

DOCUMENT TEMPLATES

SCAN WORX

About Document Templates



- The create button enables user to open any application and associated templates. The associated templates are predefined by an administrator and usable by all Invu system users. Letter heads can be setup from within Invu on applications such as Microsoft Word or standard templates for Microsoft Excel.
- **NB:** The following can only be done by a System Administrator

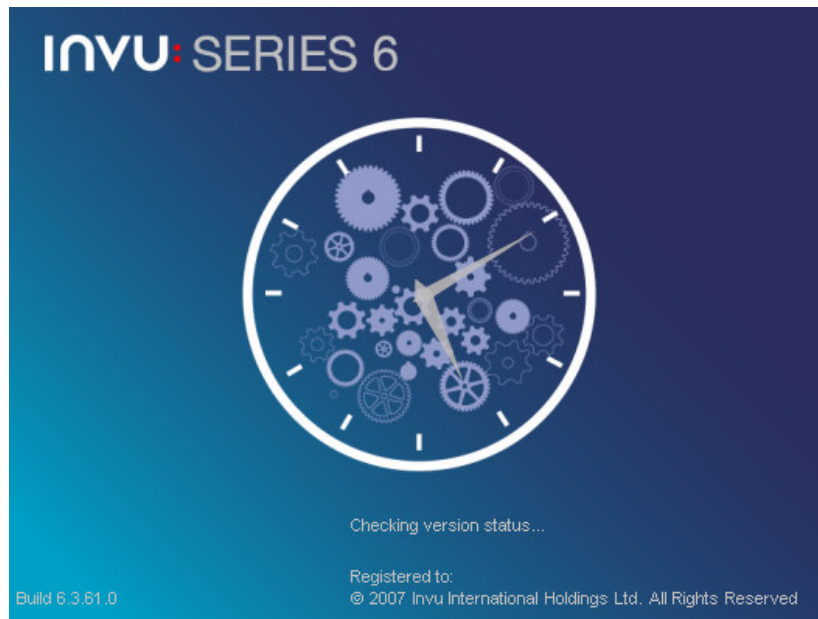


Setting Up Document Templates

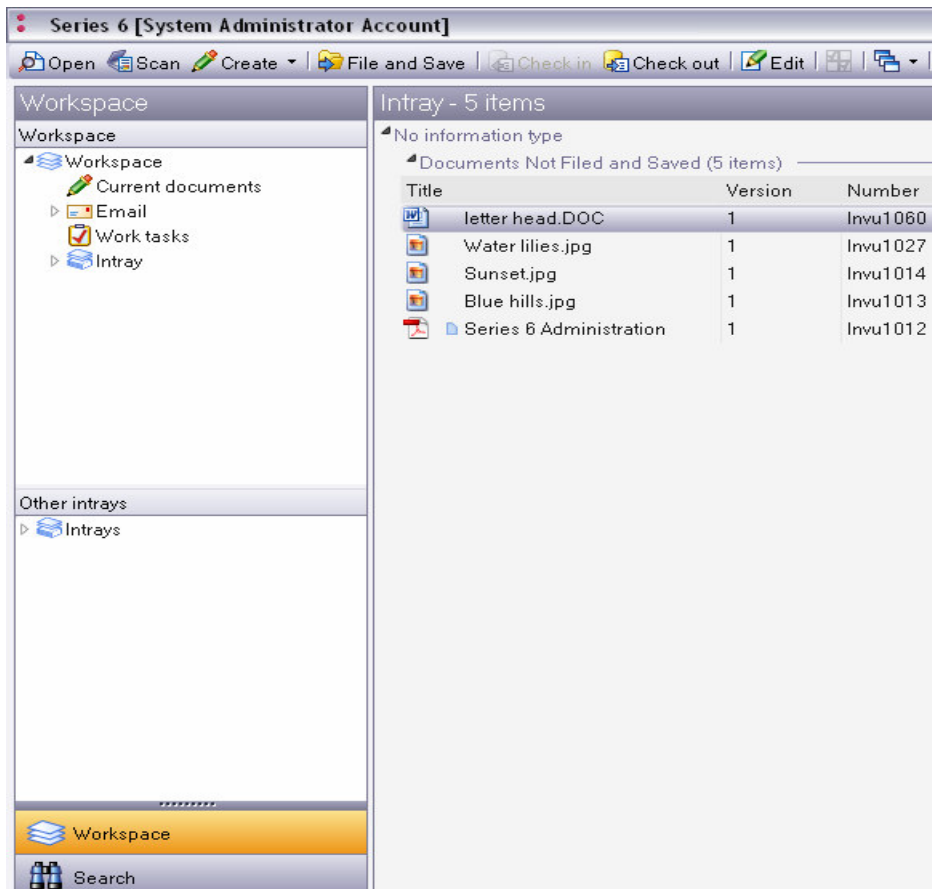
- Locate the document which will be your template and copy this to your desktop
- Right mouse click on the document and chose **Send To** and select **Series 6 Intray**



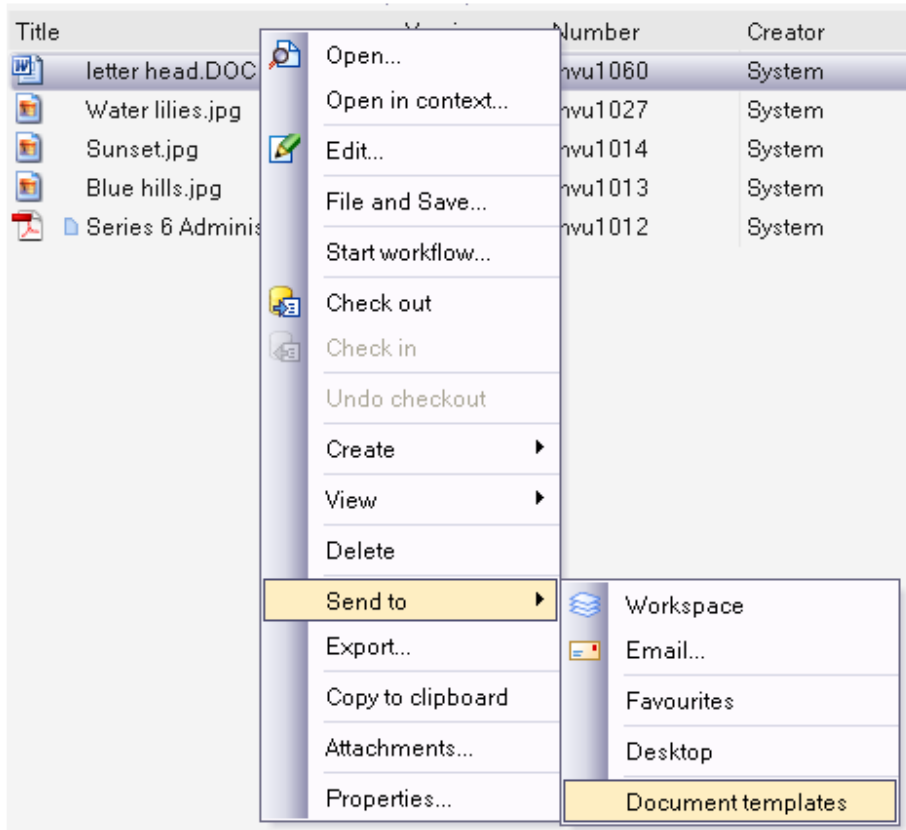
- If not already open, Invu will start automatically



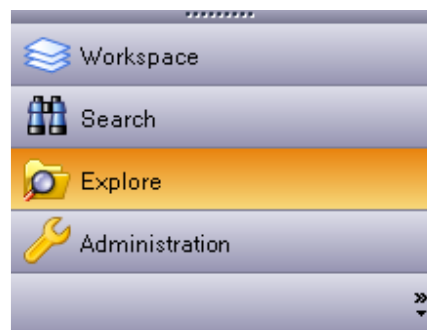
- The document will appear in your Intray



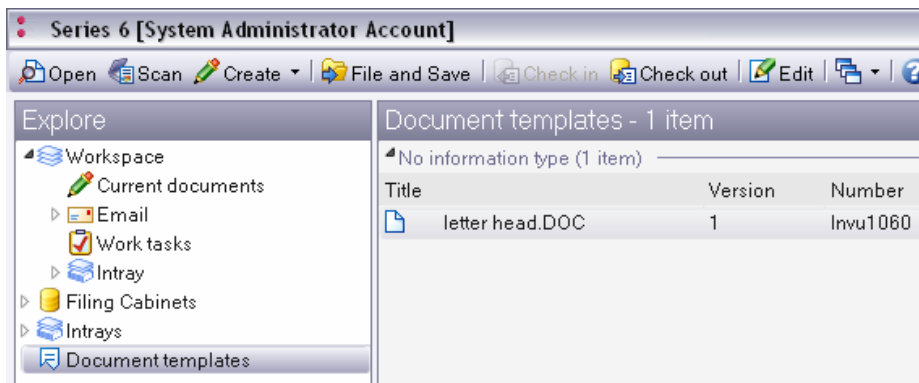
- Select the document from your Intray
- Right click on the document
- Chose the **Send To** option
- From the next drop down list select **Document templates**



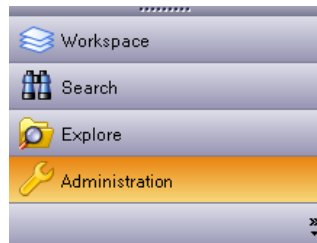
- The document will disappear from your Intray
- Click on the **Explore** option



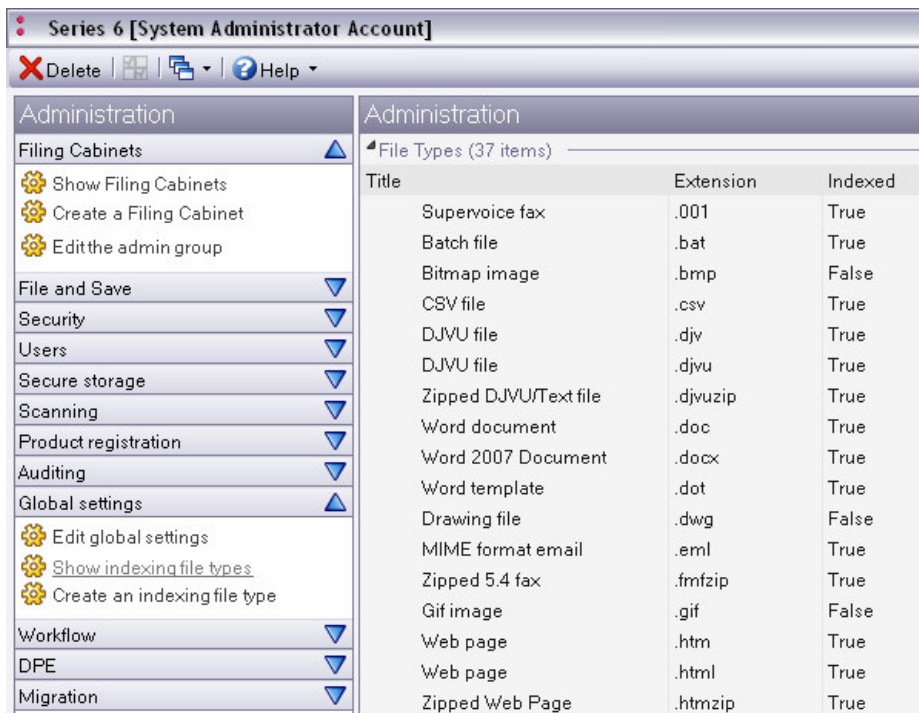
- In the Explore screen you will see the template document



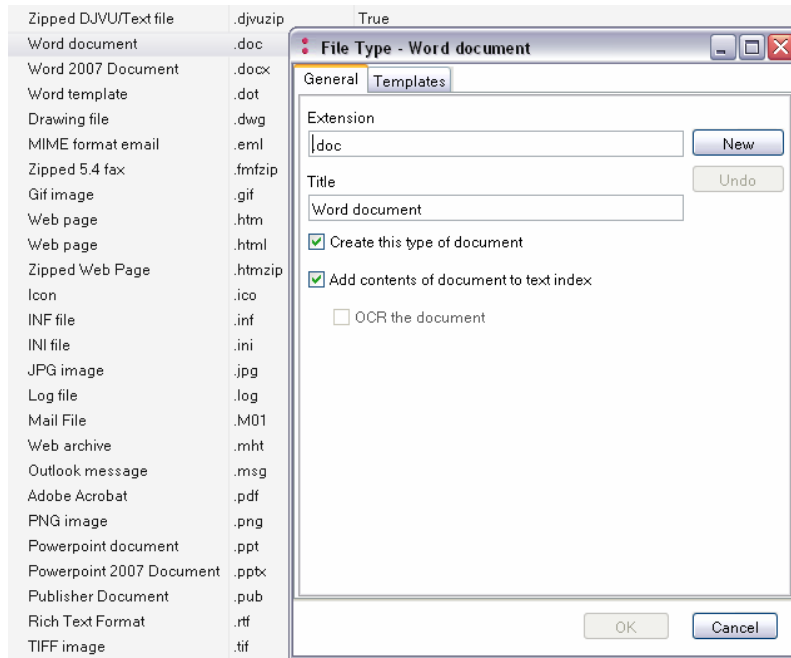
- The above screen will show all the documents available for use
- **NB:** To remove a document template right mouse click and select the **Delete** option. Document templates can only be viewed by System Administrators
- Click on the **Administration** option



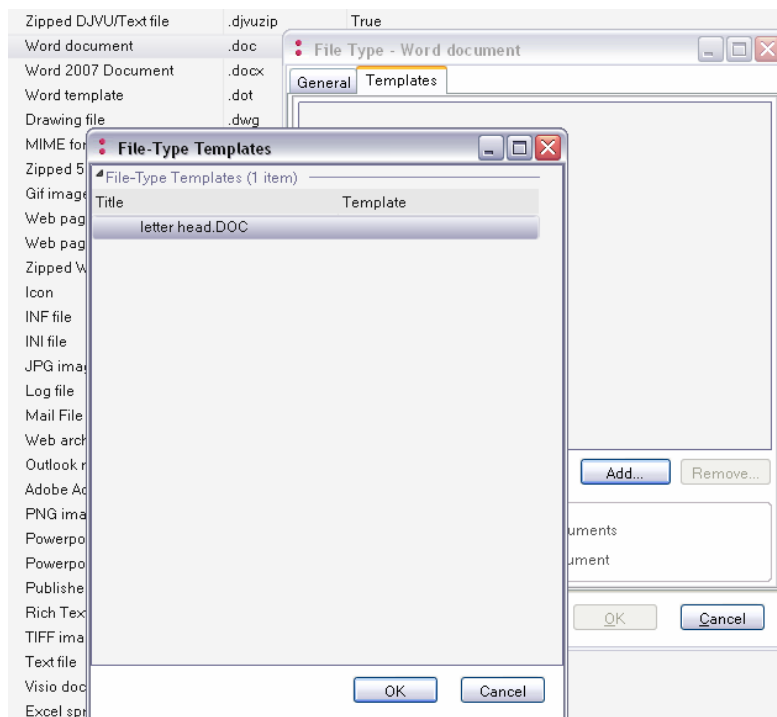
- Click on **Global Setting**
- Then click on **Show Indexing file types**



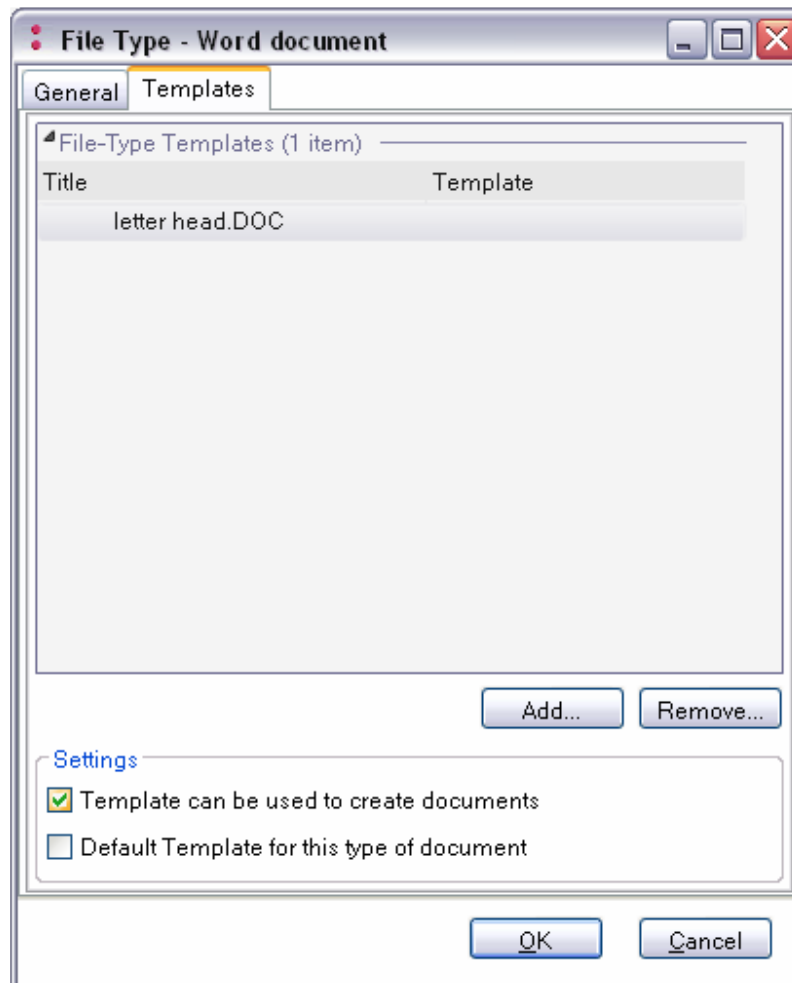
- Chose the appropriate File type
- If Word document double click on “Word document”, if spreadsheet double click “Excel” etc



- The above screen will appear
- Make sure **Create this type of document** and **Add contents of document to text index** are ticked
- Click on the **Templates** tab



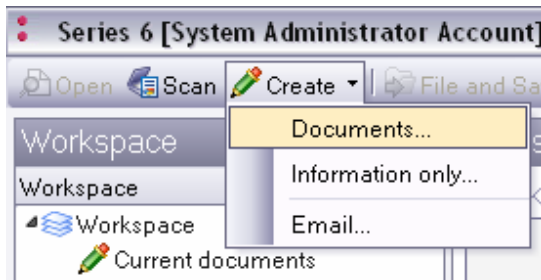
- Click on **Add** and select the correct document type
- **NB:** If file type is Word then add just documents that are Word, etc



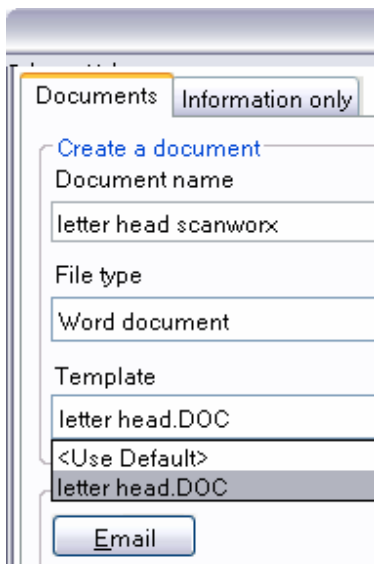
- Now your document should be added
- Select the document and then tick the **Template can be used to create documents** option. This will enable users to select this document template when using the create button.
- Only tick the **Default Template for this type of document** if you would like a standard document type every time someone selects the create button.
- If **Default Template for this type of document** this option is ticked and there is more than one document type with **Template can be used to create documents** option ticked then users can choose between the different document templates from the create screen.
- Click **OK** and this will save the changes and now you are ready to use the above document templates.
- To add more document types do the above steps again. You can have many Word templates or Excel spreadsheets, etc.

Using Document Templates

- Log on to Invu Series 6
- Go to the **Workspace**
- Click on the **Create** option



- Choose **Documents**
- In **Document Name** populate a name for this document
- Choose the appropriate **File type** (Word document for this letter head)
- I.e.: Word document for letter heads, memos, etc. Excel spread sheets for any template spread sheets
- Now click on the **Template** drop down
- The document template added earlier will appear



- Then click on the **OK** button at the button left.
- This will load the application for which the template is associated with. Now the document can be edited and once ready click on the red cross in the top right of the application and this will save back into Invu.