

# SIRE UNIVERSITY

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## SIRE WebCenter S4001 Certification Training Workbook

Student Name: \_\_\_\_\_

SIRE Technologies, Inc.  
3676 West California Ave  
Unit B100  
Salt Lake City, UT 84104

[www.siretechnologies.com](http://www.siretechnologies.com)  
[training@siretechnologies.com](mailto:training@siretechnologies.com)  
Telephone: (801) 977-8608  
Fax: (801) 977-8775

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## Welcome

Welcome to the SIRE Product Suite, SIRE Technologies innovative and powerful electronic document management solution. SIRE is an integrated document management solution that couples traditional document management features with additional non-traditional capabilities. This unique approach allows any size enterprise to handle every aspect of document management from capture, storage, and retrieval to workflow and records retention. The SIRE Product Suite consists of seven components that provide a complete range of document management solutions to streamline processes and to enhance performance in every aspect of your document management. SIRE allows you to manage your information more effectively and thereby provides you with a significant competitive advantage in today's technology-driven world. Productivity advantages of incorporating SIRE into the day-to-day operations of your organization include:

- Improved organizational workflow: Authorized users have simultaneous access to the very same document regardless of physical location, and documents don't have to be stored in one place.
- Superior management: Work in queue can be viewed and reassigned electronically.
- Rapid document retrieval and distribution: Documents can be found at the click of a button as opposed to traditional lengthy archive recovery at possibly remote locations. Documents can then be circulated just as easily via email or printed for mail distribution.
- Enhanced document safety: SIRE eliminates lost or misfiled documents. Documents are also protected by online security, and additional off-site storage of electronic information can be accomplished at much lower than current costs.
- Compliance with federal legislation: Controlled access to documents makes it easy for any organization to comply with federal legislation such as HIPAA and Sarbanes-Oxley.
- Revision control: SIRE lets you keep track of changes and additions made by various authorized users.
- Cost benefits: Reducing paper-based support systems and processes through an electronic document management system results in significant cost reductions in office space, personnel, storage space, cabinets, and paper.

## **Intended Audience**

Investing in effective user training generates immediate and long-term advantages for all organizations by bridging the gap between simply using an application and taking full advantage of its extensive capabilities. SIRE WebCenter Training is intended for the end user and focuses on its main functions and responsibilities.

## **Course Objective**

The purpose of this training workbook is to guide you through the first steps of using SIRE WebCenter. It walks you through the most important features and applications of the product. Exercises are designed to test your retention and maximize your benefit in using SIRE. The quick reference guide that is included is an aid you can keep for future use. This SIRE WebCenter course provides the necessary information for end-users to adequately perform all WebCenter related tasks. This course will help you:

- Access WebCenter
- Become familiar with the WebCenter Interface
- Master all WebCenter related tasks
- Easily search and view documents in WebCenter

## **Overview - SIRE WebCenter**

SIRE WebCenter is the Web-based application used to access and view files in your SIRE system, manage items in your workflow queue that require your action or approval, access and submit forms created through the SIRE Forms application. The following modules introduce the WebCenter application in general terms, and then detail tasks within specific functional categories accessed through WebCenter. Note that some SIRE configurations do not include all SIRE modules, and as such might not display certain navigation tabs displayed in this training.

## **Module 1 - Getting Started with WebCenter**

This module will teach you how to navigate the SIRE WebCenter interface and use SIRE WebCenter, to search and view your documents, workflow and forms. You will also learn how to work with all menu items and tools.

Upon completion of this module, you will be able to:

- ✓ Understand the concept of SIRE WebCenter
- ✓ Log into SIRE WebCenter
- ✓ Use the SIRE WebCenter Interface

### **1.1 Introducing SIRE WebCenter**

WebCenter is a powerful tool for searching and viewing your electronic documents securely from virtually anywhere. You can use WebCenter from any PC with a Web browser and Internet connection. Once documents are scanned, indexed, and submitted, you can use WebCenter to search and view any document via the web. WebCenter, also allows you to download documents and/or selected pages of a document so you can work with them. In addition WebCenter allows you to view and access your Forms and Workflow.

### **1.2 Logging In**

To open WebCenter, double-click on the SIRE WebCenter icon on your desktop (if available) or:

1. Navigate to the online location of your SIRE WebCenter application.
2. Enter your Username and Password.
3. Check the “Remember Me On This Computer” checkbox to save a cookie on your computer for future logins.
4. To automatically log into SIRE WebCenter when you boot your

computer, check the “Auto Login On This Computer” checkbox.

5. Press the Login button. Upon successful login, the SIRE WebCenter Home page appears.



### 1.3 Changing Your Password

1. On the SIRE WebCenter Home Page, click the Home > Preferences link.



2. On the User Preferences page, click the Change Password link under the My Account heading at the bottom left of the page. The Change Password page will appear.



3. On the Change Password page, enter your current password in the Password field, and your new password in the New Password and Confirm Password fields.
4. Press the Save button.

### 1.4 Logging Out of WebCenter

It is very important to log out of your session of WebCenter as apposed to just closing your browser window. From any page in

WebCenter, click the Logout: [username] link at the upper right corner of the page. You are logged out of the SIRE WebCenter application.



## 1.5 Introduction to the WebCenter Interface

The SIRE WebCenter Home Page displays a series of tabs, each of which features links to functions to which you have been given permission to access, including:



### Home Tab

The Home Tab is the default location to which you will be directed when you first log into SIRE WebCenter. It displays panels that let you perform several WebCenter functions directly from the Home page, including:

**Simple Search:** Identify files within the SIRE filing system that are described by index values matching your submitted search criteria.

**Default Forms:** Access documents used to kick-off workflow processes.

**Workflow Queue:** View items which require your approval or action to progress through the business workflow process.

**Bookmarks:** View all bookmarks created within the SIRE filing system.

Additionally, the links directly below the list of tabs let you perform general functions within the SIRE WebCenter application, including:

Preferences: Control the default display options within SIRE WebCenter

Bookmarks: Display all bookmarks created within the SIRE file system

Folder Packs: Display all folder packs created within the SIRE file system

### **Documents**

The Documents tab lets you use a variety of search types to identify and retrieve folders and files stored within the SIRE file system.



### **Workflow**

The Workflow tab lets you view all business process items that require your approval or action to proceed through the business workflow. You can take direct action on these items using the functions available within the Workflow tab.



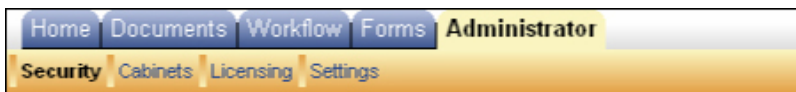
### **Forms**

The Forms tab lets you access documents used to kick-off workflow processes.



### Administrator

If you have been granted administrative access to the SIRE WebCenter application, the Administrator tab will also be displayed as part of your WebCenter interface. The Administrator tab lets you access management functions for the SIRE Solution Suite, including: Security, Cabinets, Licensing, and Settings.



### Meetings

The Meetings tab lets users of the SIRE Agenda Plus application create agendas for upcoming legislative meetings.

## Module 2 – Basic WebCenter Tasks

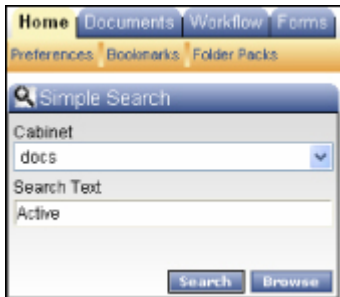
WebCenter makes commonly used tasks available directly from the WebCenter Home Page, where users are first directed when they log into WebCenter. The tasks described in this module can be performed from the various panels on the WebCenter Home Page, or from the links immediately below the Home Tab (Preferences, Bookmarks, and Folder Packs).

Upon completion of this module, you will be able to:

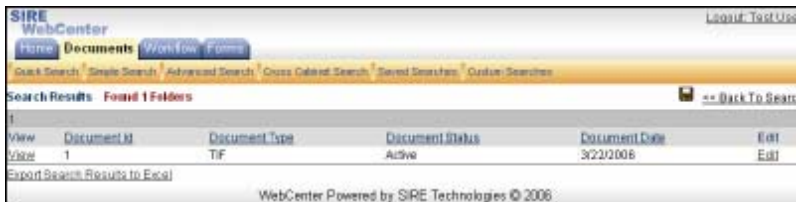
- ✓ Performing searches
- ✓ Create new folders
- ✓ Access Workflow Queues
- ✓ Work with Bookmarks
- ✓ Work with Folder Packs

## 2.1 Performing a Simple Search

1. From the WebCenter Home Page, select the cabinet you will search for desired documents from the Cabinet drop-down menu on the Simple Search panel.
2. Enter search criteria you will compare to index values of documents in the selected cabinet in the Search Text field.



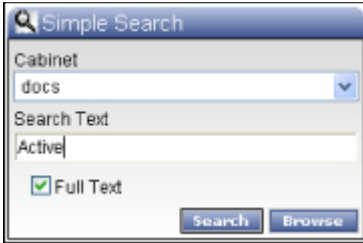
3. Press the Search button. The search is performed against the selected cabinet. The Documents Tab > Search Results Page is displayed, which features links to any documents that match your input search criteria.



### 2.1.1 Performing a Full-Text Simple Search

When the cabinet you select to search includes folders that have undergone Optical Character Recognition (OCR), and are configured for full-text searching, you can identify documents that contain text content that matches your search criteria.

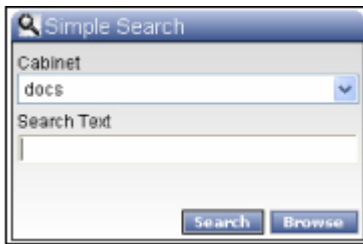
1. From the WebCenter Home Page, select the cabinet you will search for desired documents from the Cabinet drop-down menu on the Simple Search panel.
2. Enter search criteria you will compare to the text of documents in the selected cabinet in the Search Text field.



3. Check the Full Text checkbox.
4. Press the Search button. The search is performed against the selected cabinet. The Documents Tab > Search Results Page is displayed, which features links to any documents that contain text that matches your input search criteria.

## 2.2 Browsing Cabinet Contents

1. From the WebCenter Home Page, select the cabinet you will browse from the Cabinet drop-down menu on the Simple Search panel.



2. Press the Browse button. The Documents Tab > Search Results Page is displayed, which features links to all folders contained in the selected cabinet.

## 2.3 Creating New Folders Using Default Forms

If your SIRE system includes the SIRE Forms application, and you are given access to this application as a user, the Forms Tab will be displayed as part of the horizontal navigation tabs at the top of your WebCenter interface. Additionally, the Default Forms panel will be displayed on the WebCenter Home page.

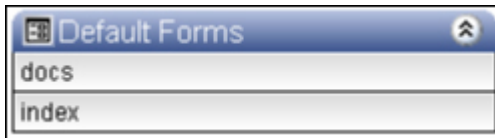
The Forms tab in WebCenter lets you perform a variety of functions using forms created in the separate SIRE Forms applications. The

Default Forms panel displayed on the WebCenter Home page lets you quickly create a new folder in any of the displayed SIRE Cabinets.

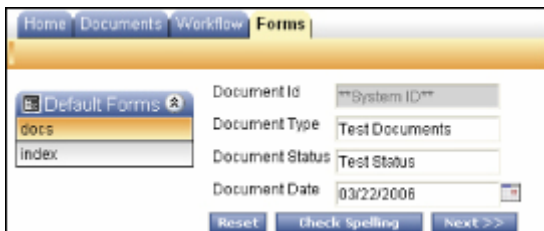
1. If the Default Forms panel on the WebCenter Home page is collapsed, click the downward arrow to expand the panel.



2. Click the Cabinet in which you will create a new folder. The Forms Tab page appears.

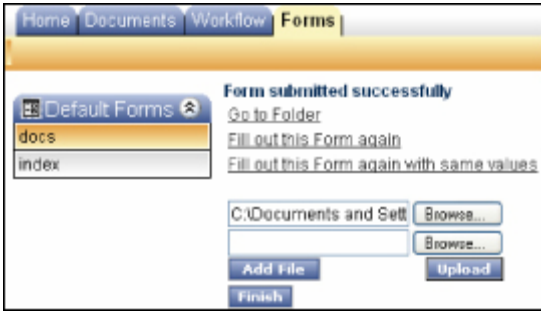


3. On the Forms Tab page, enter values for all indexes you will populate.
4. Press the Next button. The input index values appear for you to confirm accuracy.
5. Press the Next button. A page informing you that the Form was submitted successfully is displayed.



6. On the Form submitted successfully page, you can perform any of several operations:
7. Click on any of the self-explanatory links to view the newly created folder or submit the form again.
8. Import electronic files into the newly created folder using the Browse and Upload buttons. Create new upload fields to add multiple files by pressing the Add File button.
9. Press the Finish button. A page thanking you for filling out a

SIRE Form appears.



## Notes

### 2.4 Accessing Workflow Queues

If your SIRE system includes the SIRE Workflow application, and you are given access to this application as a user, the Workflow Tab will be displayed as part of the horizontal navigation tabs at the top of your WebCenter interface. Additionally, the Workflow Queues panel will be displayed on the WebCenter Home page.

The Workflow Tab in WebCenter lets you manage all business process items that require your action or approval. The Workflow Queues panel displayed on the WebCenter Home page lets you quickly view and take action on all business process items requiring your attention.

1. If the Workflow Queues panel on the WebCenter Home page is collapsed, click the downward arrow to expand the panel. The Workflow Queue panel expands and displays the name of each workflow with a number to the right, in parentheses, indicating the number of instances of that specific workflow.



2. Click the workflow item you will access. The Workflow Item page appears, and displays all instances of the selected workflow.



3. Select the desired instance of the selected workflow item, and

take action on it as described in the Workflow chapter of this manual.

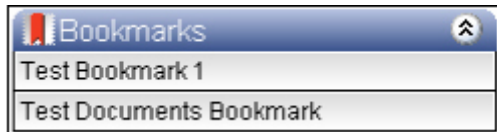
## 2.5 Accessing Bookmarks

The Bookmarks panel displayed on the WebCenter Home page lets you quickly access folders you have frequent need to view.

1. If the Bookmarks panel on the WebCenter Home page is collapsed, click the downward arrow to expand the panel.



2. Click the Bookmark you will view. The first file in the bookmarked folder appears within the Documents Tab.



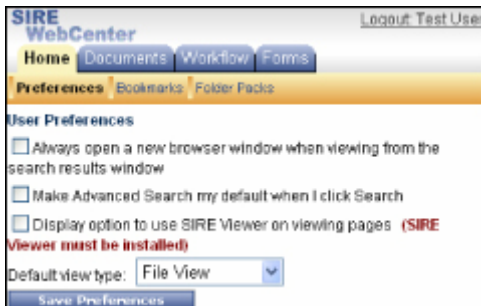
## 2.6 Setting User Preferences

WebCenter allows users to configure certain preferences to enhance their WebCenter work environment.

1. From anywhere within the WebCenter Home tab, click the Preferences link. The User Preferences page appears.



2. On the User Preferences page, check the checkboxes for all preferences you will set, including:



**Always open a new browser window when viewing from the**

**search results window:**

WebCenter opens a new browser window when viewing documents.

**Make Advanced Search my default when I click Search:**

WebCenter displays the Advanced Search panel by default when searching within the Documents tab.

**Display option to use SIRE Viewer on viewing pages:**

When the SIRE NetViewer is installed, this sets WebCenter to use the NetViewer when viewing all documents.

3. From the Default view type drop-down menu, select the format in which folders will be displayed when viewing documents in WebCenter. Display options include:

**File View:**

The first file in the folder will be displayed in the browser as an HTML document.

**Folder View:**

A list of files within the selected folder will be displayed.

**First Native File:**

Brings up the first page of the document in its native file format.

**First PDF:**

Brings up the first page of the document in PDF format.

**PDF All:**

Downloads the entire document for viewing as a single PDF file.

**SIRE Viewer:**

Brings up all documents in the SIRE viewer. The SIRE Net Viewer must be installed on your machine to use this option.

4. Press the Save Preferences button to save your preferences. You

may need to log out and log back into WebCenter for some of these preferences to take effect.

## 2.7 Using Bookmarks

As detailed above, bookmarks let you quickly access folders you have frequent need to view. You can access bookmarks directly from the Bookmarks panel displayed on the WebCenter Home Page, or you can click the Bookmarks link beneath the Home Tab.

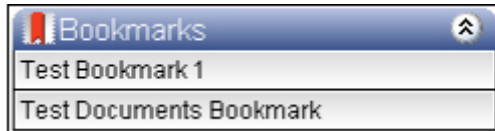
1. From anywhere within the Home Tab, click the Bookmarks link. The Bookmarks page appears.



2. On the Bookmarks page, if the Bookmarks panel is collapsed, click the downward arrow to expand the panel.



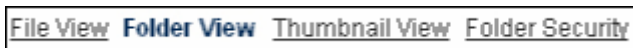
3. Click the Bookmark you will view. The first file in the bookmarked folder appears within the Documents Tab.




### 2.7.1 Adding Bookmarks

You can add a new Bookmark whenever the Folder View for a cabinet folder is displayed.

1. Perform a search, or browse to view the folder contents of a cabinet.
2. Click the Folder View link to ensure all folder contents are displayed.




3. Click the Bookmark this Folder icon  located on the far right side of the Folder View page, beneath the Back to Results link.

A pop-up window appears.

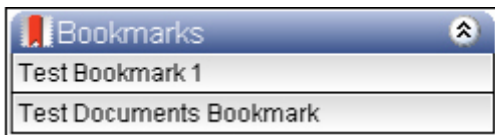
4. On the pop-up window, enter a description for the new Bookmark.




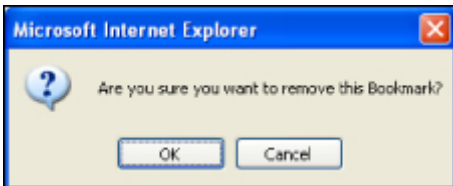
5. Press OK. The new bookmark is created. You can confirm the creation of the bookmark by ensuring that the Remove Bookmark icon  appears on the Folder View of the cabinet folder, in the location where the Bookmark this Folder icon previous appeared.

### 2.7.2 Deleting Bookmarks

1. On the Bookmarks panel on the Home Page or the Bookmarks Page, click the bookmark you will delete. The bookmarked folder appears.
2. Click the Folder View link to ensure all folder contents are displayed.



3. Click the Remove Bookmark icon  located on the far right side of the Folder View page, beneath the Back to Results link.
4. When prompted whether you want to delete this bookmark, press the OK button. The bookmark is removed from the system and no longer appears on the WebCenter Home Page > Bookmarks panel or the Bookmarks Page.



## 2.8 Using Folder Packs

Folder Packs allow you to group folders by project or similar classification for easy reference. For example, an accountant might be working on a project that requires review of all 2006 invoices, stored in various folders and cabinets throughout the SIRE system. The accountant first creates a folder pack called “2006 Invoices.” Then, the accountant searches for all folders containing 2006 invoices and “adds” these folders to the “2006 Invoices” folder pack. When folders are “added” to a folder pack, a user is actually creating shortcuts to these folders. The shortcuts appear in the folder pack.

1. From anywhere within the Home Tab, click the Folder Packs link. The Folder Packs page appears.



2. On the Folder Packs page, if the Folder Packs panel is collapsed, click the downward arrow to expand the panel.



3. Click the Folder Pack you will view. A table displaying all folders within the selected folder pack appears.

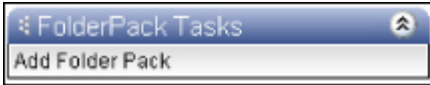


4. Click the Open link to the left of the folder you will view.

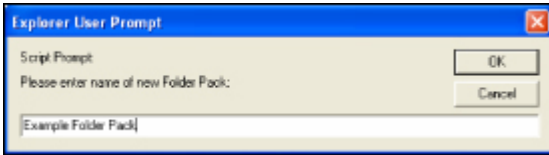


### 2.8.1 Adding Folder Packs

1. From the Folder Packs page, click the Add Folder Pack link in the Folder Pack Tasks panel. A pop-up window appears.



2. On the pop-up window, enter a name for the new Folder Pack.



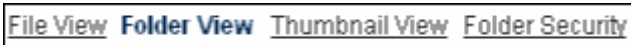
3. Press OK. The new folder pack is created, and appears in the list of folder packs displayed in the Folder Packs panel.




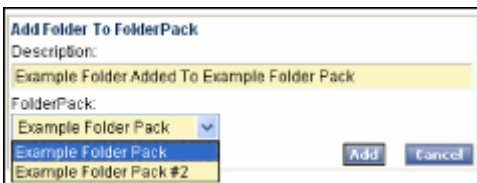
4. To add folders to the newly created Folder Pack, refer to the Adding Folders to Folder Packs task, described below.

### 2.8.2 Adding Folders to Folder Packs

1. Perform a search, or browse to view a folder you will add to a folder pack.
2. Click the Folder View link to ensure all folder contents are displayed.



3. Click the Add this Folder to a Folder Pack icon  located on the far right side of the Folder View page, beneath the Back to Results link. A pop-up window appears.
4. On the pop-up window, enter a description of the folder to be added to the folder pack in the Description field.



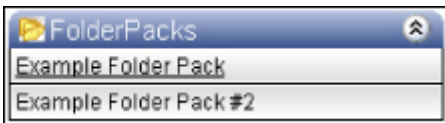
5. Select the Folder Pack to which the folder will be added from the Folder Pack drop-down menu.

6. Press the Add button. A second pop-up window appears, informing you that the folder was successfully added to the Folder Pack.



### 2.8.3 Deleting Folders from Folder Packs

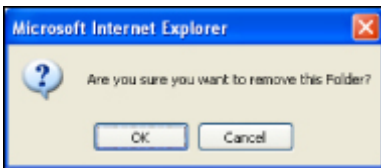
1. On the Folder Packs page, click the Folder Pack from which you will delete folders. A table displaying all folders within the selected folder pack appears.



2. Click the Delete link in the far right column of the Folder Pack table for the folder you will delete from the folder pack.



3. When prompted whether you are sure you want to remove this folder, press the OK button. The folder is removed from the folder pack.



## Module 3 – Searching for Documents

This module will teach you how to effectively search for documents using SIRE WebCenter. There are several different methods to choose from to perform your search.

Upon completion of this module, you will be able to:

- ✓ Use all search methods in WebCenter
- ✓ Use saved search options
- ✓ Using Custom Search options

### **3.1 Introduction to Document Searches**

Folders and files stored in the SIRE system can be easily retrieved using any of six search methods available in WebCenter, described below. All WebCenter searches are accessed through links immediately below the Documents Tab. Clicking on the Documents Tab directs users to the Documents > Simple Search page by default.



#### **Quick Search**

WebCenter lets you designate a single Saved Search as your Quick Search, which you can run easily by clicking the Quick Search link.

#### **Simple Search**

A Simple Search compares input search criteria to folder index fields, or the text content of files. During a Standard Simple Search, folders with index fields that match the search criteria are returned as search results. A Full-text simple search compares search criteria to the text content of files within designated folders, and returns files that contain text that matches the search criteria.

#### **Advanced Search**

An Advanced Search compares input search criteria against single or multiple index fields, and allows more variety of search conditions than a simple search. You can search for index fields “Equal To” (=) or “Greater Than” (>) input criteria, and require search results to meet multiple criteria using “And” and “Or” operators. Full-Text Advanced Searches compare search criteria to

the text content of your files

**Cross Cabinet Search**

A Cross-Cabinet Search performs a Simple Search across multiple file cabinets.

**Saved Search**

WebCenter lets you save and perform commonly-used searches easily without having to input search settings and search criteria again. Saved searches are associated with individual users, and cannot be shared with other users.

**Custom Search**

Custom Searches are similar to saved searches, but are created by a SIRE Administrator using XML files, and made available to multiple users of SIRE WebCenter.

Each of these searches can be performed in either of two modes: Standard and Full-Text. Standard searches compare input search criteria to the index values that describe the contents of folders and files in the SIRE system. Full-Text searches identify files that contain text that matches input search criteria.

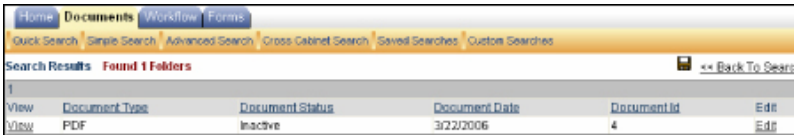
**3.2 Creating a Quick Search**

1. Click on the Saved Searches link immediately beneath the Documents Tab. The Saved Searches page appears, and displays a list of all saved searches.
2. On the Saved Searches page, check the radio button in the Quick Search column for the Saved Search you will designate as the Quick Search. The newly designated Quick Search appears with a green check mark in the Quick Search column.

Search Name	Cabinet Name	Search Type	Quick Search	Delete
Active Index Search	docs	Simple	<input type="radio"/>	X
Example Advanced Search	docs	Advanced	<input checked="" type="radio"/>	X

### 3.2.1 Performing a Quick Search

From anywhere within the Document Tab, click the Quick Search link. The designated Quick Search is automatically performed. The Search Results page appears, and displays all documents matching the search criteria of the Quick Search.



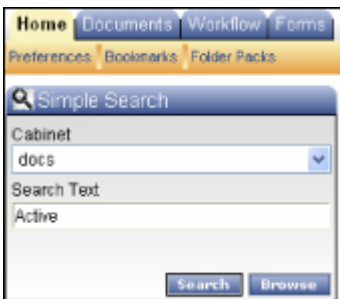
### 3.3 Performing Standard Simple Searches

A Standard Simple Search compares input search criteria to index field values describing folders within a designated cabinet. A Standard Simple Search can be performed from the Simple Search panel on the WebCenter Home Page, or from the Document > Simple Search Page. The following task description details this latter option.

1. Click the Document Tab > Simple Search link.

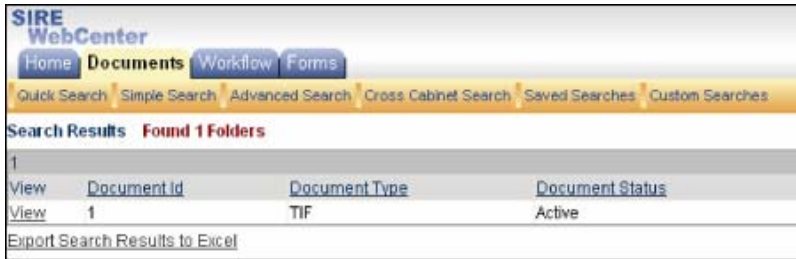


2. From the Cabinet drop-down menu on the Simple Search panel, select the cabinet you will search for desired documents.
3. Enter search criteria you will compare to index values of documents in the selected cabinet in the Search Text field.



4. Press the Search button. The search is performed against the selected cabinet. The Documents Tab > Search Results Page is

displayed, which features links to documents that match your input search criteria.



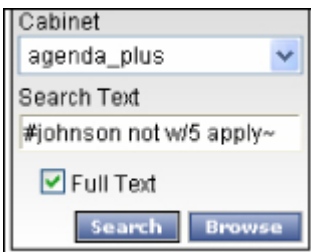
### 3.4 Performing Full-Text Simple Searches

When the cabinet you select to search includes folders that have undergone Optical Character Recognition (OCR), and are configured for full-text searching, you can identify documents that contain text content that matches your search criteria.

1. From anywhere within the Documents Tab, click the Simple Search link.



2. On the Simple Search panel, select the cabinet you will search from the Cabinet drop-down menu.
3. Enter search criteria you will compare to the text of documents in the selected cabinet in the Search Text field, including any connectors, operators, and advanced full-text search options.



4. Check the Full Text checkbox.
5. Press the Search button. The search is performed against the selected cabinet. The Documents Tab > Search Results Page is displayed, which features links to any documents that contain

text that matches your input search criteria.

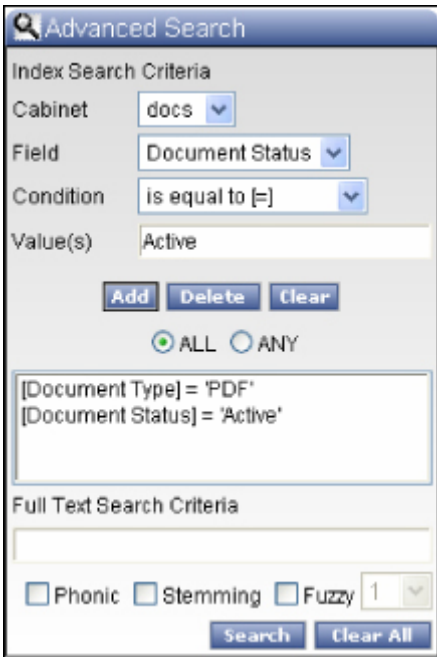
### 3.5 Performing Standard Advanced Searches

Performing Standard Advanced Searches

A Standard Advanced Search compares multiple input search criteria to multiple index field values describing folders within a designated cabinet.



1. From anywhere within the Document Tab, click the Advanced Search link.
2. From the Advanced Search panel > Cabinet drop-down menu, select the cabinet in which you will search for desired documents.



3. From the Field drop-down menu, select the first index field you will compare to the input search criteria.
4. From the Condition drop-down menu, select the type of comparison you will make between the designated index field

and the input search criteria. Options include the following conditional statements:

is equal to =

is greater than >

is less than <

is at least =>

is at most <=

does not equal <>

starts with

contains

ends with

does not start with

does not contain

does not end with

is between

5. In the Value(s) field, enter the search criteria you will compare to the designated cabinet and index field(s).
6. Press the Add button. The input search criteria is added to the list of search criteria that will be compared to the designated cabinet and index field(s).
7. Repeat steps 3 through 6 for all comparisons you will make between input search criteria and the designated cabinet and index field(s).
8. Designate whether you will display search results that match the entire list of search criteria (ALL) or at least one of the search criteria (ANY) by checking the appropriate radio button.
9. To remove a search criteria from the list, highlight the criteria

and press the Delete button.

10. To remove all search criteria from the list, press the Clear button.
11. Press the Search button. The input search criteria are compared to the designated index fields. The Search Results page appears, and displays all/any folders matching the input search criteria.

### **3.6 Performing Full-Text Advanced Searches**

When the cabinet you select to search includes folders that have undergone optical character recognition (OCR), and are configured for full-text searching, you can identify documents that contain textual content that matches your search criteria.

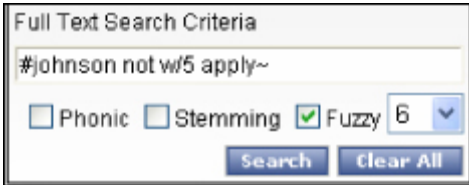
From anywhere within the Document Tab, click the Advanced Search link.

1. From the Advanced Search panel > Cabinet drop-down menu, select the cabinet in which you will search for desired documents.



2. Enter search criteria you will compare to the text of documents in the selected cabinet in the Full-Text Search Criteria field, including any connectors, operators, and advanced full-text search options (see Understanding Full-Text Searches in the SIRE User Basics section for more details).
3. Check the checkbox of any advanced full-text search option: Phonic, Stemming, and Fuzzy Logic. If Fuzzy Logic is checked, designate a level of fuzziness in the drop-down menu to the right of the Fuzzy Logic checkbox. See the “Advanced Full-Text Search Options” section for more details.
4. Press the Search button. The search is performed against the selected cabinet. The Documents Tab > Search Results Page is

displayed, which features links to any documents that contain text that matches your input search criteria.

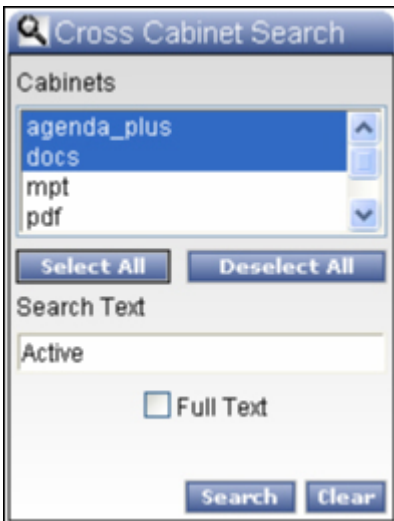


### 3.7 Performing Standard Cross-Cabinet Searches

1. From anywhere within the Document Tab, click the Cross Cabinet Search link.



2. From the Cross Cabinet Search panel > Cabinets drop-down menu, select all cabinets in which you will search for desired documents. When selecting cabinets, hold down the Ctrl key to select multiple non-consecutive cabinets or the Shift key to select multiple consecutive cabinets.
3. Enter search criteria you will compare to index values of documents in the selected cabinets in the Search Text field.




4. Press the Search button. The search is performed against the selected cabinets. The Documents Tab > Search Results Page is displayed, which features links to any documents that match

your input search criteria.

### 3.8 Performing Full-Text Cross-Cabinet Searches

1. From anywhere within the Document Tab, click the Cross Cabinet Search link.
2. From the Cross Cabinet Search panel > Cabinets drop-down menu, select all cabinets in which you will search for desired documents. When selecting cabinets, hold down the Ctrl key to select multiple non-consecutive cabinets or the Shift key to select multiple consecutive cabinets.
3. Enter search criteria you will compare to the text of documents in the selected cabinets in the Search Text field, including any connectors, operators, and advanced full-text search options (see the Understanding Full-Text Searches section in SIRE User Basics for more details).
4. Check the Full Text checkbox.
5. Press the Search button. The search is performed against the selected cabinets. The Documents Tab > Search Results Page is displayed, which features links to any documents that contain text that matches your input search criteria.

### 3.9 Creating Saved Searches

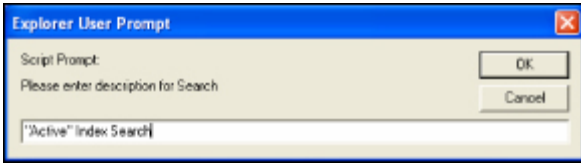
1. Perform a search of any type, as described in the preceding and following task descriptions. The Documents > Search Results page appears.
2. On the Documents > Search Results page, click the Save Search icon  to the immediate left of the Back to Search link. A pop-up window appears.



View	Document Type	Document Status	Document Date	Document Id	Edit
View	TIF	Active	3/2/2006	1	Edit
View	PDF	Inactive	3/2/2006	4	Edit

3. On the pop-up window, enter a description for the new Saved

Search.



4. Press OK. The new Saved Search appears in the list of saved searches displayed on the Documents > Saved Searches page.



### 3.9.1 Performing Saved Searches

1. From anywhere within the Document Tab, click the Saved Searches link. The Saved Searches page appears, and displays a table of all saved searches you have created.



2. Click the Search Name link of the saved search you will perform. The search page corresponding to the type of the selected Saved Search appears, and contains the search criteria of the Saved Search.
3. On the Search Page, press the Search button. The Search Results page appears, and displays all documents matching the search criteria of the Saved Search.

### 3.10 Performing Custom Searches

1. From anywhere within the Document Tab, click the Custom Searches link.

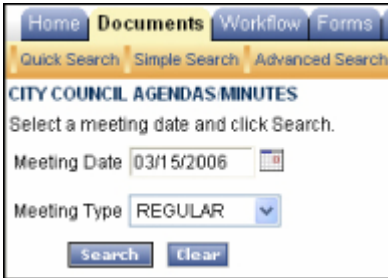


2. From the Custom Searches panel, click the link for the Custom Search you will perform. A page specific to the selected search

appears.



3. On the selected search page, enter required input search criteria in all appropriate fields.



4. Press the Search button. The Search Results page appears, and displays all documents matching the search criteria of the Custom Search.

## **Module 4 - Viewing Documents in WebCenter**

There are several different modes you can use to view your files in WebCenter. When you browse file cabinet contents, or search for specific folders within a SIRE file cabinet, the format in which those folders are displayed depends on the File View Preference setting.

Upon completion of this module, you will be able to:

- ✓ Set file view preferences
- ✓ Use the file view mode
- ✓ Use the folder view mode
- ✓ Use the thumbnail view mode

### **4.1 Setting the File View Preference**

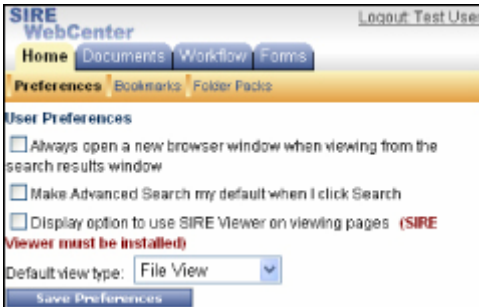
To set your file view preferences:

1. From anywhere within the Home tab, click the Preferences link.

The User Preferences page appears.



2. From the User Preferences page > Default View Type dropdown menu, select the format in which folders will be displayed when viewing documents in WebCenter. Display options include:



**File View:** The first file in the folder will be displayed in the browser as an HTML document.

**Folder View:** A list of files within the selected folder will be displayed.

**First Native File:** Brings up the first page of the document in its native file format.

**First PDF:** Brings up the first page of the document in PDF format.

**PDF All:** Downloads the entire document for viewing as a single PDF file.

**SIRE Viewer:** Brings up all documents in the SIRE viewer. The SIRE Net Viewer must be installed on your machine to use this option.

3. Press the Save Preferences button to save your preferences. You may need to log out and log back into WebCenter for the preference to take effect.

## 4.2 Introduction to the Field View Mode

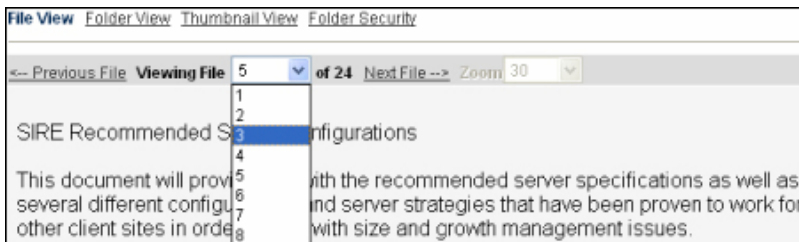
When you set File View as your preferred display format, or click the File View link when viewing the contents of a selected SIRE folder, the first file within the folder is displayed by default.

Additionally, the File View Mode offers a variety of options to select, view, organize, and download the files within a selected folder.



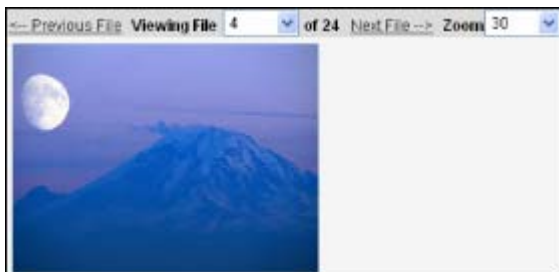
### 4.2.1 Selecting a File to View in File View Mode

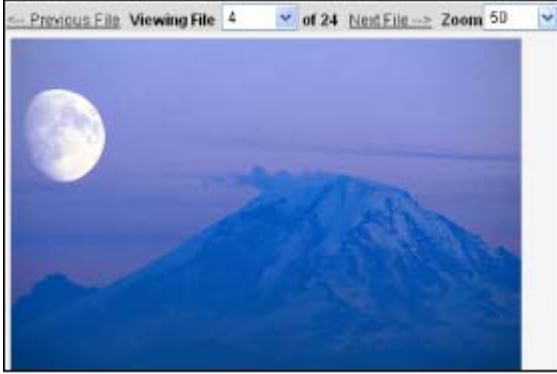
From the WebCenter File View page, select the file you will view from the Viewing File drop-down menu. The file is displayed in the view panel. Additionally, you can click either the Previous File or Next File links to display the preceding or next file.



### 4.2.2 Controlling File Magnification in File View Mode

From the WebCenter File View page, select the magnification level at which you will view the file from the Zoom drop-down menu. The file is magnified or minimized accordingly.





### 4.2.3 Downloading Files in the File View Mode

1. From the WebCenter File View page, click any of the links at the bottom of the page to download the currently displayed file, or all files within the selected folder. Options include:

[Download Native File](#) [Download File as PDF](#) [Download All as PDF](#) [Download All as MPT](#) [Download a Range of Pages](#)

**Download Native File:** The currently displayed file will be downloaded in its native format.

**Download File as PDF:** The currently displayed file will be converted to a PDF and downloaded.

**Download All as PDF:** All files within the currently selected folder will be converted to PDF files and downloaded.

**Download All as MPT:** All files within the currently selected folder will be converted to a Multi-Page TIF file and downloaded.

**Download a Range of Pages:** A designated range of pages will be converted to either a PDF or MPT file and downloaded. For a description of downloading a range of pages, proceed to step 2.

2. After clicking the Download a Range of Pages link, the Download Range of Pages page appears.
3. Select whether you will download the designated pages as a PDF file or a Multi-Page TIF by checking the appropriate checkbox in the File Format area.
4. In the Custom Range field, designate the pages you will

download. You can designate a range of pages in which the first page and the last page of the range are separated by a hyphen, a list of single pages separated by commas, or any combination of these two options.

**Download Range of Pages**

**File Format**  
 Download as PDF  Download as MPT

**Custom Range**  
4-8,18,20-22 (i.e. 1-5,7,13)

---

**Pages to Download**  
The maximum number of pages you can download at one time is: 50  
The selected document contains 24 pages.

5. Press the Download button.

### 4.3 Introduction to the File View Mode

When you set Folder View as your preferred display format, or click the Folder View link when viewing the contents of a selected SIRE folder, a list of files within the selected folder is displayed.



Additionally, the Folder View Mode offers a variety of options to select, view, organize, and download the files within a selected folder.

Home Documents Workflow Forms  
Quick Search Simple Search Advanced Search Cross Cabinet Search Saved Searches Custom Searches

File View **Folder View** Thumbnail View Folder Security << Back To Results

**Folder Information** Edit Delete Download All as PDF Download all as MPT Download a Range of Pages


Document_Id	Name	Type	Date_Received	Date_Expired	Status
1	Mixed Types	Mixed Types			Active

Folder Files (24)


#	R/C	File Description
1		File1.bmp
2		File2.doc
3		File3.gif
4		File4.jpg
5		File5.pdf
6		File6.tif
7		File7.tif

Files to Add  
  
   
Select File

### 4.3.1 Selecting a File to View in the Folder View Mode

From the WebCenter Folder View page, select the file and press the Open with Web viewer icon . A new window opens to display the selected file.

### 4.3.2 Downloading Files in the Folder View Mode

1. From the WebCenter Folder View page, perform one of the following:
2. Press the Download File button .
3. Click any of the links to the right of the Folder Information section header to download all files, or a designated range of pages within the displayed folder. Options include:

[Download All as PDF](#) [Download all as MPT](#) [Download a Range of Pages](#)

**Download All as PDF:** All files within the currently selected folder will be converted to PDF files and downloaded.



**Download All as MPT:** All files within the currently selected folder will be converted to a Multi-Page TIF file and downloaded.

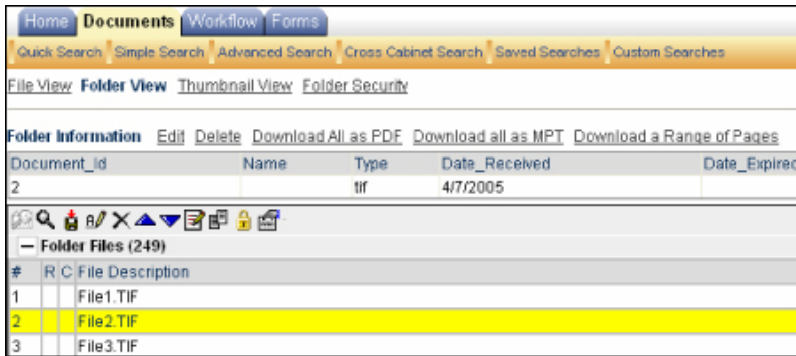
**Download a Range of Pages:** A designated range of pages will be converted to either a PDF or MPT file and downloaded. For a description of downloading a range of pages, refer to step 2 of the Downloading Files in the File View Mode section.

### 4.3.3 Organizing Contents in Folder View Mode

You can change the order of files displayed in a folder, as follows:

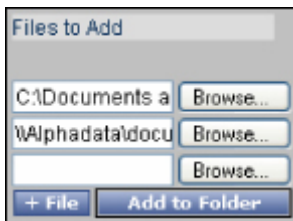
From the WebCenter Folder View page, select the file you will move from the displayed list of files in the folder.

Click the Move Up  or Move Down  icons until the selected file is in the desired position.




### 4.3.4 Adding Files to a Folder in Folder View Mode

1. From the WebCenter Folder View page, press the Browse button in the Files to Add section on the far right of the page.
2. Navigate to the file you will add to the folder. Press OK.
3. For additional files, press the + File button and repeat steps 1 and 2 for each file.



4. Press the Add to Folder button. The selected files are added to the designated folder, and a message appears informing you that the upload was successful for each of the added files. The files appear at the bottom of the list of files in the folder.

### 4.3.5 Renaming a File in the Folder View Mode


1. From the WebCenter Folder View page, select the file you will rename.
2. Click the Rename File icon . A pop-up window appears.
3. On the pop-up window, enter a new name for the file. Press OK.

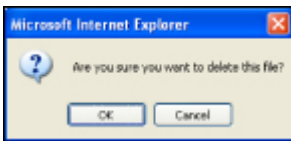


4. The renamed file appears in the list of displayed files.

#	R	C	File Description
1			File1.TIF
2			ExampleRenamedFile
3			File3.TIF


### 4.3.6 Deleting Files from a Folder in the Folder View Mode

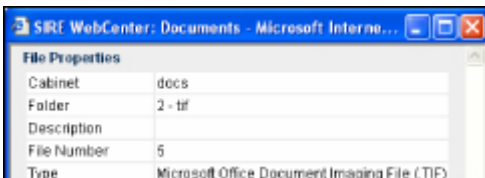
1. From the WebCenter Folder View page, select the file you will delete.
2. Click the Delete File icon . A pop-up window appears.



3. On the pop-up window, confirm that you will delete the selected file by pressing OK. The selected file is removed from the folder, and no longer appears in the list of displayed files.

### 4.3.7 Viewing File Properties in the Folder View Mode

From the WebCenter Folder View page, click the File Properties icon . A pop-up window appears, and displays all properties associated with the selected file.

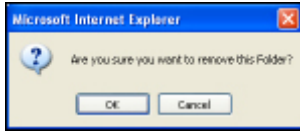


### 4.3.8 Deleting a Folder in the Folder View Mode

1. From the WebCenter Folder View page, click the Delete link to the right of the Folder Information section header. A pop-up window appears.




2. On the pop-up window, confirm that you will delete the selected folder by pressing OK. The selected folder is removed from the file cabinet, and no longer appears in search results.



### **4.3.9 Editing Folder Indexes in the Folder View Mode**

1. From the WebCenter Folder View page, click the Edit link to the right of the Folder Information section header.



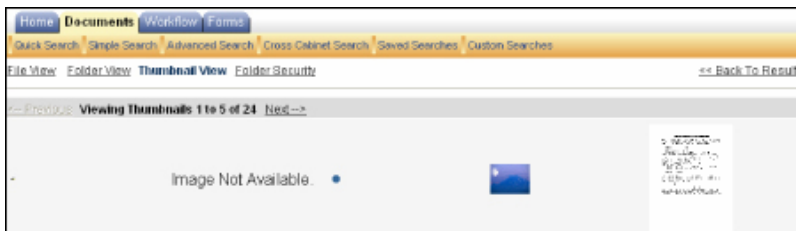
2. On the Edit Folder Indexes page, edit index values as desired.
3. Press the Update Folder button . The folder index values are updated in the SIRE system.

### **4.4 Introduction to the Thumbnail View Mode**

When you click the Thumbnail View link when viewing the contents of a selected SIRE folder, a series of small images, representing each of the files within the selected folder, is displayed.



The Thumbnail View lets you easily identify desired files by their physical appearance.



#### **4.4.1 Selecting a File to View in the Thumbnail View Mode**

From the WebCenter Thumbnail View page, click the thumbnail image of the file you will view. The selected file is opened and displayed in the WebCenter File View Mode.

#### **Notes**