DocumentDirect for the Internet
User’s Guide
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DocumentDirect for the Internet is a web-based application that enables you to locate, view and print reports, check images and account statements.

DocumentDirect uses a Windows Explorer-style graphical interface to enable you to quickly and easily access these documents.

This user’s guide will familiarize you with the interface and will also provide step-by-step procedures on using the system.
Software Requirements

To successfully access and use DocumentDirect for the Internet, we recommend the following minimum software requirements.

- Windows 7
- Microsoft Internet Explorer 9
- Java 8 update 31
  -or-
  Java 7 update 75/76

Notes

- Later versions of the above software should be backwards-compatible.
- DocumentDirect for the Internet is optimized to run in Internet Explorer with default compatibility settings.
- We do not recommend using Microsoft Internet Explorer 9 on Windows 8.1 or Windows 2012 R2.
- We do not recommend using Microsoft Internet Explorer 11 on Windows 8.1 or Windows 2012.

Support Information

If you have any questions or concerns, contact your UMB Account Administrator.

You can also contact UMB Technical Support at 1-800-821-2171, ext. 3999.
Accessing DocumentDirect

You access DocumentDirect via Web Exchange. A web browser with 128-bit encryption is required to use Web Exchange. If you are already using Internet Explorer version 9 or higher, 128-bit encryption is standard. If you are currently using an older version of Internet Explorer, then you will need to update your browser using the link below.

  - Internet Explorer Version 9 or higher is required.
  - UMB Customer Technical Support can be reached at (816) 860-3999.

Logging In via Web Exchange

When you log on to UMB Web Exchange you must enter a user ID and password. This prevents others from accessing your information. The highest level of encryption available scrambles the information being sent from your computer. This information can only be decoded by the bank’s servers.

In addition to your username and password, you must create a unique security profile. This profile assists UMB in recognizing you and your computer as well as verify for you that you are on the authentic UMB Web site.

Web Address: https://www.umb.com/Commercial/index.html

NOTE: Follow the procedure below the first time you log on to Web Exchange. For subsequent attempts, or if you have already set up your security profile, you can skip the security enrollment steps.

1. In the Account Sign In section type the user name supplied to you by UMB in the User ID field and click the Next button.

2. Enter the temporary password in the Password field and click Sign In.
To fully protect your information while using UMB Web Exchange we require you to enroll in additional security measures.

3. Click the Next button to select your image and caption.

4. Select your image from the options displayed on the right side of the screen. You can view additional images by clicking the More Images button.
Once you select an image, enter a caption in the **Caption** field. **DO NOT ENTER YOUR PASSWORD.** Your image caption should be a word, phrase, or sentence you can remember and recognize later. It will always appear together with your security image when you log on.

5. To save the image and caption, click the **Next** button.

Next, you are asked to answer three security questions. If our system does not recognize your computer when you log on to UMB Web Exchange, you will be asked to provide the answer to one of the questions you establish in this step.
6. Select each question by clicking the associated drop-down arrow. You must provide an answer to these three questions. Answer fields are case-sensitive.

7. To save your questions and answers, click the Next button. You must confirm your Security Profile. You can change the image, caption or security questions/answers by clicking the Change option associated with each.
8. When complete, click the **Next** button. You continue to UMB Web Exchange to change your password.
To help you protect your information, UMB has put rules in place for your passwords. Following these rules gives you a more secure password.

- Your password must contain at least eight characters.
  - Of those eight characters, at least three must be different.
  - Any single character can be repeated only twice.
- Your password must contain at least one uppercase and at least one lowercase letter.
- Your password must contain at least one number (digit).

9. Enter your password in the **New Password** and **Confirm Password** fields.

   If the password meets the security rules, “The new password meets the rule requirements” message displays above the password fields.

   If the password does not meet a requirement, the displayed message indicates how the password must be changed to meet the requirement.

10. Click **Submit**.
NOTE: This password is valid for 90 days. When it expires you will be asked to change it using the same procedures.

The system updates your password. The process may take several minutes to complete. Do not close the browser session during this time.

The UMB Web Exchange landing page is displayed.

You can change your password at any time by clicking **Change Password** in the upper right corner of the screen.

You can change your security image, caption or questions at any time by clicking **My Security Profile**.

11. Under Other Commercial Services, click the ??? link to proceed to the DocumentDirect interface.

12. Click the **RDS on docdirprod** icon. The Attach to **RDS on docdirprod** window (illustrated below) opens.

13. Enter your **Recipient ID**.

14. Enter your **Password**.

15. Click **OK**.

Topics and Reports are displayed, and the icon changes to illustrate that you are logged in.

**Logging Out**

To close your session, click the **RDS on docdirprod** icon.

**NOTE:** After 30 minutes of inactivity, your session automatically times out and you will have to log in again.

**Changing Your Password**

When your password expires, you need to change it. To do so, follow the steps below.

2. Click \(\text{Change Password}\). The DocumentDirect for the Internet Password Maintenance page (illustrated below) displays.

```
DocumentDirect for the Internet Password Maintenance

Document Server ID: RDS on docdirprod
Recipient ID: 
Old password: 
New password: 
Confirm new password: 

OK  Clear  Help
```

3. Make sure \textit{RDS on docdirprod} is selected in the \textbf{Document Server ID} list.

4. Enter your \textbf{Recipient ID}.

5. Enter your \textbf{Old Password}.

6. Enter your \textbf{New Password}.

7. Enter your new password again, in the \textbf{Confirm new password} box.
   
   Click \textbf{Clear} at any time to clear the contents of all boxes on the page.

8. Click \textbf{OK}. Your password is updated.

\underline{NOTE:} This procedure also changes your password for access to RDS on the mainframe.

### Accessing Online Help

Click the \(\text{Help}\) icon to open an HTML-based online help system. The help system contains an interactive table of contents and index, and is fully searchable.
The DocumentDirect Interface

This section details how to work with the toolbars, buttons, shortcut keys, and other elements of the DocumentDirect interface, illustrated below.

### Standard Buttons

The upper left corner of the left pane in DocumentDirect features three standard buttons that are always available, even before you log in. The table below describes each button and the command associated with it.

<table>
<thead>
<tr>
<th>Button</th>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Folder Icon]</td>
<td>Open</td>
<td>Open the highlighted topic or report.</td>
</tr>
<tr>
<td>![Magnifying Glass Icon]</td>
<td>Locate</td>
<td>Search for topics or reports based on specific search criteria.</td>
</tr>
</tbody>
</table>
The table belows details the buttons on the topic toolbar, the toolbar displayed when you are viewing topics. The table lists the command associated with each button, the shortcut key associated with that command, and a description of the command.

<table>
<thead>
<tr>
<th>Button</th>
<th>Command</th>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Previous Document</td>
<td>Display the previous document in the list.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Next Document</td>
<td>Display the next document in the list.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Previous Page</td>
<td>&lt;Ctrl&gt;+Left Arrow</td>
<td>Display the previous page in the document.</td>
<td></td>
</tr>
<tr>
<td>Next Page</td>
<td>&lt;Ctrl&gt;+Right Arrow</td>
<td>Display the next page in the document.</td>
<td></td>
</tr>
<tr>
<td>Previous Sub-page</td>
<td>If the document is divided into sub-pages (front and back of each page), display the previous sub-page in the document.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Next Sub-page</td>
<td>If the document is divided into sub-pages (front and back of each page), display the next sub-page in the document.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go To</td>
<td>&lt;Ctrl&gt;+G</td>
<td>Jump to a specific page in the document.</td>
<td></td>
</tr>
<tr>
<td>Find</td>
<td>&lt;Ctrl&gt;+F</td>
<td>Find specific text within the current document.</td>
<td></td>
</tr>
<tr>
<td>Find Next</td>
<td>Find the next occurrence of the specific search text.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download Pages</td>
<td>Download pages from the current document in various formats.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print Pages</td>
<td>&lt;Ctrl&gt;+P</td>
<td>Print pages from the current document.</td>
<td></td>
</tr>
<tr>
<td>Quick Print</td>
<td>Print the current page.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### The DocumentDirect Interface

<table>
<thead>
<tr>
<th>Button</th>
<th>Command</th>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Change View</td>
<td>&lt;Ctrl&gt;+&lt;Shift&gt;+Z</td>
<td>Change the scale, fit, and rotation of the document.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Rotate Page Counterclockwise</td>
<td>&lt;Ctrl&gt;+&lt;Shift&gt;-</td>
<td>Rotate the document 90 degrees to the left.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Rotate Page Clockwise</td>
<td>&lt;Ctrl&gt;+&lt;Shift&gt;+</td>
<td>Rotate the document 90 degrees to the right.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Format Page</td>
<td></td>
<td>Specify whether to display the document as an image or as a PDF.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Help</td>
<td></td>
<td>Display the online help system.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td>Close Document</td>
<td></td>
<td>Close the current document.</td>
</tr>
</tbody>
</table>

### Report Toolbar

The table below details the buttons on the report toolbar, the toolbar displayed when you are viewing reports. The table lists the command associated with each button, the shortcut key associated with that command, and a description of the function.

<table>
<thead>
<tr>
<th>Button</th>
<th>Command</th>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image7.png" alt="Icon" /></td>
<td>Previous Document</td>
<td></td>
<td>Display the previous document in the list.</td>
</tr>
<tr>
<td><img src="image8.png" alt="Icon" /></td>
<td>Next Document</td>
<td></td>
<td>Display the next document in the list.</td>
</tr>
<tr>
<td><img src="image9.png" alt="Icon" /></td>
<td>Previous Page</td>
<td>&lt;Ctrl&gt;+Left Arrow</td>
<td>Display the previous page in the document.</td>
</tr>
<tr>
<td><img src="image10.png" alt="Icon" /></td>
<td>Next Page</td>
<td>&lt;Ctrl&gt;+Right Arrow</td>
<td>Display the next page in the document.</td>
</tr>
<tr>
<td><img src="image11.png" alt="Icon" /></td>
<td>Go To</td>
<td>&lt;Ctrl&gt;+G</td>
<td>Jump to a specific page in the document.</td>
</tr>
<tr>
<td><img src="image12.png" alt="Icon" /></td>
<td>Find</td>
<td>&lt;Ctrl&gt;+F</td>
<td>Find specific text within the current document.</td>
</tr>
<tr>
<td><img src="image13.png" alt="Icon" /></td>
<td>Find Next</td>
<td></td>
<td>Find the next occurrence of the specific search text.</td>
</tr>
<tr>
<td><img src="image14.png" alt="Icon" /></td>
<td>Download Pages</td>
<td></td>
<td>Download pages from the current document in various formats.</td>
</tr>
</tbody>
</table>
### The DocumentDirect Interface

#### Button Command Shortcut Key Description

<table>
<thead>
<tr>
<th>Button</th>
<th>Command</th>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📹</td>
<td>Print Pages</td>
<td>&lt;Ctrl&gt;+P</td>
<td>Print pages from the current document.</td>
</tr>
<tr>
<td>📏</td>
<td>Quick Print</td>
<td></td>
<td>Print the current page.</td>
</tr>
<tr>
<td>🕵️‍♂️</td>
<td>Change View</td>
<td>&lt;Ctrl&gt;+&lt;Shift&gt;+Z</td>
<td>Change the scale, fit, and rotation of the document.</td>
</tr>
<tr>
<td>📖</td>
<td>Format Page</td>
<td></td>
<td>Specify whether to display the document as an HTML page or as a PDF.</td>
</tr>
<tr>
<td>🤔</td>
<td>Help</td>
<td></td>
<td>Display the online help system.</td>
</tr>
<tr>
<td>✖️</td>
<td>Close Document</td>
<td></td>
<td>Close the current document.</td>
</tr>
</tbody>
</table>

#### Window Controls

The buttons at the bottom of the window control the relative size of the left and right panes. The table below details the function of each button and how they move the divider between the right and left panes of the window.

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎎</td>
<td>Click to move the divider all the way to the left side of the screen, hiding the left pane and expanding the right pane. Click again to restore the panes to their original positions.</td>
</tr>
<tr>
<td>🎏</td>
<td>Click to move the divider to the left.</td>
</tr>
<tr>
<td>🎏</td>
<td>Click and drag to move the divider left or right.</td>
</tr>
<tr>
<td>🎏</td>
<td>Click to move the divider to the right.</td>
</tr>
<tr>
<td>🎏</td>
<td>Click to move the divider all the way to the right side of the screen, hiding the right pane and expanding the left pane. Click again to restore the panes to their original positions.</td>
</tr>
</tbody>
</table>

#### Shortcut Keys

The table below details a number of shortcut keys that are not directly associated with a toolbar button.

<table>
<thead>
<tr>
<th>Command</th>
<th>Shortcut Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Page</td>
<td>&lt;Ctrl&gt;+up arrow</td>
<td>Jump to the first page in the document.</td>
</tr>
<tr>
<td>Last Page</td>
<td>&lt;Ctrl&gt;+down arrow</td>
<td>Jump to the last page in the document.</td>
</tr>
<tr>
<td>Zoom In</td>
<td>&lt;Ctrl&gt;+ (plus sign)</td>
<td>Zoom in on the document.</td>
</tr>
<tr>
<td>Command</td>
<td>Shortcut Key</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>Zoom Out</td>
<td>&lt;Ctrl&gt;+ (minus sign)</td>
<td>Zoom out from the document.</td>
</tr>
<tr>
<td>Fit in Window</td>
<td>&lt;Ctrl&gt;+0 (zero)</td>
<td>Resize the document to fit in the window.</td>
</tr>
</tbody>
</table>
Viewing Documents

Under the Report heading in DocumentDirect, you find various text-based reports. The Topic heading generally contains image-based documents, such as account statements and check images, as well as some text-based reports.

This section provides step-by-step procedures on accessing, viewing, and printing these documents.

Locating Documents

The DocumentDirect system enables you to locate documents based on criteria that you specify. This section walks you through the process of locating specific documents or groups of documents.

Searching with Wildcards

If you do not know the exact criteria for the document, but know at least part of a particular search criterion (such as Report Version, Topic ID, Section ID, and so on), you can search using wildcards. Wildcards are special characters that can replace other characters in search terms.

- * Replaces any number of alphanumeric characters. For example, searching for a Report ID of ARP* returns all reports with IDs that begin with ARP.
- ? Replaces any single alphanumeric character.
- @ Replaces any single alphabetic character.
- # Replaces any single numeric character. For example, searching for a Report ID of EFT30## returns all reports with IDs that begin with EFT30, such as EFT3000, EFT3011, and so on.\(^1\)

Locating Reports

To locate a particular document under the Report heading, follow the steps below.

1. Click Locate. The Locate window opens.
2. Click the Locate by Report tab.

---

\(^1\) Information on wildcards taken from DocumentDirect for the Internet 4.2 Help, Copyright © 2005, Mobius Management Systems, Inc. All rights reserved.
3. Make sure RDS on docdirprod is selected in the Document server list.

4. Specify any other information you know about the document you want to locate, including:
   - Report ID
   - Version ID
   - Section ID
   - Page

5. Click Locate to find and list all documents meeting your search criteria. The documents meeting your search criteria are listed under their respective headings in the left pane.
   -or-
   Click Open to find the document and open it.

**Locating Topics**

To locate a particular document under the Topic heading, follow the steps below.

1. Click Locate. The Locate window opens.
2. Click the Locate by Topic tab.
3. Make sure RDS on docdirprod is selected in the Document server list.

4. Specify any other information you know about the document you want to locate, including:
   - Topic ID
   - Topic version
   - Topic item
   - Report ID
   - Report version

5. Click Locate to find and list all documents meeting your search criteria. The documents meeting your search criteria are listed under their respective headings in the left pane.
   -or-
   Click Open to find the document and open it.

**Browsing through Documents**

To browse through the directory of documents under Topic and Report in the left pane, follow the steps below.

1. Click to the left of the Topic or Report heading. The archive expands to list the different types of documents available.
2. Click to the left of any heading to open the first document underneath that heading.

3. Click the to show the versions available of that type of document.

Note that once you have accessed a document under a heading, the heading turns red. The heading may have the notation MountRequired, as in the example below.

The MountRequired notation means that the document is archived on a tape that must be physically mounted to access the data. When you click to expand the listing, the system begins the automated process of retrieving the appropriate tape and mounting it so you can retrieve the document. A message (illustrated below) is displayed.

Do not click again, as the retrieval process has already started. When the document is available, the heading turns red and is marked Available. The retrieved document is available for 14 days.

4. Continue to click and to expand the listings, until the appropriate document is listed.
If there are more listings under a heading than will fit on one page, a down-arrow icon is displayed at the bottom of the list. Click the icon (▼) to display more items.

5. Click ▼ to the left of any document to open that document, which is displayed in the right pane.

6. Click ☐ and ☐ to collapse the expanded lists.

Navigating Documents

When you have a document open in the right pane, a bar at the bottom of the pane displays information about the document and about the page currently displayed.

As you can see from the sample above, the document’s Report, Version, and Section are displayed. The Page portion shows the page number currently displayed and the total number of pages (for example, Page 1 of 10). For two-sided, image-based documents found under the Topic heading, the sub-page is displayed in brackets: [1 of 2] for the front and [2 of 2] for the back.

Use the toolbar at the top of the right pane to navigate through the documents.

- Click ☐ to display the previous document in the list.
- Click ◄ to display the next document in the list.
- Click ← to display the previous page of the document.
- Click → to display the next page of the document.
- Click ‖ to display the previous sub-page of a double-sided document. (This control is only visible for image-based Topic documents.)
- Click ‖ to display the next sub-page of a double-sided document. (This control is only visible for image-based Topic documents.)

For more information on navigating through documents, see “Topic Toolbar” on page 12 and “Report Toolbar” on page 13

Jumping to a Specific Page

To jump to a specific page in the document, follow the steps below.

1. Click Go To. The Go To window (illustrated below) is displayed.
2. Enter the page number and click Go To.
The window closes and the page you entered is displayed.

**Searching Document Content**

You can search for specific content (text, numbers, and so forth) in the documents. To do so, follow the steps below.

1. Click Find. The Find window (illustrated below) is displayed.

2. Enter the text you want to find in the Find What box.

3. If you want the search to be case-sensitive, that is, to search for the text exactly as you typed it in the Find What box, select the As Is (Case Sensitive) option.

4. If you only want to search the section displayed, select the Current Section Only option. If you want to search all sections in the current report, leave the option cleared.

5. Specify whether you want to search Up or Down from the part of the document currently displayed.

6. Click Find. The next page containing the search text is displayed.

7. To search again and find the next occurrence of the search text, click Find Next.
Downloading Documents

The DocumentDirect system enables you to save copies of pages as a PDF, a variety of image file types, or as plain text. To download pages from the document from the site to some other location, follow the steps below.

1. With the appropriate document open, click Download Pages.
   For text-based report documents, the Download window illustrated below is displayed.

   ![Download window for text-based report documents]

   For image-based Topic documents, the Download window illustrated below is displayed.

   ![Download window for image-based Topic documents]

2. Specify which pages you want to download.

   ![Download window for text-based report documents]

   ![Download window for image-based Topic documents]
Viewing Documents

- If you want to download the entire topic or report to a file, select **All**.
- If you want to download all pages from the current section to a file, select **Current Section**.
- If you want to download only the page that is currently displayed, select **Current Page**.
- If you want to download a specific page range, select **From** and specify the page range.

3. Specify the format in which you want to download the pages by selecting a format from the list. For text-based report documents, you can select TEXT, HTML or PDF.

   **NOTE:** If you want to be able to open the report document in Excel, select TEXT.

   For image-based topic documents, you can select PDF or one of three image formats: JPG, BMP or PNG.

4. To download all files into a single ZIP archive file, select the **Compress into ZIP archive format** checkbox.

   This option compresses the files to a smaller file size, and enables you to download a single file rather than multiple files. This option is automatically selected if you chose to download JPG, BMP, PNG or HTML.

5. If the document you're downloading is a text-based report, you can modify the file extension by entering a new extension in the **Change File Extension** box.

6. If the document you're downloading is an image-based topic document that includes sub-pages (front and back) and you want to download all of them, select the **Include all sub pages** checkbox.

7. Click **Create**.

   A **File Download** dialog box is displayed, prompting you to open the file or save it.

8. Click **Save**.

   The **Save As** dialog box is displayed.

9. Browse to the location where you want to save the file.

10. Click **Save**. The file is downloaded to the location you specified in step 8.

    If you downloaded a ZIP file, you can open the file and extract the files to any location you choose.

Printing Documents

To print documents from DocumentDirect, follow the steps below.

**NOTE:** The first time you click one of the print icons, you are prompted to download and install a plug-in that enables you to print. If you encounter issues with the automatic plug-in installation, you can manually download and install the plug-in on the DocumentDirect landing page. If you want to print without installing the plug-in, download documents and print them from your desktop. See “Downloading Documents” on page 22 for more information.

1. Click **Print Pages**.
For text-based report documents, the Print window illustrated below opens.

![Print window for text-based documents]

For image-based topic documents, the Print window illustrated below opens.

![Print window for image-based documents]

2. Specify which pages to print.
• If you want to print the entire topic or report, select All. This option prints the entire topic or report, which can contain hundreds of pages.

• If you want to print all pages from the current section (and only the current section), select Current Section.

• If you want to print only the page that is currently displayed, select Current Page.

• If you want to print a specific page range, select From and specify the page range.

**NOTE:** Some reports can contain hundreds of pages. Before you print, confirm your selections to ensure you are only printing what you need. Most of the time, Current Section is sufficient.

3. If the document you're printing is an text-based report, specify how you want the document printed.
   • To print the document at the best size for the document and paper selected, select Fit best.
   • To print the document in its actual size, starting at the upper left corner of the page, select Actual size - upper left.

4. If the document you're printing is an image-based topic document that includes sub-pages (front and back) and you want to print all of them, select the Include all sub pages checkbox.

5. If the document you want to print contains overlays or any other special formatting elements and you want to print the document exactly as it is displayed on the screen, select the Include presentation elements checkbox.

6. Click Print Pages. The standard Windows Print dialog box is displayed.

7. Select the printer and any other print options.

8. Click OK. A Now Printing... window (illustrated below) opens, displaying the progress of the print job.

When the print job is complete, the window closes.
Printing the Current Page

To print only the current page, click **Quick Print**. The document is automatically sent to your default printer. A *Now Printing...* window opens, displaying the progress of the print job, then closes when the job is complete.

Changing Document Views

To change how a document is displayed on the screen, follow the steps below.

1. Click **Change View**.
   If you are viewing a text-based report document, the *View* window (illustrated below) is displayed.

   ![View window for text-based report document]

   If you are viewing an image-based Topic document, the *View* window (illustrated below) is displayed.

   ![View window for image-based Topic document]

2. If necessary, specify the scale of the page by selecting a zoom percentage from the **Scale** list. The zoom percentages available will vary depending on the type of document.

3. If necessary, specify how the document fits in the window.
   - To set an arbitrary zoom level, select **Scale to** and enter a percentage.
   - To give the document the best fit for its size and format, select **Fit best without losing part of the document**.
   - To give the document the best fit for its size and format, select **Fit document to width of window**.
   - To give the document the best fit for its size and format, select **Fit document to height of window**.
Viewing Documents

- To make the document as wide as the window, select **Fit document to width of window**.
- To make the document as tall as the window, select **Fit document to height of window**.

4. If necessary, specify the rotation of the page.
   You can select from rotations of 0 degrees, 90 degrees, 180 degrees, and 270 degrees.

   **NOTE:** Page rotation options are available only on image-based documents such as statements and check images. Text-based reports cannot be rotated.

5. Click **Refresh** to apply the changes to the document.

**Rotating Pages**

Click 👈 to rotate the page 90 degrees counterclockwise (left).

Click 👉 to rotate the page 90 degrees clockwise (right).

**NOTE:** Page rotation options are available only on image-based Topic documents, such as statements and check images. Text-based reports cannot be rotated.

**Toggling Between Document Formats**

By default, text-based documents such as reports are displayed as HTML pages, but you can choose to display them as PDFs. All image-based documents (such as statements) are, by default, displayed as images, but you also can choose to display them as PDFs. To do so, follow the steps below.

1. Click **Format Page**.
   If you are viewing a text-based report document, the **Format** window (illustrated below) is displayed.

   ![Format Window](image)

   If you are viewing an image-based Topic document, the **Format** window (illustrated below) is displayed.
2. For text-based documents, select HTML or PDF from the **Format** list.
   -or-
   For image-based documents, select Image or PDF from the **Format** list.

3. Click **Refresh** to apply the format change to the document.

**Closing Documents**

To close an open document, click **Close**.