

SCAN WORX

document management specialists

Quick Reference INVU Guide





1.0 _Intray

1.1 The Intray

Items in your personal Intray are not accessible to other users. These items are held in your Intray under an appropriate *section* depending on its type:

- **Images** – contains all your personal post and any images that have been sent to you from other INVU users.
- **Filing** – contains all documents which are not images e.g. word documents.
- Mail, Fax and Web will no be used for you system.

1.2 Intray Tabs

The Intray possesses four tabs for each *section*, each of which performs a specific function:

- **Filing** – allows you to select documents for indexing by single clicking or view document by double clicking.
- **Indexes, Secondary indexes** – will allow you to apply the relevant indexing information to a document which is later used to retrieve the document.
- Options – allows you to configure your own intray.

1.3 Dropping Items in your Intray

Items can be dragged and dropped into your intray directly from the Windows environment e.g. From a network drive. When dragging and dropping files into your intray ensure that you have the appropriate section and the filing tab selected.

1.4 Moving Mail items

from your intray to another users' intray:

- Select the multiple intray button; this displays a list of all the Intrays in the system e.g. users and groups.
- Once displayed move the multiple Intray window so that you can see the document you wish to move and the Intray you wish to place it in.
- Select the document you wish to move → left click and release → left click and hold until a hand appears → move the document(s) to the appropriate Intray and release the left mouse button.
- Click on the multiple intray button once more to close the multiple intray window.



2.0 _Searching

2.1 General Searching

Select the binoculars from the task bar to open the search screen. Using the search indexes will allow you to retrieve documents from the INVU system. The more indexing information you specify the more refined your search will be. Combining primary and secondary searches will further refine your search.

2.2 Text Search

This will allow you to search inside documents for key words. NB: you can combine the text search with any other index field. E.g. look for a key word 'Account' inside all documents relating to client – 345.

Once the results are returned select the document of your choice, right click → View → In context display

2.3 Wild Cards

Use the % symbol as a wild card to help look for key words.

Example

Typing **%A1 Design** in the Client Index field will return **A123 – A1 Design Services.** The % omits the client number and searches for a key word A1 Design.

2.4 View a document

Double click the grey square to the left of the document ID

3.0 _Checking Documents Out

3.1 In order to edit document they must first be checked out. This stops other from editing the document; however they may still view and print the document in its original state without the changes you have made. When you have a document checked out, you are able to edit it.

To check a document out simply select the document using the grey box to the left of the document ID using a single click, right click and select check out.

3.2 Current Job: selecting your name from the current job field will enable you to see which documents you currently have checked out. NB: if your name doesn't appear in the current job field you do not have any documents check out.

4.0 _Checking Documents In

Once you feel that you have finished editing a document: Select your document as before → right click → select **check in**.

5.0 _Adding Attachments

To add attachments to document e.g. add accounts details to a cover letter.

- Select the document that you wish to add attachments too.
- Right click, and select attachments
- Once in the attachments window you will see any existing attachments, or by clicking the add button you will open a new search screen.
- In the search screen select the document you wish to add and then use the green tick to conform your choice.
- Repeat this process if you require more than one document to be attached.
- Once you have finished adding documents, use the green tick to save you attachments.



6.0 _Adding and Viewing Notes

Adding: Select the document you wish to attach a *Note* to → Select the “**Notes**” button → Fill in the *Title* and complete your note *content* in the box provided.

Viewing: Select the document you wish to view the notes on in the search screen → Select the “*Notes*” tab → select the grey square to the left of the *Note* you wish to view.

7.0 _Emailing Documents

Select the document as aforementioned → right click → select “**email**”

8.0 _Extracting documents

Select the document → Right click and select “**extract copy**” → Save the document to a location that you will be able to retrieve it from e.g. My Documents, Desktop

9.0 _Notes
