# Epicor ECM (DocStar) – Page Operations

Managing the pages that make up a document in Epicor ECM (DocStar) is actually quite easy.

This course looks at how you can change the order of pages in a document, delete pages, split the document into multiple separate documents, move pages from one document to another, and merge multiple documents into one. Select the first topic to continue.

Split, Reorder, and Delete Pages

If you need to split a document, delete pages, reorder pages, or copy pages, the first step is to make sure thumbnail view is switched on. In the document viewer, select Actions > Thumbnails, and select Left or Right to set where to display the thumbnails.

In this example, we have two documents together, with a blank page between them. The title page for the second document is also out of place, after the table of contents.

We want to split the document. In the thumbnail pane, right-click on the page where you want to make the split. There are several options here. In this case, select Split Document. The highlighted page will become the first page of the new separate document. In the Split Document window, you can enter some settings for the new document. If you need to delete the first page of the new document, select the Delete Page check box. In this case, that page is blank, so we want to delete it. You can also enter a Title for the new document, and set the Document Type.

The original document, which will now be a single-page item, retains its original meta data, workflow, security settings, keywords, and so on.

The action you will now take is called Burst and Split. Let’s just explain what Burst means here. By default, multiple pages in a document are digitally bound together, like papers being stapled together. The Burst action essentially removes these bindings. But all the pages are still associated with the same content item; they’re not going anywhere.

So, select Burst and Split. We now have two documents open – one is this single page, the other is the multi-page handbook.

In the thumbnail pane, the marks between the pages indicate the document has been burst. You don’t have to unburst it, but if you save it – or email it as a PDF or TIFF file – you’ll have the option to Create as a Single File, which will recombine all the separated pages.

Now, let’s reorder the document. One way is to right-click on the thumbnail, and select Reorder Pages. Or, you can simply drag and drop thumbnails into a different order. Let’s do that, and move the title page to the top.

Copy to New & Move to New

One essential feature is the ability to copy – or move – parts of one document to another.

To copy a page to a new document, select the page in the thumbnail pane. If you want to copy multiple pages, just hold down CTRL and select each page. Then, right-click on the thumbnails and select Copy to New Document. In the Copy to New Document window, you can see which pages you are going to copy. Enter the Title for the new document, and select the Content Type. By default, the type comes from the document you’re copying from. Select Copy Pages.

The new document is created, and it takes on the workflow specified in its content type. But of course, the pages you copied also still exist in the original document.

If we go to the Retrieve tab, and search for documents created today, we’ll find the new document.

Now, instead, let’s move some pages to a new document. In this example, we’ll select the last two pages in the thumbnail pane, then right-click and select Move to New Document. The Move to New Document window shows you which pages you’re moving. Enter the Title and Content Type for the new document. Select Burst and Move Pages. The move action includes a Burst, because we are effectively splitting up the document and removing two pages from it.

As you can see, the original document no longer contains those pages, and you can see the burst bars between each page. Now, if we go to the Retrieve tab and search for documents created today, here’s our new two-page document.

Set Starting Page

If you find you have long documents, where the actual meat of the content starts long after the cover sheet, legal text, and table of contents – like this Site Configuration Guide here – the Set Starting Page feature is a nice little “quality of life” enhancement that you might find useful.

First, in the thumbnails, scroll to the page you’d like your document to start on, so you can see what the Page number is (here). Go to the Actions menu, and select Set Start Page. In the Start Page field, enter the page number, and select OK. This is actually making a change to the document, so now you also need to select Save.

Now, whenever you come back to this document, and open it in the document viewer, it will automatically open at the start page you set. But, of course, the previous pages are still in the document.

Merging

If you have two or more documents that you need to consolidate into a single document, you can Merge them from the Retrieve screen. You’ll need to have all the documents visible in the grid, so make sure you can find them all.

In this example, we have two documents. Part 1 and part 2. Select each document’s check box, in the order you want them arranged in the final document. Then from the Actions menu, select Merge. The confirmation message informs you that two documents will merge, and they’ll take on the title of the first document.

The meta data and settings of the second document will be discarded, so make sure you account for this when merging.

Now we can see that, instead of two documents, we have just one. And when we open it, we can see the total page count increased.

Recap

In this course, we looked at how to Split, Reorder, Delete, and Copy pages, and we covered the concept of Bursting a document. We saw how to Copy pages to a new document, or Move pages to a new document.

We also set a different start page in a multi-page document, and merged multiple documents into one.

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