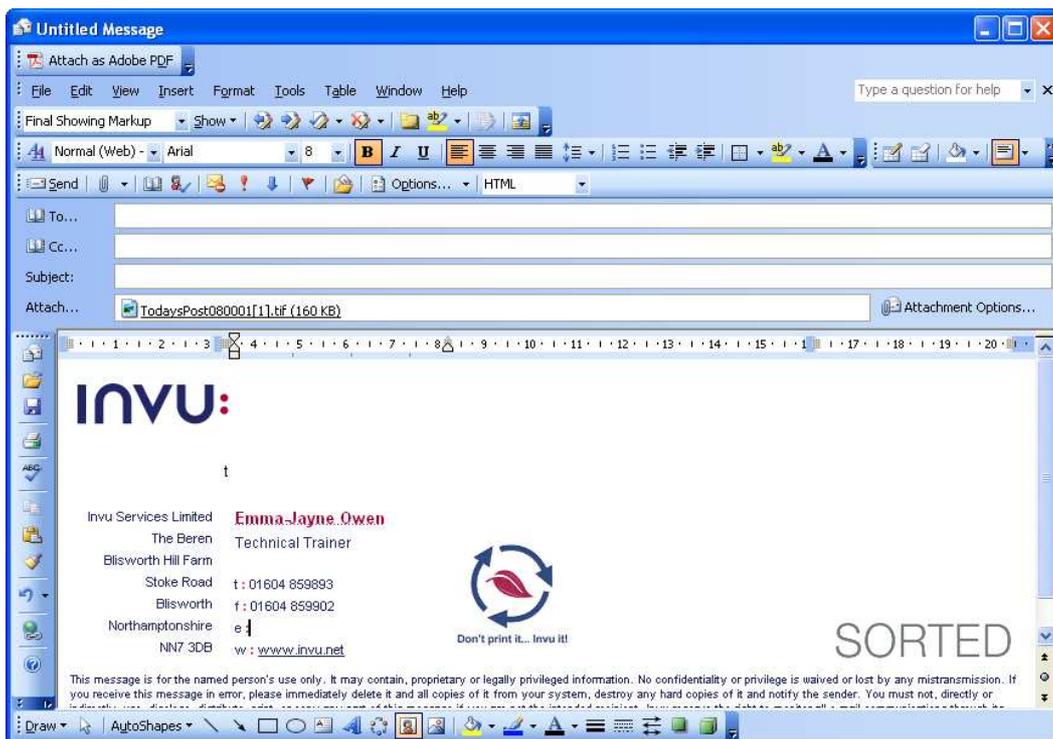
If the document has multiple pages on the Right-hand pane at the bottom the button will be displayed. Click the  **Thumbnails** button, the Right-hand pane will change to show mini images of each page in that document.



Click the thumbnail you wish to attach or if you wish to select multiple pages click the first then hold down the **CTRL** key and click each subsequent thumbnail. If the thumbnails you wish to select are in a block then click the first thumbnail then hold down the **SHIFT** key and click the last thumbnail in the block.

Once the thumbnails are highlighted, click the **File** menu and then select the **Send Pages by Email** option.

No matter whether a single page or multiple pages selected, the email screen will be displayed with the document attached.



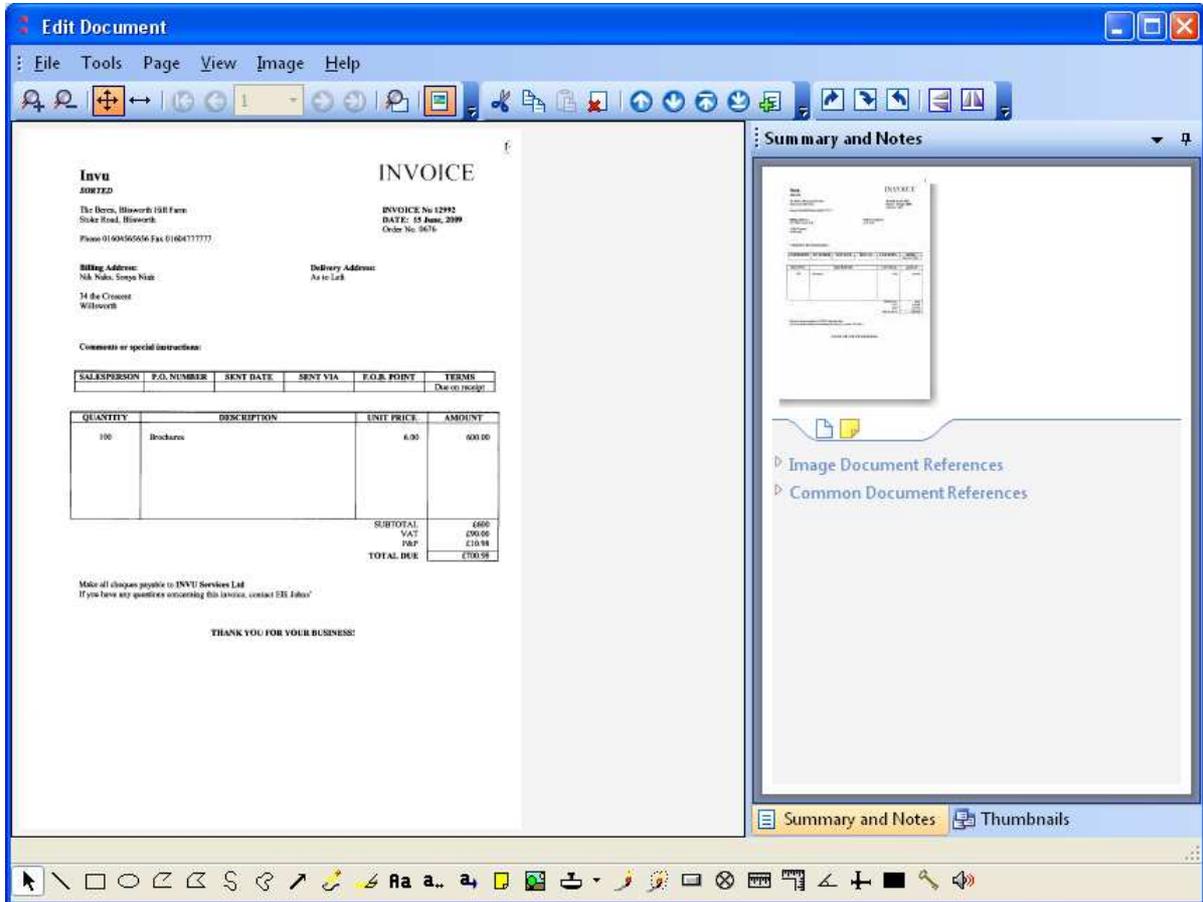
If you have selected multiple pages these will be placed in one file and attached. Complete the email as normal and click the **Send** button.

**Close**

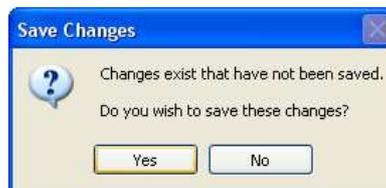
If you wish to exit the 'View Document' screen click the **File** menu and then select the **Close** option.

## The Edit Menu

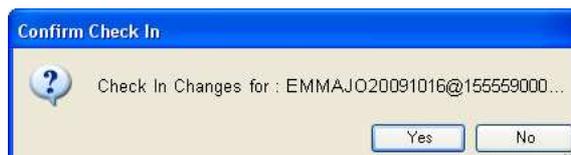
The Edit menu will allow you to edit the existing document you have open in the viewer or if you have multiple documents the current one. Select the **Edit** menu then **Current Document** option or click the  icon and the 'Edit Document' screen will be displayed:



Once you have made the changes click the X in the top right corner and the following message will be displayed:



Click the **Yes** button to save the changes and check the document in as normal. For information on how to check in please see page 109.



## Tools Menu

The **Tools** menu will allow you to manipulate the view of the document by using Zoom, Centre and magnify tools.

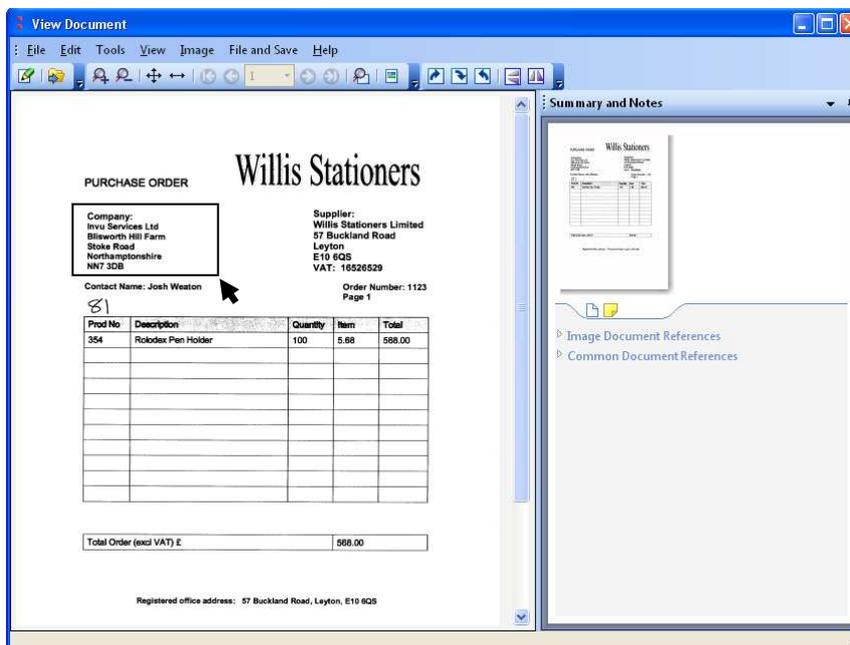
### None

Click the **File** menu and then select the **None** option, a tick will be displayed by the option and this will turn off the three other options **Zoom**, **Centre** and **Magnifying Glass**.

### Zoom

This is the default option. Click the **File** menu and then select the **Zoom** option, a tick will be displayed by the option.

Move the mouse to where you would like to zoom in.



Click and drag a box like the one shown in the picture above and when you release your mouse it will zoom in.

### Centre

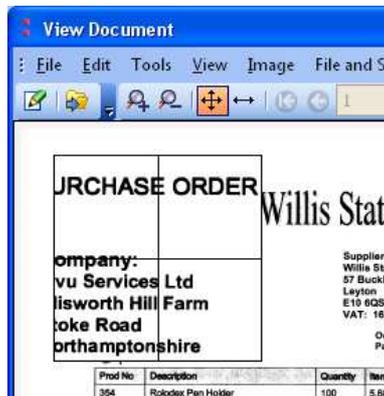
Click the **File** menu and then select the **Centre** option, a tick will be displayed by the option.

Move your mouse into the document where you would like to centre it click once and the point will be centred.

## Magnifying Glass

This is the default option. Click the **File** menu and then select the **Magnifying Glass** option, a tick will be displayed by the option or click the  icon on the toolbar.

Move your mouse into the document then hold down the mouse and where ever your mouse is will be magnified in a box as shown below. While you are hold down the mouse button you can also move your mouse around the document to view other areas.



Once you release your mouse it will go back to the default tool **Zoom**.

## View Menu

In the **View** menu you can use zoom tools and navigation tools which can be very useful. The view option can also be found on the toolbar as well.



### Zoom in

The user can easily zoom in on a document's content. Each time the icon is clicked it will zoom in further or click the **View** menu then select the **Zoom** option and click **In**.



### Zoom out

The user can easily zoom out from document's content. Each time the icon is clicked it will zoom out further or click the **View** menu then select the **Zoom** option and click **Out**

The **Normal Fit** option when selected will show the document at 100%. To use click the **View** menu then select the **Zoom** option and then click **Normal Fit**.



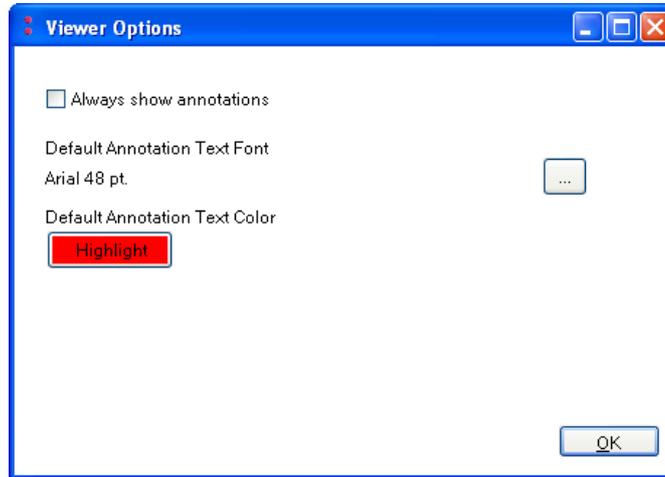
### Fit to window

The document will fit to the window for better viewing if clicked or click the **View** menu then select the **Zoom** option and then choose the **Fit to window** option.



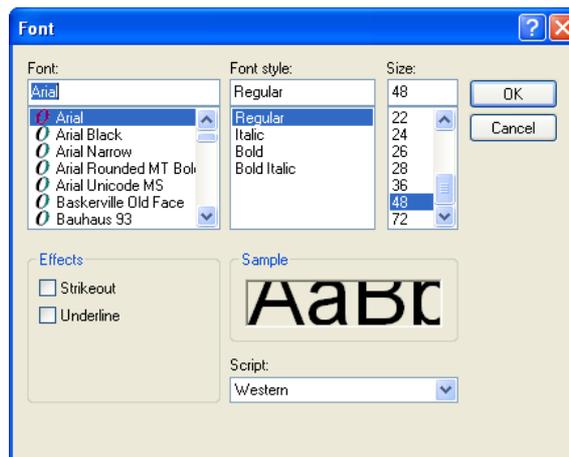
## View Options

The view options will allow you to change how things are viewed. Click the **View** menu and then select the **Options** option. The screen on the following page will be displayed:



The **Always show annotations** check box, if ticked, will always show annotations by default.

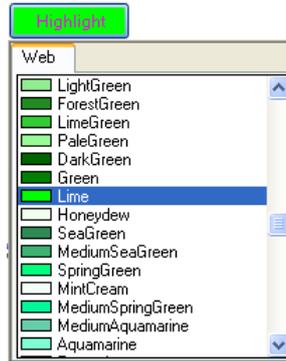
The default annotation font can be changed. To change the font click the  and the following screen will be displayed as shown below:



Make the necessary changes to the font then click the **OK** button to return back to the view options.

You can also change the default colour of the annotation text, Click the  button and a drop down will be displayed on the next page:

Default Annotation Text Color

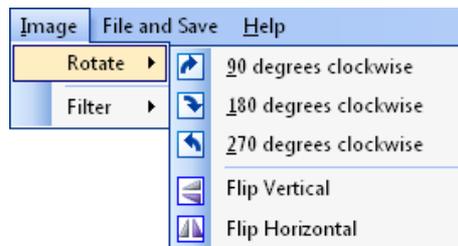


Choose the colour required and the button will change to that colour.

## Image Menu Options

Within the image menu you are able to rotate the images and also tidy up so that you can read it better.

Click the **Image** menu and then select the **Rotate** option, a cascade menu will be displayed:

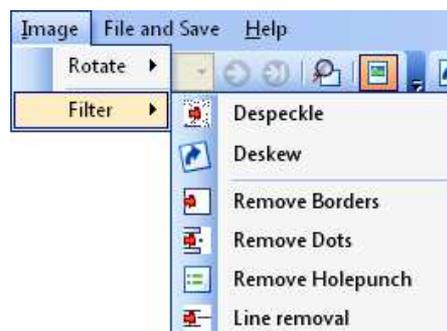


Here you can choose the degrees you wish to **rotate** the image or **flip** the document **horizontally** or **vertically**.

There is also a toolbar which has the same options



Click the Image menu and then select the **Filter** option and the following menu is displayed:



### Despeckle

This option will clean the image and eradicate any grey blemishes from the body of the document.

### Deskew

The image will be straightened automatically after scanning.

## Border removal

Will remove Borders from the document.

## Dot Removal

Will remove any dots from the document

## Holepunch removal

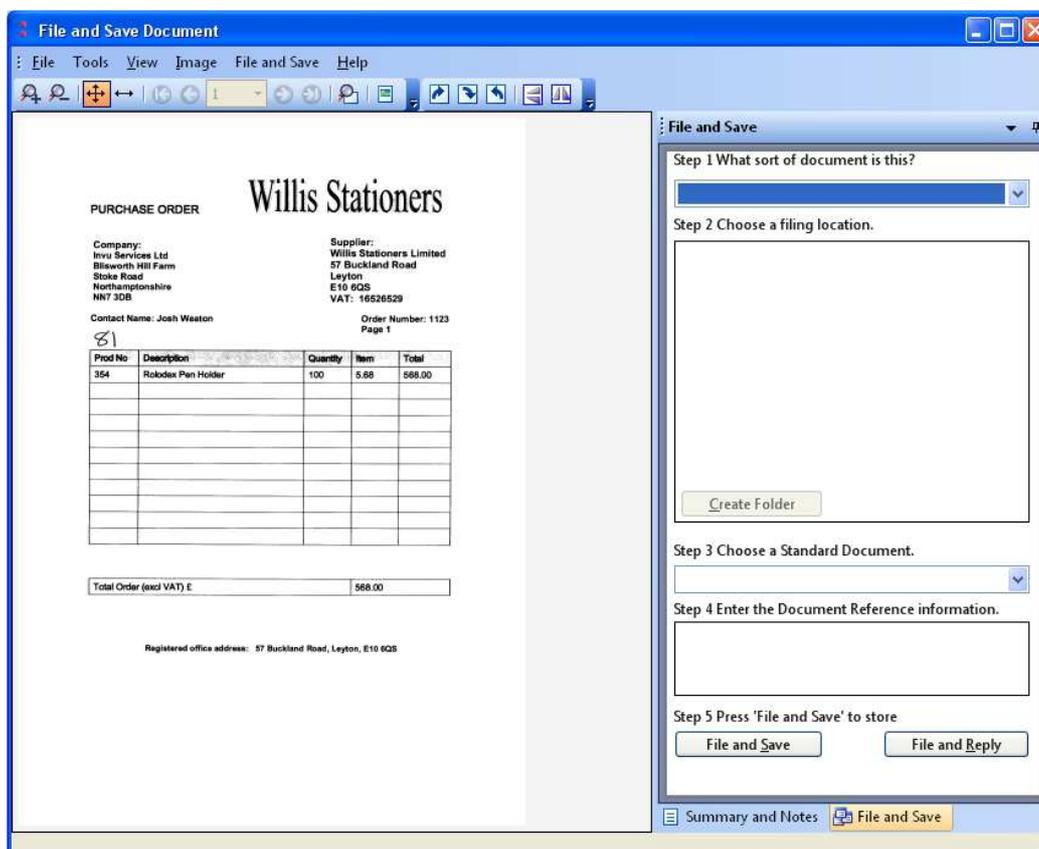
Will remove any hole punch marks from the document.

## Line Removal

Will remove unnecessary lines from the document.

## File and Save Menu Options

Within the File and Save menu you are able to take the current document and file it away. Click the **File and Save** Menu then select the **File and Save** option or click the **File and Save Current Document**  icon and the following will be displayed:



File the document in the normal way for more information on file and save see page 65.

## Help Menu

Click the **Help** menu and then select the **Contents** option and the help for Series 6 will be displayed:

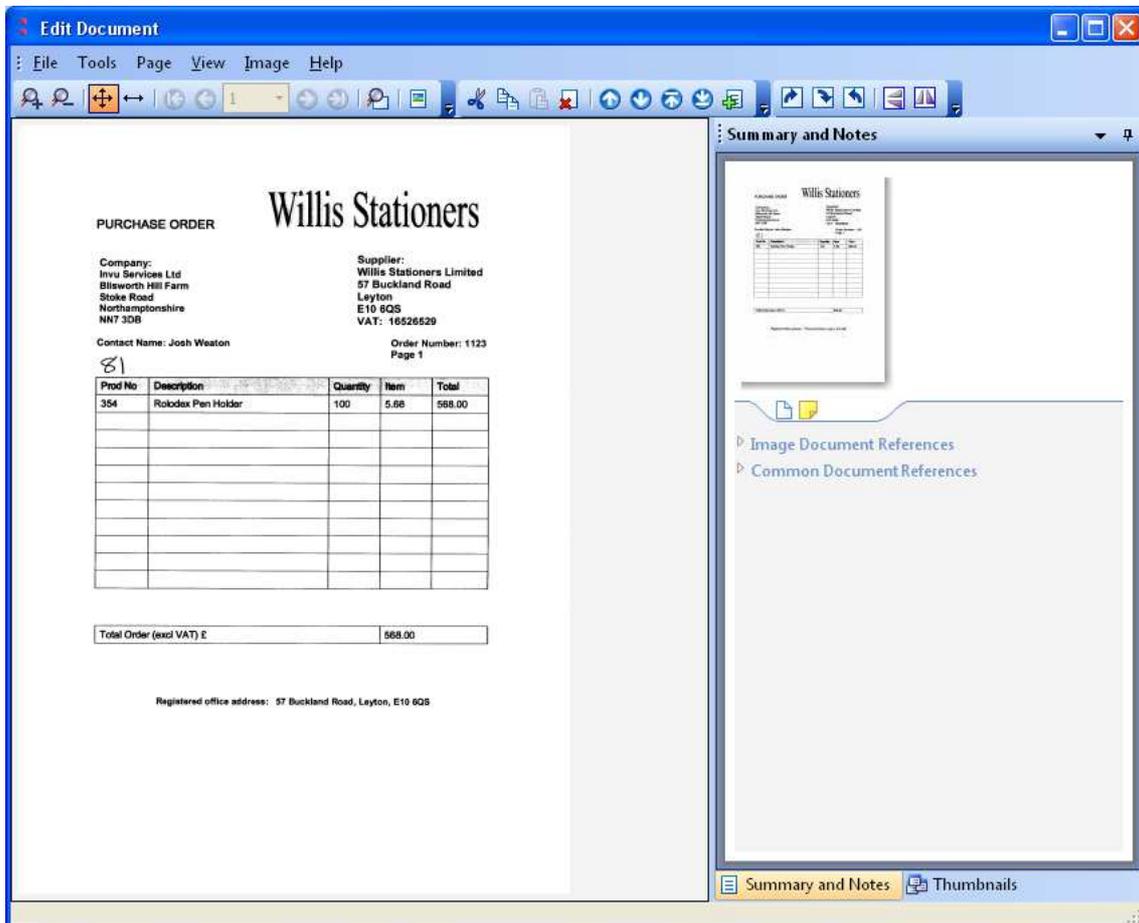


Use the Left hand panel to expand the topics and click the page to view the contents.

## THE EDIT DOCUMENT SCREEN

When you edit a document depending on the type of document and how the system has been configured you may see the 'Edit Document' screen. The 'Edit document' screen is normally only used for image based documents such as tiff, jpg, bmp images.

To access the 'Edit Document' screen you will need to edit a document. For more information on editing please see page 108.



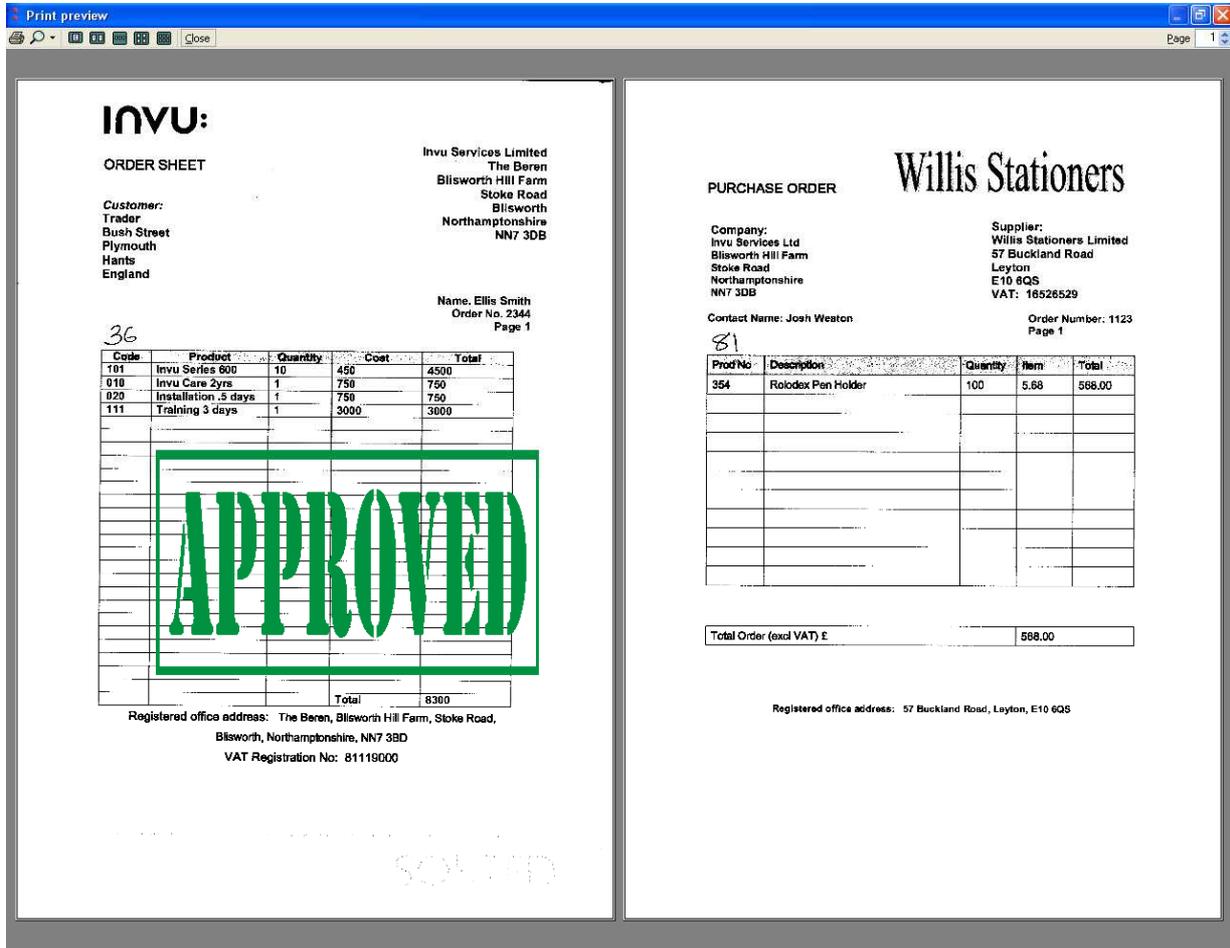
The functions within the 'Edit Document' screen are used to change the document such as moving the page around, removing pages, image tools such as rotating and also annotating the document as well.

In the section on the next page the options are explained:

## File Menu

### Print Preview

To preview the document click the **File** menu then select the option **Print Preview** and the print screen will be displayed. Click the **OK** button and the Print Preview screen will be displayed.



Click the **Close** button to exit the screen.

### Print Option

To change the print options before printing, in the 'View Documents' screen click the **File** menu and then select the **Print Options** option and the following screen will be displayed.



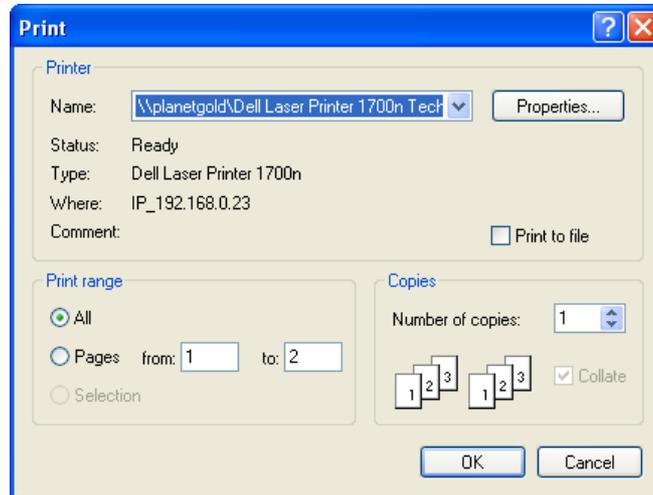
The **Actual size** option will make sure that when the document is printed it will print in full size no matter how many pages it will span.

The **Fit to page** option will ensure that each page fits to the paper size chosen.

Click the **OK** button to save the changes.

## Print

Choose the **File** menu then select the **Print** option and the following screen will be displayed:



Choose appropriate options then click the **OK** button to print.

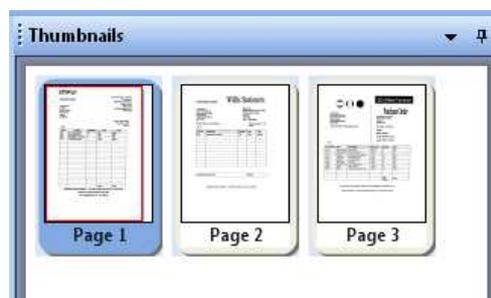
## Send – Pages to Intray

When working with a document you are able to send selected pages to your Intray using the **Thumbnails** pane within the 'Edit documents' screen.

To send selected pages to your Intray, Edit a document.

If a one page document, click the **File** menu and then select the **Pages to Intray** option.

If the document you are editing has multiple pages then on the Right-hand pane at the bottom the **Thumbnails** button will be displayed. Click the **Thumbnails** button, the Right-hand pane will change to show mini images of each page in that document.



Click the thumbnail you want to send to your Intray or if you wish to select multiple pages click the first then hold down the **CTRL** key and click each subsequent thumbnail. If the thumbnails you wish to select are in a block then click the first thumbnail then hold down the **SHIFT** key and click the last thumbnail in the block.

Once the thumbnails are highlighted, click the **File** menu then click **Send** and then select the **Pages to Intray** option.

The document will be sent straight to your Intray as a copy it is not linked in any way to the original.

## Close

If you wish to exit the 'Edit Document' screen click the **File** menu then select the **Close** option.

## Tools Menu

The **Tools** menu will allow to you manipulate the view of the document by using Zoom, Centre and magnify tools.

## None

Click the **File** menu and then select the **None** option, a tick will be displayed by the option and this will turn of the three other options **Zoom**, **Centre** and **Magnifying Glass**.

## Zoom

This is the default option. Click the **File** menu and then select the **Zoom** option, a tick will be displayed by the option.

Move the mouse to where you would like to zoom in.

The screenshot shows the 'Edit Document' application window. The main content area displays a purchase order from Willis Stationers. The order details include:

- Company:** Invu Services Ltd, Blisworth Hill Farm, Stoke Road, Northamptonshire, NN7 3DB, Contact Name: Josh Weaton
- Supplier:** Willis Stationers Limited, 57 Buckland Road, Leyton, E19 6QS, VAT: 16526529
- Order Number:** 1123, Page 1

| Prod No | Description        | Quantity | Item | Total  |
|---------|--------------------|----------|------|--------|
| 354     | Rolodex Pen Holder | 100      | 5.66 | 566.00 |
|         |                    |          |      |        |
|         |                    |          |      |        |
|         |                    |          |      |        |
|         |                    |          |      |        |
|         |                    |          |      |        |
|         |                    |          |      |        |
|         |                    |          |      |        |
|         |                    |          |      |        |
|         |                    |          |      |        |

Total Order (excl VAT) £ 566.00

Registered office address: 57 Buckland Road, Leyton, E19 6QS

The right-hand pane is titled 'Summary and Notes' and contains a thumbnail of the document and two expandable sections: 'Image Document References' and 'Common Document References'.

Click and drag a box like the one shown in the picture above and when you release your mouse it will zoom in.

## Centre

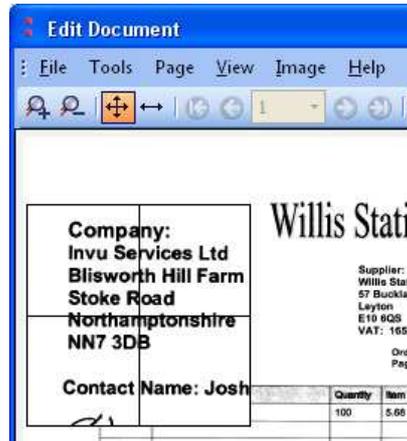
Click the **File** menu and then select the **Centre** option, a tick will be displayed by the option.

Move your mouse into the document where you would like to centre it click once and the point will be centred.

## Magnifying Glass

This is the default option. Click the **File** menu and then select the **Magnifying Glass** option, a tick will be displayed by the option or click the  icon on the toolbar.

Move your mouse into the document then hold down the mouse and where ever your mouse is will be magnified in a box as shown below. While you are hold down the mouse button you can also move your mouse around the document to view other areas.

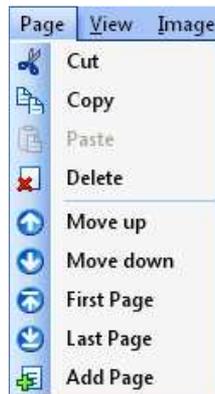


Once you release your mouse it will go back to the default tool **Zoom**.

## Page Menu

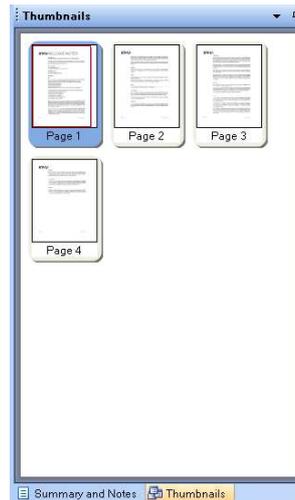
When editing a document an option is available that will allow you to manipulate the pages of a document.

Click the **Page** menu and the following options are available:



The above options will allow you to reposition pages if they have been scanned in wrong or even remove pages.

If the document you are editing has multiple pages on the Right-hand pane at the bottom the  **Thumbnails** button will be displayed. Click the  **Thumbnails** button, the Right-hand pane will change to show mini images of each page in that document.



In the **Thumbnails** pane click the thumbnail you wish to delete or move.

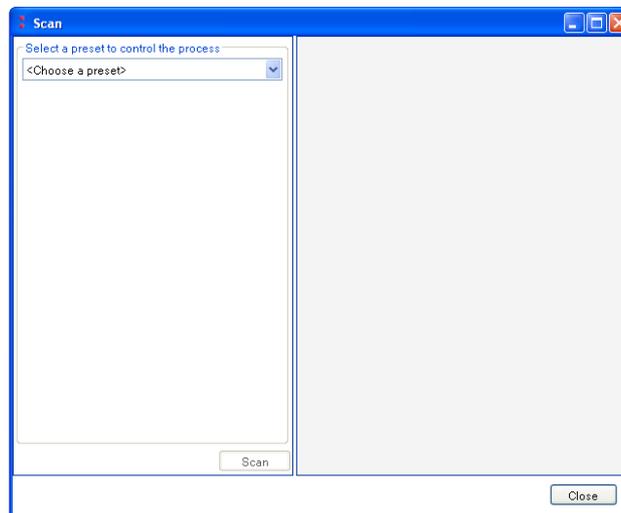
**Delete** option to delete the current page selected.

Select the **Move up** option to move the selected page up by 1 page. I.e. if current page was Page 3 and choose **Move up** then it would become Page 2.

Select the **Move Down** option to move the selected page down by 1 page. I.e. if current page was Page 3 and choose **Move Down** then it would become Page 4.

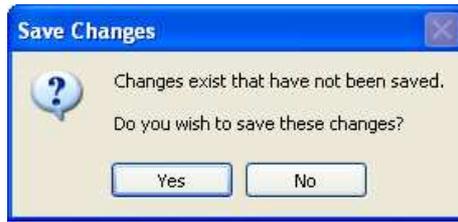
Select the **Move to first page** option to move the selected page to be the first page of document. Select the **Move to last page** option to move the selected page to be the last page of the document.

You can also add pages to an existing document. To add a new page, click the **Page** menu and select the **Add Page** option. The following screen will be displayed:



Click the drop down list and **choose a preset** and then click the **Scan** button it will bring in the pages that have been scanned. The scanned pages will be added after the last page of the document.

When finished making the changes to the document, click the **File** menu and select the **Exit** option. The following screen will be displayed if changes have been made:



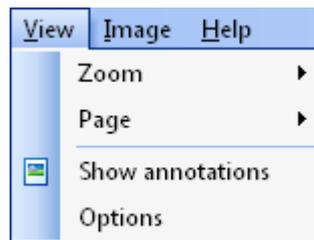
Click the **Yes** button to save any changes you have made and exit. Click the **No** button to abandon any changes made and exit.

You can also use these pages option on the Page Toolbar.

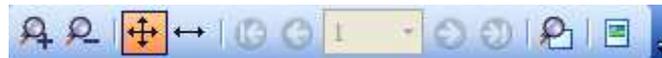


## View Menu

In the View menu you can use zoom tools and navigation tools to move around the document.



These option can be found on a toolbar as well.



## Zoom



### Zoom in

The user can easily zoom in on a document's content. Each time the icon is clicked it will zoom in further or click the **View** menu then **Zoom** and click **In**.



### Zoom out

The user can easily zoom out from document's content. Each time the icon is clicked it will zoom out further or click the **View** menu then **Zoom** and click **Out**



### Fit to window

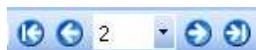
The document will fit to the window for better viewing or click the **View** menu then **Zoom** then select the option **Fit to window**.



### Fit to Width

The document will fit to the width of the viewer to get a closer look or click the **View** menu then **Zoom** then select the option **Fit to width**.

## Page



### Navigation

These icons enable the user to navigate through multiple page documents. The First Page, Previous Page, Next Page and Last Page as well as the option to select a specific page number. To navigate via the menus click the **View** menu then the **Page** then choose from **First Page**, **Previous Page**, **Next Page** and **Last Page** options.



### Magnifying Glass

Is on the Toolbar and in the **Tools** menu. See page 135.

## Show Annotations

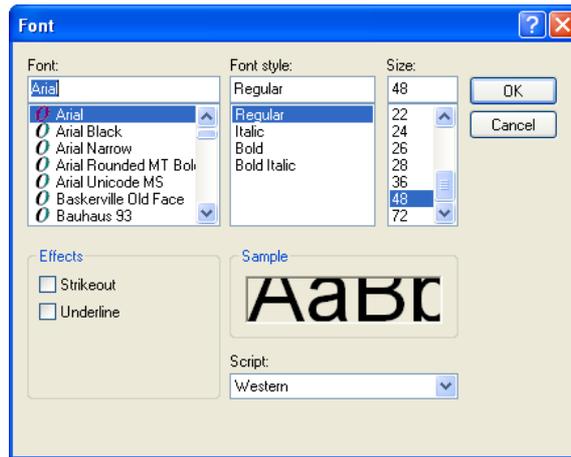
When editing a document click the  icon or click the **View** menu and choose **Show annotations** to display the annotation toolbar at the bottom of the screen (as shown below) and show any annotation already added to the document.



This toolbar consists of drawing, text, notes, ruler's, buttons, hyperlinks and even audio tools.

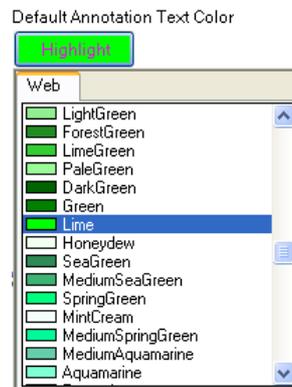
For example the **Rubber Stamp**  icon will display text such as Urgent, Action, and Approved etc. To apply a stamp, click the arrow to the right of the **Rubber Stamp** icon. From the menu choose the type of stamp to apply such as Approved.





Make the necessary changes to the font then click the **OK** button to return back to the view options.

You can also change the default colour of the annotation text, Click the **Highlight** button and a drop down will be displayed on the next page:



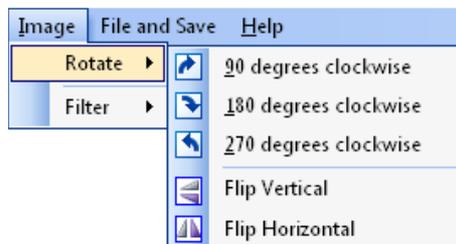
Choose the colour required and the button will change to that colour.

## Image Menu

Within the image menu you are able to rotate the images and also tidy up so that you can read it better.

### Rotate

Click the **Image** menu and then select the **Rotate** option, a cascade menu will be displayed:

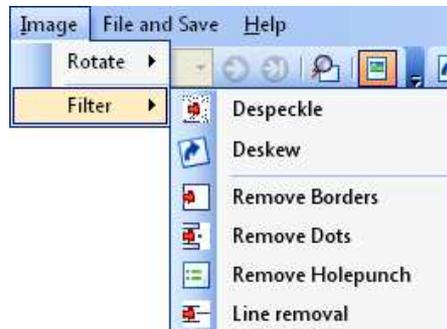


Here you can choose the degrees you wish to **rotate** the image or **flip** the document **horizontally** or **vertically**.

There is also a toolbar which has the same options 

## Filter

Click the Image menu and then select the **Filter** option and the following menu is displayed:



### **Despeckle**

This option will clean the image and eradicate any grey blemishes from the body of the document.

### **Deskew**

The image will be straightened automatically after scanning.

### **Border removal**

Will remove Borders from the document.

### **Dot Removal**

Will remove any dots from the document

### **Holepunch removal**

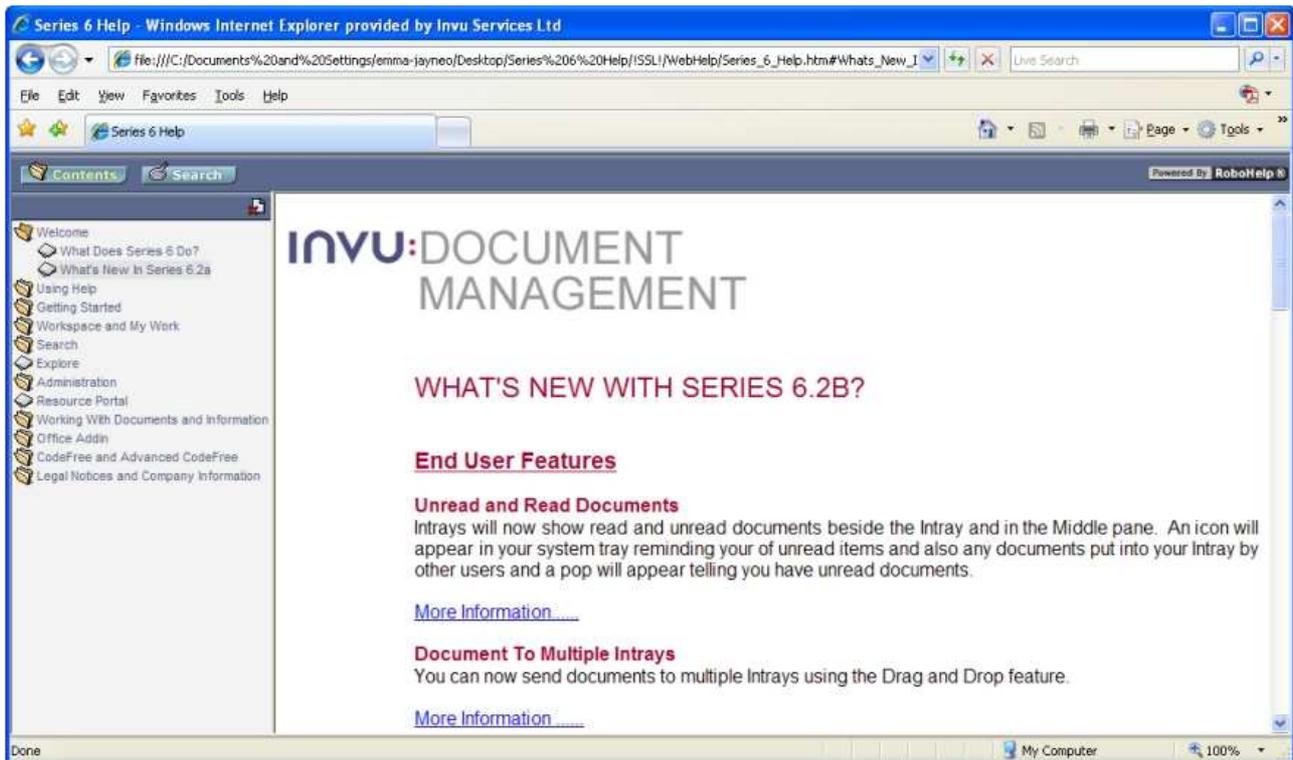
Will remove any hole punch marks from the documents.

### **Line Removal**

Will remove unnecessary lines from the document.

## Help Menu

Click the **Help** menu and then select the Contents option and the help for Series 6 will be displayed:



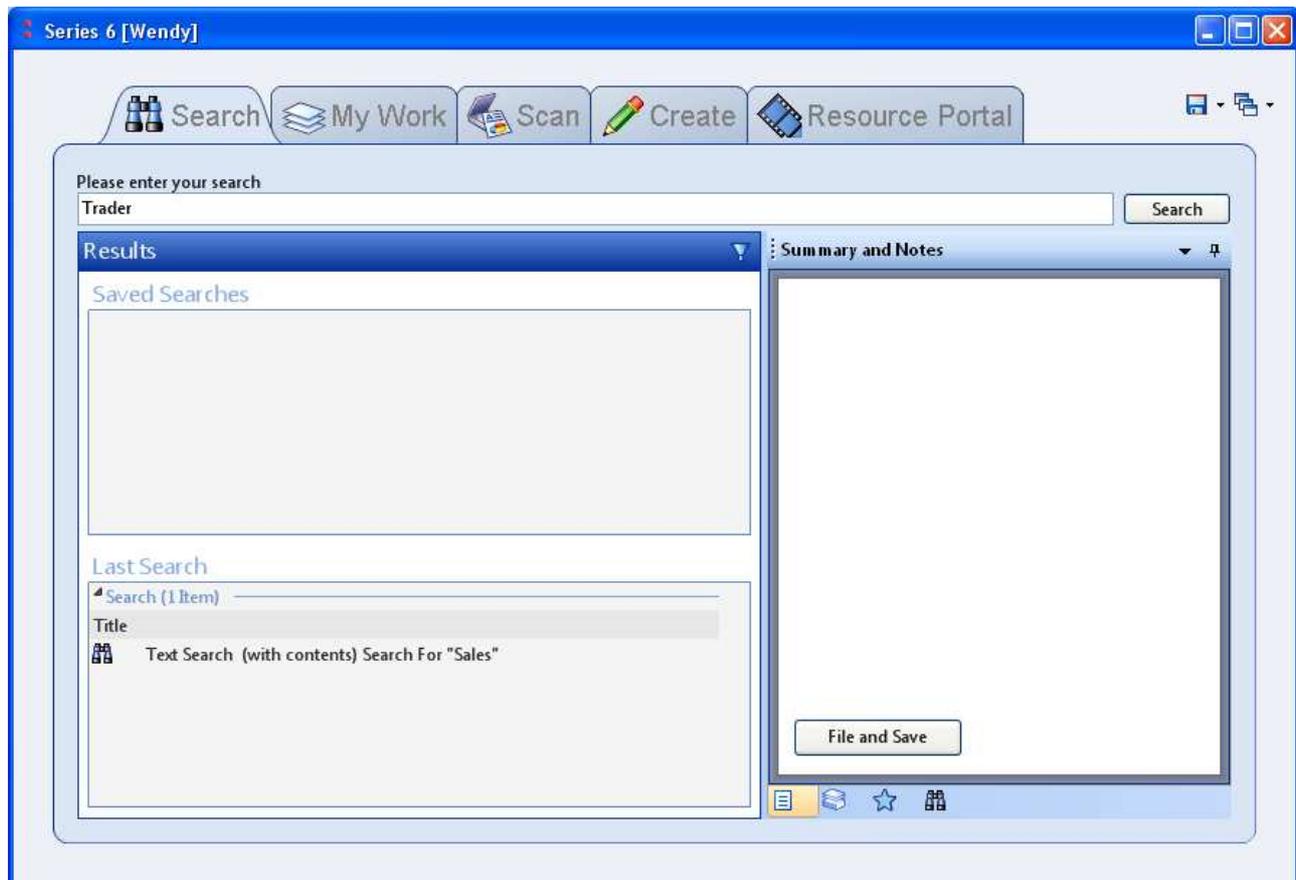
Use the Left hand panel to expand the topics and click the page to view the contents.

## **SEARCHING**

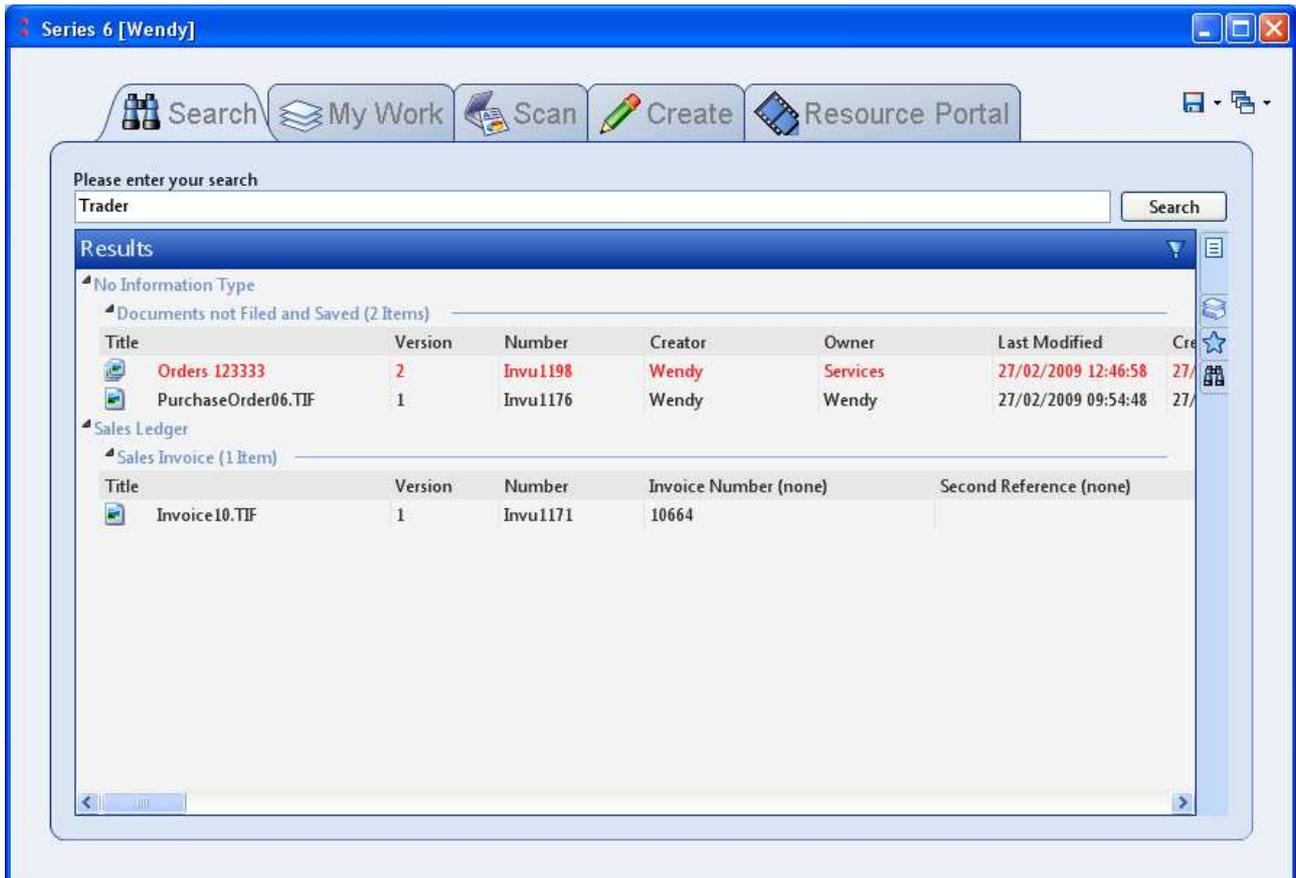
## SEARCHING

Invu Series 6 provides a great deal of flexibility in the way in which the user can perform a search within the system. A general search in the Simple Mode will always search through both the document's filing information and its content. When performing a search within the Simple mode all locations are searched including the Intrays accessible by the user. Within the Standard and Advanced mode when you perform a search you are able to choose, where, and what information is searched such as document content or the document references (metadata) and even search for a document with specific document reference values.

### Simple Mode Search



To search for a document within the Simple Mode click the **'Search'** tab and then enter the word or phrase into the field called **Please enter your search**. Press the Enter key or click the **Search** button to activate the search. The matching documents will be displayed in the search results area as shown on the next page:

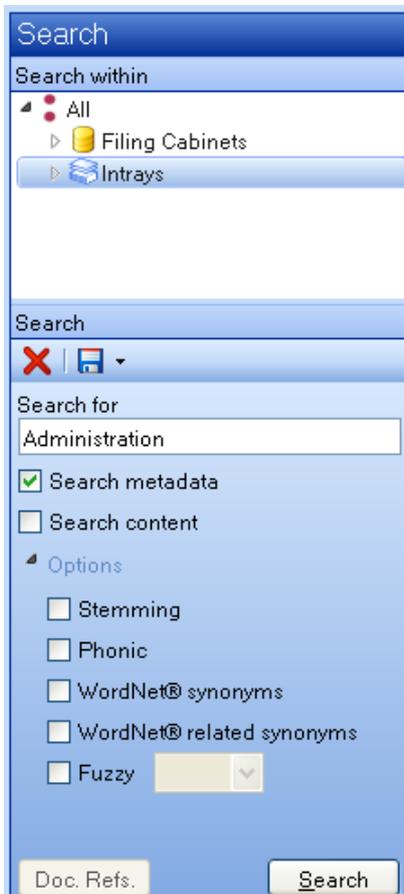
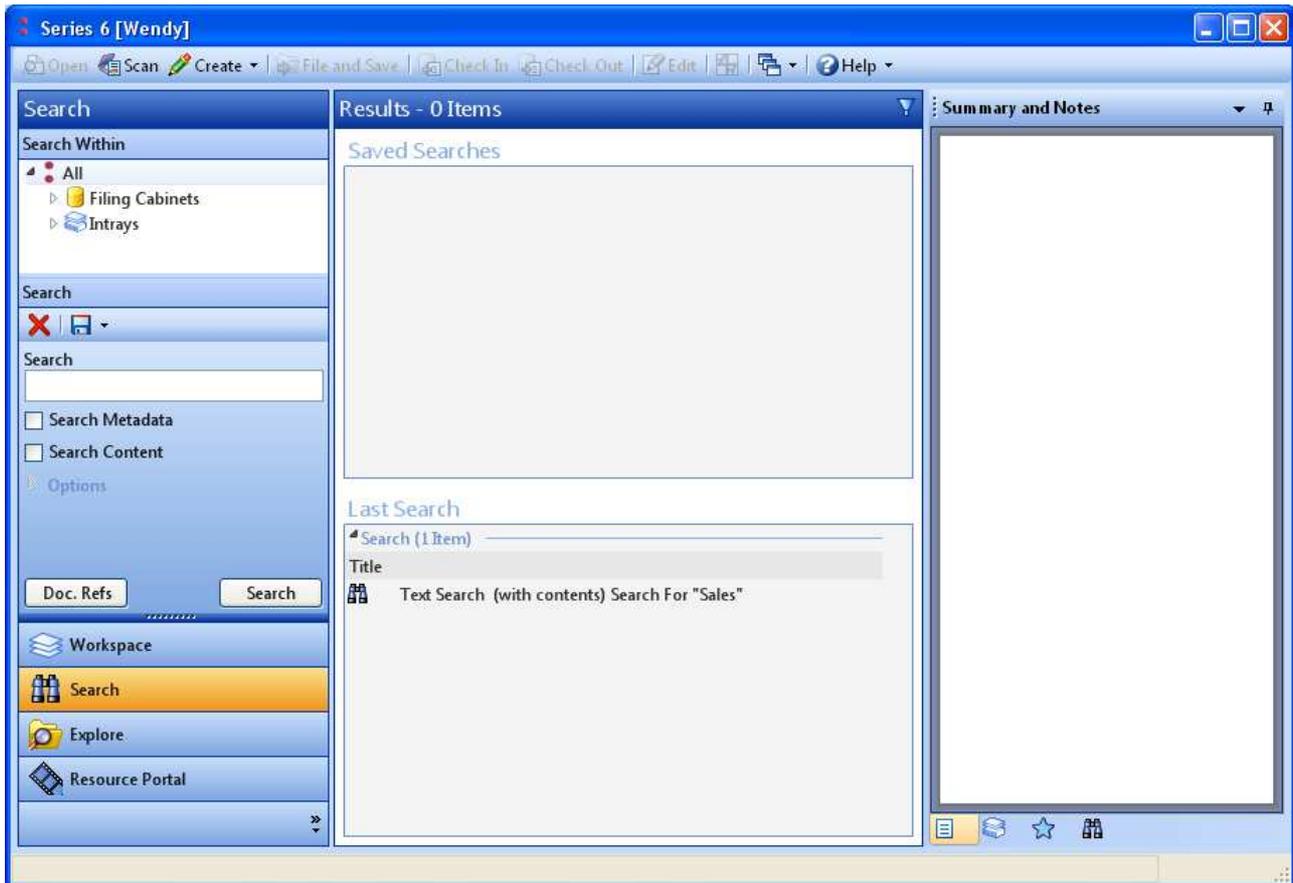


If you wish to run another search remove text from the **Please enter your search** field, enter the new search text and press the Enter key or click the **Search** button new search results will be displayed.

### Standard and Advanced Mode Search

In the Standard and Advanced modes there is scope to search through either the document's filing information or content, or to build more complex searches by using logic and filters. The search can also be localised to specific locations within the Invu system (such as a specific Folder or Filing Cabinet) to narrow the search's scope.

To access Search, in the Standard Mode click the  button on the floating toolbar or if within the Advanced mode click the  button on the Left-hand pane.



In the Left-hand pane is the search area here you would enter the criteria for the search, this pane is split into two sections – **Search within** and **Search for**.

The '**Search within**' area – controls where within the Series 6 the search needs to take place.

The '**Search For**' area – specifies the criteria used to find the documents.

Two different types of Searches can be performed:

**Text Search** – enables the user to search through all Document References and the contents of the documents (this is the default search option).

**Document References Search** – enables the user to create more complex criteria using specific Document References incorporating logic and operators.

### Text Search

A text search can search through the metadata and/or the contents of the documents within Series 6.

To perform a Text search, First choose where you are going to search. In the area '**Search within**' click **All** to search all Intrays and folders you

have access to. To search all Intrays click the  Intrays option so it is highlighted in blue. To search a specific Inray click the white arrow beside the  Intrays option then click the name of the Inray you wish to search so it is highlighted in blue.

To search all filing cabinets click the  Filing Cabinets option. To search a specific folder click the white arrow beside  Filing Cabinets option then browse to the folder. Click to highlight in blue.

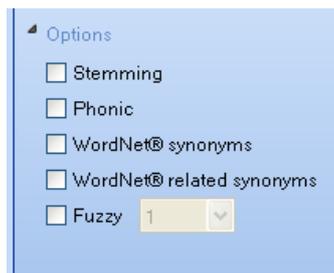
Next you need to enter the search text. Type in a word or phrase to base the search on into the **Search for** text box.

Then tick the **Search metadata** check box to search through all Document References and/or tick the **Search content** check box to search through the documents' content. Ticking both check boxes will ensure both Document References and document content is searched.

When performing a text search there are several **Options** to widen the search for documents.

- **Stemming**
- **Phonic**
- **WordNet Synonyms**
- **WordNet related synonyms**
- **Fuzzy**

To view these options click the white arrow beside the  Options heading. The available option will be displayed as shown below.



### Stemming

Tick to extend the search to check for grammatical variations on a word i.e. a search for **'applied'** would also find documents with 'applying', 'applies', and 'apply'.

Stemming searches can also be applied across all text in the search criteria, by appending the special character of ~ at the end of specific words i.e. **applied~**.

### Phonic

Tick to extend the search to check for words which sound like and begin with the first letter of the search phrase i.e. a search for **'Smith'** would also find 'Smite', 'Smyth', 'Smithy' etc.

Phonic searches can also be applied, by placing the special character of # in front of the word in the search criteria i.e. **#smith**

### WordNet @ & WordNet@ related Synonyms

These options will extend the search to check for words with a similar or related meaning using a thesaurus.

**WordNet@ synonyms** - If ticked will search through a comprehensive thesaurus. I.e. if a search for **'fast'** was initiated it would also look for 'quick', 'speedy', 'rapid', 'express' etc.

**WordNet® related Synonyms** - If ticked will search for related words in the thesaurus. I.e. if a search for **'fast'** was initiated it would look for 'quick', 'speedy', 'rapid', 'express' and related words such as 'slow', 'velocity', 'accelerates', etc.

Synonym searches can also be applied by appending the special character **&** at the end of certain words in the search criteria. I.e. **improve&**

## Fuzzy

Tick to extend the search to check for words, even if they are misspelled. A degree of fuzziness can be applied from 1 to 10 .i.e. a fuzzy search for **'chosen'** will find 'chosen' with the degree of fuzziness set to **2**. The higher the degree the more search results will be returned.

Fuzzy searching can be useful when searching text that may contain typographical errors, or for text that has been scanned using optical character recognition (OCR).

A search for **alphabet** with a fuzziness of **2** would find **alphaqet**, with a fuzziness of **3** it would find both **alphaqet** and **alpkaget**.

Fuzziness is not built into the index, so you can vary fuzziness at the time of each search.

You can also add fuzziness selectively by using the **%** character. The number of % characters you add determines the number of differences the search engine will ignore when searching for a word. The position of the % characters determines how many letters at the start of the word have to match exactly. Examples:

**fav%our** Word must begin with *fa* and have at most one difference between it and *favour*.

**fav%%our** Word must begin with *fav* and have at most two differences between it and *favour*

## Other Special Characters

The special character can be applied to match any characters within the search criteria.

The **?** special character would be used to replace a letter. I.e. **M?N** would look for Man, Men or Min.

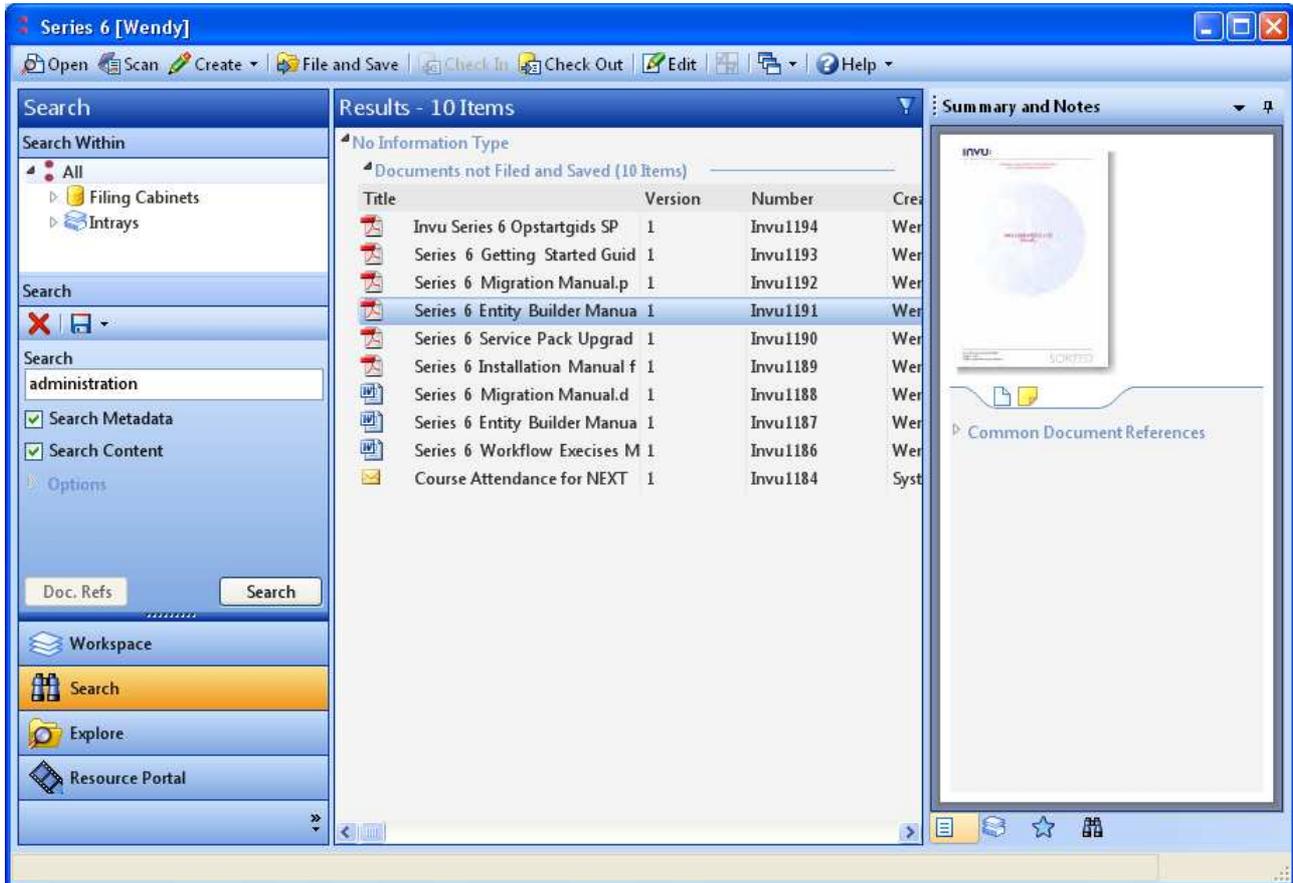
The **\*** special character would be used to search for documents were the search value starts with or ends with. I.e **fav\*** would find anything which starts with *fav*.

The **and** special character would be used to search for more than one word in the same document but not a phrase. I.e. **Administration and Support** would find any document with both those words.

The **Or** special character would be used to search for different words in the documents. I.e. **storage or cabinets** would find any documents which contain the word Storage **or** cabinets in the contents or Document References.

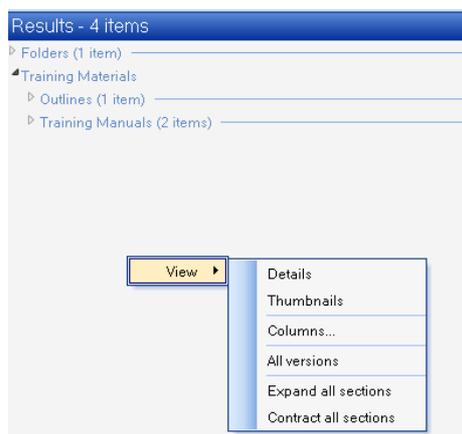
**NB:** The special characters can also be used in the Simple mode.

Once the search criteria has been set click the  button and the results will be displayed in the Middle pane. Series 6 will display the total number of results in the title of the Middle pane.

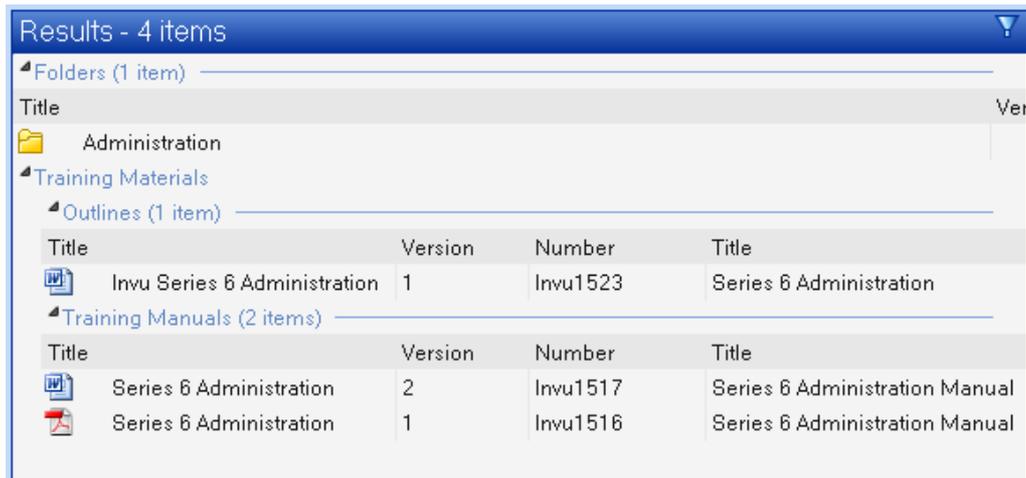


Depending on the number of results returned it may not see the documents but instead see the section headings (Information Types and Standard Documents).

To expand all results, right click anywhere in the Middle pane.



From the right click menu select the **View** option then click **Expand all sections**.



| Results - 4 items                                                                                              |         |          |                                |
|----------------------------------------------------------------------------------------------------------------|---------|----------|--------------------------------|
| Folders (1 item)                                                                                               |         |          |                                |
| Administration                                                                                                 |         |          |                                |
| Training Materials                                                                                             |         |          |                                |
| Outlines (1 item)                                                                                              |         |          |                                |
| Title                                                                                                          | Version | Number   | Title                          |
|  Invu Series 6 Administration | 1       | Invu1523 | Series 6 Administration        |
| Training Manuals (2 items)                                                                                     |         |          |                                |
| Title                                                                                                          | Version | Number   | Title                          |
|  Series 6 Administration      | 2       | Invu1517 | Series 6 Administration Manual |
|  Series 6 Administration      | 1       | Invu1516 | Series 6 Administration Manual |

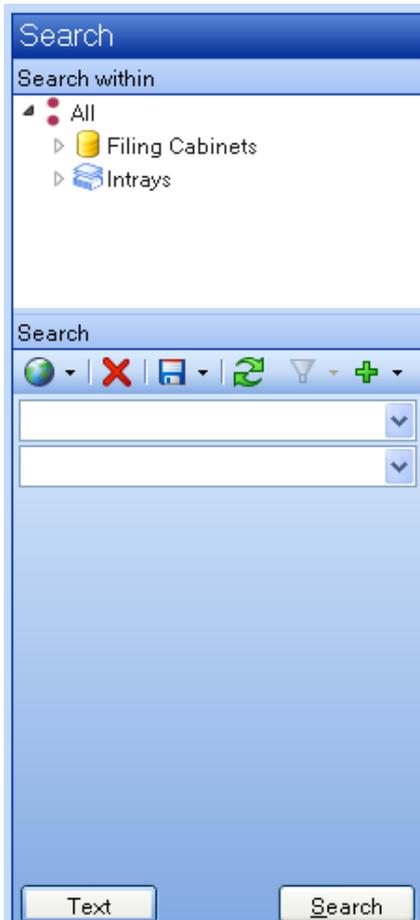
These documents can be worked with in the normal way such as open, edit etc...

To clear a search and results from the Middle pane click the  button in the Left-hand pane.

## Document References Search

A Document Reference search will search for a document using specified references and also enable you to create more complex searches using operators.

To open the Document Reference search feature click the  button to clear the current search then click the  button.

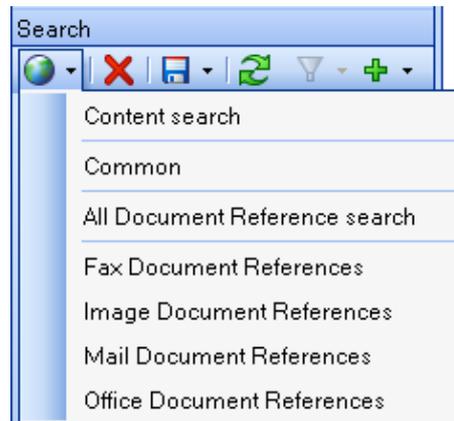


To perform a document reference search, first choose where you are going to search. In the area '**Search within**' click the **All** option to search all Intrays and folders you have access to. To search all Intrays click the  option so it is highlighted in blue. To search a specific Intray click the white arrow beside the  option then click the name of the Intray you wish to search so it is highlighted in blue.

To search all filing cabinets click the  option. To search a specific folder click the white arrow beside  option then browse to the folder click to highlight in blue.



**Search options** – click the arrow beside the icon the following options are displayed:



On the following pages is information on what the above menu options will do:

Select the **Content Search** option and a field will be displayed as in the picture below:



Enter your search text into the **Content** field then click the  button and the results will be displayed in the Middle pane. The results displayed will show any documents where the text searched was located in the content.

From the **Search Option** menu select the **All Document Reference search** option then click the arrow beside the **Add Document Reference**  icon and from the list choose the Document Reference you wish to search and a field will be displayed:



You would enter your search text into the field. You will see in brackets that it states (is equal to) these operators can be changed please see section on Equality Type (operators) on page 153.

For example we could search for any documents where the document reference Contact Name is equal to Sale BDM.



Click the  button and the results will be displayed in the Middle pane.

Also Document References sets such as **Common, Fax Document References, Image Document References, Mail Document References** or **Office Document References** can be used to search.

Click one of the above document reference options, and they will be displayed in the Left-hand pane under the **search for** section.

To select, click the arrow beside the **Search Options** icon and click the required option. The chosen option will be displayed in the search area. Image to the left shows multiple options selected, **Contents search** and **Office Document Reference search**. The Content is equal to Administration and Subject is equal to Training.



### Clear current search

This icon, if selected, clears the current search from the screen including search criteria and results.



### Saved Searches

This icon will allow you to open previously saved searches please see page 160.



### Refresh

Will display any new data associated to the Document References for which other users may have inputted when filing and saving documents or changing data. Click the **Refresh** icon to check for any new information.



### Equality Type (operators)

When creating a search you can choose how a specific document reference will be compared. These can also be known as Operators.

By default when document references are added to the Search area the operators are set to **Equals to** and **And**. Below is a list of available operators from the menu:

| Operators             |                   |                    |
|-----------------------|-------------------|--------------------|
| <b>Logical</b>        |                   |                    |
| AND                   | All types of data |                    |
| OR                    |                   |                    |
| NOT                   |                   |                    |
| <b>Comparison</b>     |                   |                    |
| No value              | All types of data |                    |
| Equals                | String            | Date and Numerical |
| Between               |                   | Date and Numerical |
| Greater than          |                   | Date and Numerical |
| Greater than or equal |                   | Date and Numerical |
| Less than             |                   | Date and Numerical |
| Less than or equal    |                   | Date and Numerical |
| Contains              | String            | Date and Numerical |
| Begins With           | String            | Date and Numerical |
| Ends with             | String            | Date and Numerical |



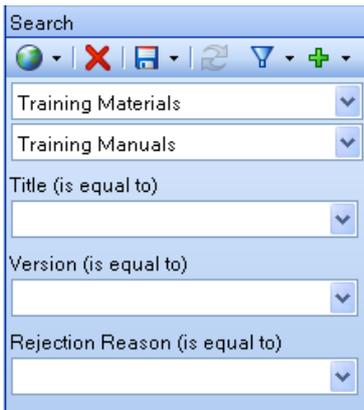
### Add a Document Reference

This icon allows you to add an unlimited number of additional Document References to the search criteria.

For example the user could have two order number Document References and use the OR operator in between. This means the user could search for two different order numbers at once.

This feature is also used in conjunction with the **All Document Reference Search** see page 151 for more information.

Below the toolbar is where the search criteria can be selected.



The screenshot shows a search toolbar with a globe icon, a red X, a save icon, a refresh icon, a funnel icon, and a plus icon. Below the icons are two drop-down menus. The first is set to 'Training Materials' and the second is set to 'Training Manuals'. Below these are four text input fields with labels: 'Title (is equal to)', 'Version (is equal to)', and 'Rejection Reason (is equal to)'. Each field has a small drop-down arrow on its right side.

The first two drop down boxes are, in order, the **Information Type** and the related **Standard Documents**.

You can just search for certain types of documents.

Find all documents of a particular Information Type and/or Standard document.

If you choose a Standard Document (second drop down) the related Document References will be displayed as shown to the left.

**Tip:** Remember the Information Type is the category of document i.e. Letter and the Standard Document the sub category i.e. Job offer letter.

Each Document Reference displays a title (name of Document Reference), in brackets the operator and a text box where data to be compared is entered.

To change the operator which appears next to Document References, click into the field of the Document Reference. Click the drop down arrow beside the  **Equality Type** icon and choose the relevant operator required for the search criteria.



This screenshot is similar to the previous one, but the 'Title' field now has the label 'Title (begins with)' and the text 'Admin' entered in the input box. The 'Equality Type' icon in the toolbar now shows a blue funnel with a downward arrow.

The example above shows changing from **Equals** to **Begins with**.

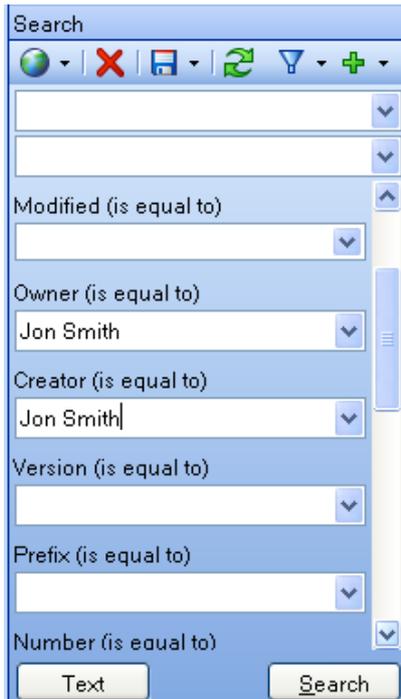
A search can also be performed on just the Information Type and or a Standard Document. To search on an Information Type click the first drop down box and choose from the list then click the **Search** button and the results will be displayed in the Middle pane.

To search on just a Standard Documents click the second drop down box and choose from the list then click the **Search** button and the results will be displayed in the Middle pane.

If doing a search on Information Type then the related Standard Document(s), choose from both drop down boxes then click the **Search** button and the results will be displayed in the Middle pane.

If you wish to search by more than one Common Document Reference then an **And** or **Or** operator will be required.

Click the arrow beside the  icon from the list choose the **Common** option. All the Common Document References will be displayed on the next page:

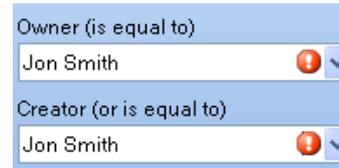


Creator **Equals** Jon Smith

**OR**

Owner **Equals** Jon Smith

Enter the search criteria as shown in the picture to the left. Click into the **Creator** Document Reference field and click the arrow beside the **Equality Type**  icon. From the menu choose the Operator **OR**; the text in brackets will change to include **OR** at the beginning.



The example will find all documents with the Owner or Creator of 'Jon Smith' (if any).

Once all search criteria has been entered click the **Search** button to initiate the search and display the results in the Middle pane.

The best way to learn this feature is to play!

## Opening the Document in Context

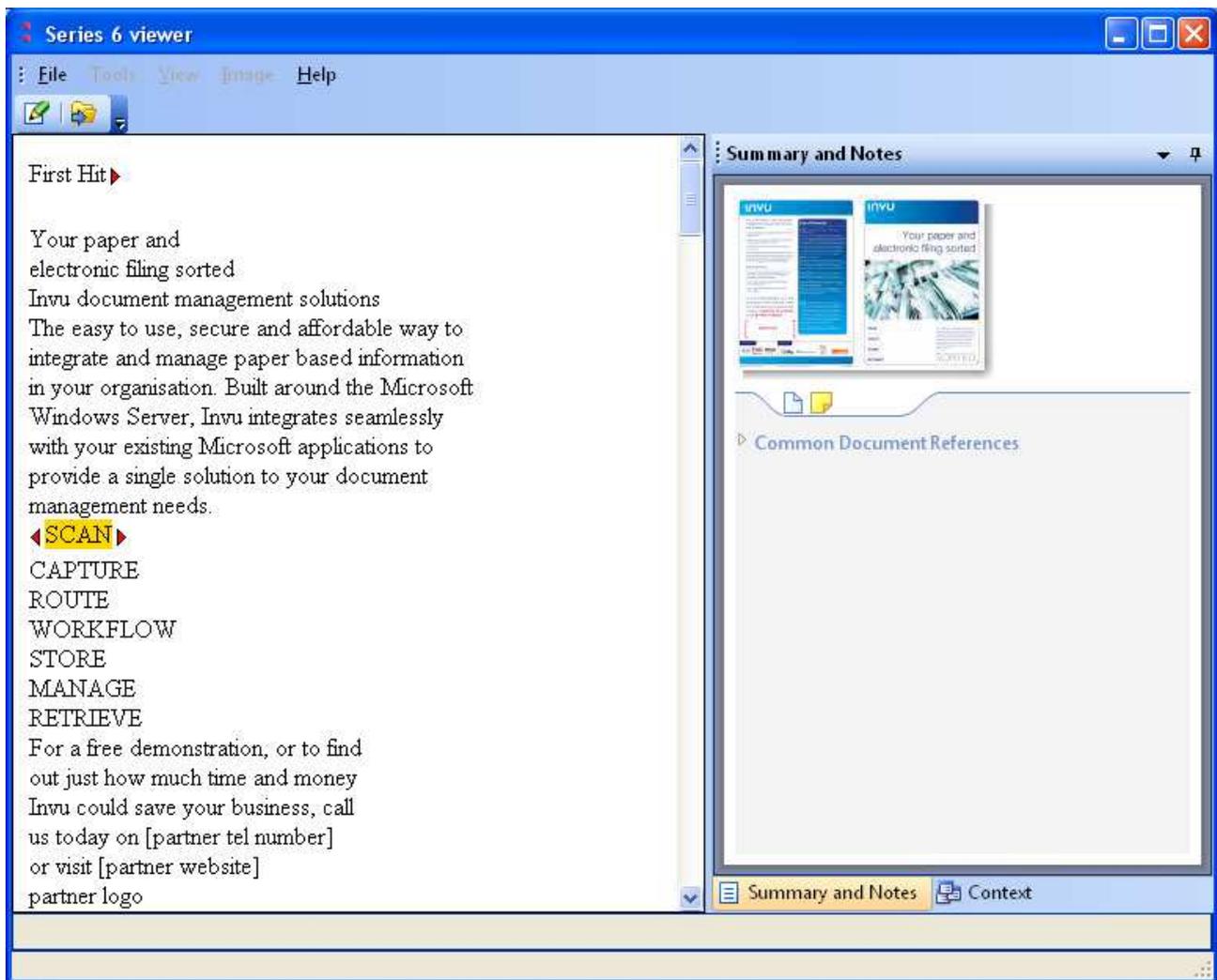
In any of the three modes you are able to open documents in context. This will highlight the instances of the text searched within the document contents or document references.

**NB:** Does not work through the **doc. refs** button unless using the content option.

For example if a user wishes to find all documents which have the word '**Administration**' within its contents the search will show the associated documents.

Once the search results are displayed in the Middle pane, right click the document and select the **Open in Context** option.

The 'View document' screen will be displayed:



At the top of the document will be the text 'First Hit ▶' 'click the red arrow to go to the first instance where the text appears within the document.

with your existing Microsoft applications to provide a single solution to your document management needs.

◀SCAN▶

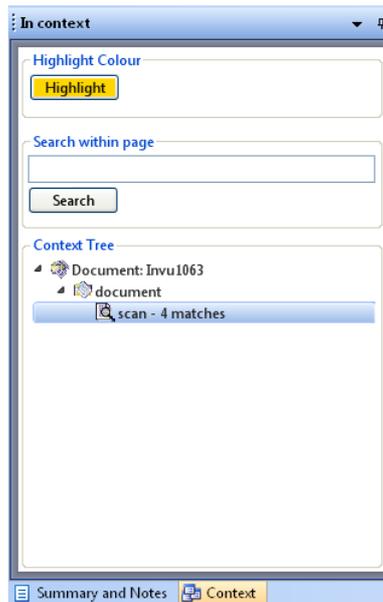
CAPTURE

ROUTE

Each instance of the text will be highlighted in yellow with a red arrow either side. To move to the next instance click the red arrow on the right hand side of the highlighted text. To move to the next or previous text instance click on the red arrows on the left and right hand side of the highlighted text.

**NB:** The First Hit and navigation arrows will not work with image files.

At the bottom of the Right-hand pane click the  **Context** button and the **In context** Pane will be displayed:



The **Highlight** button allows you to change the colour of the highlight to show instances. The default colour is yellow. Click the **Highlight** button and from the list choose the colour. This will remain the default colour until changed.

The **Search within page** field will allow you to search the pages for different words within the same document. To do this, enter a word / phrase into the **Search within page** text box then click the **Search** button. If the word is found within the document the selected word will be highlighted.

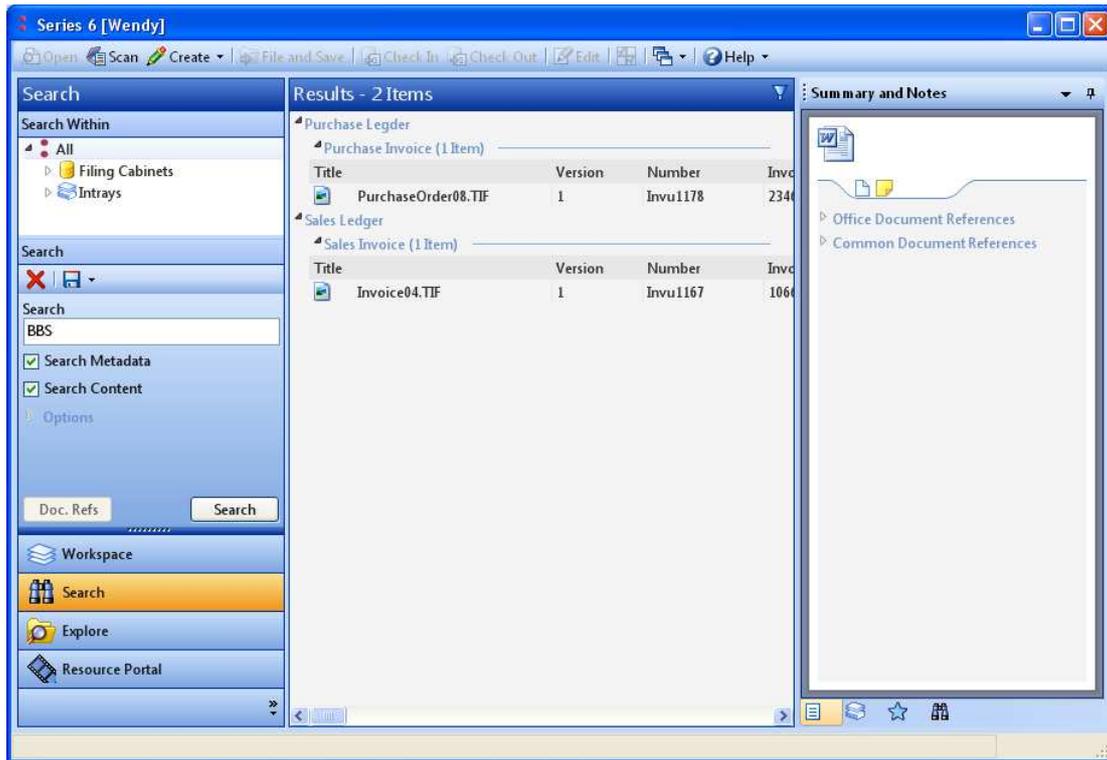
In the area **Context tree** you can expand the document to find out the number of matches of the search word.

To close the 'Series 6 viewer' screen click the  button in the top right-hand corner of the window.

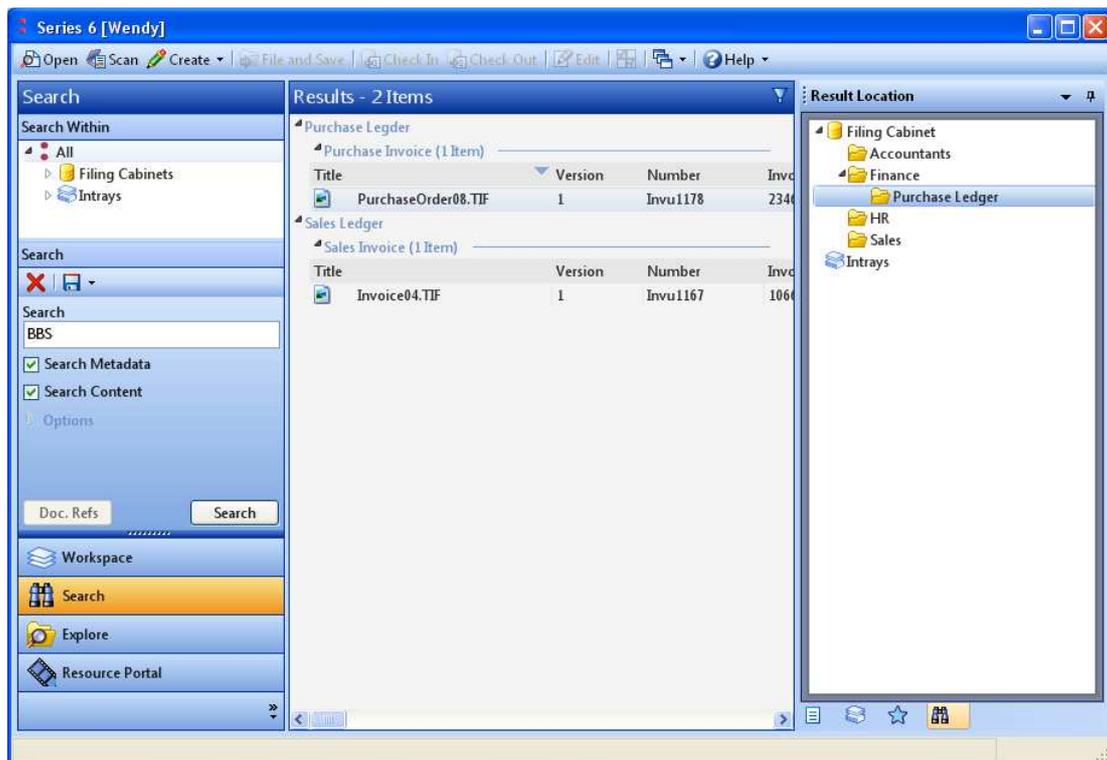
### View Location of Results

When you have the result of a search in the Middle pane you are able to view the location of those results using in the Right-hand pane,

To perform a search, at the bottom of the Right-hand pane click the  button and the following will be displayed as shown on the next page:



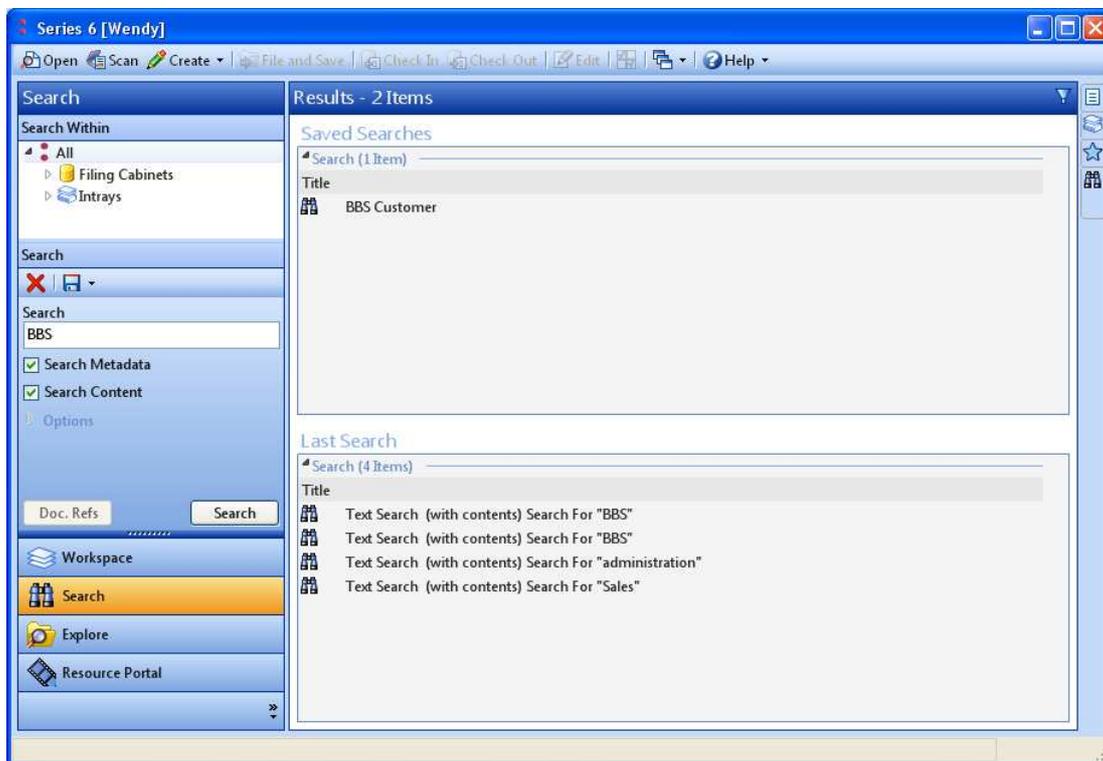
To view a document location click the document in the Middle pane and in the **Result Locations** pane you will see where the document is located in Series 6.



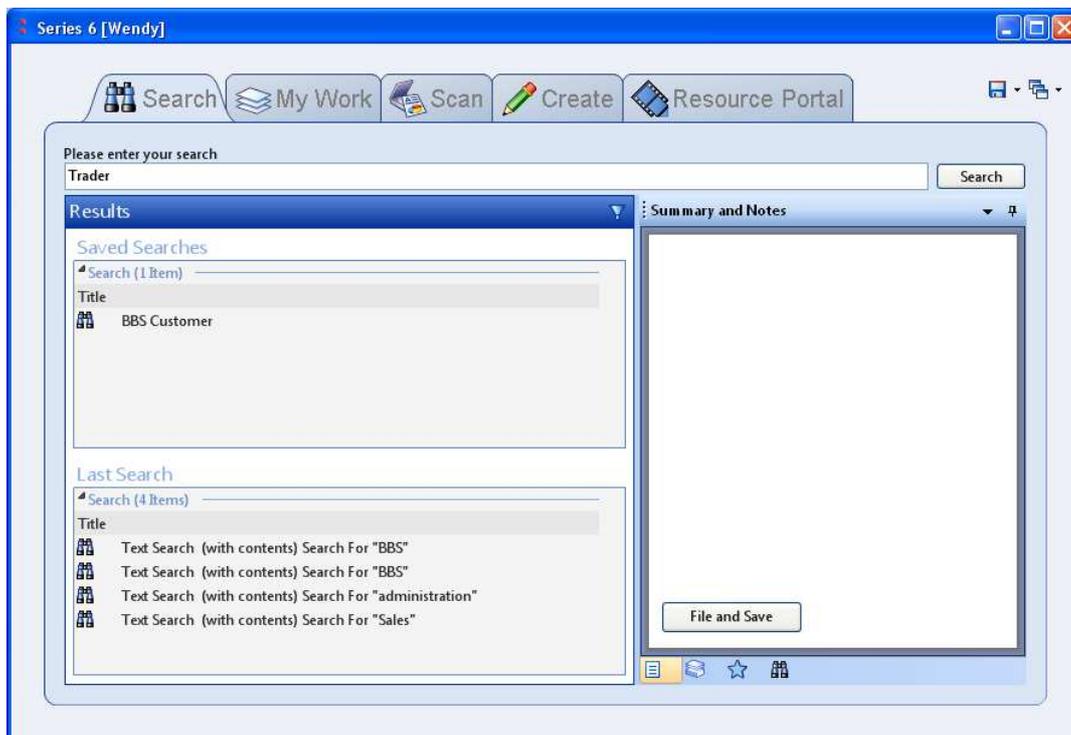
The **Results Location** pane will also show which In tray a document is located in.

## Saved Searches and Last Searches

When you use the Search feature from any mode the Middle pane will show the summary screen this comprises of **Saved searches** which allows you to view any searches you have saved to use again and **Last searches** which will allow you to see a history of the last 10 searches performed.



**Standard and Advanced mode** - the **Saved Searches**  icon is located in the Left-hand pane.



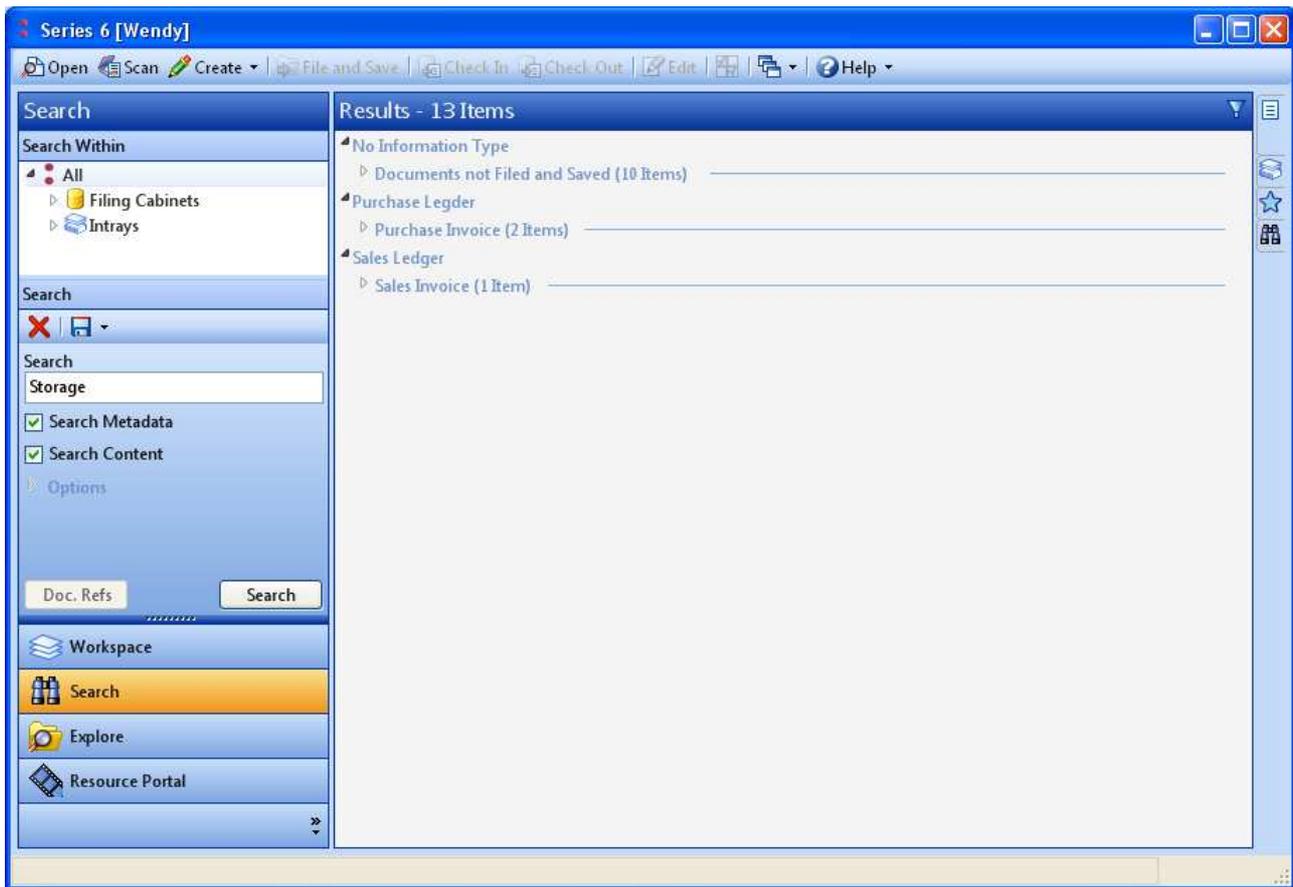
**Simple mode** - the **Saved Searches**  icon is located in the right corner of the screen.

If the summary screen is not displayed then click the arrow beside the **Saved Searches**  icon and from the menu select the **Show Summary** option. The summary will be displayed in the Middle pane of the Search.

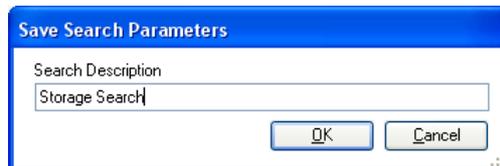
## Saved Searches

You are able to save searches you would like to keep which can then be run again at a later date.

To save a search within the Search feature of any of the three modes enter the criteria and then click the **Search** button to display the results in the Middle pane as shown below:



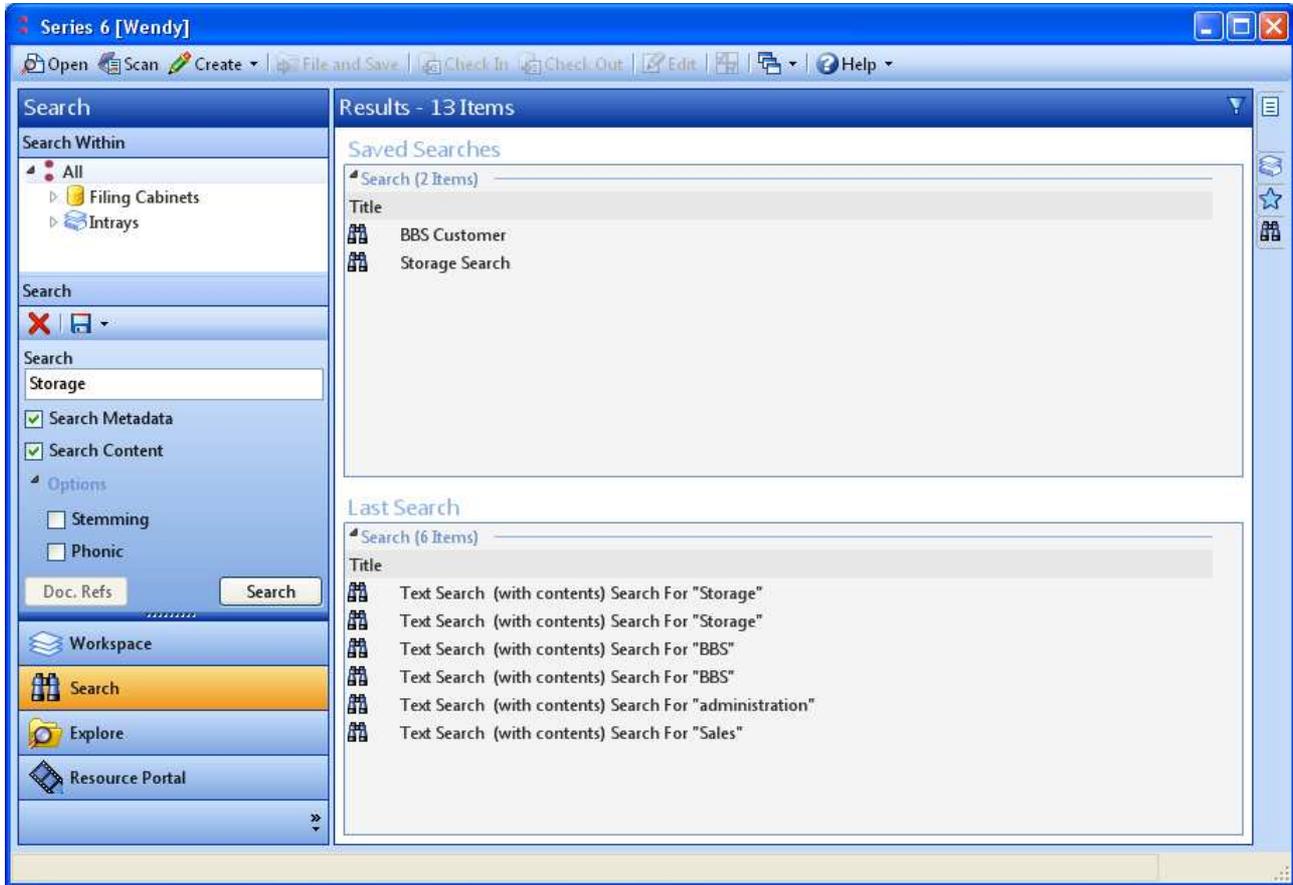
Click the **Saved Searches**  icon and the following will be displayed:

A dialog box titled "Save Search Parameters". It contains a text input field labeled "Search Description" with the text "Storage Search" entered. Below the input field are two buttons: "OK" and "Cancel".

Enter **Search description** and then click the **OK** button. The search has now been saved.

## View Saved Searches

To view all saved searches click the arrow beside the **Saved Searches**  icon and from the menu select the **Show Summary** option. The following will then be displayed:

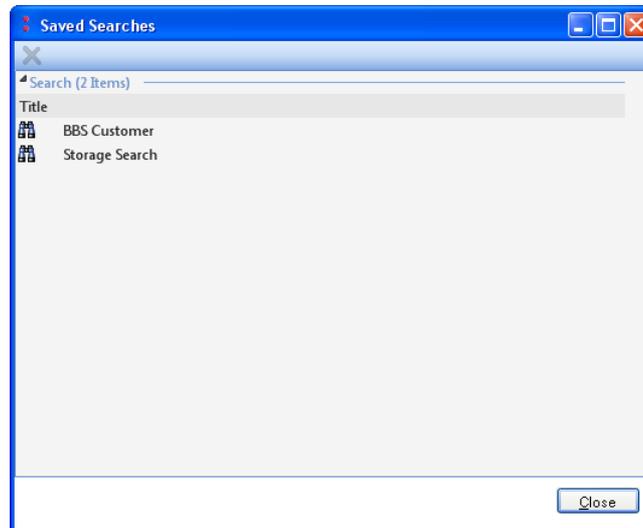


To run a saved search double click the title of the saved search in the Saved Searches section in the Middle pane and the result will be displayed.

To clear the search, click the  button which is located on the search toolbar in the Left-hand pane.

## Delete Saved Searches

To remove a saved search click the arrow beside the **Saved Searches**  icon and from the menu select the **Open...** option. The following will then be displayed:



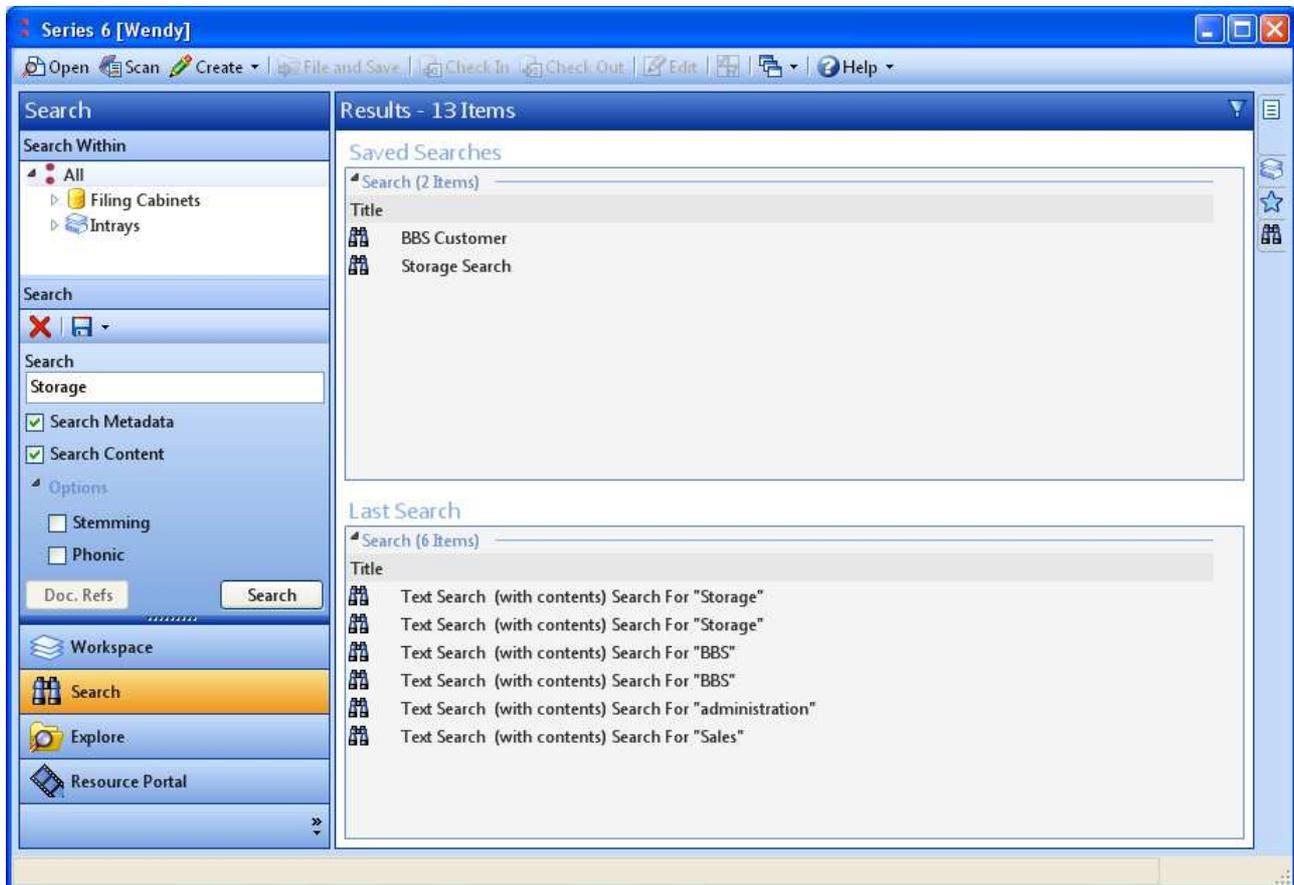
To delete a saved search, highlight the search by clicking the title and then click the **Delete**  icon. You would need to repeat this if you have more than one search to delete.

Once you have finished, click the **Close** button to exit the 'Saved searches' screen.

## Last Searches

The **Last Searches** will store up to the last 10 searches that you have performed.

To show the Summary in the Middle pane of the Search click the arrow beside the **Saved Searches** icon and from the menu select the **Show Summary** option. The following will then be displayed:

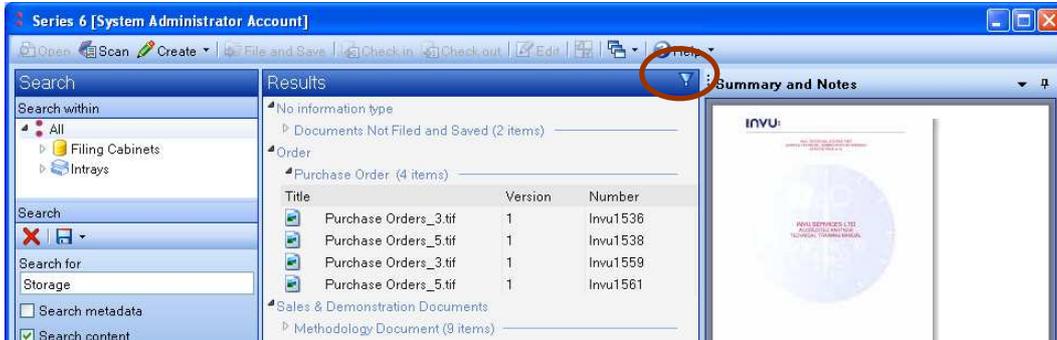


In the area '**Last searches**' it will display the last 10 text and Document Reference searches performed. To run a **Last search** in the Middle pane double clicks the title of the last search and the results will replace the summary in the Middle pane.

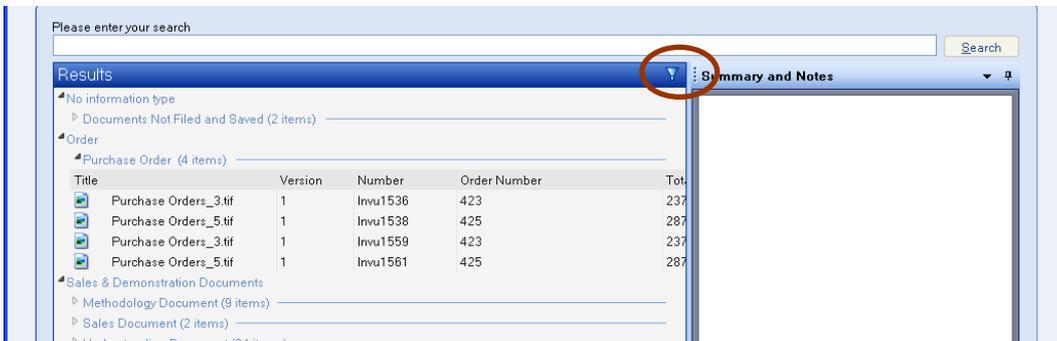
To clear the search, click the  button which is located on the search toolbar in the Left-hand pane.

## Group and Filters

Within the Middle pane of Search for all three modes is a **Filter**  icon, which enables you to select the way in which the results are displayed and filters the results further by selecting and deselecting where Series 6 will look. The icon is located in the top right corner of the search area as shown below:

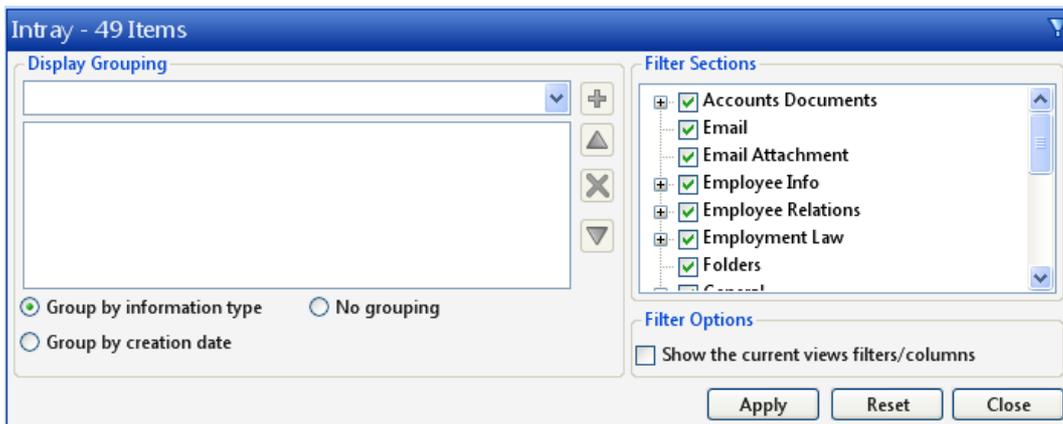


Standard and Advanced mode



Simple Mode

Click the **Filter**  button and the following pane will be displayed:

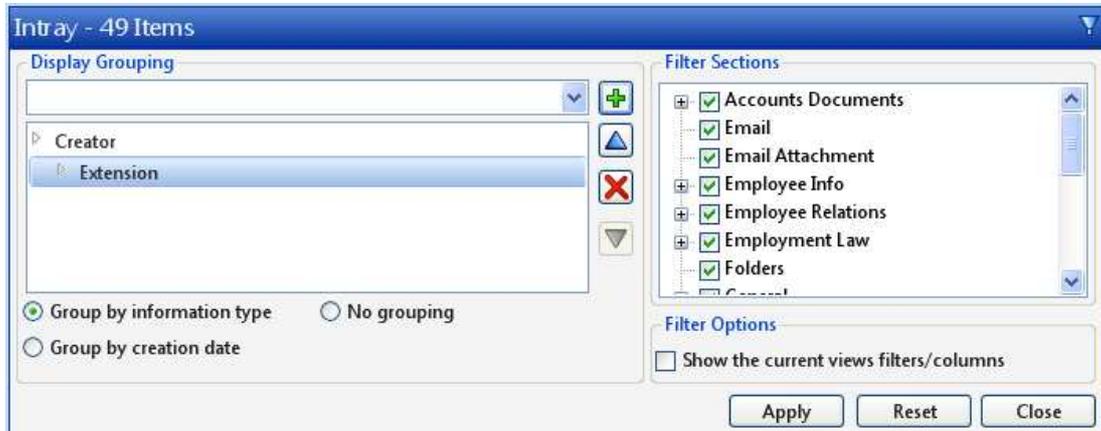


In the **Display grouping** area you can choose from a list of Common, Office, Image or Mail Document References which are used to sort the search results into groups. The results can be grouped by one or more Document References.

For example - you could group your search results by a common Document Reference called **Creator** and then by **Extension**.

## The Display Grouping

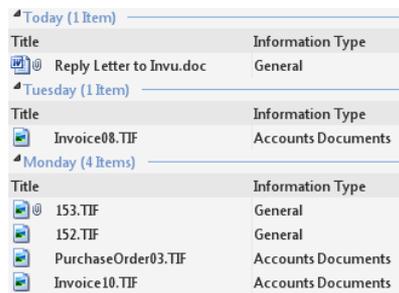
In the **Display grouping** areas click the drop down and choose **Creator** from the drop down list and click the **Add**  button the Document Reference will be added to the list below. Next click the drop down again and choose **Extension** the click the **Add**  button the Document Reference will be added to the list below **Creator** as shown below:



Then click the Apply button and the search result will change as shown in the picture on the next page sorted by **Creator** then by **Extension**.



If you wish to order the document by creation date select the **Group by creation cate** option, most recent will be displayed at the top.



Select the **Group by information type** option and the order will revert back to original group by Information Type and Standard Document.

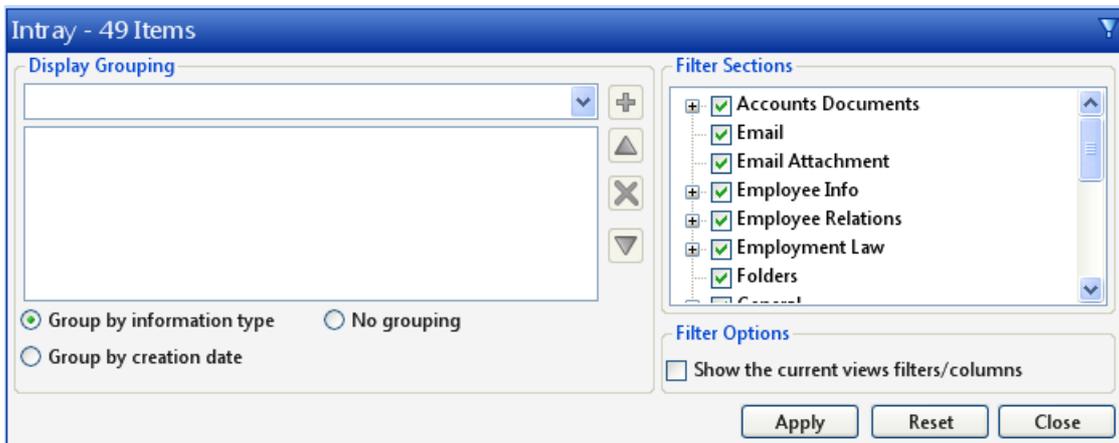
If you want no grouping in the Middle pane then select the **No grouping** option.

| Documents (6 Items)      |                    |
|--------------------------|--------------------|
| Title                    | Information Type   |
| Reply Letter to Invu.doc | General            |
| Invoice08.TIF            | Accounts Documents |
| 153.TIF                  | General            |
| 152.TIF                  | General            |
| PurchaseOrder03.TIF      | Accounts Documents |
| Invoice10.TIF            | Accounts Documents |

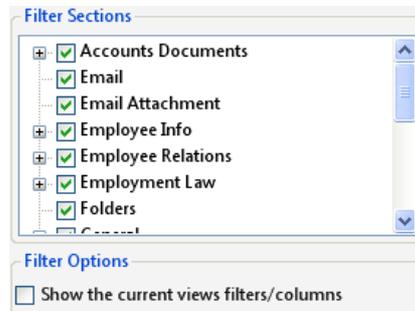
If you wish to clear the **'Display grouping'** area click the **Reset** button.

## The Filter Sections

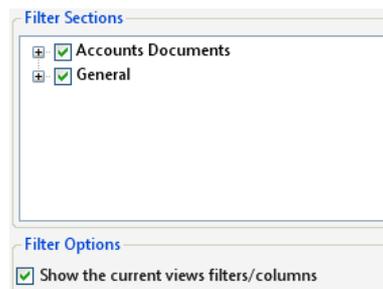
The **Filter sections** area enables you to filter out specific Information Types and Standard Documents on search results. All the options in the **Filter Sections** area are ticked by default. The list consists of information Types and Standard Document.



To filter out certain types of documents un-tick the relevant section within the list as shown below:



If you wish to show only the Information Types/Standard Documents that are relevant for the files displayed in the Middle pane then tick the **Show the current views filters/columns** check box filter selection list will be reduced as shown below:



Click the **Apply** button and the relevant documents will be removed. If you wish to clear the 'Filter Sections' area click the **Reset** button.

Display grouping and/or Filter section changes can be applied together if required.

The filtered changes will remain as they are until changed by you during searching. The options selected will also remain as they are if you log out and log back in.

To remove any the Groups and Filters screen from the Middle pane click the **Close** button.

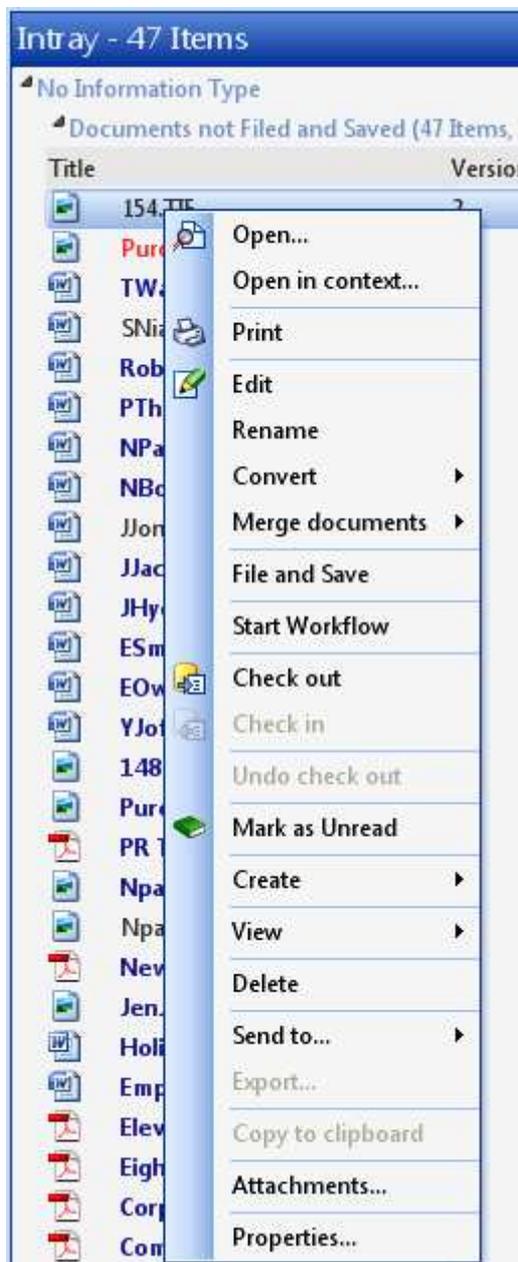
The Groups and Filters section will work independently in Explore, Workspace and Search.



## **OTHER DOCUMENT OPTIONS**

## INTRODUCTION TO OTHER DOCUMENTS OPTIONS

In this section you will find out how to work with the documents using the right click menu. You are able to convert, merge documents as well as create notes and attachments etc..



Each option on this menu will be explained what it is and how to use.

### Open

The **Open** option will allow you to open the document for read only purposes. For more information on how to open documents please see page 94.

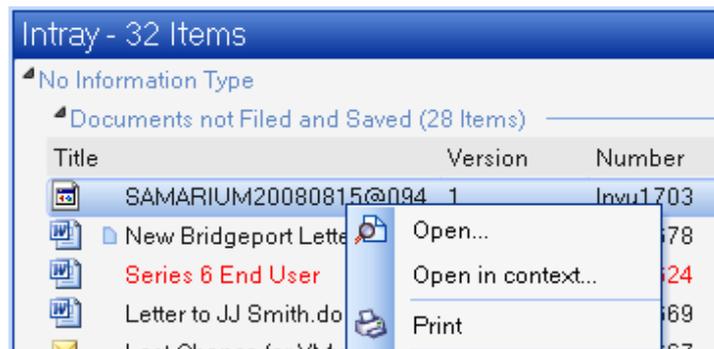
## Open in Context

The **Open in context** option will allow you to view the searched text and highlight the text in the content you were searching for. For more information on opening documents in context please see page 156.

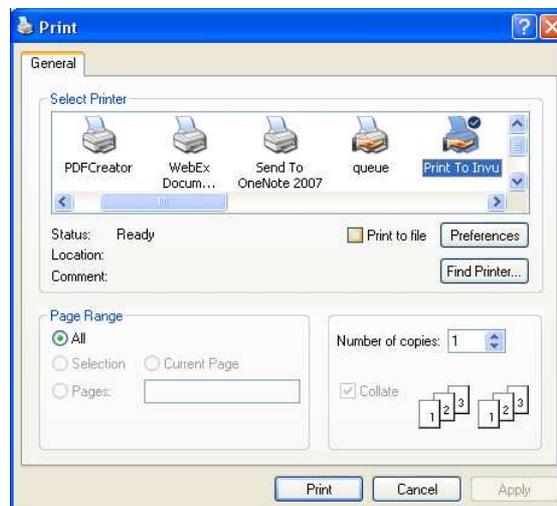
## Print

The **Print** option will allow you to print out a selected document. This can be done from your In tray and from a Folder in the Filing Cabinets.

To print a document, browse to the document in your In tray or Explore for the document or by Searching for the document. In the Middle pane right click the document as shown below:



From the menu select the Print option and the following will be displayed:



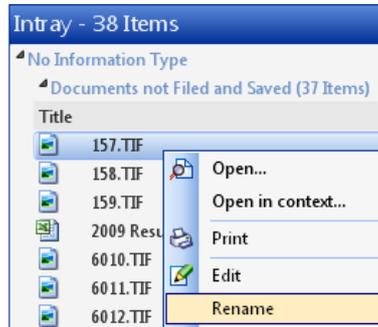
Select the **Printer**, **Page Range** and **Copies**, then click the **Print** button to continue.

## Edit

The **Edit** option will allow you to edit documents you have access to from your own In tray or from the Filing Cabinets. For more information on how to edit documents please see page 108.

## Rename a Document in your Intray

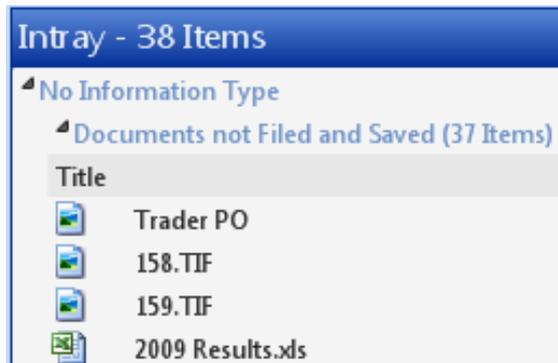
Within the Intrays you are able to rename a document no matter what type of document it is. To do this right click a document in the Middle pane as shown below:



From the menu click the Rename option and the following will be displayed:



Enter the new title for the document and then click the OK button. The document title change will be displayed as below:



## Convert

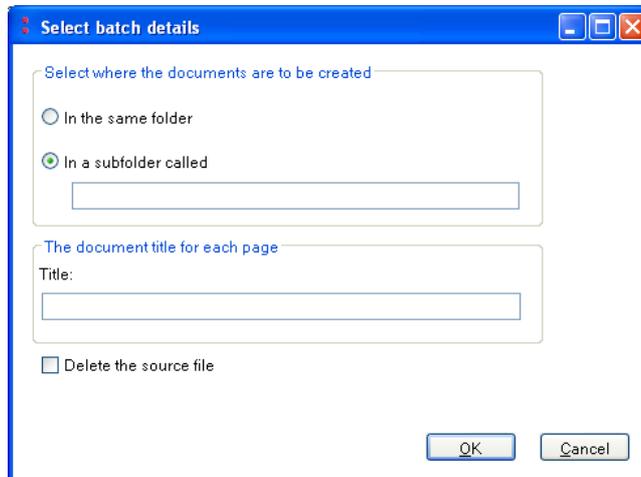
This feature is shown within the right click menu only but in all three modes. This feature allows you to convert documents from multiple page documents to single page documents or many single page documents in a single document with multiple pages within it. This can be done on any tif document from your Intray only.

### Convert a Multiple Page Document to Single Page Documents



The above document has four pages and we wish to split each page into a single page document.

To convert files to a multiple page document, in the Middle pane right click the document and from the list **Convert** then select the **To single page documents** option. The following screen will be displayed:



In the **Select where the documents are to be created** area you have two options:

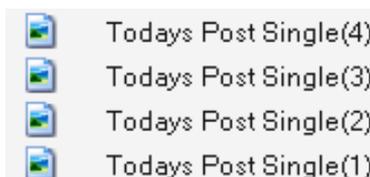
The **In the same folder** option, if selected, will create the new files in the same location as the original.

The **In a subfolder called** option, if selected, will create a new folder in your Intray. Enter the name of the new folder in the text box below the option.

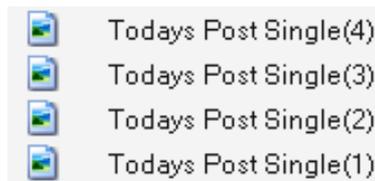
In **The document title for each page** area you will need to enter a **Title** for the new documents.

The **Delete the source file** check box, if ticked, will delete the original file you are creating the single page documents from.

Click the **OK** button once you have set the options. The document will be split in to single documents as shown below:



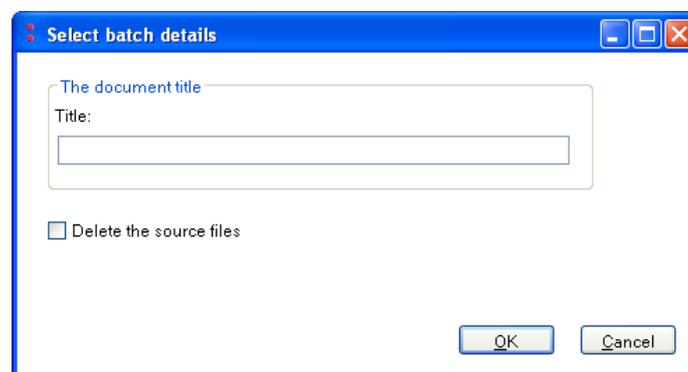
## Convert to Multiple Page Document



The above documents need to be amalgamated into one document.

To convert, in the Middle pane click the first document then hold down the **CTRL** key and click each subsequent document or if the files you want to convert are in a block then click the first document then hold down **SHIFT** key then click the last document in the block.

Hold down the **CTRL** or **SHIFT** key and right click the document. From the right click menu click **Convert** then select the **To multiple page document** option. The following screen will be displayed:



In **The document title** area you will need to enter a **Title** for the new document.

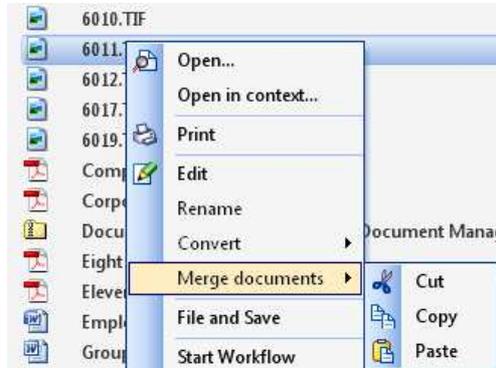
The **Delete the source file** check box, if ticked, will delete the original files you are creating the amalgamated document from.

Click the **OK** button once you have set the options. The selected documents will be joined together to create a single document as shown below:



## Merge Documents

The **Merge Documents** option allows you to Cut or Copy a TIF document then Paste into another TIF document thus merging the two documents together. The Merge Documents option will only be displayed when a TIF document is selected. You must have the permission to edit the document and it's not checked out or it's checked out to you.



This can be done from the Middle pane of Workspace (Intray), Explore or Search.

### Merge a Document using Copy and Paste

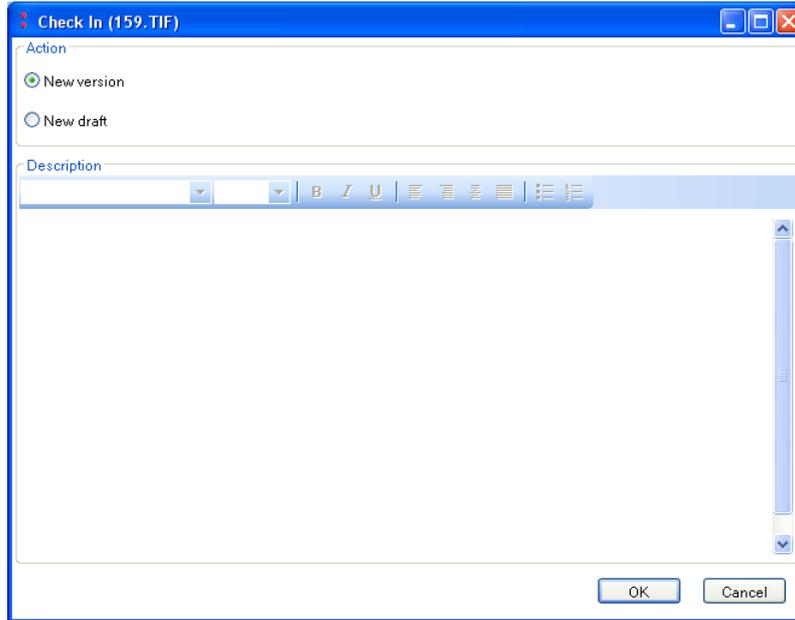
This will make a copy of the selected document and paste it (append it) to the end of another document.

In the Middle pane select source document, this is the document that will be appended to the selected destination document. Right click the selected document, from the menu choose **Merge Documents** option then click the **Copy** option.

Then browse to and select the document you wish to pasted the copied document into, right click the selected document and from the menu choose **Merge Documents** option then click the **Paste** option.

Both document will be check out automatically and the message "**Documents Merging please wait**". The source document will be appended to the end of destination document and the check out will be undone on the source document version (the one which was copied).

When the documents have been merged the screen on the next page will be displayed:



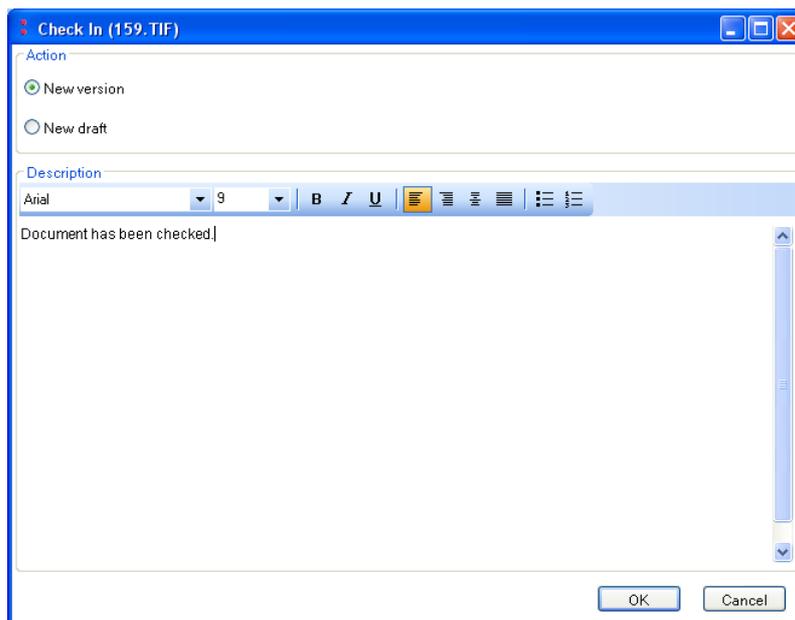
The 'Check In' screen allows you to specify the type of revision made to the document.

In the **Action** area choose from one of the following options:

**New version** – if selected creates a new version of the document. I.e. if version number was **1** this will increment to **2** or if the version number was **2.4** then the new version would be **3**.

**New draft** – if selected creates a draft (meaning the document is a work in progress not the finished revision). The draft number will be based on the version created from and increment by **.1**. I.e. if version was **1** then draft would be **1.1** or if created from an existing draft **1.3** then new draft would be **1.4**. The document will be displayed in green text.

In the **Description** area, type brief notes of what was done to the document. This is for other users to review the comments made when checking in the revision.



The notes entered can have basic font and paragraph formatting applied using the toolbar above the notes area.

Click the **OK** button to check in the new merged documents.

### Merge a Document Using Cut and Paste

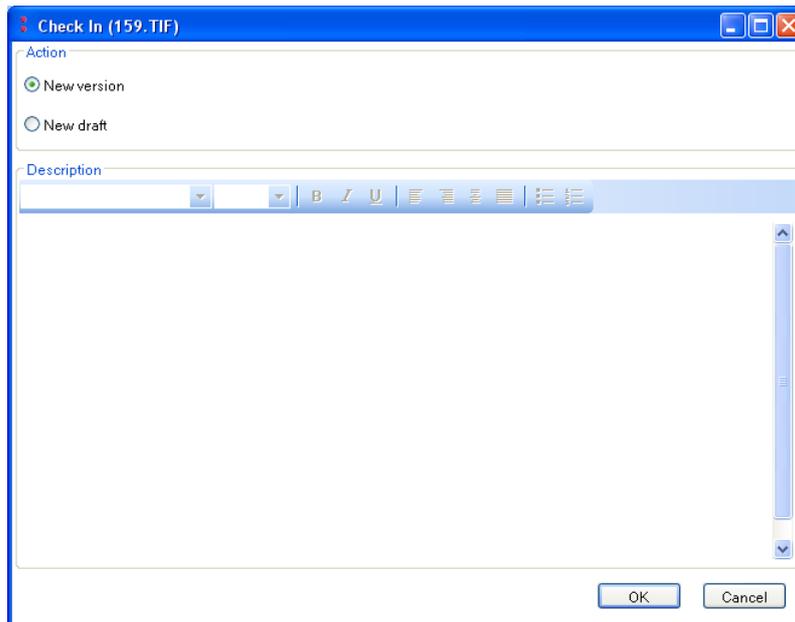
This will make a cut (remove the original) of the selected document and paste it (append it) to the end of another document. The original version cut will then be deleted.

In the Middle pane select source document, this is the document that will be appended to the selected destination document. Right click the selected document, from the menu choose **Merge Documents** option then click the **Cut** option.

Then browse to and select the document you wish to paste the cut document into, right click the selected document and from the menu choose **Merge Documents** option then click the **Paste** option.

Both document will be checked out automatically and the message "Documents Merging please wait". The source document will be appended to the end of destination document and the source document version (the one which was cut) will be deleted.

When the documents have been merged the following screen will be displayed:



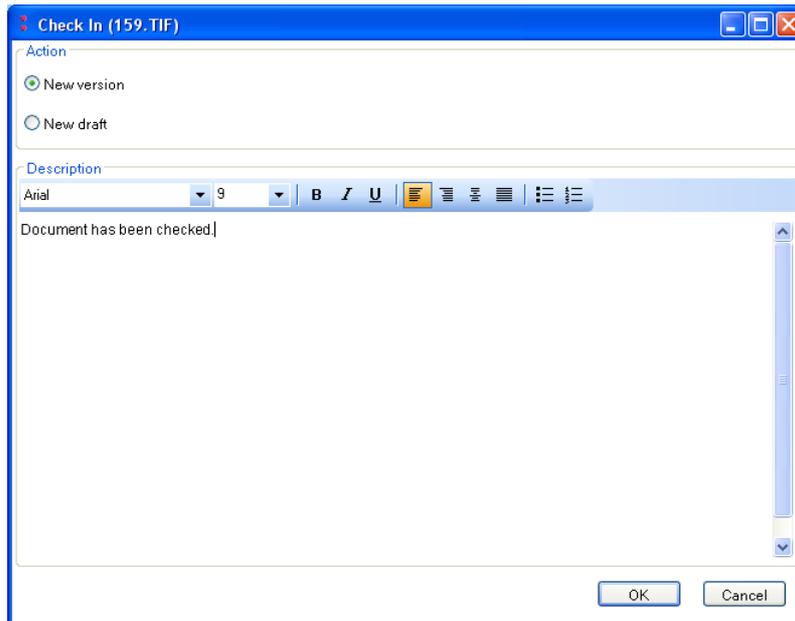
The 'Check In' screen allows you to specify the type of revision made to the document.

In the Action area choose from one of the following options:

**New version** – if selected creates a new version of the document. I.e. if version number was **1** this will increment to **2** or if the version number was **2.4** then the new version would be **3**.

**New draft** – if selected creates a draft (meaning the document is a work in progress not the finished revision). The draft number will be based on the version created from and increment by **.1**. I.e. if version was **1** then draft would be **1.1** or if created from an existing draft **1.3** then new draft would be **1.4**. The document will be displayed in green text.

In the **Description** area, type brief notes of what was done to the document. This is for other users to review the comments made when checking in the revision.



The notes entered can have basic font and paragraph formatting applied using the toolbar above the notes area.

Click the **OK** button to check in the new merged documents.

## File and Save

The **File and Save** option will allow you to file your document from your Intray to a Folder location in the Filing Cabinets. For more information on how to file and save a document please see page 65.

## Publish To SharePoint

The **Publish To SharePoint** option will allow you to publish selected documents to a Share Point website. This option only appears if Sharepoint has been configure and the setting in Series 6 are also completed. For how to configure Series 6 please see the Technical Administration manual.

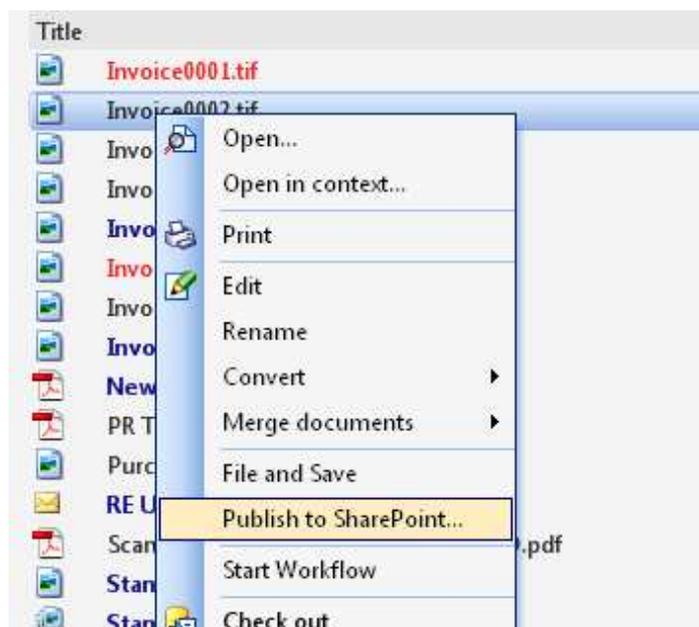
### Publish Documents to SharePoint

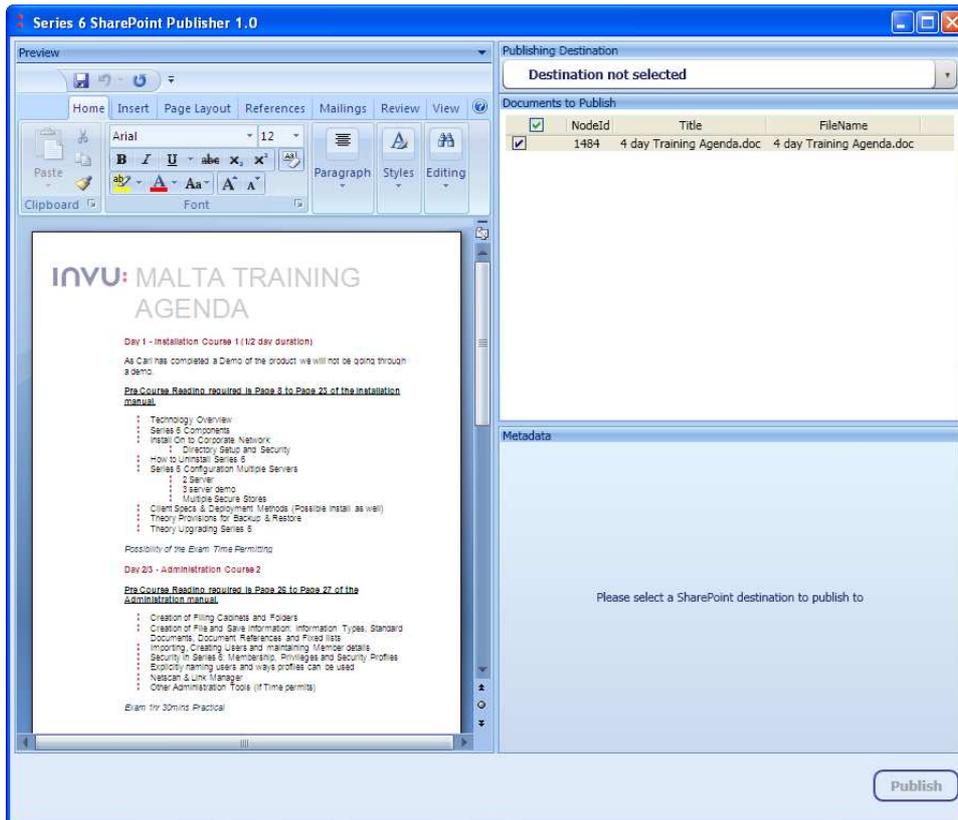
Once the SharePoint settings have been configured and the Invu SharePoint Publisher Application has been installed you are now ready to go.

To publish a document from Series 6 to SharePoint right click selected document in the Middle pane and from the menu select the **Publish to SharePoint** option.

Or if multiple documents need to be published click the first document in the Middle pane then hold down the **CTRL** key and click each subsequent document. Keep the **CTRL** key pressed and in the Middle pane right click one of the documents selected and release the **CTRL** key. From the menu select the **Publish to SharePoint** option.

You are able to Publish to SharePoint for both documents located in a Filing Cabinet folder or from an Intray.

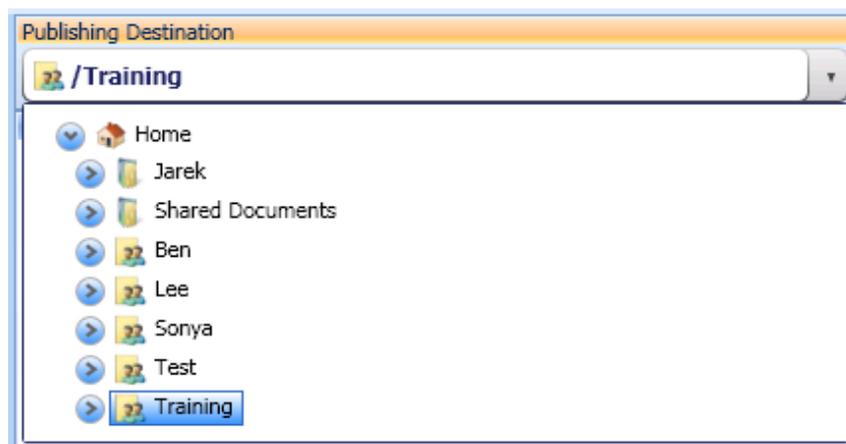




If the SharePoint server is unavailable on start up of the SharePoint Publisher application, the user will be notified of this via a message box and informed the application will close. Click the **OK** button and the application will safely shutdown but Series 6 will remain open.

The application can only be started by Series 6. Do not attempt to locate the executable file and start it up the application as a message will inform you that the application can only be run from Series 6 and will now close. This will be followed by a safe shutdown of the application.

### Choose Publication Destination



The **Publishing Destination** section allows you to choose the site, sub site (if applicable) and then the Document Library (document type or similar).

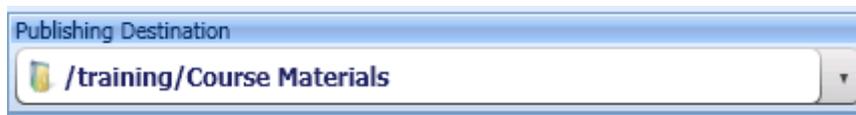
The Publishing Destination list allows you to navigate the tree structure (nodes) from the SharePoint server. The tree structure symbols are explained below:

-  Root (Home) – the main site. Cannot publish to this destination
-  Site – sub site within the main site. Cannot publish to this destination
-  Document Library – document site within either the root or a site that declares the type of document it holds (i.e. columns and requirements). Can publish to this destination
-  Folder – document folder within a document library that inherits the document library column settings.

**NB:** Certain locations in your SharePoint site may be visible but inaccessible to publish to. These are normally shown using a yellow triangle with an exclamation mark over a folder.

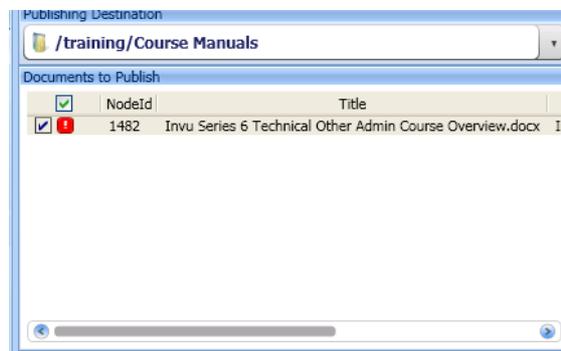
Visibility of any of these nodes does not imply access to that particular area. Access will be attempted during the Publish process.

Click the drop down arrow and expand the nodes  and then click the Document Library it will be displayed as shown below:



### Choose which documents you wish to publish

Once a SharePoint destination folder has been chosen you can choose which documents you want to publish.



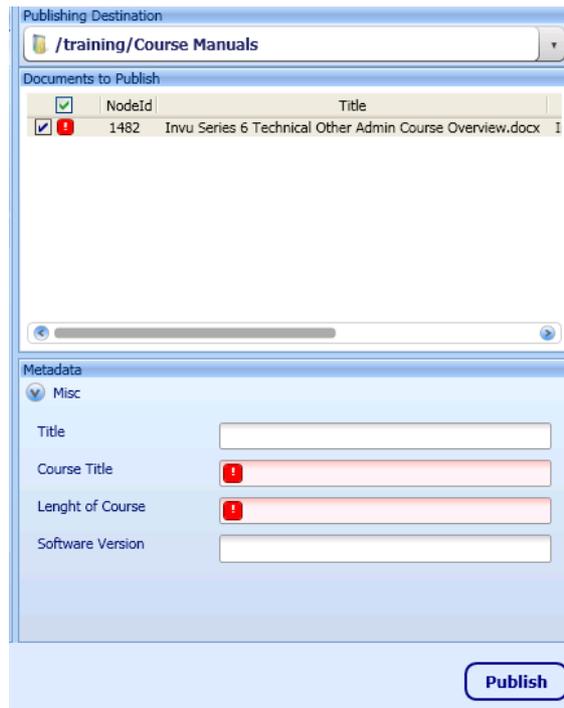
In the **Documents to Publish** section a list of files selected when you clicked the **Publish to SharePoint** option in Series 6 will be displayed.

The documents which have a tick in the first column of this section will be published (when you click the **Publish** button). So for a document you don't wish to publish yet un-tick the check box.

If the document has mandatory metadata fields a  symbol will be displayed beside the check box as shown in the picture above. The fields with this symbol must be completed with valid data.

### Check/amend the metadata

In the **Documents to Publish** click a document and the Metadata for that document will be displayed as long as you have also selected a **Publishing Destination** (see page 180 for more information).

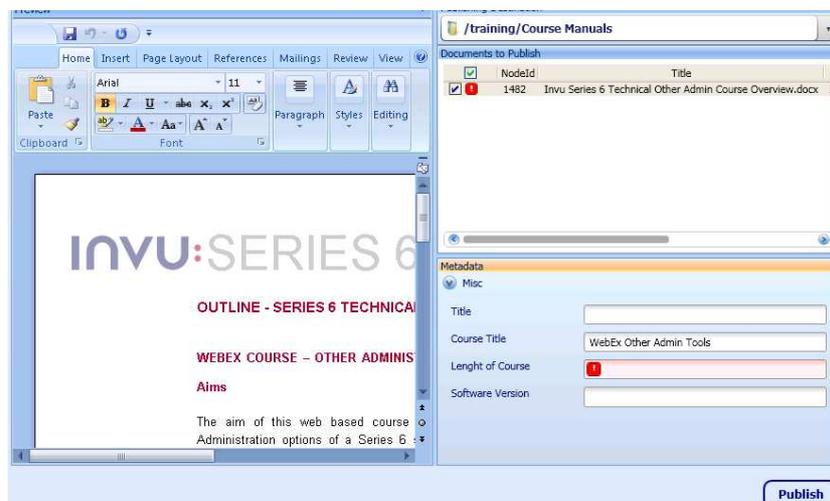


Click into each field and enter the information i.e. **Course Title** as shown in the screen above.

Any changes made to the metadata whilst multiple documents to publish are selected will be reflected to each file so they will have the same text.

If a metadata field is mandatory a  symbol will be displayed in the text box and requires correct data to be entered before you publish the document. Once all the mandatory metadata fields have been correctly entered the  symbol will disappear from the metadata text box and from the **Documents to Publish** section.

If the documents you wish to publish are located in a Filing Cabinet folder the SharePoint Publisher application will attempt to populate the metadata with the values from the Document References as long as the data types and the Document Reference titles match the metadata of the chosen Document Library (document type). The populated data can be edited if required.



**NB:** Metadata changes are not reflected back to the actual file within Series 6.

The validation requirements of the metadata is provided by the SharePoint Site, Document Library configuration. The following list shows the SharePoint validation options supported in version 1.0 of the SharePoint Publisher application:

- Drop down list selection required
- Drop down list selection not required
- Text field required
- Text field max number of characters
- Text field number validation
- Text field number range validation (i.e. 13 – 23)
- Date Picker (drop down) Date field required
- Date Picker (drop down) Date field not required

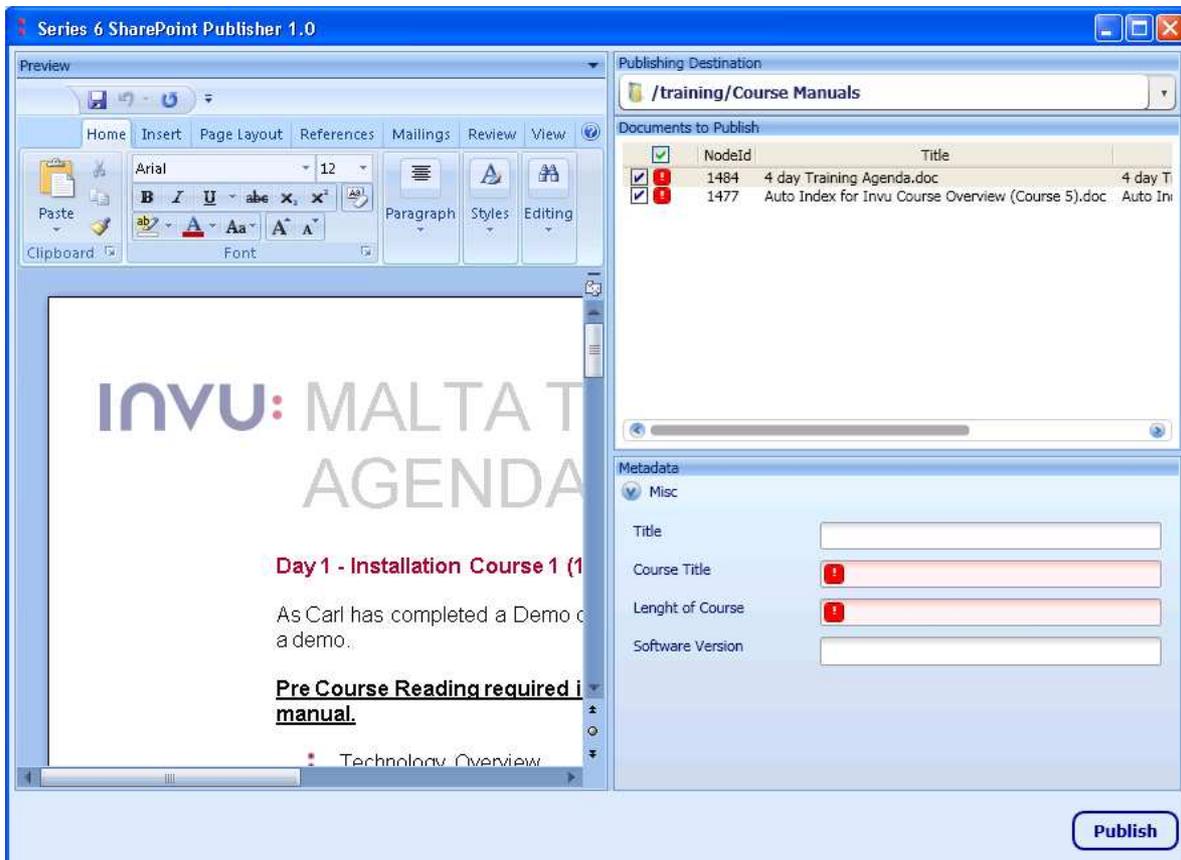
A list of supported types not displayed above and how these are declared in SharePoint are provided in Appendix F of the Technical Administration Manual.

The following list shows SharePoint validation options that are **not** supported in version 1.0:

- Person/Groups selection
- Lookups
- Time field required

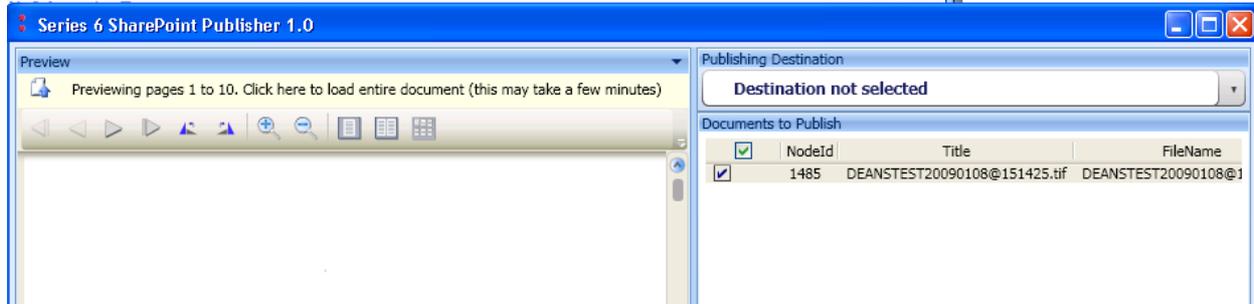
A list of non-supported types not displayed above and how these are declared in SharePoint are provided in Appendix D of the Technical Administration Manual.

## Preview



When you select a file from the **Documents to Publish** area the section will attempt to show a read-only view of that file. When viewing larger Tiff files (10+ pages) the viewer will only show the first 10 pages. A panel will be displayed at the top of the **Preview** section giving you the opportunity to load the entire file as shown below:

**NB:** Loading the full file may take some time to load up.



The following file types will be supported in version 1.0 of the SharePoint Publisher application:

- Tiff,tif,jpg,bmp,gif (Xps Viewer)
- Txt,rtf (Xps Viewer)
- Xps (Xps Viewer)
- Pdf (Web Pdf Viewer)
- Doc, docx,xls,xlsx,ppt,pptx (Web Office Viewer)

All other **Preview** document types, and any of the above that may fail to preview, will cause the **Preview** section to display notification that the file could not be previewed. In this instance, an option to open the document externally will be offered to allow you to try and open the file through the Operating System and relevant application. Version 1.0 will contain three different viewers for various types.

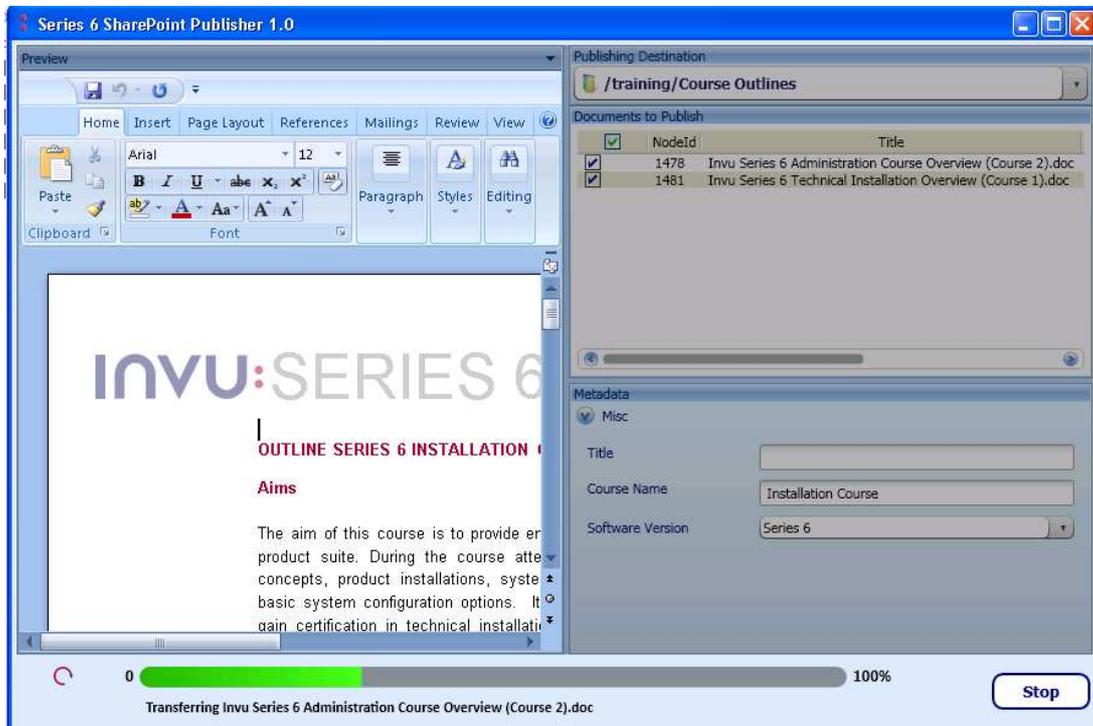
The Xps Viewer allows navigation, zoom, rotation and multi-page views. The Web Pdf and Office versions are dependent on the versions of Acrobat and Office installed on the local machine respectively. As such, the functionality and experience of these web viewers is entirely sealed and therefore cannot be manipulated or influenced by the application. Browser settings, warnings and policy settings may have an impact of the ability of the viewer to display these documents.

Any editing within these viewers is ignored by the publisher as when the document is published it will retrieve the original file from Series 6. If you wish to edit the document this must be done in Series 6 using the edit functions.

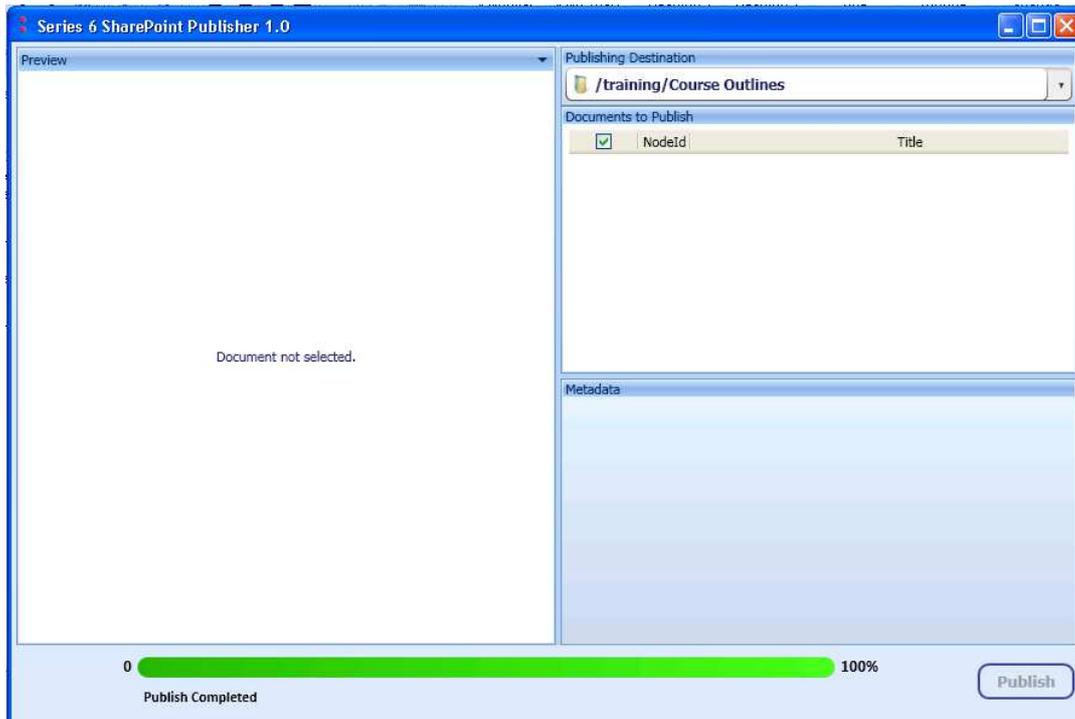
## Publish document(s)

If a destination has been selected and at least one document has been ticked and any required metadata has been completed the **Publish** button will be enabled.

Click on the **Publish** button to publish the file(s) to a SharePoint site. The following screen will be displayed:



The above status bar will be displayed during the publishing process. Click on the **Stop** button to stop the process at any point. A message will be displayed once finished telling you that the Publish is complete as shown in the screen on the next page:



If you had any un-ticked files then they will still be displayed otherwise if all documents were ticked the publisher screen will be empty as shown above.

Click the  button to exit the SharePoint Publisher application.

### Notes:

If the documents published came from an In tray then the document will be moved from your In tray into an Archive area or a relevant Filing Cabinet configured in Series 6. If the document comes from a filing cabinet location then it will remain there.

Publish will fail if the required metadata is not completed correctly. You will be notified through a progress bar message.

If the publish is successful the document is removed from the **Document to Publish** section. If the document resides in an In tray, it will be removed from the In tray as mentioned above.

If a document fails to publish the application will continue to the next document within the **Document to Publish** section. A document that fails to publish will display a yellow warning triangle. Click the triangle, you will see the cause of the failure. In this case, the document is not removed from the **Document to Publish** section (or the In tray if relevant).

If you do not have access to the Publishing Destination, each document will fail and display a warning notification.

If access to Series 6 for any particular document fails during the publish process, the publishing of that document will also fail and a warning notification will be displayed.

For more information on assumptions and limitations please see the Technical Administration Manual.

## Start Workflow

This feature is shown within the right click menu only but in all three modes. This feature allows you to start a workflow on a document that sits in your Intry and a filing cabinet location. This option is only shown if you have the correct licence and privileges which are assigned by the System Administrator. Please see the the Technical Workflow Manual for more information.

## Check out

The **Check out** option will allow you to check out a document ready for you to edit at a later point. For more information about check out and how it works please see page 108.

## Check in

The **Check in** option will allow you to check in a new version of the document you have been editing. For more information about check in and how it works please see page 109.

## Undo Check out

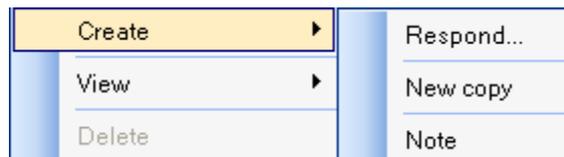
The **Undo check in** option will allow you to cancel a checked out document as long as the document belongs to you and if not you have the correct privileges applied please see page 114.

## Mark as read / Mark as unread

The **Mark as read / Mark as unread** options will allow toy to mark an unread document as read and a read document as unread please see page 54.

## Create

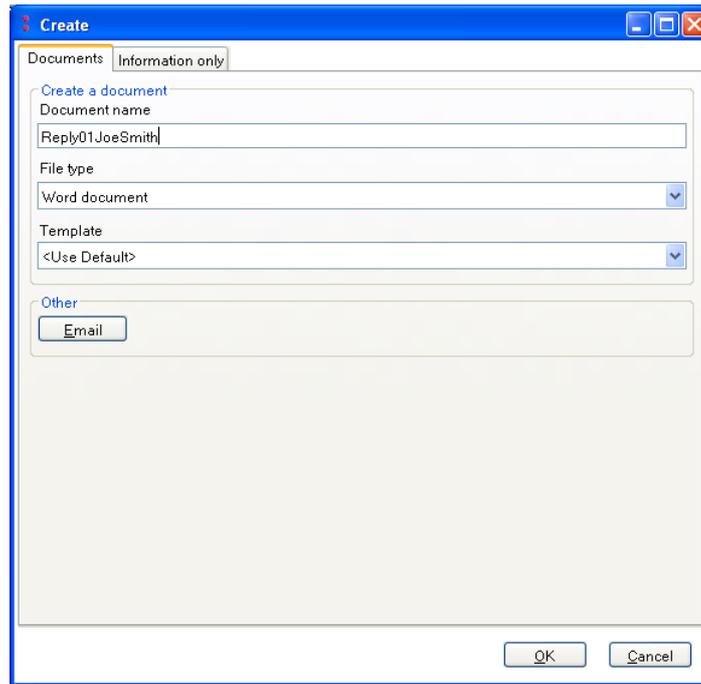
This feature is shown within the right click menu only but in all three modes. This feature allows you to create a response, new copies and also notes to a selected document.



## Respond

The **Respond...** option is a way to respond to a document within Series 6. You can also perform a similar function by using the File and Reply feature please see page 79.

In the Middle pane right click a document then click the create option and then from the right click menu select the **Respond...** option. The screen on the next page will be displayed:



In the '**Documents**' tab you can create new documents (in many different file formats).

To create the reply document first, type the **Document Name** and click the drop down and choose the required **File Type**.

If a **Template** is required when creating a document, click the drop down and choose a template from the list. Want to create a blank document then leave the option **<Use Default>** selected. Click the **OK** button and the document will be created in the chosen format.

Enter the text into the document in the normal way then close and save the file. The document will be brought into your In tray and the 'file and save document' screen will be displayed.

File and save the document as normal (for more information please see page 65) and click the **File and Save** button. The document saved will then be attached to the original document responded to.



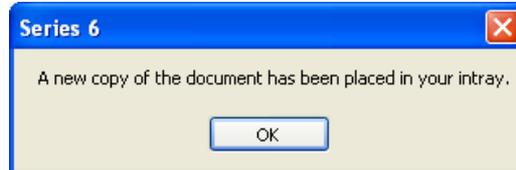
In the Standard or Advanced mode go to the '**Explore**' tab. At any time after the document has been saved it can be re-filed and saved. A small paper clip symbol will be displayed before the title of the document both on the original and the reply.

**NB:** To view the attached document please see page 204.

## New Copy

The **New Copy** option would be used to create new copies of existing documents which are then placed into your Intray.

In the Middle pane right click the document you wish to create a copy of, then from the right click menu select the **Create** option and then click the **New Copy** option. The following message will be displayed:



As the message states a new copy of that document is now in your Intray.

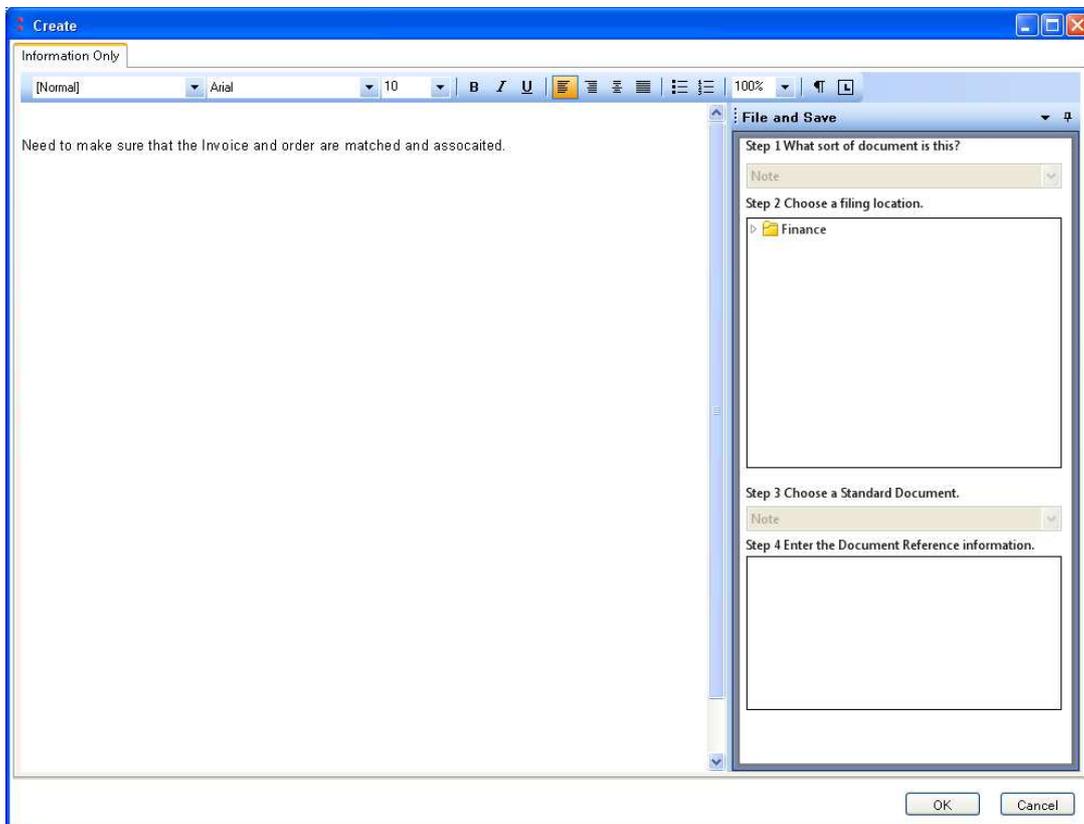
**NB:** The copy is not linked to the original in any way.

## Note

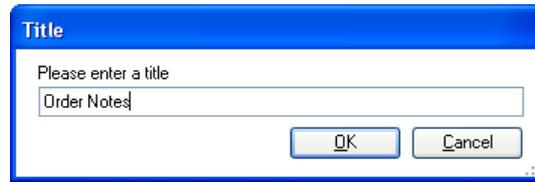
The **Note** option would be used to create and attach notes to a selected document. This document can be located either in Workspace - Intray or Current documents or Explore or Search with in the Middle pane. These notes are known as simple notes.

## Add a Note

To add a note, in the Middle pane right click the document you wish to add a note to. From the right click menu select the **Create** option and then click the **Note** option. The following screen will be displayed:



Add the text for your note which can be formatted using the toolbar to change font style, size, alignment etc. Once finished click the **OK** and the 'Title' dialogue will be displayed:



Enter the title (by default the title will be picked up as the first line of your note. Once you have finished, click the **OK** button to save the note and exit the screen.

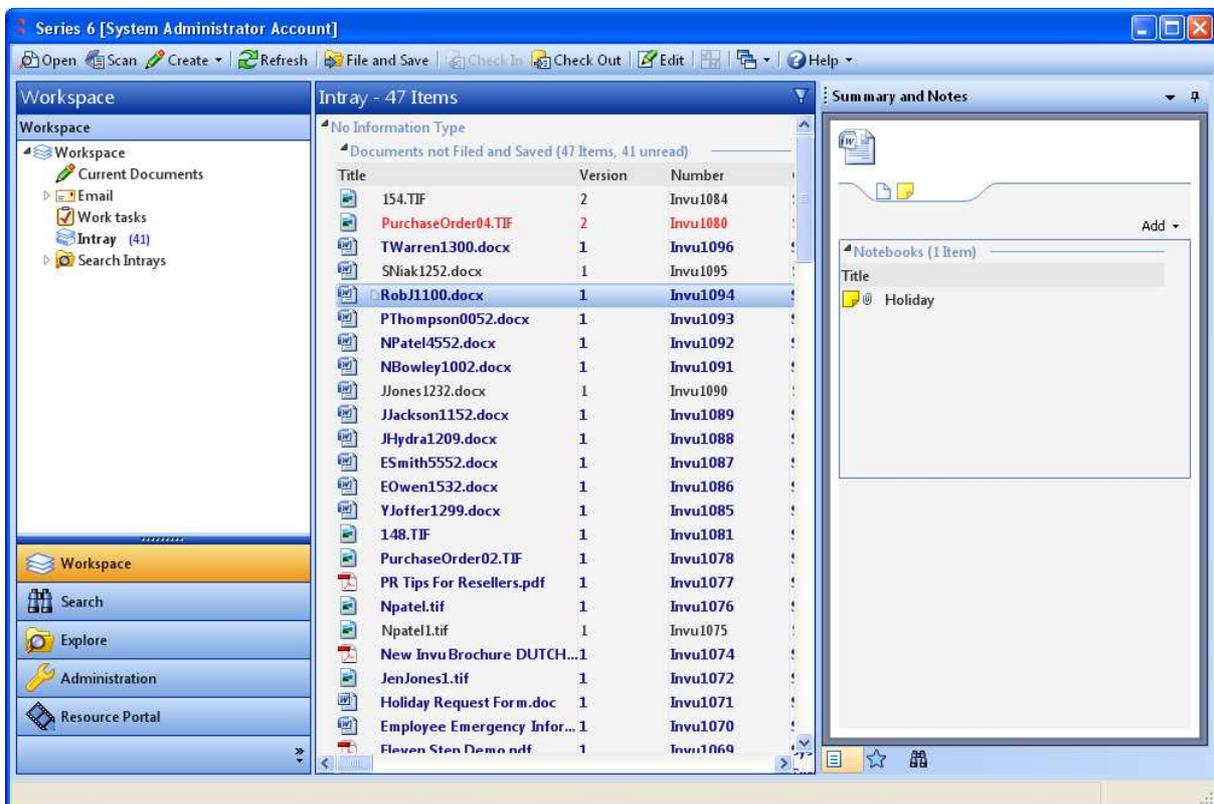
The note will be saved in the same location as the actual document but under the heading of **Notes**. If you file and save the document away the note will move to the new location as well. When a note is added to a document a note  symbol will appear to the left of the title as shown below:



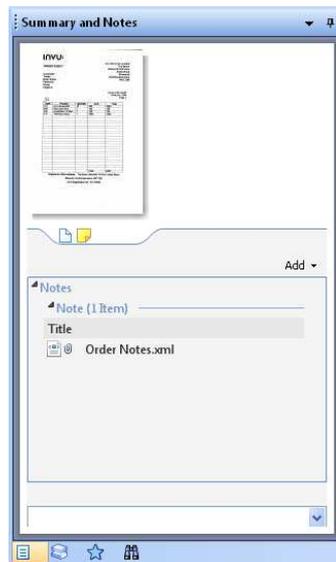
The note itself will be placed in a section called **Note** as shown on the previous page.

## Open a Note

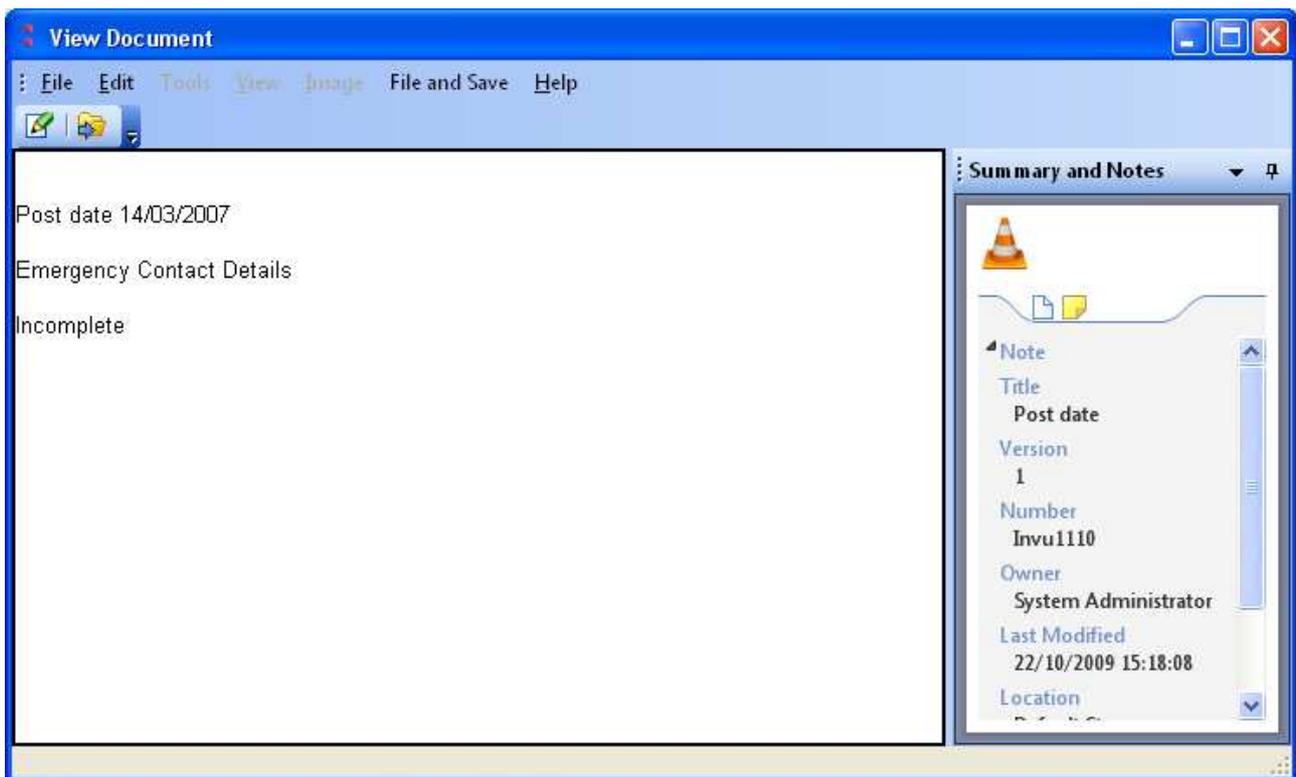
To open a note, find the document that has a note attached and in the Middle pane highlight it. In the Right-hand pane make sure the  **Summary and Notes** pane is displayed:



Once in the **Summary and Notes** pane you will need to click the  icon and the notes section will be displayed:



To view the note double click the title in the notes section or right click the note in the Right-hand pane and select the **Open** option. The 'View Document' screen will be displayed as shown on the next page:



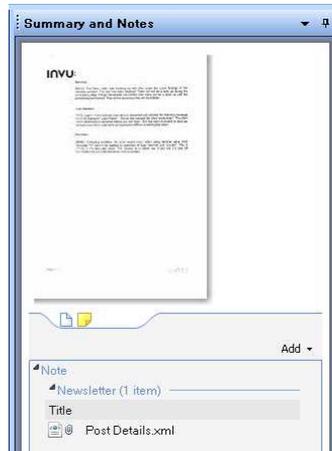
Click the **X** in the top right corner of the screen to close.

You can print out or view the information on your note. For more information regarding the 'View documents' screen please see page 116. To close the screen click the **File** menu then select the **Exit** option or click the **X** in the top right corner.

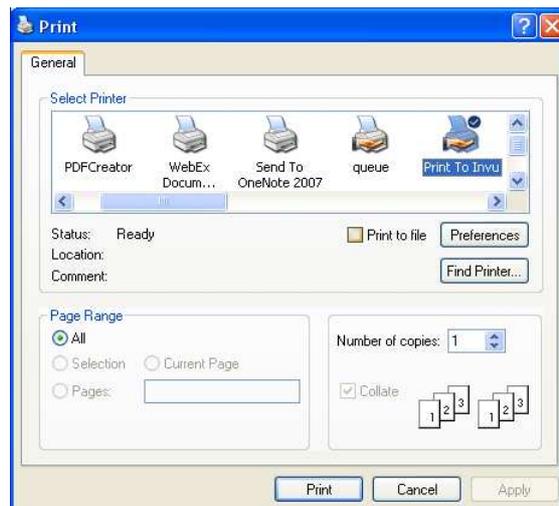
## Print a Note

To print a note, find the document that has a note attached and in the Middle pane highlight it. In the Right-hand pane make sure the  **Summary and Notes** pane is displayed.

Once in the **Summary and Notes** pane you will need to click the  icon and the following will be displayed:



Right click the note title in the Right-hand pane and select the **Print** option. The following will be displayed:

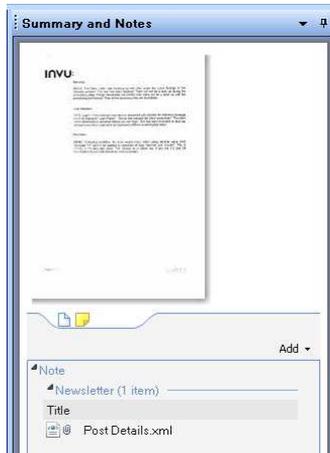


Select the **Printer**, **Page Range** and **Copies**, then click the **Print** button to continue.

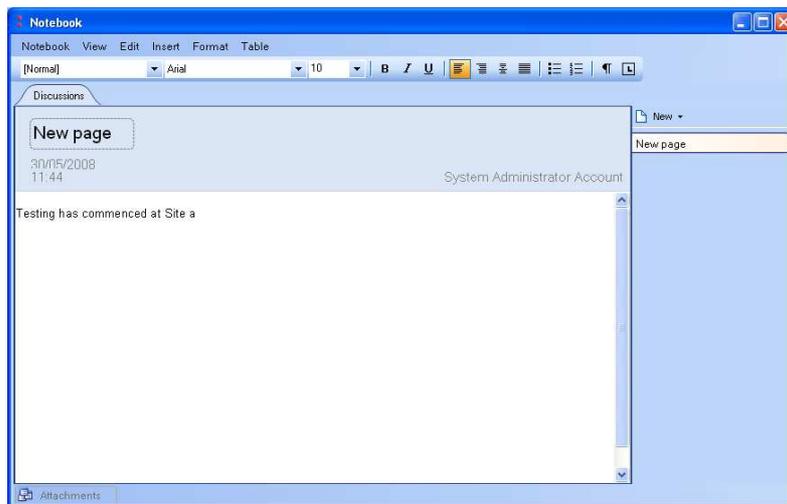
## Edit a Note

To edit a note, find the document that has a note attached and in the Middle pane highlight it. In the Right-hand pane make sure the  **Summary and Notes** pane is displayed.

Once in the **Summary and Notes** pane you will need to click the  icon and the following will be displayed:



Right click the note title in the Right-hand pane and select the **Edit** option. The screen on the next page will be displayed:



Here you are able to add new sections (tabs) or even new pages.

**NB:** You cannot add text to existing sections (tabs) you will have to create a new one.

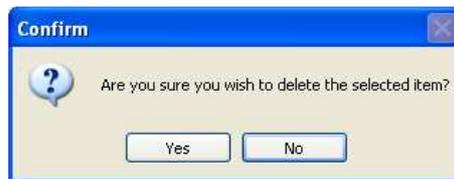
For more information on how to add pages please see page 19 and for more information on how to add new sections please see page 20.

## Delete a Note

To remove a note, once in the **Summary and Notes** pane you will need to click the  icon and the following will be displayed:



In the notes section right click the note you wish to remove. From the right click menu select the **Delete** option.



Click the **Yes** button to remove the note. The note will be removed from the notes section and the note symbol will be removed from the document it was attached to. Click the **No** button to cancel the deletion.

## View

The **View** options will allow you to choose how you wish to view the documents in the Middle pane. For more information regarding the view option please see page 39.

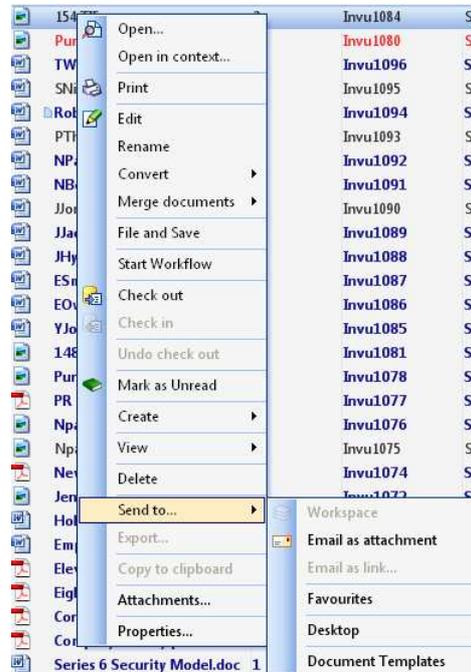
## Delete

The delete option will allow you to remove documents from Series 6. For more information on deleting documents please see page 106.

## Send To

This feature is shown within the right click menu only but in all three modes. This feature allows you to send selected documents from your Intray or a filing cabinet location to your **Workspace** - Current documents, Email as an attachment, Favourites as a shortcut or the Windows Desktop.

This feature is available to use in your **Intray**, **Explore** and **Search** Middle pane.



**NB:** All functionality on the right click menu is governed by the privileges given to the user. Certain functions may not be available.

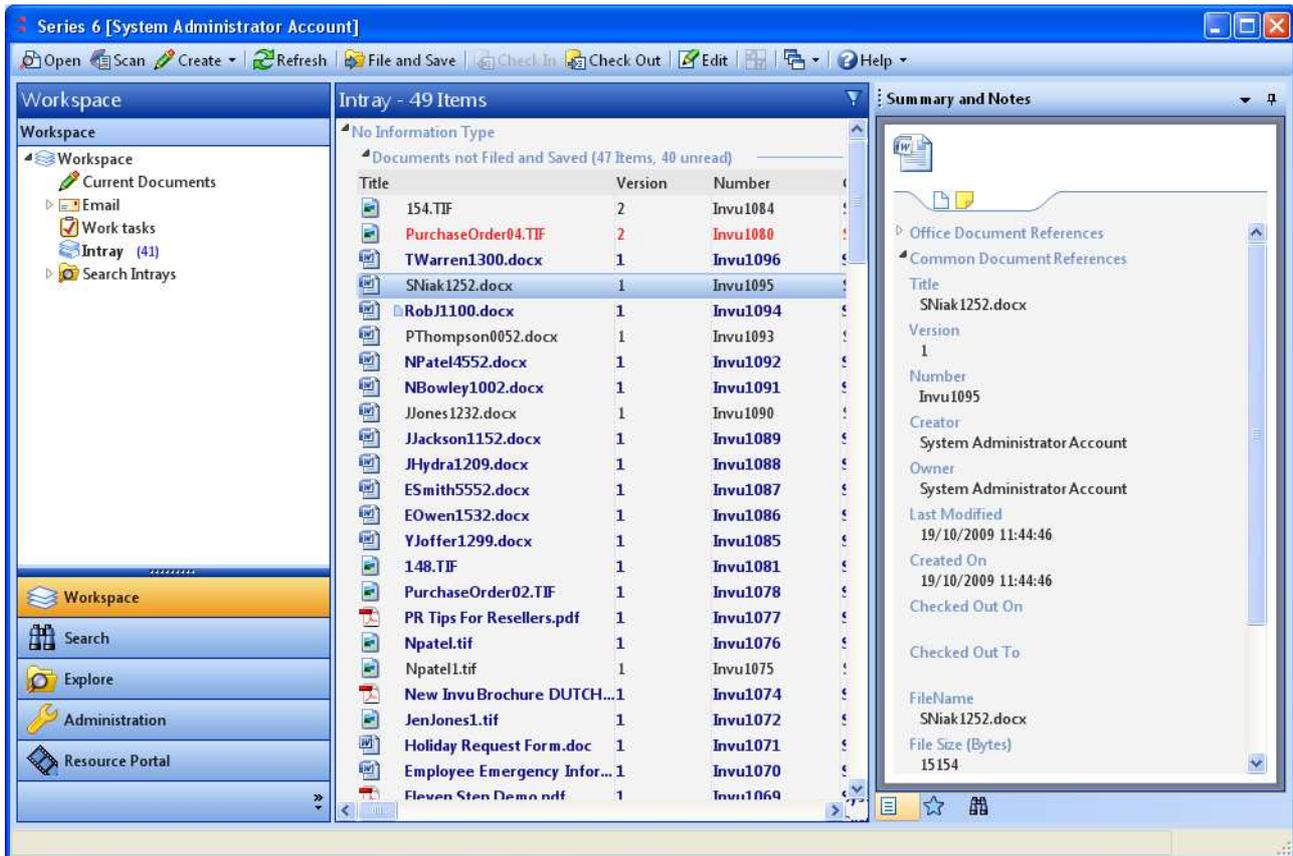
### Send to - Workspace

The **Workspace** option allows you to send a **read only** copy of the document to 'Current Documents' in the Workspace. This is like putting something on a desk to read later. This is useful as the document will be available 'offline' when not connected to Series 6 via a network or the internet.

To Send to the Workspace, in the Middle pane right click the required document or if you want to send multiple documents highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to select are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

Right click one of the highlighted documents, from the menu select **Send to** and from the cascade menu click the **Workspace** option. The copies of the document will be sent to Current Documents.

To access Current Documents, in the Simple mode the Workspace area is known as 'My Work'. Click the **'My Work'** tab to access the Workspace area. To access the Workspace in the Standard mode click the  button on the floating toolbar or if within the Advanced mode click the  button on the Left-hand pane.



In the Left-hand pane click the Current documents option and in the Middle pane you will be able to browse the documents sent to the Workspace these will appear in black as shown in the picture above.

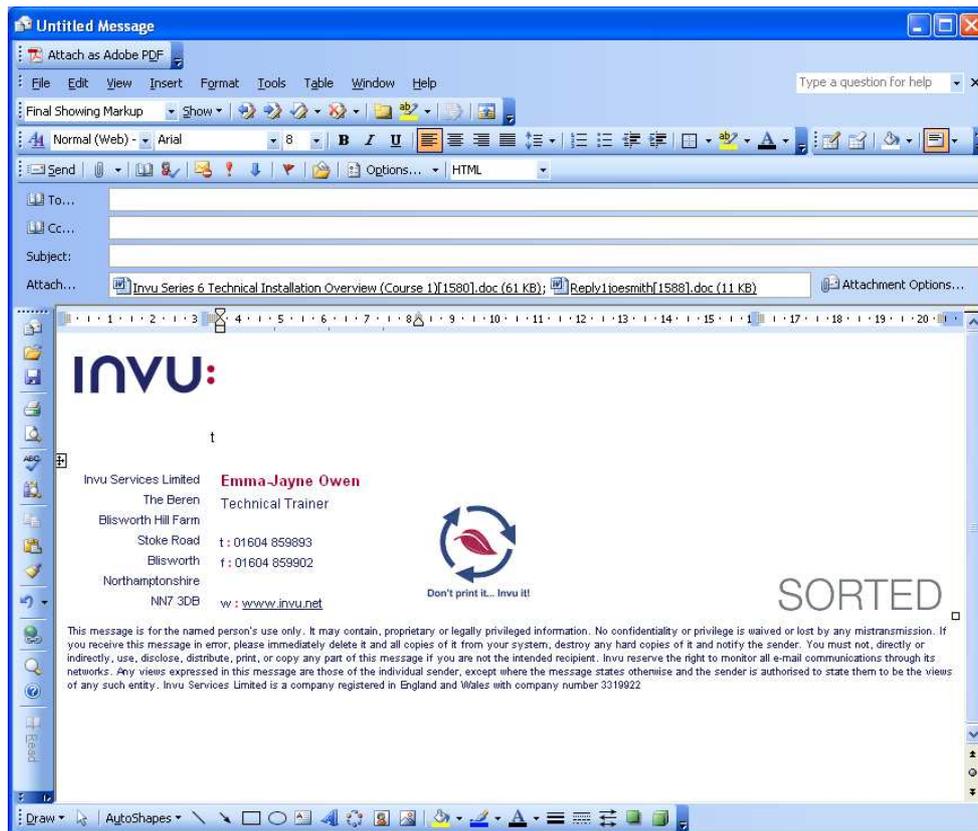
## Send to - Email...

The **Send to - Email** option allows you to send a document to a blank email as an attachment.

To Send to an Email, in the Middle pane right click the required document or if you want to attach multiple documents highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to select are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

Right click one of the highlighted documents, from the menu select **Send to** and from the cascade menu click the **Email...** option. The copies of the document will be sent to current documents.

The email screen will then be displayed. The screen on the next page shows a new email from MS Outlook (other email systems are also supported).



The documents selected will be attached as shown on previous page. Complete the email as normal and then click the **Send** button.

**NB:** As the email is created in the appropriate email application (such as MS Outlook) full email functionality is available. I.e. Address books, signatures, stationary, etc.

### Send to - Favourites

The **Send to - Favourites** option allows you to send a document to the **Favourites** Pane. This creates a shortcut to the document.

To Send to favourites, in the Middle pane right click the required document or if you want to select multiple documents highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to select are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

Right click one of the highlighted documents, from the menu select **Send to** and from the cascade menu click the **Favourites** option. Shortcuts to the documents will be created. For more information on the **Favourites** pane please see page 35.

### Send to - Desktop

The **Send to - Desktop** option allows you to send a copy of a document to your Windows desktop. The copy of the document is sent to your desktop will not affect the document stored within Series 6.

To Send to your Desktop, in the Middle pane right click the required document or if you want to select multiple documents highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to select are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

Right click one of the highlighted documents, from the menu select **Send to** and from the cascade menu click the **Desktop** option. The document is then copied and placed on the user's desktop.



The document will show the Invu number in square brackets as shown above.

## Send to - Document Template

When creating new documents you have the option to choose a document template to base the document on. For more information regarding creating documents please see page 99.

This option allows the user to add templates to the Document Templates area which is located in Explore (only available in Standard or Advanced Mode).

To add a new document template bring the file into your Series 6 In tray then right click the template in the In tray. From the right click menu choose **Send to** and then the **Document Template** option.

You will then need to speak to your systems administrator to finish off the Document Templates configuration or refer to the Technical Administration Manual.

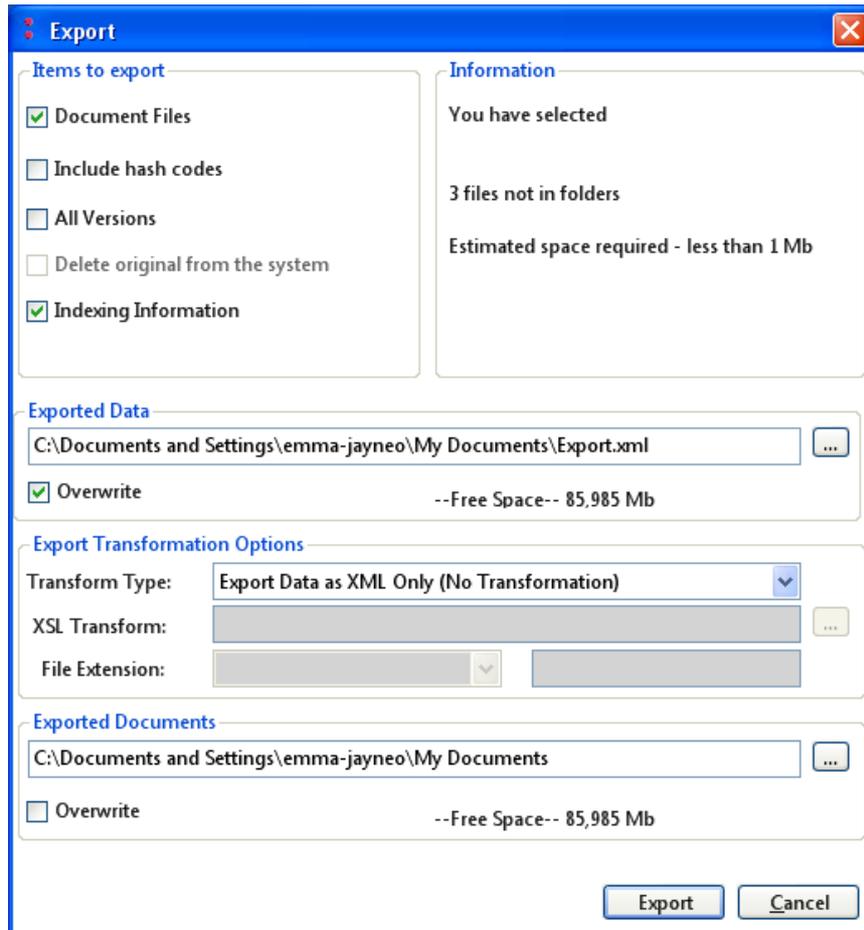
## Export

The Export option allows you to export out the documents and the information that goes with it, this can be useful if a lot of documents have been filed in the wrong place.

This is only available if you have been given the privilege by the Series 6 Administrator.

To Export, in the Middle pane right click the required document or if you want to export multiple documents highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to select are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

Right click one of the highlighted documents, from the menu select the **Export** option and the 'Export' screen will be displayed as shown on the next page:



You will need to set what to export and where the data and files will go this is explained below:

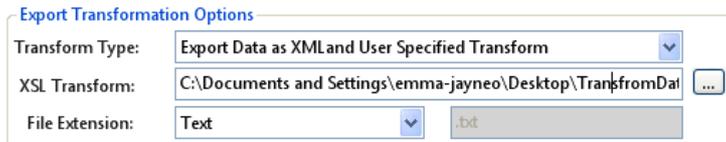
In the **Items to export** area tick the **Document Files** check box to export the actual documents selected. If you would like to export all versions of the selected document then tick the **All Version** check box. If you want to include the File and save information (Information Type, Standard Document and Document References) then tick the **Indexing Information** check box.

In the **Information** area will show you what you have selected and the estimated space required.

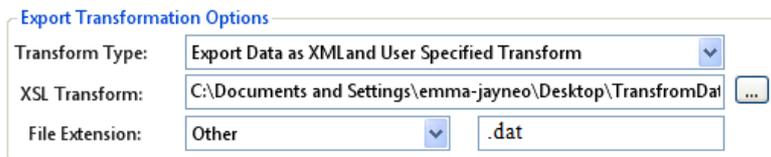
In the **Exported Data** area you can choose where to put the XML file that will be exported with the information about the exported items. By default the xml file will be saved into your My documents folder but if you wish to store it elsewhere, click the **...** button and choose where the xml file will be exported to and give a file name but make sure you add the file extension of **.xml** then click the **Save** button. If the file already exists in the chosen location then tick the **Overwrite** check box.

In the **Export Transformation Options** area you can choose a Transform Type:

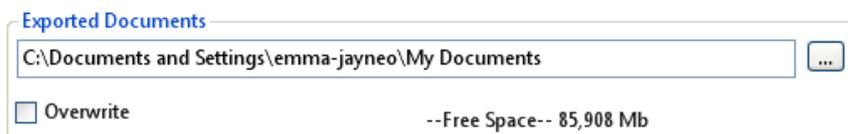
- **Export Data as XML Only(No Transformation)** – will create the XML file but not transform the data into a more readable format.
- **Export Data as XML and Default CSV Transform** – will create the XML file then transform the data into a CSV format which could be used with Link Manager.
- **Export Data as XML and Default HTML Transform** - will create the XML file then transform the data into a HTML format which gives you a nice report format.
- **Export Data as XML and User Specified Transform** – will create the XML file and allow you to create your own XSL Transform file. When this option is selected the **XSL Transform** and **File Extension** fields are enabled as shown below:



You will need to select the **XSL Transform** file, click the  button and browse to the location of the xsl/xslt file and click the **Save** button. Click the drop down for the **File Extension** field and choose the file the XML data will be transformed into. If you choose the **Other** option you will need to enter the extension into the field that is enabled (see below).



In the **Exported Documents** area you can choose where the documents will be exported to. By default the documents will go to your My documents folder but if you want to point them else where

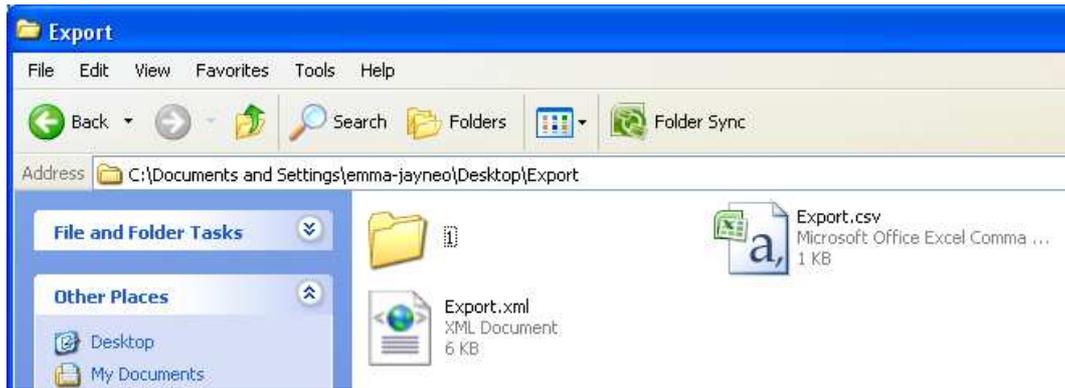


By default the documents will go to your My documents folder but if you want to point them else where then click the  button browse to the location and click the **OK** button. If the documents have been exported before you may wish to tick the **Overwrite** option.

Once you have completed the 'Export' screen click the **Export** button and the following message will be displayed:



Click the **OK** button to close the message.



The files will be exported to the chosen location the documents will be stored in separate folders depending on where they were stored in the Series 6 system.

Below is examples of how the different Transform options would look.

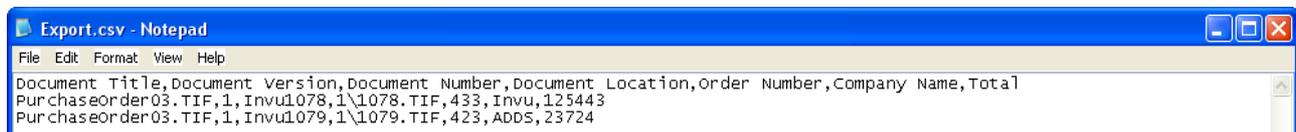
### Export Data as XML Only(No Transformation)

```

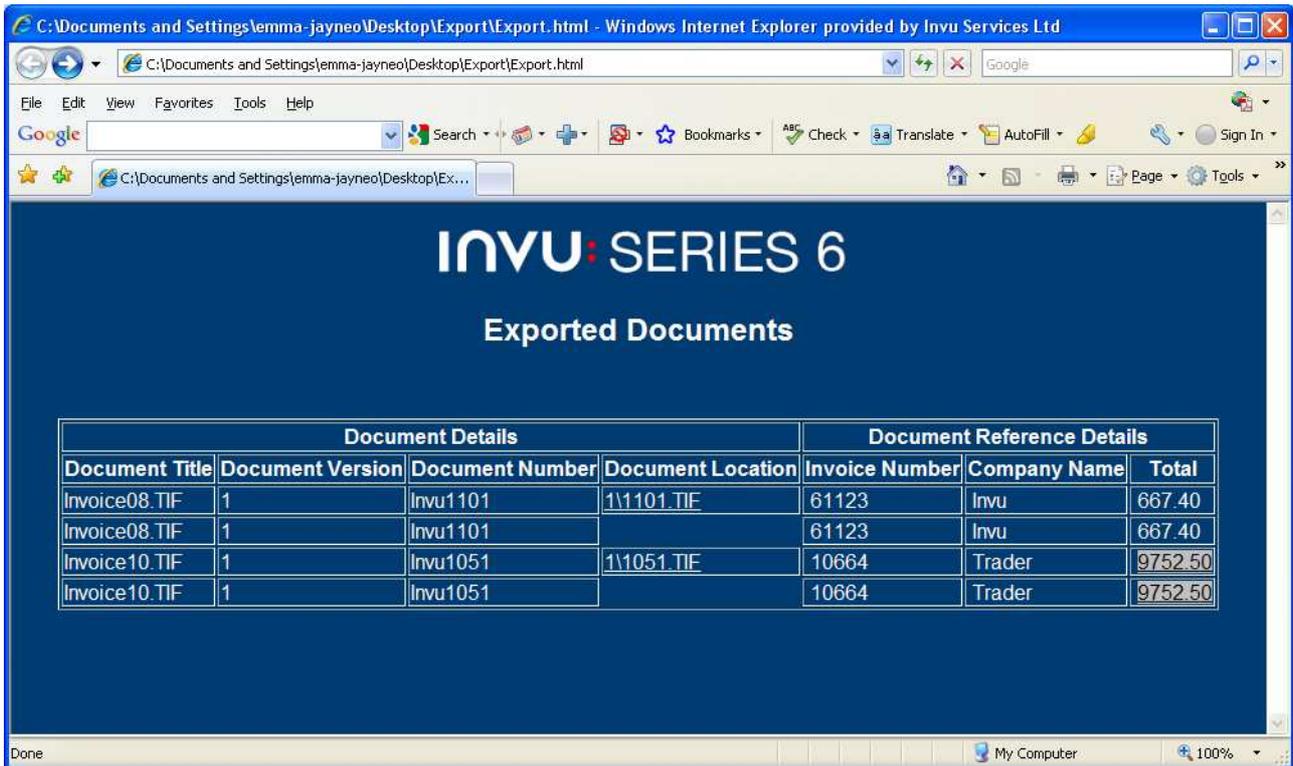
- <nd:InvuNodes xmlns:nd="www.invu.net/schema/document">
  <nd:DocumentPath>C:\Documents and Settings\emma-jayne\Desktop\Backup</nd:DocumentPath>
  - <nd:Node>
    <nd:Id>1079</nd:Id>
    <nd:NodeType value="34">DocumentVersion</nd:NodeType>
    <nd:HParentNodeId>1041</nd:HParentNodeId>
    <nd:Title>PurchaseOrder03.TIF</nd:Title>
    <nd:CreatedOn>2009-10-19 11:43:21Z</nd:CreatedOn>
    <nd:OwnerUorgId>1000</nd:OwnerUorgId>
    <nd:CreatorUorgId>1000</nd:CreatorUorgId>
    <nd:VersionNum>1</nd:VersionNum>
    <nd:VersionDesc>1</nd:VersionDesc>
    <nd:Prefix>Invu</nd:Prefix>
    <nd:Number>1079</nd:Number>
    <nd:Suffix />
    <nd:Filename>PurchaseOrder03.TIF</nd:Filename>
    <nd:FileExtension>.TIF</nd:FileExtension>
    <nd:Filedate>2009-06-04 13:30:57Z</nd:Filedate>
    <nd:FileLocation>C:\Documents and Settings\emma-jayne\Desktop\Backup\1
      \1079.TIF</nd:FileLocation>
    <nd:RelativeFileLocation>1\1079.TIF</nd:RelativeFileLocation>
    <nd:InfoTypeId>1010</nd:InfoTypeId>
    <nd:TemplateId>35</nd:TemplateId>
  - <nd:IndexData>
    <![CDATA
      [ <ATT><MT2><A13>1</A13><A12>300</A12><A15>PurchaseOrder03</A15><A28>1</A28><A11>300</A11><A14>CrittG:
      Group 4 Fax</A8><A9>2496</A9><A10>3507</A10></MT2><T35><A33>423</A33><A34>Invu</A34><A35>23724</A35>
    </nd:IndexData>
  - <nd:IndexDataFull>

```

### Export Data as XML and Default CSV Transform



## Export Data as XML and Default HTML Transform



In this format you are able to click the document location and view the document.

## Copy to Clipboard

The Copy to clipboard enables the user to copy the contents of the Middle pane to clipboard this could then be pasted into Word or Excel. You can use this feature for your Intry, filing cabinets locations or even Search results Middle pane. This would be extremely useful to copy the results of a search.

To copy the contents, first browse to the correct Middle pane then right click a document in the Middle pane. From the right click menu choose the **Copy to clipboard** option. Open an application such as Microsoft Word, Excel or Note Pad and paste in as normal example shown below:

|    | A                               | B                                                   | C       | D        | E                                  | F                                  | G                    |
|----|---------------------------------|-----------------------------------------------------|---------|----------|------------------------------------|------------------------------------|----------------------|
| 4  |                                 |                                                     |         |          |                                    |                                    |                      |
| 5  |                                 | My Scan.tif                                         | 1       | Invu1284 | System Administrator Account       | System Administrator Account       | 13/07/20             |
| 6  |                                 |                                                     |         |          |                                    |                                    |                      |
| 7  | Sales & Demonstration Documents |                                                     |         |          |                                    |                                    |                      |
| 8  |                                 | Demonstration Document (2 items)                    |         |          |                                    |                                    |                      |
| 9  |                                 | Title                                               | Version | Number   | Title                              | Primary Contact                    | Creator              |
| 10 |                                 |                                                     |         |          |                                    |                                    |                      |
| 11 |                                 | New Bridgeport Letter.doc                           | 2       | Invu1232 | New Bridgeport Letter              | Sales Team BDM                     | Dean King            |
| 12 |                                 | Bridgeport Scan Two Pages S600.tif                  | 1       | Invu1210 | Bridgeport Boating 2 Page Scan     | Sales Team BDM                     | System Administrator |
| 13 |                                 |                                                     |         |          |                                    |                                    |                      |
| 14 |                                 | Methodology Document (5 items)                      |         |          |                                    |                                    |                      |
| 15 |                                 | Title                                               | Version | Number   | Title                              | Type of Document                   | Primary Contact      |
| 16 |                                 |                                                     |         |          |                                    |                                    |                      |
| 17 |                                 | Video Script.DOC                                    | 1       | Invu1436 | Invu Corporate Video Script        | Information                        | Sales Team BDM       |
| 18 |                                 | Six Step demo Final.doc                             | 1       | Invu1435 | Six Step Demo Final                | Information                        | Sales Team BDM       |
| 19 |                                 | Sales Video Explained.DOC                           | 1       | Invu1434 | Sales Video Explanation            | Information                        | Sales Team BDM       |
| 20 |                                 | Sales Support Team.doc                              | 3       | Invu1240 | Sales Support Team                 | Information                        | Sales Team BDM       |
| 21 |                                 | Company History.doc                                 | 2       | Invu1211 | Company History                    | Information                        | Sales Team BDM       |
| 22 |                                 |                                                     |         |          |                                    |                                    |                      |
| 23 |                                 | Understanding Document (3 items)                    |         |          |                                    |                                    |                      |
| 24 |                                 | Title                                               | Version | Number   | Author                             | Title                              | Primary Contact      |
| 25 |                                 |                                                     |         |          |                                    |                                    |                      |
| 26 |                                 | End User Manual SP1.pdf                             | 1       | Invu1402 |                                    | End User Manual SP1                | Support Team         |
| 27 |                                 | Understanding IFA.DOC                               | 3       | Invu1264 |                                    | Understanding IFA's                | Sales Team BDM       |
| 28 |                                 | Understanding Accounts Departments.doc              | 3       | Invu1253 | Majid Nagra                        | Understanding Accounts Departments | Sales Team BDM       |
| 29 |                                 |                                                     |         |          |                                    |                                    |                      |
| 30 | Training Materials              |                                                     |         |          |                                    |                                    |                      |
| 31 |                                 | Training Manuals (4 items)                          |         |          |                                    |                                    |                      |
| 32 |                                 | Title                                               | Version | Number   | Title                              | Version                            | Rejection Reason     |
| 33 |                                 |                                                     |         |          |                                    |                                    |                      |
| 34 |                                 | Series 6 Administration Manual for SP 6.1 a.doc     | 2       | Invu1517 | Series 6 Administration Manual     | SP 2                               |                      |
| 35 |                                 | Series 6 Workflow Reference Manual for SP 6.1 a.pdf | 1       | Invu1519 | Series 6 Workflow Reference Manual | 6.1 a                              |                      |
| 36 |                                 | Series 6 Administration Manual for SP 6.1 a.pdf     | 1       | Invu1516 | Series 6 Administration Manual     | SP 2                               |                      |
| 37 |                                 | Series 6 Installation Manual for SP6.1 a.pdf        | 1       | Invu1515 | Series 6 Installation Manual       | SP 2                               |                      |
| 38 |                                 |                                                     |         |          |                                    |                                    |                      |
| 39 |                                 |                                                     |         |          |                                    |                                    |                      |
| 40 |                                 |                                                     |         |          |                                    |                                    |                      |
| 41 |                                 |                                                     |         |          |                                    |                                    |                      |
| 42 |                                 |                                                     |         |          |                                    |                                    |                      |
| 43 |                                 |                                                     |         |          |                                    |                                    |                      |
| 44 |                                 |                                                     |         |          |                                    |                                    |                      |
| 45 |                                 |                                                     |         |          |                                    |                                    |                      |
| 46 |                                 |                                                     |         |          |                                    |                                    |                      |
| 47 |                                 |                                                     |         |          |                                    |                                    |                      |
| 48 |                                 |                                                     |         |          |                                    |                                    |                      |
| 49 |                                 |                                                     |         |          |                                    |                                    |                      |
| 50 |                                 |                                                     |         |          |                                    |                                    |                      |
| 51 |                                 |                                                     |         |          |                                    |                                    |                      |

**NB:** All functionality on the right click menu is governed by the privileges given to the user. Certain functions may not be available.

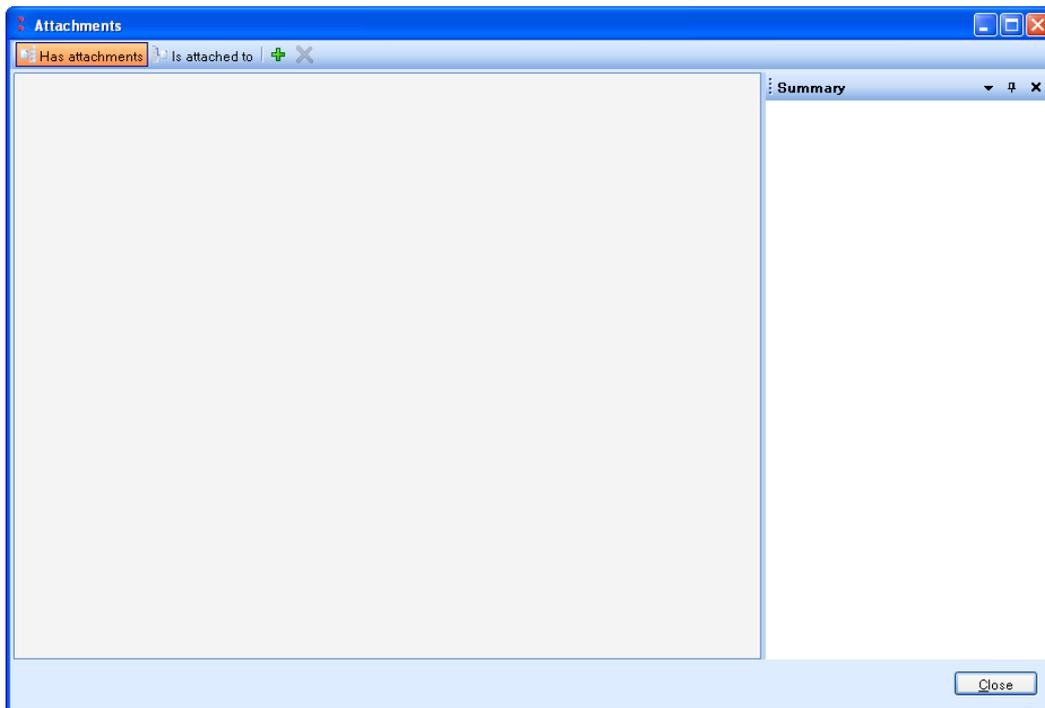
## Attachments

Attachments are used to associate one document to another within Series 6. For example if you have a statement you could then attach all the related invoices to it.

You can create attachments on any documents within Series 6 and a document can have many attachments. The attachment feature is available through documents in the Middle pane of Workspace, Explore and Search. This feature will allow you to see what has been attached to a document, review the documents it's attached to, add new attachments and also remove existing attachments.

### Create an Attachment

To create an attachment, first right click the required document. From the right click menu choose the **Attachments...** option and the following screen will be displayed:

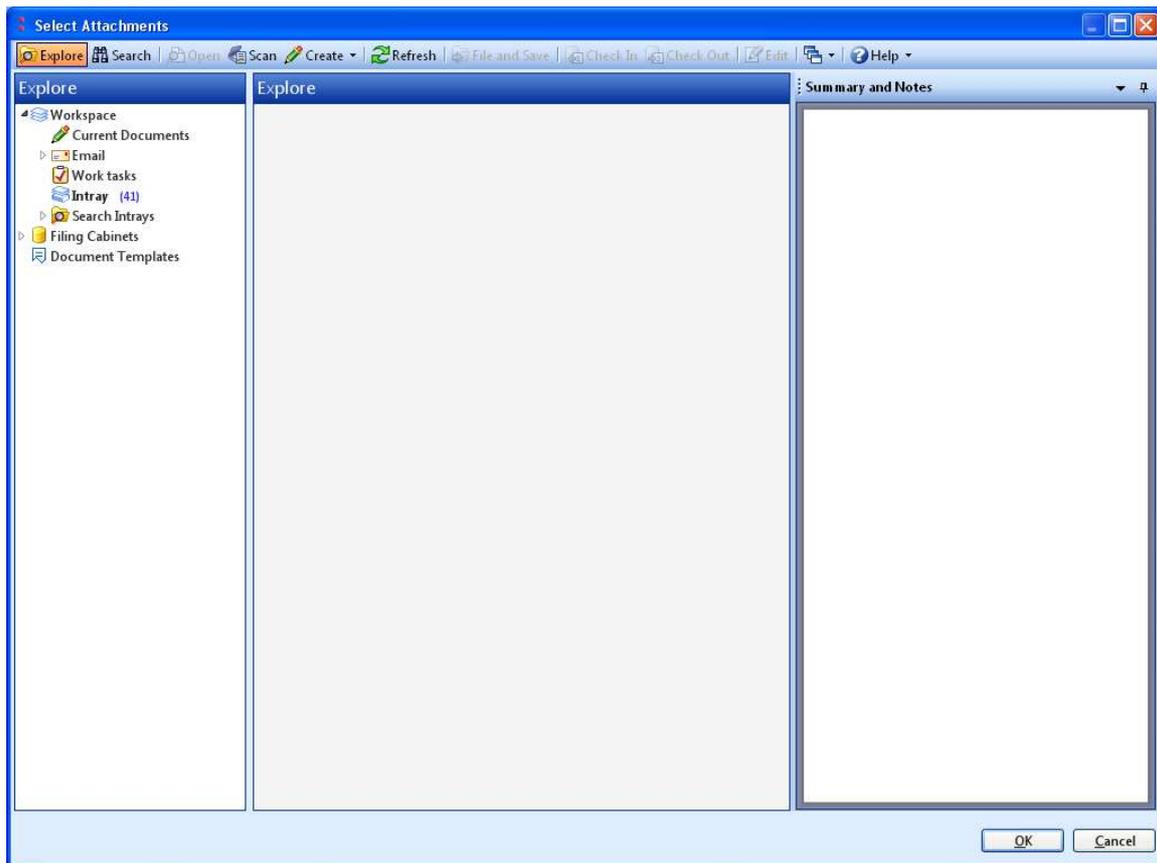


First choose which type of attachment needs to be created. On the toolbar there are two types of attachments that can be applied.

Ensure that the **Has Attachment**  button is selected, it will be highlighted in orange as shown below.



Click the  button and the following screen will be displayed as shown on the next page:

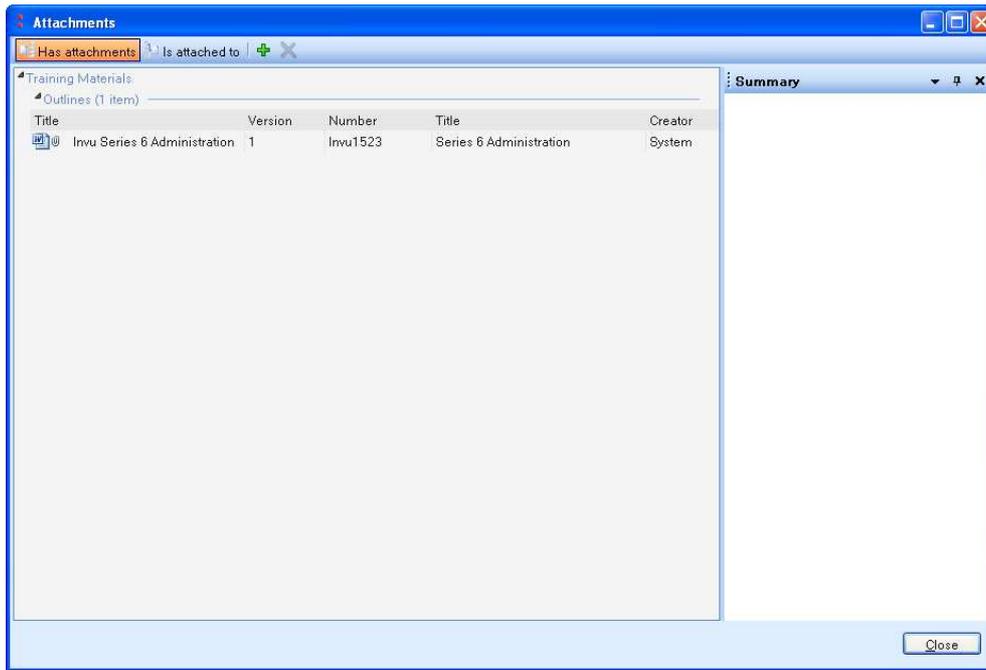


Here you can perform most of the functionality in Series 6 such as **Explore** or **Search**.

Browse Series 6 to find the documents you wish to attach. For example the outlines need to be attached to the manuals. Highlight the document to be attached as shown in the picture above.

If you want to select multiple documents highlight the first document then hold down the **CTRL** key and click each subsequent document. If the documents you wish to select are in a block then highlight the first document then hold down the **SHIFT** key then click the last document in the block.

Once the document(s) have been highlighted, click the **OK** button to attach the document.



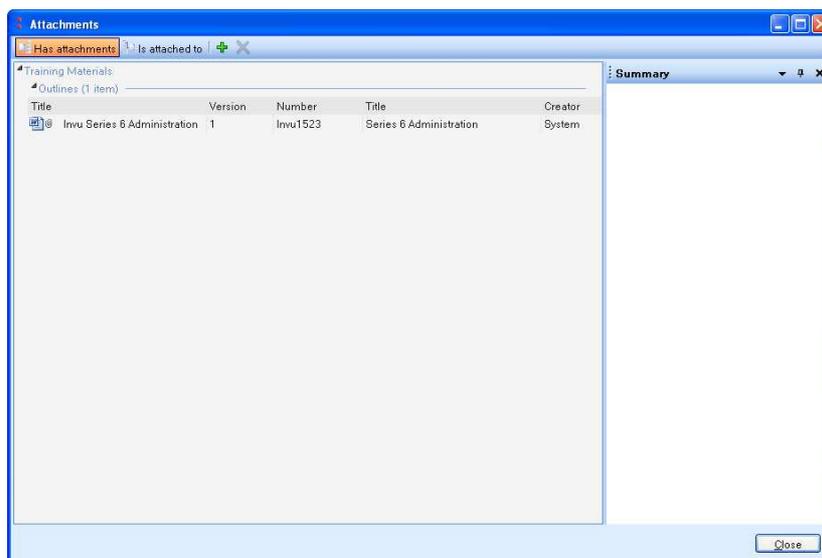
The document(s) will then be displayed in the 'Attachments' screen. Click the **Close** button to return to Series 6.

| Title                       | Version | Number   | Title                          | Version  |
|-----------------------------|---------|----------|--------------------------------|----------|
| Welcome to Invu.ppt         | 2       | Invu1570 | Presentation                   | course 1 |
| Series 6 Administration     | 2       | Invu1517 | Series 6 Administration Manual | SP 2     |
| Series 6 Workflow Reference | 1       | Invu1519 | Series 6 Workflow Reference    | 6.1a     |

In the picture above documents with attachments will display  symbol just before the title.

### View Attachments

To view documents attachments right click a document. From the right click menu select the Attachments... option.



There are two types of attachments:

The **Has attachments**  button which is the default will list all documents that are attached to the document you right clicked.

The **Is attached to**  button, if selected, will list documents that the document you right clicked is attached to.

Click the document in the list to view the Summary information in the Right-hand pane. Double click the document in the list to open the document in the 'View Document' screen.

### Delete Attachments

To remove a document from the attachment list first choose which type of attachment to view then highlight the document and click the  button from the toolbar.

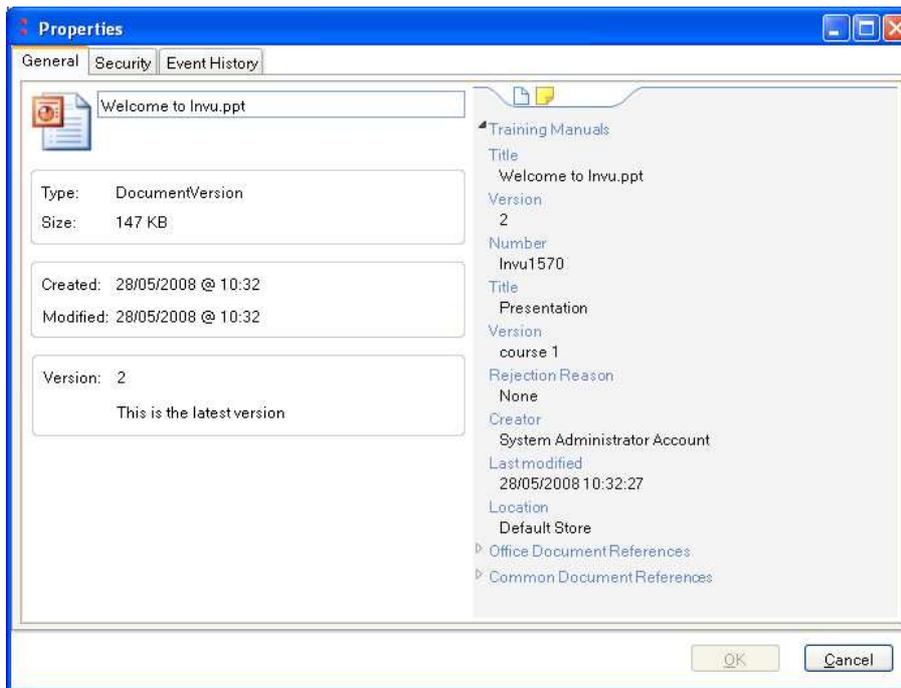
The  symbol will be removed from the document in the Middle pane.

## Properties

The document properties allow you to view information about a specific document. The screen has three tabs General, Security, and Event History (depending on privileges set by System Administrator). You view the Properties of a document from the Middle pane of Workspace, Explore and Search.

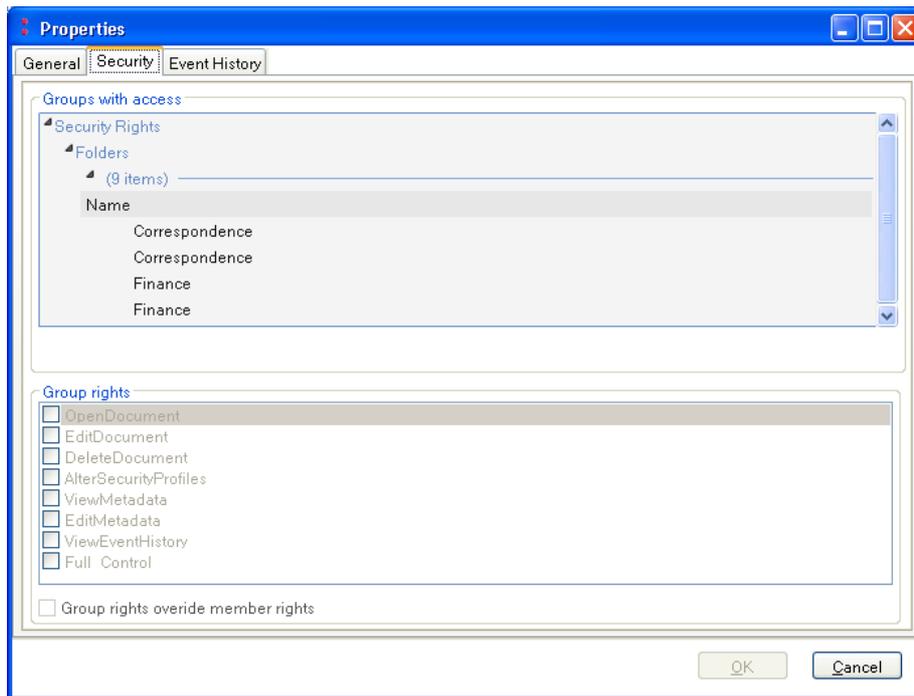
To access the document properties, in the Middle pane right click the selected document. From the right click menu select the **Properties** option. The 'Properties' screen will be displayed.

### The General Tab



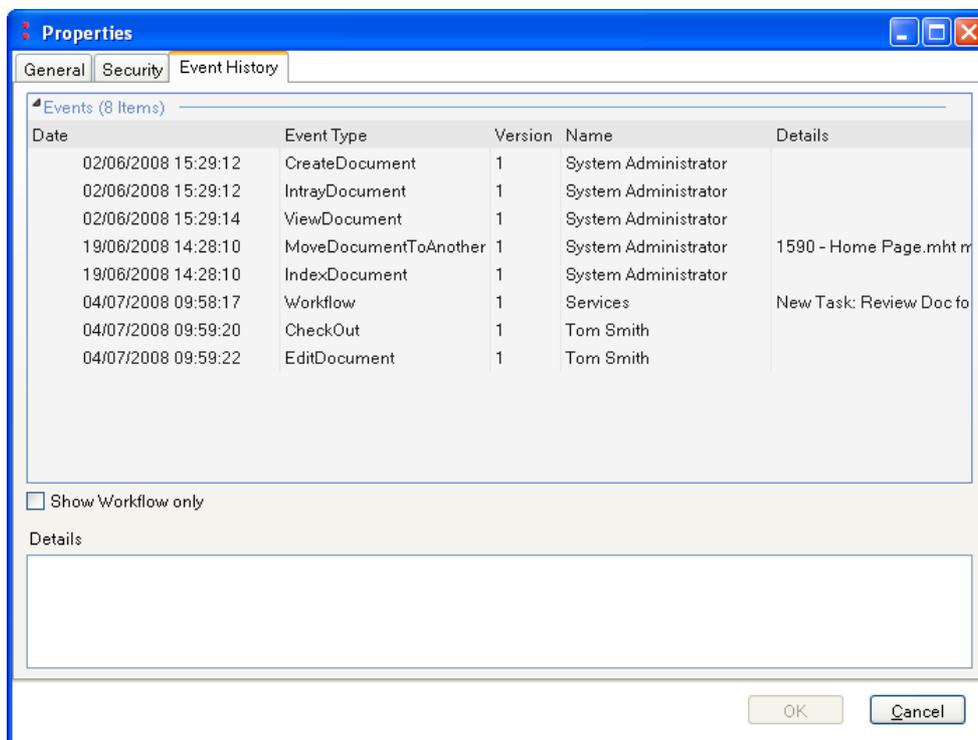
The '**General**' tab show you general information about the document such as the full name, **Type**, the **Size** of the document, the date and time of when the document was **Created/Modified**, the **Version** control details and Summary and Notes (for more information on summary and notes please see page 13).

## The Security Tab



The **'Security'** tab shows you the access rights setup for the folder the document is located in. Depending on the Access Rights set for the user, this is a read only area.

## The Event History Tab



The **'Event History'** tab will allow you to view the document's events (audit information) on a daily basis such as when it has been Checked out/in, Edited, Viewed, File and Saved etc...

To view the details of an event and any supporting details click the specific row underneath the headings. Name, Workstation and Date and the detail will be displayed below the **Details** section.

The actual events can be sorted by Name, Workstation and Date in ascending or descending order.

For example to sort the events by Date (and time) click the **Date** heading and the  ascending order arrow will be displayed to the right of the heading. To change the order to descending click the heading again and the  descending order arrow will be displayed.

| Date                | Event Type            | Version | Name                 | Details                  |
|---------------------|-----------------------|---------|----------------------|--------------------------|
| 28/05/2008 10:32:27 | CheckInNewVersion     | 2       | System Administrator |                          |
| 28/05/2008 10:31:33 | EditDocument          | 1       | System Administrator |                          |
| 28/05/2008 10:31:13 | CheckOut              | 1       | System Administrator |                          |
| 28/05/2008 10:29:11 | IndexDocument         | 1       | System Administrator |                          |
| 28/05/2008 10:29:11 | MoveDocumentToAnother | 1       | System Administrator | 1570 - Welcome to Invu.p |
| 28/05/2008 10:24:58 | IntrayDocument        | 1       | System Administrator |                          |
| 28/05/2008 10:24:58 | CreateDocument        | 1       | System Administrator |                          |

If you wish to only see Workflow events tick the **Show Workflow only** check box and the list above will change.

Show Workflow only

When finished with the 'Properties' screen click the **Cancel** button or the **X** in the top right-hand corner of the 'Properties' screen to return to the Series 6.

**OFFICE ADDIN**

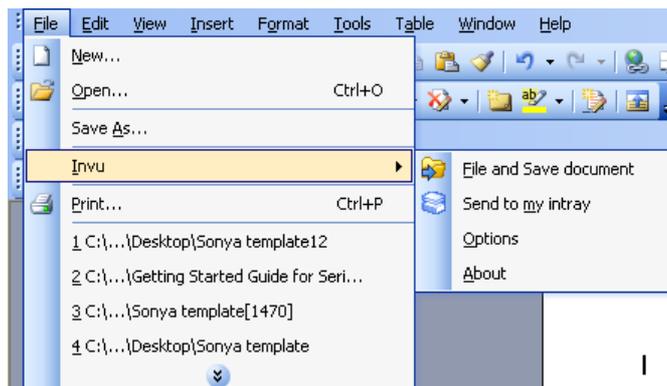
## THE OFFICE ADDIN

The Series 6 Office Addin will allow you to file documents from within the Microsoft Office Suite. Installed as part of the Series 6, the Office Addin can be used as part of MS Word/Excel/PowerPoint/Outlook the Office Depending on the version of Office will depend on how the Office Addin toolbar will be displayed.

If using Office 2000, Office XP and Office 2003 then the Office Addin will be displayed as below:



OR



The Office Addin can be accessed by the **Invu** menu on the menu bar of the MS application.

If using Office 2007 will be displayed as below:

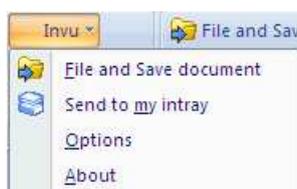
The Office Addin is located within the **Add-Ins** ribbon as shown below.



OR

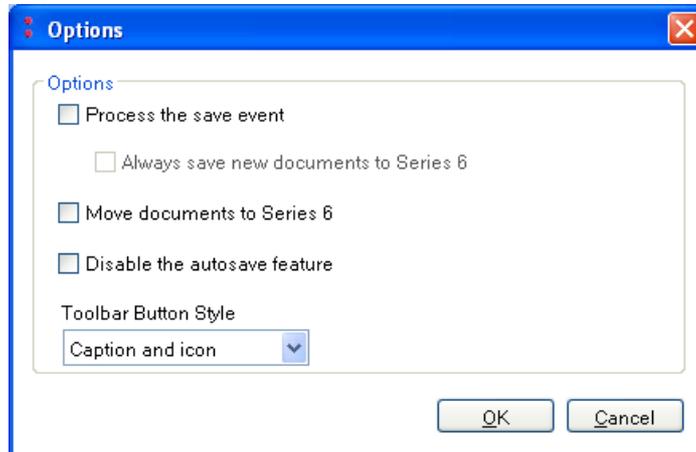


The menu commands area click the **Invu** and the following menu will be displayed:

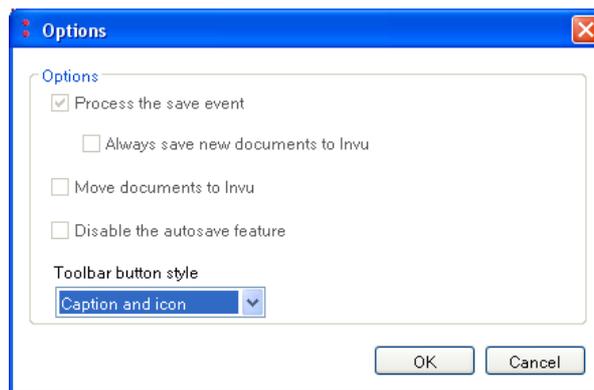


## Office Addin Options

No matter what version of Office you are working with to access the options for Word, PowerPoint and Excel, click the **Invu** menu then select **Options**.



The 'Options' screen will enable the user to determine how the MS application and Invu will behave. If all the check boxes are greyed out it means that these are controlled centrally by the Series 6 Administrator.



Every time a file is saved if the **Process the save event** check box is ticked it will enable the user to choose what happens to the document.

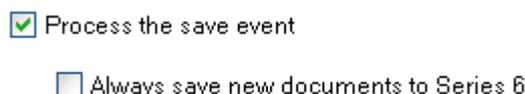
Choose one of three options:

**File and Save in Series 6** which sends the document into Invu and displays the File and Save screen.

**Send to my Intray** which sends the document straight to the users Intray.

**Save the document** which will save the document as normal in word and will not go to Invu.

Click the **OK** button.



**Always save new document to Invu** - each time a document is saved normally the choice of saving option such as File and Save into Series 6, send to the Intray or just save in the application will be displayed but when **Always save new document to Invu** option is ticked the save options are bypassed and the 'File and Save document' screen will be displayed. File and Save the document as normal. For more information on filing and saving a document go to page 65.

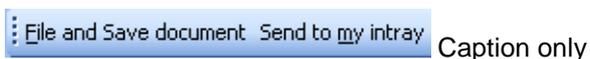
**NB:** This option is only available if **Process the save event** has been ticked.

**Move documents to Invu** - if ticked this option will move the original file into Series 6 when sent for File and Save or to the In tray. If not ticked when a file is sent to Indexing or the In tray the document will be copied into Invu and the file will remain in its original location.

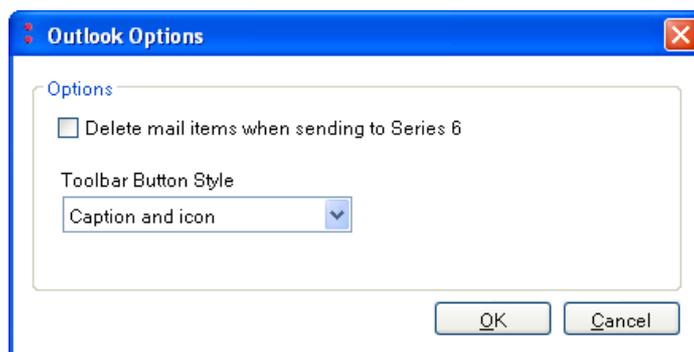
**Disable Auto save feature** - If ticked will disable the auto save feature in the MS Application.

**NB:** By default the **Process the save event** and **Always save new documents to Series 6** check boxes are not ticked.

**Tool Button Style** - click the drop down list and choose from **Caption and icon** (which is the default), **Caption only** and **Icon only**. These options will determine how the Addin toolbar will look as shown below:



If using Outlook the Office Addin options are slightly different, click the **Invu** menu then select **Options**.



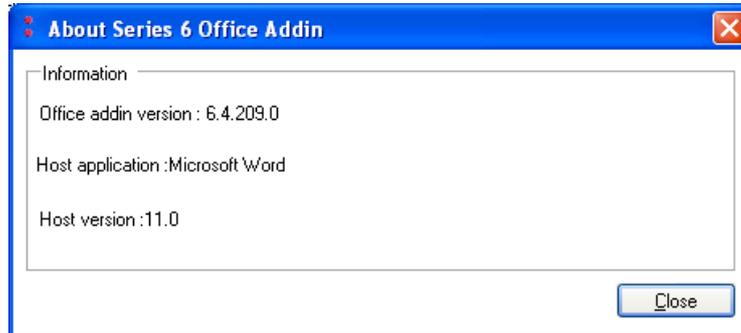
If the check box **Delete mail items when sending to Series 6** is ticked the email would be deleted from Outlook when moved into Series 6.

The Tool Button Style works the same way as for Word, Excel and PowerPoint.

Click the **OK** button once finished.

## About The Office Addin

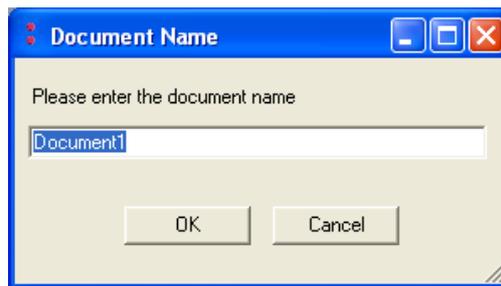
Click the **Invu** menu then select **About** and the following screen will be displayed:



This shows details on the Office Addin version, the host application (i.e. Word) and version. To exit click the **Close** button.

## Manually send a document to the Intray from an MS Application

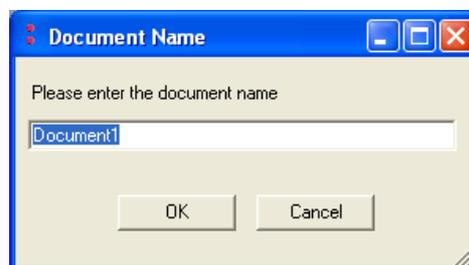
To place an MS file into a user's Inray in Invu click the **Send to my Inray** icon and the following screen will be displayed:



Type in the name of the document and click the **OK** button. The document will then be sent to the Inray.

## Manually File and Save a document from MS Application

To File and Save an MS file into the Filing Cabinets. Click the **File and Save Document** icon and the following screen will be displayed:



Type in the name of the document and click the **OK** button. The document will be displayed in the 'File and Save document' screen.

**GD Office Furniture**

## INVOICE

Customer:  
Invu Services Ltd  
Blisworth Hill Farm  
Stoke Road  
Northamptonshire  
NN7 3DB  
Customer Name: Mrs MacDonald

GD Office Furniture,  
54 Old Kent Road,  
London  
WC2E 5LE  
VAT No: 12121212  
Page 1  
Date: 20/2/08  
Invoice Number: 119425  
Total: 33058.63

1014

| Item Number | Item           | Description             | Item price               | Quantity | Cost            |
|-------------|----------------|-------------------------|--------------------------|----------|-----------------|
| 01010       | Filing Cabinet | Filing cabinet          | 183.00                   | 7        | 1281            |
| 01011       | Filing Cabinet | Executive Deluxe        | 119.00                   | 5        | 595             |
| 00017       | Desk           | Basic                   | 116.00                   | 80       | 9280            |
| 02011       | Drawers        | Executive Deluxe Mobile | 73.00                    | 18       | 1314            |
| 02111       | Cupboard       | Basic                   | 78.00                    | 12       | 936             |
| 01181       | Screens        | Curved Screens          | 79.00                    | 20       | 1580            |
| 02100       | Bookcases      | Economy                 | 46.00                    | 14       | 644             |
| 01000       | Storage Unit   | Corner storage unit     | 141.00                   | 10       | 1410            |
| 01220       | Chair          | Deluxe Chair            | 122.00                   | 42       | 5124            |
| 01221       | Chair          | Basic                   | 130.00                   | 12       | 1560            |
| 02111       | Cupboard       | Basic                   | 78.00                    | 12       | 936             |
| 01191       | Screens        | Curved Screens          | 79.00                    | 20       | 1580            |
|             |                |                         | <b>Sub Total</b>         |          | <b>26240</b>    |
|             |                |                         | <b>INVOICE SUB TOTAL</b> |          | <b>26240</b>    |
|             |                |                         | <b>INVOICE VAT TOTAL</b> |          | <b>4023.63</b>  |
|             |                |                         | <b>INVOICE TOTAL</b>     |          | <b>33058.63</b> |

If you have any question please do not hesitate to contact us on :-  
01604 676767 or 01604 676768 Quote your Invoice Number.

**File and Save**

Step 1 What sort of document is this?  
[Dropdown menu]

Step 2 Choose a filing location.  
[Text area]  
[Create Folder]

Step 3 Choose a Standard Document.  
[Dropdown menu]

Step 4 Enter the Document Reference information.  
[Text area]

Step 5 Press 'File and Save' to store  
[File and Save] [File and Reply]

Summary and Notes | File and Save

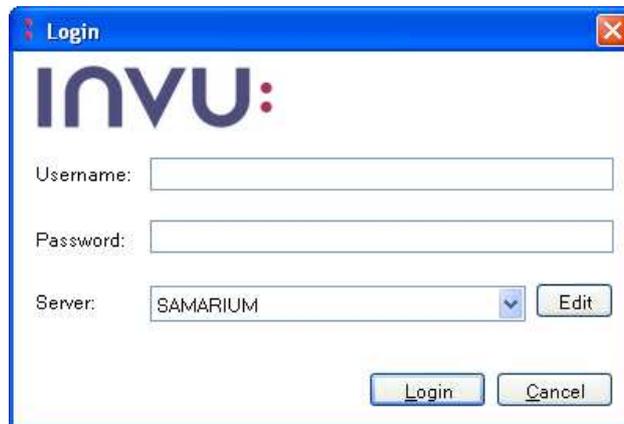
File and Save the document as normal.



**APPENDIX**

## APPENDIX 1 - LOGIN SCREEN IF OUTSIDE THE NETWORK

If the user is outside the network the following screen will be displayed:



The screenshot shows a Windows-style dialog box titled "Login". At the top left is the INVU logo. Below it are three input fields: "Username:" with an empty text box, "Password:" with an empty text box, and "Server:" with a dropdown menu showing "SAMARIUM" and an "Edit" button to its right. At the bottom of the dialog are two buttons: "Login" and "Cancel".

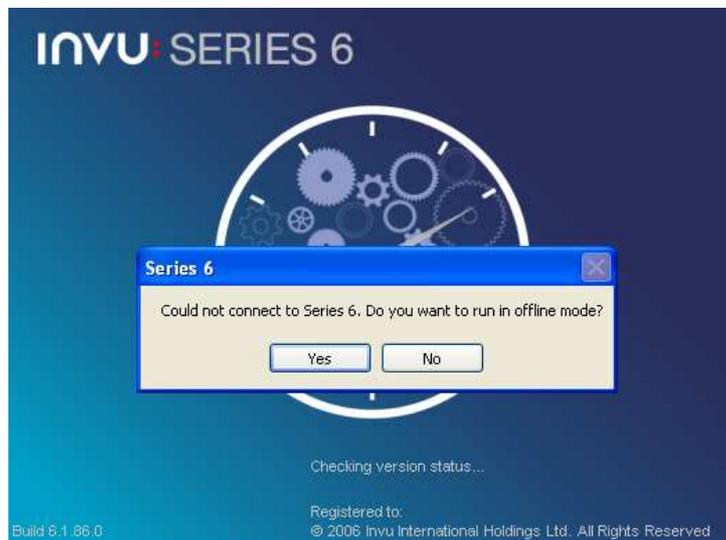
The user will need to login. Enter the Server location\username and password. Check the Server is correct or choose from the drop down list. Click the **Login** button.

## APPENDIX 2 - LOGIN OFFLINE

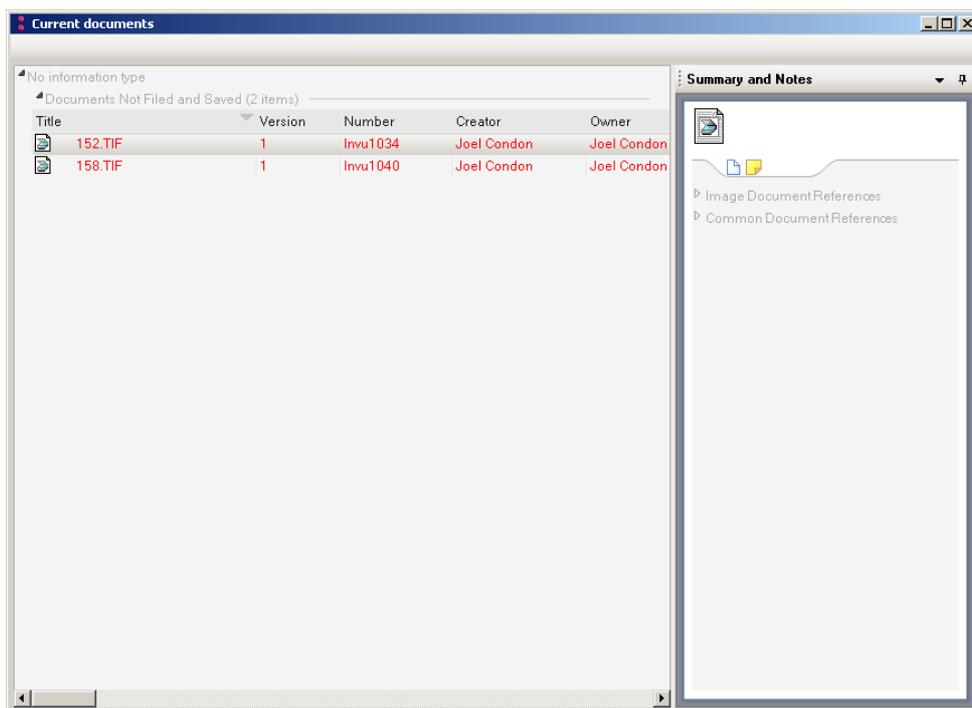
This will allow you to login and work with current documents when not connected to the Series 6 system. To login offline to Invu, first double click the following Icon which will be located on the desktop.



Series 6 will start to login and the following message will be displayed:



Click the **Yes** button and the Current documents section will be displayed:



In offline mode you will only be able to see documents which are Checked out (See page 108) or sent to Workspace (See page 195) as a read only copies.

Once finished in offline mode click the **X** button in the top left of the screen.

**NB:** You must have logged into Series 6 on the network once before the offline mode will work.