AIS Document Viewer

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* denotes a new feature in Version 4.2
AIS Document Viewer Introduction

What is AIS Document Viewer? {tc "What is AIS Document Viewer? " \l 2}
AIS Document Viewer is a secure, web-based, report-viewing product. Current reports that are produced by the AIS mainframe computer can now be viewed, searched, and printed at your desktop via common web browsers.

What are the benefits? {tc "What are the benefits? " \l 2}
- Reports can be viewed via the web without having to be printed.
- Using supported web browsers, reports will be displayed with an excellent likeness to the original printed version of the reports.
- A single online location is provided to view reports.
- There is no wait for printed reports to be delivered to your office.
- There is no more searching for a paper report.
- If needed, select pages or entire reports can be printed from the web to a printer in your own office.
- Reports can be searched to find specific information, or reports can be indexed to improve information access.
- Text reports can be downloaded to your PC for further data manipulation.
- You have control in defining who can have access to view your reports and in defining how long the report archives should be kept.
- Web viewing is expected to reduce the amount of actual printing of reports, which supports the University’s direction toward reducing paper.

Where to go for help {tc "Where to go for help " \l 2}
Contact the AIS Service Desk for problems with:
- Logging in and accessing AIS Document Viewer
- Displaying or printing reports

Contact the AIS Service Desk by email at ais311@msu.edu or call (517) 884-3000, Monday through Friday 7:45 am to 5:00 pm.
Getting Started

Browser Requirements
- Safari is not a supported web browser
- Java Plug-in 1.4.2_11 or greater

<table>
<thead>
<tr>
<th>Browser</th>
<th>Versions</th>
<th>Operating systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Internet Explorer</td>
<td>6.x</td>
<td>Microsoft Windows XP Professional</td>
</tr>
<tr>
<td></td>
<td>7.0 (see Notes)</td>
<td>Microsoft Windows Vista Enterprise</td>
</tr>
<tr>
<td></td>
<td>8.0 (see Notes)</td>
<td>Microsoft Windows 2008 R2 64 bit</td>
</tr>
<tr>
<td>Firefox (**See Notes)</td>
<td>3.0</td>
<td>Microsoft Windows XP Professional Microsoft Windows Vista Enterprise</td>
</tr>
</tbody>
</table>

Notes:
- Internet Explorer 7 Protected Mode must be disabled.
- The ActiveX print control is not supported with Firefox; the JAVA print plug-in is available as an alternative.
- Internet Explorer 8 Requirements: Microsoft Security Update 972260

Note: Java Plug-in 1.4.2_11 or greater is required to access the Document Viewer Interface. When launching the Interface for the first time, you may be prompted to install the correct version of the Java Plug-in. You must have Administrative rights to your PC to install the Java Plug-in. If you do not have Administrative rights, please contact your internal technical department to arrange for the Java installation or upgrade. The Administrator will also have to print a test page in order for the print driver to successfully install.

If you try to access the Document Viewer Browser Interface and do not have the required Java Plug-in, a warning message displays. You can either click the Install button and follow the instructions on the screen to install the Java Plug-in or click the Don’t Install button and contact your internal technical department about the Java Plug-in.
Logging in to AIS Document Viewer on the Web

Open a browser window and type in the following URL:
http://docview.ais.msu.edu/

1. Enter your MSUNet ID and password.

2. Be sure that MSUNet appears in the Authenticator list box and click Login.
   When logging on for the first time this box may appear. In the Security screen
   that displays, click Yes.

NOTE: If you are using Internet Explorer you can disregard this box and uncheck the
box that says Always perform this check on startup to prevent this box from
appearing in the future, then click the check mark.
Navigating in the AIS Document Viewer Window

The window that opens after you log in is referred to as Enterprise Explorer. It is divided into two panes: the Enterprise Explorer pane and the Document Page pane.

*To adjust the two panes, click and drag the double-headed arrow at the very bottom of the Document Viewer pane that separates the two windows to the desired width. See circled button above.
When the Document Viewer session is opened, the Enterprise Explorer pane displays a graphical tree of the reports to which you have access. The Document Page Pane displays the current document (that is, the document that is highlighted in the Enterprise Explorer pane).

An open document server session is indicated by a yellow lightning bolt in the document server icon, and by the appearance of the topic and report

1. Expand or collapse the Topic and Report folders by clicking on the plus (+) or minus (-) sign to the left of each folder:
   - Expand the Topic folder to explore by topic (such as PID, account number).
   - Expand the Report folder to explore by report name.

2. Click the plus sign to the left of the desired Report ID to expand the graphical tree, showing Version IDs.

3. Click the Plus sign to the left of the Version ID to show Section IDs.
Working in AIS Document Viewer

Opening Documents with AIS Document Viewer
To find the document you want to open, you can use either the Enterprise Explorer window or the Locate dialog:

- Use the Enterprise Explorer to browse through a graphical tree of document servers, reports or topics, versions, and sections, as well as Enterprise Folder contents.

- Use the Locate button on the toolbar when you know the full or partial Report or Topic ID, Version ID, and/or Section ID of the document you want to open.
# Finding Documents with the Enterprise Explorer

![Diagram showing folder and report structure](image)

## Report Folder
- **Report ID**
- **Version ID**
- **Section ID**

## Report
Most documents that are produced by the AIS mainframe computer.

## Report ID
Unique identifier for a report viewable through AIS Document Viewer. (Example: XX-BILLS Sample Student Billing is the Report ID for the Sample Student Billing Statement)

## Version ID
The timestamp that tells when a specific report was generated. Several generations of the same report may be available at the same time. (Example: there are four versions of the XX-BILLS Sample Student Billing report: May 5, May 2, April 2, and February 27, 2010.)

## Section ID
Unique identifier for a section of a report. Section IDs are assigned when the report is defined to AIS Document Viewer. (Example: A11111111, A22222222, A33333333, etc, are Section IDs for sections of the April 2 version of the XX-BILLS . . . report.)
The Report Folder

- When you open Document Viewer, by default the Report folder will be expanded with a list of available Reports IDs displayed.

- Click the Plus sign (+) to the left of the desired Report ID to expand the graphical tree, showing Version IDs.

  Note: If a Show Arrow is displayed at the bottom of the report list, this means there are additional reports available. Click the Show Arrow until you see the Report ID you are looking for.

- To expand the graphical tree and display the document’s sections, click the Plus icon to the left of the desired Version ID.

- Click the page icon to the left of the desired Section ID. The first page of the selected section is displayed in the Document Page. Note that the number of pages of a report is displayed in the report’s Page Information line (e.g. Page 1 of 2).

  Note: You can also open the first page of the first version of the selected report by clicking the Quick Open button with the name of the report selected—not the folder icon selected—as shown in the figure below. The Quick Open button will be functional only when the report folder is collapsed.

Banner Pages

- All reports will display a banner page containing information about how the report is created. If the original report was a duplexed (two-sided) report, there may be blank pages displayed (the blank back sides of the banner sheets).

- Text reports do not have the typical banner page. They are displayed with alternating green and white stripes.
The Topic Folder

The Topic folder expands to display a list of categories of reports, by which information can be identified and quickly located across reports, as shown in the figure below. In the example below, the Topic ID XX-PID is expanded to show several reports which can be obtained for specific PIDs.

| Topic | Category by which a type of information can be identified and quickly located across reports. For example, one topic might be PID, including all reports about a given PID, such as grades, bills, and transcripts |
| Topic ID | Unique identification of a topic, assigned when Enterprise Indexes are set up for a report. Topic IDs allow you to select reports by information contained in the report rather than by the Report ID. |
| Topic Version (date) | The timestamp that tells when a specific topic was started. Several versions of the same topic may be available for report selection. |
| Topic Item | The specific field of data in a report used as the index entry for a topic. (For example, in the sample student billing statement, the Topic Item is the PID number.) |
• To explore by topic, click the plus sign (+) next to **Topic** to display a list of Topic IDs that are available. (Double clicking on **Topic** will also expand it.)

• Student PIDS, Dept Accounts, and Employee Social Security Numbers are Topic IDs listed under **Topic** on the screen below.

• Clicking on the plus sign next to a Topic ID will expand the graphical tree for that Topic ID, showing the available Topic Versions. In the example shown below, there is only one Topic Version (February 25) for the Topic ID named XX-PID. A Topic Version consists of a date and time.

• This screen shows a Topic Version that has been expanded. The Topic Items are then listed. The Topic Items in this case are PID numbers.

• Clicking on the plus sign next to a Topic Item displays a list of Report IDs available for that Topic Item.
Finding Documents with the Locate Dialog Box

To find a document by Report or Topic ID using the Locate dialog box, perform the following steps:

1. Click the Locate button on the Enterprise Explorer toolbar.

2. The Locate dialog box is displayed, as shown below.

   Note: The Report tab or Topic tab is displayed, based on your configuration settings.

3. You can locate documents by Report or Topic. Click the Report or Topic tab.

<table>
<thead>
<tr>
<th>Open</th>
<th>Locate</th>
<th>Cancel</th>
<th>Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>To open the document, click the Open button.</td>
<td>To display a document’s location, click the Locate button.</td>
<td>To close the Locate dialog box, click the Cancel button.</td>
<td>Displays help for finding documents using Locate.</td>
</tr>
</tbody>
</table>
The following fields are available in the Report tab:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Server</td>
<td>Document server you want to search.</td>
</tr>
<tr>
<td>Report ID</td>
<td>Full or partial Report ID you want to locate.</td>
</tr>
<tr>
<td>Version ID (Date)</td>
<td>Full or partial Version ID you want to locate. A Version ID consists of a date and time. The Version ID must be entered in the format displayed in the Enterprise Explorer window. When you enter a partial Version ID, Locate finds the greatest permissible value.</td>
</tr>
<tr>
<td>Section ID</td>
<td>Full or partial Section ID you want to locate.</td>
</tr>
<tr>
<td>Page</td>
<td>Page number at which you want to open the section.</td>
</tr>
</tbody>
</table>

The following fields are available in the Topic tab:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server</td>
<td>Document server you want to search.</td>
</tr>
<tr>
<td>Topic ID</td>
<td>Full or partial Topic ID you want to locate.</td>
</tr>
<tr>
<td>Topic Version</td>
<td>Full or partial Topic Version you want to locate.</td>
</tr>
<tr>
<td>Topic Item</td>
<td>Full or partial item you want to locate.</td>
</tr>
<tr>
<td>Report ID</td>
<td>Full or partial Report ID containing the topic you want to locate.</td>
</tr>
<tr>
<td>Report Version</td>
<td>Full or partial report version containing the topic you want to locate.</td>
</tr>
</tbody>
</table>

Note the following guidelines when using the Locate dialog box:

- Fields left blank in the Locate dialog box default to the first entry of that type.

- If Locate finds no exact match for the data entered in the Locate dialog, it identifies the next closest name for Report, Topic, or Section IDs, or the next most recent date for Version IDs.
4. After you specify information in the **Locate** dialog box, you can **highlight** the document's location in the Document Explorer, or **open** the document.

   a. **Locate**: To display a document's location, click the **Locate** button. The specified document is highlighted in the graphical tree.

   b. **Open**: To open the document, click the **Open** button. The first page that meets the selection criteria is highlighted in the graphical tree and displayed in the Document Page pane of the current browser window.

   ![Enterprise View](image)

   ![Locate](image)

   **NOTE**: Whatever is selected in the Enterprise Explorer window will display in the corresponding fields in the **Locate** dialog. Making the appropriate selections in the Enterprise Explorer window will assist in locating the reports.
The Enterprise Explorer toolbar buttons

- Opens the Locate dialog box
- Expands the contents of the selected item, if applicable, and opens the first page of the first document
- Prints selected reports without opening them. Document options are available.
- Downloads selected reports without opening them. Format and directory options are available.
- Creates a new Enterprise Folder
- Deletes the currently selected item
- Copies the currently selected item
- Moves the currently selected item
- Opens the Enterprise Explorer help
The Page Toolbar Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Page</td>
<td>Goes to the previous page of an open report.</td>
</tr>
<tr>
<td>Next Page</td>
<td>Goes to the next page of an open report.</td>
</tr>
<tr>
<td>Previous Document</td>
<td>Goes to the previous report in the document tree.</td>
</tr>
<tr>
<td>Next Document</td>
<td>Goes to the next report in the document tree.</td>
</tr>
<tr>
<td>Go To</td>
<td>Opens the Go To window that allows you to jump to a specific page.</td>
</tr>
<tr>
<td>Find</td>
<td>Finds specific text within an open report.</td>
</tr>
<tr>
<td>Find Next</td>
<td>Finds the next occurrence of a specific text search.</td>
</tr>
<tr>
<td>Filter By Field</td>
<td>Specifies the criteria for displaying a filtered view of the report based on predefined fields.</td>
</tr>
<tr>
<td>Filter By Line</td>
<td>Specifies the criteria for displaying a filtered view of the report based on text in the document.</td>
</tr>
<tr>
<td>Download</td>
<td>Downloads an open report. Format and directory options are available.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints an open report. Size and quantity options are available.</td>
</tr>
<tr>
<td>Quick Print</td>
<td>Prints an open report without the ability to make option modifications.</td>
</tr>
<tr>
<td>Change View</td>
<td>Provides document resizing and folder location options.</td>
</tr>
<tr>
<td>Clockwise</td>
<td>Rotate clockwise</td>
</tr>
<tr>
<td>Counterclockwise</td>
<td>Rotate counterclockwise</td>
</tr>
<tr>
<td>Format</td>
<td>Provides options to select the format of the page.</td>
</tr>
<tr>
<td>View/Hide Page Notes</td>
<td>View or hide the annotations that are associated with this document.</td>
</tr>
<tr>
<td>Edit Annotations</td>
<td>Create annotations or edit the annotations associated with this document.</td>
</tr>
<tr>
<td>Create Table</td>
<td>Converts open report into table format for downloading.</td>
</tr>
<tr>
<td>Help</td>
<td>Opens the Help window.</td>
</tr>
<tr>
<td>Close Document</td>
<td>Closes current report.</td>
</tr>
</tbody>
</table>
Searching for Text

Find Dialog Box
The Search feature can be used to search for specific text in a text report. The Search cannot be used in reports that are images (that is, pictures of reports, such as grades, bills, etc.) Many reports in AIS Document Viewer are images, even though they may appear to contain text. Text reports can be easily identified by the alternating green and white rows.

To search for specific text in the current report version, follow these steps:

1. Click the Search button that appears on the Page toolbar. The Find dialog box is displayed, as shown below.

![Find dialog box](image)

The following fields are available:

<table>
<thead>
<tr>
<th><strong>Find What</strong></th>
<th><strong>The text you want to find</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>As Is (Case Sensitive)</td>
<td>Perform a search that distinguishes between uppercase and lowercase letters. In a case-sensitive search, you must specify the text exactly as it appears in the file. For example:</td>
</tr>
<tr>
<td></td>
<td>Equipment does not find EQUIPMENT</td>
</tr>
<tr>
<td></td>
<td>EQUIPMENT does not find Equipment</td>
</tr>
<tr>
<td>Current Section Only</td>
<td>Limit the search to the current section.</td>
</tr>
<tr>
<td>Direction Up/Down</td>
<td>Change the direction of the search.</td>
</tr>
</tbody>
</table>
2. Complete the dialog and click the **Find** button. For a text report, the first occurrence of the specified text is displayed.

3. To search for the next occurrence of the specified text, click the **Search Again** button that appears on the page toolbar.

**Find Option Restrictions**
As mentioned above, it must be stressed that many reports are **images**, not **text**, and therefore not searchable with the **Find** option. The Find option cannot search resources such as overlays and graphics.

**Going To Specific Document Pages (Go To)**

Using the **Go To** button lets you navigate to a specific page in a file by typing in the number in the **Go To** dialog box.

If the page number you enter is greater than the number of pages in the section but less than the total number of pages in the document version, the page that appears is from a subsequent section that is the specified number of pages later, relative to page one of the current section. If the page number you enter is greater than the total number of pages in all sections of the document version, the last page in the version appears.
Changing Document Views for Image Reports

Changes can be made to **image report views** using the **Format** dialog box, **Rotate Image** buttons, and the **View** dialog box. The default format for an image report is **Image**. You may find it helpful to convert your image documents to **PDF** format for file sharing, for example. Although there are several other formats available (see table below), it is recommended that you use the **Image** and **PDF formats** for the best results.

The Format Dialog Box

The following table highlights the characteristics of the presentation formats available in the **Format** dialog box:

<table>
<thead>
<tr>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*HTML (Hypertext Markup Language)</td>
<td>• Relatively small document size.</td>
</tr>
<tr>
<td>*Preferred format</td>
<td>• Documents cannot be rotated.</td>
</tr>
<tr>
<td></td>
<td>• Due to format limitations, certain document layouts may not convert accurately.</td>
</tr>
<tr>
<td></td>
<td>• Supported in Internet Explorer 4 or later only.</td>
</tr>
<tr>
<td>*PDF (Portable Document Format)</td>
<td>• An industry standard presentation format.</td>
</tr>
<tr>
<td>*Preferred format</td>
<td>• Moderate document size.</td>
</tr>
<tr>
<td></td>
<td>• Refer to Adobe Systems Inc. for browser support details.</td>
</tr>
<tr>
<td>Image</td>
<td>• Provides an exact reproduction of the original document.</td>
</tr>
<tr>
<td></td>
<td>• Relatively large document size.</td>
</tr>
<tr>
<td></td>
<td>• Supported in all Web browsers.</td>
</tr>
</tbody>
</table>
Using the Format Dialog box

To change the presentation format of the image document you are viewing, perform the following steps:

1. To change the presentation format of the image document you are viewing, click the **Format** button. The **Format** dialog box is displayed with the default image format selected.

2. Select an alternative format and click the **Refresh** button.

**Note:** The most recent format you select is saved during the current session and becomes the default presentation format the next time you view a document.

Using Rotate Image Buttons

1. Click the clockwise button to rotate the image 90 degrees clockwise from its current orientation.

2. To rotate the image 90 degrees counter-clockwise, click the counter-clockwise button.
Using the View Dialog box

To change rotation or size of the displayed image, perform the following steps:

1. Click the View button. The View dialog box displays with a Refresh, Cancel, and Help icons displays to the side.

![View Dialog Box]

2. Re-size an image by selecting a percentage of the original image size from the Scale field.

3. Change the orientation of the image in the window by selecting one of the rotation settings in the Rotation field.

4. Apply the properties that you selected by clicking the Refresh button.

   **Note:** DO NOT press the Enter key after making selections—you **must** click the Refresh button in the dialog.
Changing Document Views for Text Reports

Changes can be made to text report views using only the Format dialog box. Note that the View and Rotate buttons do not appear on the Page Toolbar of text reports.

1. Click the Format button. The Format dialog box is displayed with the default text report format selected.

![Format Dialog Box](image)

2. Select an alternative format and click the Refresh button.

3. You may want to use the PDF format to change the magnification of the document, since the View option is not available in a text report.

   **Note:** The most recent format you select is saved during the current session and becomes the default presentation format the next time you view a document within that same session.
Annotating Documents with Page Notes

Creating Page Notes

If your department has requested rights to create and read page notes, you can use this feature to annotate reports by attaching notes to them. Although anyone viewing a document can display the page notes attached to it, only the person who created the page note can edit or delete it during the session in which the page note is created. Only one person at a time can create a page note.

To create a Page Note, follow these steps:

1. Locate the document, and open the desired page of the report.

2. Click the Page Note button on the Page Toolbar.

   The Page Note Annotations window is displayed as showed in the figure below.

   ![Page Note Annotations window](image)
3. Click the **New Page Note** button. The note area changes from yellow to white, and the insertion point is positioned in the note box.

4. Type the text of the note in the **Page Note** text box and click the **View Page Note** button to save the **Page Note**.
Editing Page Notes

**Page Notes** can be edited or deleted **only** by the creator of the note during the session in which they are created.

**Note:** The author of the page note is identified by a W# before their MSU NetID in the Recipient column. The creation and updated dates are also displayed in the **Created** and **Updated** columns.

To edit the page note during the current session:

1. Select the page note to edit.

2. Click the **Edit Mode** button.

3. Modify the page note text and click the **View Mode** button to save your changes. (The **Edit Mode** button toggles to **View Mode** during editing.)
**Viewing Page Notes**

When the current page has page notes associated with it, the Page Notes Indicator icon appears on the Page Information line to the left of the Report ID.

To view page notes attached to a document page, follow these steps:

1. Click the **Page Note** button on the **Page Toolbar** to display the **Page Note Annotations** window.
2. Click the **Previous** and **Next** buttons to view the page notes.

**NOTE:** Text does not automatically word-wrap in a Page Note box. You must press **Enter** to go to the next line. A scroll bar in the example above indicates there is additional text beyond the viewing window.
Deleting Page Notes

Only the creator of a Page Note can delete the Page Note during the current session only. Once they leave their session and then sign on again, they will not be able to delete the page note. To delete a page note during the session, follow these steps:

1. On the Page Note Annotations window, select the page note you want to delete.

2. Click the **Delete Page Note** button.
Saving Documents as Files

AIS Document Viewer provides several ways to save documents as files. Use the **Download** feature to save multiple pages or large amounts of information. Use the Save and Copy features to quickly save single image or text documents. Files will be downloaded to your default location at C:/Documents and Settings/ your Net ID folder (i.e. jdoe)

**Downloading Documents**

Downloading can now take place in either pane of the Document Viewer window. Like printing, you can select multiple reports and download them at once by clicking the download button on the Enterprise Explorer pane or you can view one report at a time and download individually from the Document Page pane.

* * * **Downloading Multiple Reports at one time**

You can now download multiple reports at once, from the Enterprise Explorer Pane, without having to open each report and download separately. Keep in mind, multiple reports can be downloaded in various formats (HTML, PDF, etc.) but with one orientation (landscape or portrait).

1. Select non-contiguous reports by holding down the Ctrl key and selecting each report). You can also display the desired document in Document Viewer.
2. Click the Download button on the Enterprise Explorer pane on the left side of the window.
3. Specify the download formats for you image and text reports. Like printing in the Enterprise Explorer pane, formats (HTML, PDF, etc) can vary within a download but orientation (landscape or portrait) can not and will only download as one type. *The LPFD Format drop down will not be utilized by Michigan State University.*

4. Specify if you would like to “Include all Subpages,” but keep the “Save Download in ZIP Format” box checked in order for the download to result in a usable file format.

5. Choose your format options for the download and then click Download or Cancel.

6. The Download Status dialog box will appear, prepare the report, and then complete once the download has been performed.

7. Click OK. Then check the location of your download for the zipped files. The default is C:\Documents and Settings\ your Net ID
**Downloading a Text Report**

Downloaded TXT files can be imported into Excel or Access using the Text Import Wizard. Download the file as a TXT file and choose Open from within Excel to use the step by step Text Import Wizard to open the file.

To save a text report as a TXT file, follow these steps:

1. Display the desired document in Document Viewer.

2. Click the Download Pages button in the Document Page pane on the right side of the window.

The **Download** dialog box appears:

![Download dialog box](image)

3. Make the desired selections in the dialog box and click **Create**.
The tables below describe the fields in the dialog box.

**Options in Download Dialog Box**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Download all the pages of the current report. <strong>Note:</strong> This option may result in a very large download that may take a long time.</td>
</tr>
<tr>
<td>Current Section</td>
<td>Download all the pages of currently open section.</td>
</tr>
<tr>
<td>Current Page</td>
<td>Download the currently open page.</td>
</tr>
<tr>
<td>From: To:</td>
<td>Download a specified range of pages. <strong>Note:</strong> By default, you can specify a range that includes pages from sections subsequent to the one currently open.</td>
</tr>
</tbody>
</table>

**Different File Extensions**
The following fields may appear in the Download dialog box, depending on the type of document being downloaded:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compress . .</td>
<td>Check this option to download to a ZIP file, which, when uncompressed, results in a single file. When you select this checkbox, the downloaded file will have a file extension of ZIP. You will need a special program (i.e., WinZip) to unzip the file.</td>
</tr>
<tr>
<td>Download As</td>
<td>Select one of the following:</td>
</tr>
<tr>
<td></td>
<td>• TXT if the report is a text report.</td>
</tr>
<tr>
<td></td>
<td>• Default, JPG, BMP, or PNG, if the page is an image file.</td>
</tr>
<tr>
<td></td>
<td>• PDF, if the page is a PDF file. The download writes all PDF pages into a single PDF file that you can view or print with software that handles PDF files, such as Adobe Acrobat.</td>
</tr>
<tr>
<td></td>
<td>• HTML to save the current page as a web file</td>
</tr>
<tr>
<td>File Extension</td>
<td>Enter a desired file extension. This field only displays for text pages.</td>
</tr>
</tbody>
</table>
1. The dialog boxes in this step will differ slightly depending on whether you are using Internet Explorer or Firefox. 
   a. In IE, click **Save**. (**NOTE:** Selecting **Open** in IE results in a download that displays in a Notepad window. This download is not saved directly to a file.) 
   b. In Firefox, click **Save File**. 

2. The **Save As** dialog box appears. Choose the location and type in a name for the file, and click **Save**.
Saving an Image to a File

Web browsers let you save an image to a file by using the following procedure. Saving the image to a file will only save the current page.

1. Display the desired image document in Document Viewer.
2. Right-click the image. A context menu is displayed.
3. Select Save As. A Save As dialog is displayed.
4. Specify the folder, filename, and file type and click Save.

Importing a Text File into Excel

Once you have downloaded a text file in TXT format, you can then open the file in an Excel worksheet.

1. In an Excel worksheet, select the cell where you want to put the data from the text file.
   
   To ensure that the external data does not replace existing data, make sure that the worksheet has no data below or to the right of the cell you click.

2. On the File menu, select Open.

3. In the Files of Type list box, select All Files (*.*).

4. In the Look in list, locate and double-click the text file you want to open in Excel.

5. In Step One of the Text Import Wizard, choose Fixed Width and click Next.
6. To specify how you want to divide the text into columns, follow the instructions in Step 2 of the Text Import Wizard, and click **Next**.

7. Set data formats in Step 3 of the Text Import Wizard, and click **Finish**.

**NOTE:** In the example shown below, set the format for the first column to text to display the leading zero in Excel.
**Printing Documents**

You can print documents with Document Viewer by using the **Print Selected Documents** button or the **Print Pages** or **Quick Print** button on the Document toolbar. Upon printing for the first time, you may need to install the DDI Print Engine from ASG (the company that created Document Viewer).

To print the currently displayed page of the document without launching the Print dialog box, click the **Print Pages** button.

*If you are using Firefox, there is a possible issue with text reports having misaligned columns. If this occurs, changing the default font settings may fix this issue. In Firefox, click the Tools menu and choose Options. Choose the Content category at the top of the dialog box and then click the Advanced button to the right of the Default Font setting. In the Font dialog box, at the Monospace drop down, choose Courier or any other fixed pitch font type (Times New Roman and Arial won’t work). Click OK and get back to AIS Document Viewer to view text reports with the correct alignment.*

To print a document from the **Print Selected Documents** dialog box:
1. Display a page from the desired document section.

2. Click the Print button and the Print dialog box displays.

**NOTE:** The Fits Best option only appears when you are printing a text report. Check Fits Best to scale down large document pages to fit on the selected paper size.

3. To configure or change printers, change the paper margin sizes or to change the font type and size, click Print Setup, Page Setup, or Font Setup respectively.

4. Clicking the printer at the bottom left of any Print dialog box will automatically send your document to the printer.

**NOTE:** Clicking the Quick Print button in the document pane will send one copy of your document to your default printer without a dialog box to initiate the printing.

**New In 4.2!**

* Printing Multiple Reports at one time
You can now print multiple reports from the Enterprise Explorer Pane (select non-contiguous reports by holding down the Ctrl key and selecting each report) and selecting Print Selected Documents to print at once. Like downloading multiple reports at one time, report formats (PDF, jpg, etc) can be combined within a download, though report orientation (landscape, portrait) can not. Thus, multiple reports can be printed in various formats but with one orientation.

**Managing Content with Enterprise Folders**
Document Viewing enables you to create personal, easily customizable Enterprise Folders in which you can save and categorize documents for future retrieval.

By saving a document in an Enterprise Folder, you are not storing a physical copy of that document, but rather a link to the document stored on the document server. One of the benefits of this feature is that the contents of your folders are automatically updated when documents are revised or new versions added.
The following sections explain how to perform the common tasks associated with storing documents in Enterprise Folders, including:

- Creating a New Enterprise Folder
- Specifying a Directory for Enterprise Folder
- Placing items in folders
- Renaming folder items
- Modifying the Report Versions Display
- Deleting folders and folder items

Creating a New Enterprise Folder

Enterprise Folders are displayed as yellow folders in the Enterprise Explorer pane, located beneath the document server icon.

You can create as many Enterprise Folders and subfolders as you like. This enables you to store and organize your documents.

To create a new folder, perform the following steps:

1. Click on **Enterprise View**.

2. Click the **New Enterprise Folder** button, or right-click and select **New** from the context menu. A new folder appears in the Enterprise Explorer pane with the default name **New Folder**.

3. To name the folder, type the new name, then press **Enter**.

Where are Enterprise Folders Stored?

When you create Enterprise Folders, they are stored in a default directory on your hard drive, in the folder named with your NetID. C:/Documents and Settings/open your NetID folder (i.e. jdoe). Keep this location in mind in case you’d like to backup that folder from your C: drive.
Placing Items in Enterprise Folders
You can copy items from document servers into your Enterprise Folders, as well as move or copy items from one Enterprise Folder to another. An item can be an entire topic or report, a version, section, or individual document.

⚠️ If you copy a Report ID, you will be able to control the versions of the report that display in your Enterprise Folder (see *Modifying the Report Versions Display on Page 45*). This feature will not be available if you copy a Version ID or Section ID.

Copying Items into Folders
You can copy an item into an Enterprise Folder by:

1. Dragging and dropping it.

   Or

1. Highlight the item you wish to copy.

2. Click the **Copy** button. The **Copy to** Folder dialog box appears.

3. Select the folder to which you want to copy the item, and then click **OK** (the green check mark).
Moving Items Into Folders

To move an item from one folder to another:

1. Highlight the item you wish to move, then hold down the right mouse button and drag the item to the destination folder.

2. Release the mouse button, and from the context menu that appears, select Move Here.

Or

1. Click the Move button. The Move to folder menu appears.

2. Select the folder to which you want to move the item and then click OK.

Folder Management Notes

- You can copy, but not move, an item from a document server to a folder.
- You cannot copy or move individual topic or report items into another topic or report.
- If you drag and drop an item from one folder to another using the left mouse button, it is moved rather than copied.
- Just as in Microsoft, you can use the Shift and Control keys to copy or move multiple items.
Renaming a Folder

After you place an item in a folder, you may wish to rename it to make it more easily recognizable at a later time.

To rename an item in an Enterprise Folder:

1. Select the item and click it again to activate the in-place edit feature.

   Or

1. Open the appropriate folder and right-click the item you want to rename.

2. Select Properties from the context menu. The Properties dialog box opens.

3. Type the new name for the item in the field provided and click OK (the green check mark).

You can also view the properties for document server items by accessing the Properties dialog box in a similar manner. However, you cannot rename an item until you copy it to an Enterprise Folder.
Modifying the Report Versions Display

Your Enterprise Folder contents may include reports containing a large number of versions. You can modify the way such reports are displayed so that you only see those report versions created within a particular time frame when you expand the report in Enterprise Explorer. For example, you can set an option that updates the contents of your folder so that only the most recently created version of the report is displayed.

To modify the number of report versions displayed when you expand the report, perform the following steps:

1. Open the Enterprise Folder containing the Report ID whose display properties you want to modify.

2. Select the Report ID, then right-click and select Properties from the context menu. The Properties dialog box will display. (This feature will be dimmed out if you have copied a Version ID or Section ID.)

3. Open the Report Version(s) list, select the appropriate timeframe, and click OK.

In the future, when you expand the report in the Explorer pane, only those versions that were created within the timeframe you specified are displayed.

Deleting Folders and Folder Items

You can delete individual folder items or an entire folder as required. Deleting an item in a folder does not remove it from the document server.

To delete folders or folder items:

1. Select the folder or item.
2. Click the Delete button on the Explorer toolbar.
Logging Out of Document Viewer

To log out of AIS Document Viewer, simply exit out of Internet Explorer or Netscape by choosing **Close** from the File menu or clicking on the **X** in the upper right-hand corner of the browser window.
New in AIS Document Viewer 4.2

* Printing Multiple Reports at one time
You can now print multiple reports from the Enterprise Explorer Pane (select non-contiguous reports by holding down the Ctrl key and selecting each report) and selecting Print Selected Documents to print at once. Keep in mind that all selected reports will only print in either landscape or portrait orientation and not switch between the two.

* Downloading Multiple Reports at one time
You can now download multiple reports from the Enterprise Explorer Pane (select non-contiguous reports by holding down the Ctrl key and selecting each report) and selecting Download to download several reports at once. Reports will download to the default location at C:/Documents and Settings/ your Net ID folder (i.e. jdoe). Like Printing Selected Documents, reports will only print in either landscape or portrait orientation and not switch between the two.
* Downloading Data that You Select
When you are viewing an image or text report, you can select the data you want to download by creating a table that contains the selected data. This table is called a data definition table. After you create a data definition table, you can download the data from the table to Microsoft Excel. A Data Definition Table will be saved to a policy as well, to be used later for the Filter by Field option.

* Creating a Data Definition Table
This section provides instructions for creating a data definition table that identifies specific data on a text report. The procedure for identifying this data varies slightly based on whether the data occurs in the same position on every page or the position varies from page to page. A Data Definition Table will be saved to a policy as well, to be used later for the Filter by Field option.

* To create a data definition table:

   1. Open the text or image report from which you would like to select data.

   2. In the Document Viewer toolbar, click the Data Definition Table button.

      Processing depends on whether you have previously saved a data definition table for the displayed report.

      - If you have never saved a data definition table for the open report or version, Document Viewer automatically enters the mode for creating a data definition table.

      If you previously configured a data definition table for the open report, Document Viewer displays a dialog box that lists all tables that are associated with the report. Click the New data definition table button to enter the mode for creating a data definition table.

      - The Data Definition Table toolbar replaces the Document Viewer toolbar. The Data Definition toolbar buttons are described below.

   3. Select the area of the document that contains the data you want to include in the data definition table, by clicking and dragging the mouse pointer across the report to create a red box around the data you want to select.
4. Click the New data definition table button. Grid lines are displayed to show columns in the table. If necessary, you can refine the table’s initial layout as described in Changing the Table Layout below.

Continue as indicated below:
- If the data you want to select occurs in the same position on every page of the report, go to step 6.
- If the data you want to select does not occur in the same position on every page of the report, you must set anchors to specify the position of the table relative to any recurring text in the report as explained in step 5.
5. Set anchors to position the table relative to specified characters as described below:

Click the Table settings button. The Table Position dialog box appears as shown below. The Start anchor settings correspond to the table's upper left corner. The End anchor settings correspond to the table's lower right corner.

- Select the Start anchor option.

  Locate any recurring text on the report that is located near the beginning of the table data on every page, such as a heading. This text identifies the start position of your table relative to the location of the specified characters. Enter this text into the Character string field.
• Select the Case sensitive option when the case of the anchor text on the page must match the case found in the Character string field.

• If a page contains multiple occurrences of the character string you selected for the anchor, enter a number to indicate the occurrence to use as the anchor. Occurrences are calculated from the top left of the page to the bottom right. The setting defaults to the first occurrence.

• Optionally, repeat these steps to set an end anchor. You may need to set an end anchor if the end of the table that selects the desired data is in a different location on different pages.

• Click OK.

6. When the table meets your requirements, optionally save the table.

• If you are creating this table is for a one-time download, it is not necessary to save the table.

• If you are creating this table for filtering, or for future downloads, you must save the table.

To save the table, click the Save data definition table button. The Save Data Definition Table dialog box prompts you to enter a name for the new table and a folder in which to store the table node. The data definition table is not saved with the report for which it was created. Tables are saved in the Enterprise Explorer tree. A new tree node represents each saved data definition table.

Notes:

• To save the table as a node at the root level of the Enterprise Explorer tree, select Enterprise View in the Save Data Definition table in this folder box.

• To save the table to a specific subfolder in the tree, select an existing subfolder before you click the Save data definition table button or click the Create New Table button in the Save Data Definition table dialog box.

• You can move saved tables to other locations in the Explorer tree by dragging and dropping them on the desired location or by using the Copy or Move buttons on the Enterprise Explorer toolbar.

• A Data Definition Table will be saved to a policy as well, to be used later for the Filter by Field option.
*Data Definition Table Toolbar Buttons*

The buttons on the data definition table toolbar identify the functions available for creating and editing data definition tables. The Data Definition toolbar is detailed below.

<table>
<thead>
<tr>
<th>![Button]</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Button]</td>
<td>New data definition table.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Rename column headings for use in filtering. Note that column heading names entered through this facility do not download. They appear in the Filter On list in the Filter by Field dialog box.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Save the open data definition table.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Merge columns in a table.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Cancel the data definition table and return to the Document Viewer.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Split columns in a table.</td>
</tr>
<tr>
<td>![Button]</td>
<td>View or modify the current table settings.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Toggle the table's heading row on or off.</td>
</tr>
<tr>
<td>![Button]</td>
<td>View or modify the current column settings.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Download the selected table to Excel.</td>
</tr>
<tr>
<td>![Button]</td>
<td>Apply a data definition table to specified reports and report versions.</td>
</tr>
</tbody>
</table>
* Renaming Column Headings

When you create a data definition table, the table's default column heading names may not be meaningful in the Filter by Field dialog box. For example, when you create a table, the default headings may display as generic labels such as Table_Col1 and Table_Col2. These column headings do not help you identify the column content, so you can rename them by doing the following:

1. When the table is displayed, click the Column names button. The Rename column dialog box is displayed with a list of columns in the table as shown below.

2. Select a column name. The current column name appears in the Rename this column to field at the bottom of the dialog box.

3. Enter the name you want displayed in the Filter On list.

4. Click OK. When you open Filter by Field dialog box, the new name appears in the list.

Note: The renamed columns do not replace the column headings in the report.
* Downloading Data from Data Definition Tables*

When the current data definition table correctly identifies the data you want to download, you can download the data and automatically export it into Microsoft Excel by doing the following:

1. Click the View data in Excel button. The View in Excel dialog box appears with the following options:

   - All - downloads the data specified in your table for all pages of the report.
   - Current section - downloads the data specified in your table for just the current section of the report.
   - Current page - downloads the data specified in your table for just the current page of the report.
   - A range of pages - downloads the data specified in your table for the specified range of pages.

2. Select the desired option and click OK. The File Download dialog box appears.

3. Click Open. Document Viewer launches Microsoft Excel and displays the data specified in your data definition table.

Document Viewer determines a default data type for the downloaded data based on the following:

- If the column contains a mix of text and numbers, Document Viewer downloads the data in text format.
- If the column contains numbers, Document Viewer downloads the data as numeric data.
- If the data in a column contains a monetary symbol, Document Viewer downloads the data as currency formatted data.
- If the data in a column contains a common date format, Document Viewer downloads the data as dates.
If you need to change the default download settings to ensure that only the appropriate column data downloads to Excel, see Limiting the Data Downloaded to Specific Data Types.

* Limiting the Data Downloaded to Specific Data Types

You can limit the download to data in a specific data format. That is, rather than download all the data defined in a table, you can limit the download to data that is formatted as one of the following:

- Currency
- Date
- Text
- Number

Document Viewer provides a default format for the data in each table column that it exports to Microsoft Excel. If you need to limit the type of data that is exported for each column to a specific data type, you can override the default settings. Once you specify the format, Document Viewer inspects the data in each row. It only exports a row of data, if the data in each column matches the specified format. For example, if a column contains only dates, choosing Date in the Column Settings dialog box includes all column data in the download. However, if the column contains mixed data types, such as dates and text, and you select Date in the Column Settings dialog box, only rows containing data in a date format within that column are included in the download.

To limit the type of data to download for a specific column, do the following:

1. Select a table column by clicking inside it. The column is highlighted.
2. Click the Column settings button.
Select a data type in the Type of data box. The right side of the dialog box changes to provide appropriate formatting options for the selected data type.

4 Specify the formatting options for the selected data type.
5 Click OK.

* Viewing and Editing Saved Data Definition Tables
To open a saved data definition table to view or edit it, navigate to the table in the Explorer tree and double-click it. When you open a table, the report for which you defined the table also opens.

* Associating Data Definition Tables with Specific Reports and Versions
You can apply an existing data definition table to any other report or version that has the same layout as the report you were viewing when you created the table. This section describes how to associate an existing table with specific reports or report versions. A Data Definition Table will be saved to a policy as well, to be used later for the Filter by Field option.

To associate a table with a report:

1 Create a data definition table or open an existing table in the Document Viewer window.
2 Click the Constraints button.
3 Complete the dialog box to associate the data definition table with the appropriate reports and versions.

- To restrict the table to the report for which it was defined, select Original report only.

- To associate the table with other reports, select Selected reports, then enter the names of the reports, separated by commas.

4 Click OK. The data definition table is now associated with the reports and versions you specified, however, these settings are not yet saved.

5 Click Save data definition table. The Save Data Definition Table dialog box is displayed.

6 Enter a name for the table and specify a folder to which you want to store the table node.

7 Click OK. When you open a report or version that you associated with this table, the Select Data Definition Table dialog box shows the table in the list of available tables that you can apply to the report.
**Applying Data Definition Tables**

You can apply a data definition table to any report or report version with which it is associated, as described in Associating Data Definition Tables with Specific Reports and Versions. To apply a data definition table to a report or report version do the following:

1. Open the report to which you want to apply an existing table.
2. In the Document Viewer toolbar, click the Data Definition Table button.
3. Select the desired table from the list and click OK. The table is displayed on the open report.
* Changing the Table Layout
This section describes how you can adjust a data definition table's size and layout, and modify the table and column settings as needed.

You can change the table layout in the following ways:

- Resize and adjust row, column, and table borders by clicking and dragging them to the desired dimensions.

- Split one column into two or more columns as follows:

  1. Select an individual column by clicking inside it. The column is highlighted.

  2. Click the Split column button. The column splits into two columns. You can split the column further by clicking Split column additional times. Each time you split the column, a new column is added.

- Merge two or more columns into a single column as follows.

  1. Select two or more adjacent columns by clicking inside one column and dragging the pointer across the table until all desired columns are highlighted; then release the mouse button. You can select the entire table by clicking inside the first or last column of the table and dragging the pointer across the table until all columns are highlighted.

  2. Click the Merge columns button.
* Display Specific Content by Creating a Filtered View

Document Viewer allows you to create a view of a document that displays only the information you need to see. For example, instead of displaying the entire report, you might limit the display to the lines that contain the text "Electricity." Or, you might limit the display to accounts with invoices greater than 1,000. When you limit the information displayed, you are creating a filtered view of the document.

You may want to create a filtered view to:
- View all occurrences of specific information in one glance
- Compare information from different pages of the document
- Provide a quick method of navigating to specific information

The filtered view is displayed below.

When you are viewing the results of your filtered view, a toolbar provides buttons for functions that you can perform. See "Filter Results Toolbar."
To specify the criteria for your filtered view, select one of the following filter dialog boxes:

- Filter by line: Displays a dialog box that lets you specify the characters that must appear in each line. Your filtered view contains all lines in the document that have the specified characters. See "Displaying Lines that Contain Specific Characters."

- Filter by field: Displays a dialog box that lets you specify conditional criteria. Your filtered view contains all lines in the document that meet the conditions you specify. See "Displaying Selected Data from the Document."

* Displaying Lines that Contain Specific Characters: Filter by Line

To create a view that contains all occurrences of lines with specific characters, perform the following steps:

1. Open the document and click the Filter by Line button on the Document Viewer toolbar.

2. If you previously saved a Filter by Line filter that you want to apply to the document, do the following:
1. Click the Load Filter icon. The Load Filter dialog box is displayed, showing Filter by Line filters.

2. Select the filter.

3. Click OK. The Filter by Line dialog box populates with the filter criteria.

4. Go to step 5.

3. Complete this dialog box as follows:

- Specify filter criteria as described below.

  - Each Line Contains - Enter the value that must be present on a line in the report. Add a wildcard character to the beginning of the value to find strings that begin with any character and end with the specific characters. Add a wildcard character to the end of the value to find strings that begin with the specified characters but end with any character. You can use standard shortcut keys to cut, copy, and paste in this field.

  - And/Or - allows you to specify multiple criteria.

And finds multiple strings in the same line.

Or finds a line that contains any of the listed strings.

- Parentheses - Select the parentheses to group one or more conditions into a single condition. This allows you to create a hierarchy for evaluating the conditions.

- If you want to limit your selection to character strings that match the case you entered on this dialog box, select Match case.

- If you want to limit the view to data in the current section of this report version, select Current section only. If you do not select this option, Document Viewer lists occurrences in all sections of this report version.

4. If you want to save these filter criteria so you can use it again at another time, see "Saving the Filter Criteria."

5. Click OK. Document Viewer presents the data you requested in the Results pane.
Notes:

- To facilitate processing, your administrator may provide a limit to the number of results returned at a time. To display the next set of results, click the More Results button on the toolbar.

- The number of returned results is displayed at the bottom of the results window. If you delete, move, or add more results by performing another query, or filter request, the number changes to reflect the updated list.

- The buttons on the Results toolbar allow you to perform additional functions as described below in "Filter Results Toolbar.”

* Filter Results Toolbar

<table>
<thead>
<tr>
<th>![Folder]</th>
<th>Opens the page containing the highlighted result</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Print]</td>
<td>Prints the results</td>
</tr>
<tr>
<td>![Export]</td>
<td>Exports the results to a file (user specifies location)</td>
</tr>
<tr>
<td>![Remove]</td>
<td>Remove the highlighted items from the Results list</td>
</tr>
<tr>
<td>![Settings]</td>
<td>Displays the current filter criteria and allows you to edit it</td>
</tr>
<tr>
<td>![Columns]</td>
<td>Displays the Select Columns dialog box and allows you to select the columns that are displayed and change the order of the display</td>
</tr>
</tbody>
</table>
* Saving the Filter Criteria

If you frequently need to see the same filtered view of the document, you may want to save the filter criteria. This allows you to select the filter criteria from a folder an re-run it, rather than re-enter the filter criteria.

To save the filter, perform the following steps:

On the Filter dialog box, click the Save As button.

Note: If you have already processed your filter, you can return to the filter dialog box by clicking the Edit Filter button.

Filters are saved in the highlighted folder. By default, Document Viewer highlights the folder specified on the Preferences dialog box.

1. Select the folder where you want to store the filter.
2. Type a name that will help you recognize the filter at a future time.
3. Click OK.

Note: You can change the name later by right-clicking on the results in the Explorer tree and selecting Properties from the context menu or by clicking on the results name and editing it.
* Displaying Selected Data from the Document: Filter by Field

To create a view of the document that limits the display to information that meets criteria you specify, first apply a data definition table to the open document as described in Downloading Data that You Select.

Click the Filter by Field button on the Document Viewer toolbar to select your previously defined data definition table (referred to as policy).

Upon clicking OK, the Filter by Field dialog box is displayed as shown below.
If you previously saved a Filter by Field filter that you want to apply to the document, do the following:

- Click the Load Filter icon. The Load Filter dialog box is displayed, showing Filter by Field filters.
- Select the filter.
- Click OK. The Filter by Field dialog box populates with the filter criteria. It also loads the filter's policy information, which is not visible. Document Viewer does not validate the applicability of the policy to the document you are filtering. If the policy does not fit the document, an error message appears when you apply the filter.
- Go to step 6.

4. Complete this dialog box as follows:

- Specify filter criteria as described below. Your filter criteria can consist of one or more multiple conditions.

**Parentheses** - Select if you want to group conditions into a single condition, creating hierarchies for evaluating the conditions.

**Filter On** - select an item from the list. The list consists of items you created. To add items to this list, see the section Creating Items for Filtering.

**Comparison** - select a comparison operator. The following operators are available:

- Contains
- Is Greater Than
- Is Less Than
- Is Greater Than or Equal To
- Is Less Than or Equal To
- Equals
- Does Not Equal

When specifying the Is Like comparison, you can also include the following wildcard characters:

- ? (question mark) - will match any single character.
- * (asterisk) - will match any string of characters (including the null string).
- [x-y] - this range matches a single character in standard ASCII sequence. For example:
  - [0-3] matches any single instance of the character 0, 1, 2, or 3;
  - [a-c] matches any single instance of the character a, b, or c;
  - [E-G] matches any single instance of the character E, F, or G.
**Value** - Enter a value that completes this condition. For example, your condition might be:

![Filter by Field - Policy: AC001](image)

You can use standard shortcut keys to cut, copy, and paste in this field.

**And/Or** - Select one of the following to specify multiple criteria:
- And indicates you want to display lines in the document that satisfy this condition as well as the next condition.
- Or indicates you want to display lines in the document that satisfy either this condition or the next condition. It does not need to satisfy both conditions.

**Parentheses** - Select if you want to group conditions into a single condition, creating hierarchies for evaluating the conditions.

**Notes:**
- If the field is defined as numeric, you can perform a numeric search; if it is defined as character, you can only perform a text search. In a text search 12 is less than 2.
- The "Contains" comparison operator is only available for character data.
- Select Match case if you want to limit your view to character strings that match the case you entered on this dialog box.
- Select Current section only if you want to limit your view to data in the current section of this report version. If you do not select this option, Document Viewer displays occurrences in all sections of this report version.

5 If you want to save this filter criteria so you can use it again at another time, see "Saving the Filter Criteria."

- Click OK to view the data you requested in the Results pane.
The buttons on the toolbar allow you to perform several functions.

* Filter Results Toolbar

The following toolbar buttons are available in the results pane:

| ![Folder Icon] | Opens the page containing the highlighted result |
| ![Print Icon] | Prints the results |
| ![File Icon] | Exports the results to a file (user specifies location) |
| ![Trash Can Icon] | Remove the highlighted items from the Results list |
| ![Pencil Icon] | Displays the current filter criteria and allows you to edit it |
| ![Column Icon] | Displays the Select Columns dialog box and allows you to select the columns that are displayed and change the order of the display |
* Annotating Reports

An annotation is information that you attach to a report. Document Viewer provides two methods for attaching the information:

- Annotation toolbar: The annotation toolbox allows you to attach several different types of information (sticky notes, text, highlight, and rubber stamp) to a specific position on a page.

- Page notes dialog box: The page note utility allows you to attach one or more notes to a page; however, unlike annotations created from the annotation toolbox, you cannot specify a position on the page, and the only type of information you can attach is text.

Although anyone viewing a document can display the page notes or annotations attached to it, only the person who created an annotation or page note can edit or delete it only during the current session. Only one person at a time can create or edit an annotation or page note on a given document. A paper clip in the Page Information Bar denotes that annotations exist for that report. Those annotations can only be viewed by clicking the Edit Annotations icon.

* Creating and Managing Annotations and Page Notes

This section contains instructions for creating, viewing, editing, and deleting annotations. Annotations and page notes are not mutually exclusive; you can add both to any given document.

* Creating Annotations

To create an annotation, perform the following steps:

1. Open Enterprise Explorer, locate the document, and open the desired page. Click the Edit Annotations button on the Document Viewer toolbar:

Note: When you hover your mouse over a button, Document Viewer displays its associated tool tip.
Add a text note, sticky note, rubber stamp, or highlighted text to the document, by clicking the appropriate button. The Annotations Properties dialog box opens.

Specify the properties for your annotation by completing the fields in the Annotations dialog box, as described in the table below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>The annotation type you selected in step 2 is shown by default. You can change your selection by choosing a different type from the list.</td>
</tr>
<tr>
<td>Text</td>
<td>Enter the text of your annotation. This field is disabled for Highlight annotations. Note that the text entered here initially appears in your browser's default font, but after you save the annotation, it is displayed as an Arial font.</td>
</tr>
<tr>
<td>Text Color</td>
<td>Select the color of your annotation text. This field is disabled for Highlight annotations.</td>
</tr>
<tr>
<td>Background Color</td>
<td>Select the background color for you annotation. &quot;0&quot; indicates a transparent background.</td>
</tr>
</tbody>
</table>
4 Click OK. You can position the annotation anywhere on the page by dragging and dropping it. You can also resize it by dragging its lower-right corner when you get a double-headed arrow.

5 Click Save Annotations to store the annotation. If you don't want to save the annotation, click Cancel Annotations.

* Viewing and Editing Annotations
If the document you are viewing contains annotations, the View Annotations button will allow you to view all annotations added to the document. A paper clip icon appears in the Page Information bar beneath any document containing annotations. Click Cancel Annotations again to hide the annotations.

Notes:

- You can create and view annotations only for content displayed in HTML, image, text, and PDF formats.
- Annotations added to PDF documents are visible in Adobe Acrobat Reader.
- When you scale an image page, the annotation is also scaled with the image. Like Page Notes, you can edit an annotation only during the current session. To edit an annotation, perform the following steps:

1 With the related document open, click View Annotations on the Document Viewer toolbar to show the annotations you added to the document.

2 Click Edit Annotations. The Annotations toolbar replaces the Document Viewer toolbar.

3 Double-click the annotation you want to edit. The Annotations Properties dialog box opens, enabling you to view the current properties of the annotation.

4 Make changes to the annotation as desired and click OK.

5 Reposition and resize the annotation as desired.

6 Click Save.
* Deleting Annotations

Like Page Notes, you can delete an annotation only during the current session. To delete an annotation that you added to a document, perform the following steps:


2. Click Edit Annotations. The Annotations toolbar replaces the Document Viewer toolbar.

3. To delete an annotation that you added to the page, select the annotation by holding down your mouse button and simultaneously clicking the Delete key.
<table>
<thead>
<tr>
<th>Command</th>
<th>Shortcut Keys</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>CTRL + P</td>
<td>Displays the print dialog box.</td>
</tr>
<tr>
<td>Next page</td>
<td>CTRL + RIGHT ARROW</td>
<td>Displays the next page you are authorized to view.</td>
</tr>
<tr>
<td>Previous page</td>
<td>CTRL + LEFT ARROW</td>
<td>Displays the next page you are authorized to view.</td>
</tr>
<tr>
<td>First page</td>
<td>CTRL + UP ARROW</td>
<td>Displays the first page of the archive.</td>
</tr>
<tr>
<td>Last page</td>
<td>CTRL + DOWN ARROW</td>
<td>Displays the last page of the archive.</td>
</tr>
<tr>
<td>Go To</td>
<td>CTRL + G</td>
<td>Displays the Go To dialog box to jump to a specific page in that document.</td>
</tr>
<tr>
<td>Zoom in</td>
<td>CTRL + PLUS SIGN (You must use the plus sign on the numeric pad.)</td>
<td>Zooms in on the document by the increments specified in the View dialog box.</td>
</tr>
<tr>
<td>Zoom out</td>
<td>CTRL + MINUS SIGN (You must use the minus sign on the numeric pad.)</td>
<td>Zooms out on the document by the increments specified in the View dialog box.</td>
</tr>
<tr>
<td>View dialog box</td>
<td>CTRL + SHIFT + Z</td>
<td>Displays the View dialog box so you can specify the zoom percentage.</td>
</tr>
<tr>
<td>Fit in window</td>
<td>CTRL + ZERO (You must use zero on the numeric pad.)</td>
<td>Automatically resizes the document to fit in the window.</td>
</tr>
<tr>
<td>Rotate 90° clockwise</td>
<td>CTRL + SHIFT + PLUS SIGN (You must use the plus sign on the numeric pad.)</td>
<td>Rotate image clockwise 90 degrees from its original orientation.</td>
</tr>
<tr>
<td>Rotate 90° counter clockwise</td>
<td>CTRL + SHIFT + MINUS SIGN (You must use the minus sign on the numeric pad.)</td>
<td>Rotate image counter-clockwise 90 degrees from its original orientation.</td>
</tr>
<tr>
<td>Find</td>
<td>CTRL + F</td>
<td>Displays the Find dialog box.</td>
</tr>
<tr>
<td>Page Notes</td>
<td>ALT + SHIFT + N</td>
<td>Displays the Page Notes dialog box that allows you to attach text notations to either a text or image</td>
</tr>
<tr>
<td>Edit Annotations</td>
<td>CTRL + SHIFT + A</td>
<td>Puts the document in edit annotations mode.</td>
</tr>
</tbody>
</table>
Appendix A: Downloading DEPACT Files

NOTE: Business Intelligence will be replacing DEPACT as of January 4, 2011

The screen below displays a partial list of reports in AIS Document Viewer that are available to be downloaded and imported into DEPACT.

Download Options
Accept the default TXT file extension.

File Naming and Storage Recommendations
For files that will be imported into DEPACT, the following naming conventions are recommended.

Ledger Reports:

yymmled.txt (e.g., 0401led.txt for January, 2004) with the exception of June, since June has two ledger closings that need to be downloaded.
June Ledger download files:
First close: yy061led.txt (e.g., 04061led.txt)
Second close: yy062led.txt (e.g., 04062led.txt)

Transaction Reports:

yymmtrn.txt (e.g., 0401trn.txt for January, 2004), with the exception of June, since June has two closings that need to be downloaded.

June Transaction download files:
First close: yy061trn.txt (e.g., 04061tran.txt)
Second close: yy062trn.txt (e.g., 04062.tran.txt)

E03 Reports (Grad Assistant)

ymmdde03.txt (e.g., 40104E03.txt)

Where to store your download files
It is important that you know where your files are being saved when you download them. You can store your download files on your local hard drive or on a network server. You may want to create a folder (e.g., C:\DATA\LEDGER, C:\DATA\TRAN, C:\DATA\E03) for each type of download file. Storing your files on a network drive offers the security of having your files backed up for you.
# Appendix B: Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AIS Document Viewer</strong></td>
<td>A web-based, report-viewing product to replace INFOPAC.</td>
</tr>
<tr>
<td><strong>Annotation</strong></td>
<td>To attach a text page note to a document. (Note: This feature is only available if enabled by your administrator.) Also see Page Note Annotations.</td>
</tr>
<tr>
<td><strong>Archive</strong></td>
<td>A data storage file created by AIS Document Viewer. Archives contain either report or topic information.</td>
</tr>
<tr>
<td><strong>Archive Retention</strong></td>
<td>The total time a report or topic version is kept.</td>
</tr>
<tr>
<td><strong>Browser</strong></td>
<td>An Internet application that lets users access World Wide Web servers. A browser interprets tagged files, navigates links, performs searches, and displays the results of searches.</td>
</tr>
<tr>
<td><strong>CSV (Comma Separated Value) format</strong></td>
<td>File format that is often used to exchange data between applications, in which field information is separated with commas; compatible with Microsoft Excel, Access, etc. Files have .csv extension.</td>
</tr>
<tr>
<td><strong>Document Server</strong></td>
<td>Any document storage location that can be configured as a document server. Document servers can be configured as View Direct document servers, ViewDirect for MVS report servers, or any Windows-compatible storage device. Provides services, such as viewing and printing of DAFs, and report and topic archives, to the ASG (formerly Mobius) viewing clients.</td>
</tr>
<tr>
<td><strong>Document Server Session</strong></td>
<td>Logging on to AIS Document Viewer opens a session, during which reports can be accessed.</td>
</tr>
<tr>
<td><strong>Enterprise Explorer</strong></td>
<td>Displays a graphical tree of the document server, Report or Topic Ids, Version Ids, and Section Ids</td>
</tr>
<tr>
<td><strong>Enterprise Folders</strong></td>
<td>Customizable folders and subfolders in which to store and categorize links to documents.</td>
</tr>
<tr>
<td><strong>Export</strong></td>
<td>Make archived data available to other software programs, such as spreadsheets or word processors.</td>
</tr>
<tr>
<td><strong>Migration</strong></td>
<td>The process of copying report archives from one medium to another.</td>
</tr>
<tr>
<td><strong>Page Note Annotations</strong></td>
<td>You can add a note to a document by attaching a text page note to it. Think of it as an electronic “post it” note. Although anyone viewing a document can display the page notes attached to it, only the person who created the page note can edit or delete it. Only one person at a time can create or edit a page note.</td>
</tr>
<tr>
<td><strong>Policy</strong></td>
<td>A set of definitions used to locate the Report IDs, Section IDs, Topic IDs, and topic items with which to create archive index entries during archive creation. This term is also used for a set of field-specific criteria that locates and extracts data from pages in text reports.</td>
</tr>
<tr>
<td>Report</td>
<td>Any document that is produced by the AIS mainframe computer.</td>
</tr>
<tr>
<td>--------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Report Archive</td>
<td>A file contains the data for each report version. It is a data storage entity that is easily distributed across multiple platforms. See Archive and Topic Archive.</td>
</tr>
<tr>
<td>Report Version</td>
<td>The timestamp that tells when a specific report was generated. Several generations of the same report may be available at the same time. For example, several days of a daily report may be kept on the system for day-to-day comparisons. Also called Version ID. Each version of a report is identified by its Report ID and the timestamp when it was produced. The timestamp is in the format YYYYMMDDHHMMSS (year, month, day, hours, minutes, and seconds) based on a 24-hour clock. Therefore, a report processed on June 30, 1999 at 1:30 P.M. has a Version ID of 19990630133000.</td>
</tr>
<tr>
<td>Section ID</td>
<td>Unique identification for a section of a report. Section IDs are assigned when the report is defined to AIS Document Viewer.</td>
</tr>
<tr>
<td>Text (Tab delimited) format</td>
<td>File format that is often used to exchange data between applications, in which field information is separated with tabs; compatible with Microsoft Excel, Access, etc. Files have .txt extension.</td>
</tr>
<tr>
<td>Topic</td>
<td>Category by which a type of information can be identified and quickly located across reports. For example, one topic might be PID, including all reports about a given PID, such as grades, bills, and transcripts.</td>
</tr>
<tr>
<td>Topic Item</td>
<td>Specific field of data in a report used as the index entry for a topic.</td>
</tr>
<tr>
<td>Topic ID</td>
<td>Unique identification of a topic, assigned when Enterprise Indexes are set up for a report. Topic IDs allow you to select reports by information contained in the report rather than by the Report ID.</td>
</tr>
<tr>
<td>Topic Version ID</td>
<td>The timestamp that tells when a specific Enterprise Index topic was started. Several versions of the same topic may be available for report selection.</td>
</tr>
<tr>
<td>Topic Archive</td>
<td>A data storage entity that contains the data for each topic version and is easily distributed across multiple platforms.</td>
</tr>
<tr>
<td>Version ID</td>
<td>The timestamp that tells when a specific report was generated. Several generations of the same report may be available at the same time.</td>
</tr>
<tr>
<td>View</td>
<td>A rearrangement of the way a report is displayed on your screen. A change in the view does not change the underlying report in any way, but makes viewing and data extraction easier.</td>
</tr>
<tr>
<td>Web Server</td>
<td>A computer running software that responds to requests from Web clients. The Web server sends the requested file across the Internet to the user who requested it.</td>
</tr>
</tbody>
</table>
Appendix C: Frequently Asked Questions

ACCESS

1. How do I gain access?
   To gain access, enter `http://aissecuritycontact.ais.msu.edu/arms/` into the address field of your browser and click the Go button or press the Enter key. Scroll down to locate "DocView__" in the ARM Name Column (far left). Select the ARM with the reports for which you are requesting access.

2. Why can't I get into Document Viewer with my MSU NetID?
   There are several potential reasons that you can try to determine on your own or with the assistance of the AIS Help and Support Center. For login self-help, visit the AIS Service Desk's "Common Login Problems System." Otherwise, contact the AIS Service Desk by e-mail at ais311@msu.edu or by phone at (517) 884-3000. Normal Business Hours are Monday - Friday 7:45a.m. - 5:00p.m. Resolutions for calls received during non-business hours may be delayed until the next business day.

3. Which Web Browsers are supported by Document Viewer?
   The following web browsers are supported:
   - Internet Explorer (IE) version 6.0 and above with all patches and Updates.
   - Mozilla Firefox version 3.0 and above

4. Which reports are available to the general MSU departments?
   The following reports are available to MSU departments:

Accounting Department Reports:
- A17MNTHY-1 Fund Ledger by Mail Drop
- A17MNTHY-2 Fund Ledgers by Account Number
- A17MNTHY-3 Deans List
- A17MNTHY-4 Expanded Account Ledgers: download of Account balance
- A17MNTHY-5 Expanded Account Transactions: Download of Account Transactions
- A17MICRO-1 Fiscal Year’s Fund ledger
- A17LEDG-02 University Chart of Accounts
- A17WKCHK-1 Weekly Voucher/PO Check Report
- A57WKLY-01 A5706 Departmental Invoice Summary

University Payroll Department Reports:
- E01PAY3E-1 Labor Distribution Report by Department Number
- E01PRV3E-1 Labor Distribution Report by Department Number
Access to these reports will be granted to anyone with a business purpose to view the information. The decision regarding who has a legitimate business reason to see the reports will be determined at the department level by individuals already authorized to conduct department business. With the exception of payroll data, once a person is granted permission to view a report, they will have access to all University accounts. Because payroll data involves potential privacy issues (e.g. FERPA), access to that data will be limited to the specific department(s) for which there is a business reason.

Student Accounts Reports - Billing & Receivables:

- J35GLEX-06 Distributed Transaction Details

University Stores

- A37MNTHY-2 University Stores Monthly Charge Statements

Mail Processing

- H80MNTHY-3 Mail Processing Department Monthly Charge Statements

Office Services

- B189091-01 Office Services Temporary Employee Billing Statements
- B189091-02 Office Services In-house Billing Statements

Academic Computing and Network Services

- ACNSBILL-1 Statement of Supplies & Services
- ACNSCSTR-1 Computer Store Monthly Billing Statement

Inventory

- INVACTIV-1 Active Tabulated List
- INVDISPO-1 Disposal Tabulated List
- INVMISNG-1 Missing Tabulated List
- INVTRANS-1 Transferred Tabulated List

Physical Plant

- PPLSTMT-01 Physical Plant Division Customer Statement

5. **What should I do when I receive a new PC or receive an upgrade on my current PC?**
   To avoid problems after an upgrade or after receiving a new PC, verify that you have installed Java or the correct browser security settings for Trusted Sites by clicking on the following links: Install Java and Trusted Sites.
6. **Why can't I get into Document Viewer with my MSU NetID?**
   There are several potential reasons that you can try to determine on your own or with the assistance of the AIS Service Desk. For login self-help, visit the AIS Service Desk's "Common Login Problems System." Otherwise, contact the AIS Service Desk at ais311@msu.edu or by phone at (517) 884-3000. Normal Business Hours are Monday - Friday 7:45a.m - 5:00p.m. Resolutions for calls received during non-business hours may be delayed until the next business day. Please Note: There are printing problems associated with Mozilla Firefox.

7. **What if someone who has access to reports leaves his/her department?**
   If someone who has access to reports in Document Viewer changes departments or terminates employment, the security contact person for that department should be notified and an ARM form must be sent to AIS requesting that the person be deleted from all applications to which he/she had access. Access cannot follow an employee from one department to another. It has to be requested by the employee's new department.

8. **Retention guidelines – how long will AIS keep our reports?**
   AIS follows the retention guidelines set by the University Archivist. Please refer to the University Archivist website [http://www.msu.edu/unit/msuarhc/](http://www.msu.edu/unit/msuarhc/) for retention guidelines. There will be a charge for going beyond the archivist requirements. Reports will remain on disk for up to ten years.

**LOCATING/NAVIGATING**

9. **How can I quickly find a Document by Report ID or Topic ID?**
   Please refer to "Searching for Text" for instructions on how to conduct either type of search.

10. **How do I create an enterprise folder?**
    Please refer to "Creating a New Enterprise Folder" for instructions.

11. **What are some helpful tips for Financial Report users?**
    If you are interested in all the accounts for a department (Group 2), or a set of departments (Group 3), then you can use a feature known as a "Topic Id" in Document Viewer along with a Favorites Folder feature to make it easier to locate and print (if needed) information for all of your accounts. Please click the following Link: "Document Viewer and Financial Report Users - Helpful Tips" for a step-by-step guide to using a Topic Index and setting up a Favorites Folder.
12. **When I try to display E01PAY3E-1 Payroll Labor Distribution report I get a message that reads "Requested list is empty." Why can’t I see my report?**

For E01PAY3E-1 you are only authorized to look at information for your department or common unit code. You will receive this message if you are trying to view an E01PAY3E-1 version where there is no activity for your common unit code. The most common reason people see this is that they are looking at the wrong payroll run. Verify that the version date of the report is the same as the pay date you are looking for. Also, keep in mind that there can be multiple payrolls with the same pay date. So, if you know you’ve got the right date check again to see if there is another report with the same version date.

13. **In the earlier version of Document Viewer, I was able to resize my window panes. How do I do that in this new version?**

   ![Image](image.png)

   Click and drag the double-headed arrow at the very bottom of the Document Viewer pane that separates the two windows to the desired width.

14. **Is there a way to open several reports at one time, in separate windows, so that I can tile the windows and see more than one report?**

   Not without opening multiple copies of your browser. Since each report opens in the Document Page pane of the browser window—not in a new window—only one report can be viewed at a time. You can open additional browser windows to view additional reports. You can print or download multiple reports at one time in this new version.

**PRINTING**

15. **Why do I receive the error message: "No printer control installed"**

   Possible reasons for this could include not having Java installed or not having the correct browser security settings for Trusted Sites. Correct these problems by following the procedures for performing each by clicking on the following links: Install Java and Trusted Sites.

16. **Why do I receive an error when trying to Print?**

   The reason you receive an error message when trying to print could be because you do not have Java installed or because you have not adjusted your Trusted Sites browser security settings. Follow the procedures for each by clicking the installing Java and Trusted Sites. Note: Please use Internet Explorer 6.0 or above if you experience problems printing with Mozilla Firefox. There may be printing problems associated with Mozilla Firefox. See FAQ below.
17. **Why are my text reports printing misaligned when using Firefox?**
   If you are using Firefox, there is a possible issue with text reports having misaligned columns. If this occurs, changing the default font settings may fix this issue. In Firefox, click the Tools menu and choose Options. Choose the Content category at the top of the dialog box and then click the Advanced button to the right of the Default Font setting. In the Font dialog box, at the Monospace drop down, choose Courier or any other fixed pitch font type (Times New Roman and Arial won’t work). Click OK and get back to AIS Document Viewer to view text reports with the correct alignment.

18. **How do I print duplex?**
   To find out how to do this, please click the following link and follow the instructions: [Printing Duplex](#).

19. **How do switch from Portrait to Landscape?**
   To find out how to do this, please click the following link and follow the instructions: [Portrait or Landscape](#).

20. **Why do I print an extra blank sheet in between each account number while printing my Ledger?**
    If your printer allows you to print duplex, then please click the following link and follow the instructions for [Printing Duplex](#).

**DOWNLOADING**

21. **Why do I have problems with downloading a report?**
    Possible reasons for this could include not having Java installed or not having the correct browser security settings for Trusted Sites. Correct these problems by following the procedures for performing each by clicking on the following links: [Install Java](#) and [Trusted Sites](#).

22. **Why does it take so long to view my report?**
    The reason could be that you do not have Java installed. [Install Java](#) and follow the procedures contained therein.

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