# Epicor ECM (DocStar) – The Document Viewer

Introduction

As the name suggests, in Epicor ECM (Docstar), you use the Document Viewer to view documents. But of course, there’s a little bit more to it (than that)!

In this course, we’ll look at how to search for documents, and open them in the document viewer.

We’ll also see how to view additional information, or metadata, for the document, and how to navigate in the viewer to see what you want to see. Lastly, we’ll look at the User Preferences, which help you customize the viewing experience to suit you.

Objectives

* Search for Documents
* Open and View Documents in Document Viewer
* View Metadata and other information on Accordions
* View documents in native format and in Epicor ECM (DocStar) image rendering

Finding Items

If you’re not sure where to find a document, you can search for it. You can employ filters, and even save common searches so you can access them any time.

Navigate to the Retrieve tab. If you know the content type of the document you’re looking for, select it from the Content Type drop-down. If not, just leave this field blank.

On the Search Fields card, in the first drop-down you can select a system parameter to search by. For example, here we select Created On. In the second field, you can select from various operators or limiters. For example, you can search for items created Today, Yesterday, in the Last Seven Days, or in the Last Thirty Days.

Once you select an option, click Search. Based on our settings, the system searches for all items, of all content types, created in the last thirty days. In the results grid, the Created On date for all items will, of course, be in the last thirty days.

You can also insert additional search criteria, to narrow down your search even more. On the Search Fields card, select Add. This creates a new line, where you can select new criteria. For example, we also want to limit our search to items that contain a certain word in their annotation text. So, we select Annotation Text from the first drop-down, and select Contains as the operator. In the third field, enter the actual word to search for. For example, peanut. Then click Search.

If your search is something you’ll want to use regularly, you can also save it. Above the results grid, you can currently see a drop-down field with –New--. Click there, and enter a suitable name for your search. Select Save.

Now, you can access this search anywhere in the system. Next to the quick search field (at the top?), select the drop-down arrow beside the Search button, and you can select from any searches you have saved. Select the right arrow to move to the next topic.

Viewing Documents

So, you’ve found a document – or multiple documents – that you want to open in the Document Viewer. Simply select the check box against each item you want to open, go to the Actions drop-down, and select View.

The documents open in the order you selected them. This is the document viewer. On the left, you’ll find the Accordions panel. We’ll look at that in detail in the next topic.

Just above the Accordions panel, if you’ve opened multiple documents, you can use these forward and back buttons to navigate between the different documents. In the document viewer pane itself, you’ll find some similar buttons, but these enable you to move through multiple pages of the current document.

Also on the document viewer toolbar, you can rotate this page left or right, or rotate all the pages. Hover over the divider, and you can drag and stretch the relative size of the accordion panel, and the viewer window.

If your mouse has a wheel, you can zoom in and out of the document. Just point the cursor at the spot you want to zoom in on, and roll the mousewheel up. And roll down to zoom out. Incidentally, if you prefer, you can set the mousewheel to scroll through the pages of a document instead. To do this, navigate to User Preferences > Viewer, and set the Mouse Wheel Behavior to Scroll.

At the moment, you can see thumbnail images for the document on the right. You can click on a thumbnail image to display that page in the viewer.

You can also change the thumbnail display settings. Go to Actions > Thumbnails. The check mark shows that we currently have them set to display on the right. But you can have them display on the left, or switch off thumbnail display.

Accordions

On the left, you can see the Accordions panel. There are various different accordions, which enable you to view metadata for the document, perform various actions, and review the history of a document.

You can expand or collapse each accordion by clicking on the little up or down arrow. You can rearrange the order in which the accordions display in the pane. Just click and hold, and drag the accordion to where you want it.

Select the Compass Arrow to expand an accordion to display across the full page width at the bottom of the viewer. Click again to return it to the panel. If you want, you can do this with multiple accordions.

Now let’s look at the accordions themselves.

The Workflow accordion contains elements that enable you to interact with the workflow process for the document. You may have options for who to send the document to for approval, or you may be required to approve the document. When you interact with a workflow, you’ll need to select Submit to move it along to the next step.

The History accordion has several tabs. You can view a record of the item’s workflow activity, any chat messages, and information on approvals.

The Related Documents accordion may display items considered related, based on some matching data.

On the Versions accordions, you can check in, check out, promote, and roll back different versions of the document.

The Line Items accordion enables you to view and edit data in field groups. Depending on the amount of data here, you may find it helpful to make this accordion full width. Select the Compass Arrow to do that.

The Content Fields accordion displays all the important meta data for the document. You will not normally make changes here; but if you do, you must also select Save. Select the right arrow to move to the next topic.

View Image vs. View Native

You have the option to toggle between a document’s Native View and Epicor ECM (Docstar)’s Image rendering of the document.

In the document viewer, select the Actions menu. At the moment, the check mark tells us View Image is selected. If you select View Native, you’ll see a version of the document in its native format - as it was at the time it was captured. Whereas, View Image uses the image rendered by Epicor ECM (Docstar)’s client service application.

Only the View Image setting supports Epicor ECM (Docstar)’s Annotations, Approval Stamps, and Redaction tools – available on this toolbar. If you set the document to View Native, you won’t see the Annotations & Stamps toolbar at the top, and you won’t see any thumbnails. Also, depending on the document format, you might see the Click here to download button, or with PDFs, you’ll see the standard PDF viewer controls.

This setting is a User Preference toggle, so each new item you open will display with the current setting.

I mentioned user preferences. If you open User Preferences (from the Epicor ECM drop-down), both the Viewer and the Layout sections contain options for how to configure your document-viewing experience.

In the Viewer section, we mentioned the Mouse Wheel Behavior setting. You can also select the Thumbnails setting here – which is the same as the setting we saw in the Actions menu.

In the Layout section, you can toggle which Accordions display. Select the right arrow to move onto a short knowledge check.

Recap

In this course, we looked at how to search for documents, how to open them in the document viewer, and navigate between documents and within the documents.

We also looked at the various accordions, and the purpose they serve in working with documents.

We compared the Native View and the Image View rendered by the client service application.

And we looked at the User Preferences that relate to the document viewer.

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