



CALYX™

Table of Contents and Bookmark Handling

CALYX.AI

Revision History

When Calyx releases a new version of Calyx RIM, they issue Release Notes which explain the new features and updates. Calyx reviews the Release Notes against each Best Practice to determine any impact to the document:

- Impact = Release notes-documented upgrade changes this Best Practice
- No Impact = Release notes-documented upgrade changes do not affect this Best Practice

When Release Notes impact Best Practice documentation, Calyx recommends that clients review the entire Release Notes for a full understanding of all changes associated with this Best Practice documentation.

Software Version	Release/ Revision Date	Summary of Change(s)
v7.0	30-Apr-2021	Update Best Practice for 7.0 - No Impact
N/A	01-Apr-2021	Update Best Practice for Calyx Rebranding – No Impact
v6.2 CHF6	21-Oct-2020	Update Best Practice for v6.2 CHF5 – No Impact
v6.2 CHF5	09-Sep-2020	Update Best Practice for v6.2 CHF5 – No Impact
v6.2 CHF4	28-Feb-2020	Update Best Practice for v6.2 CHF4 – No Impact
v6.2 CHF3	27-Jun-2019	Update Best Practice for v6.2 CHF3 – No Impact
v6.2 CHF2	15-Feb-2019	Update Best Practice for v6.2 CHF2 – No Impact

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2 Document Purpose

The purpose of this document is to outline the process steps necessary to obtain published output with PDF bookmarks that differ from the TOC.

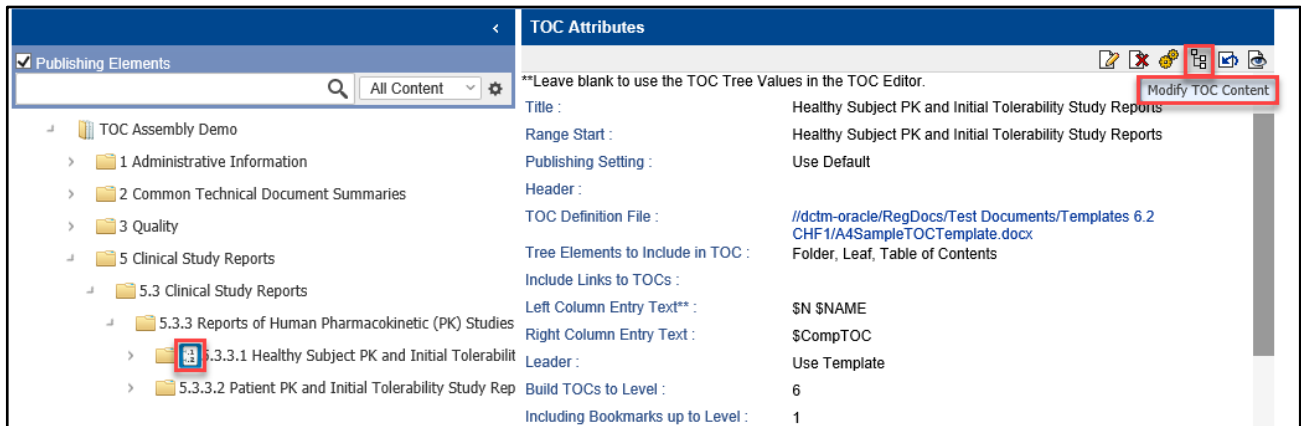
3 Scope

The publishing component of Calyx RIM generated Tables of Contents which can be used to generate the bookmarks that will be used in the published output. If the 'Bookmark Handling' option in the TOC Attributes is set to "All TOC Bookmarks", then the TOC entries that appear in the TOC Editor will become PDF bookmarks. The PDF bookmarks can be made to differ from the TOC by either creating the TOC first and then adjusting the PDF bookmarks, or by setting the PDF bookmarks first and then adjusting the TOC.

4 Manage Bookmarks from Modify TOC Content

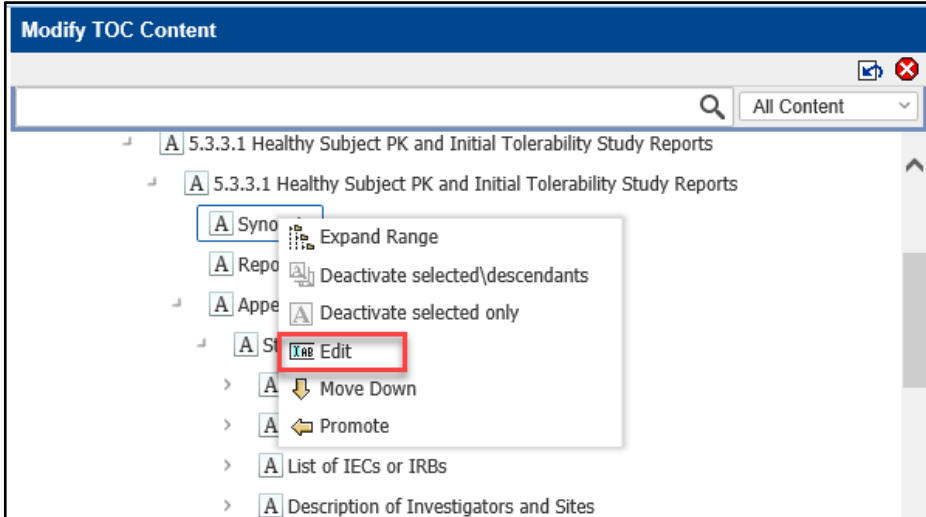
The TOC entries and bookmarks in published output can be managed directly through manipulating the activation/deactivation of items in the 'Modify TOC Content' screen. After (report) content has been assigned, rendered, and extracted, select the TOC and choose 'Modify TOC Content'.

Modify TOC Content

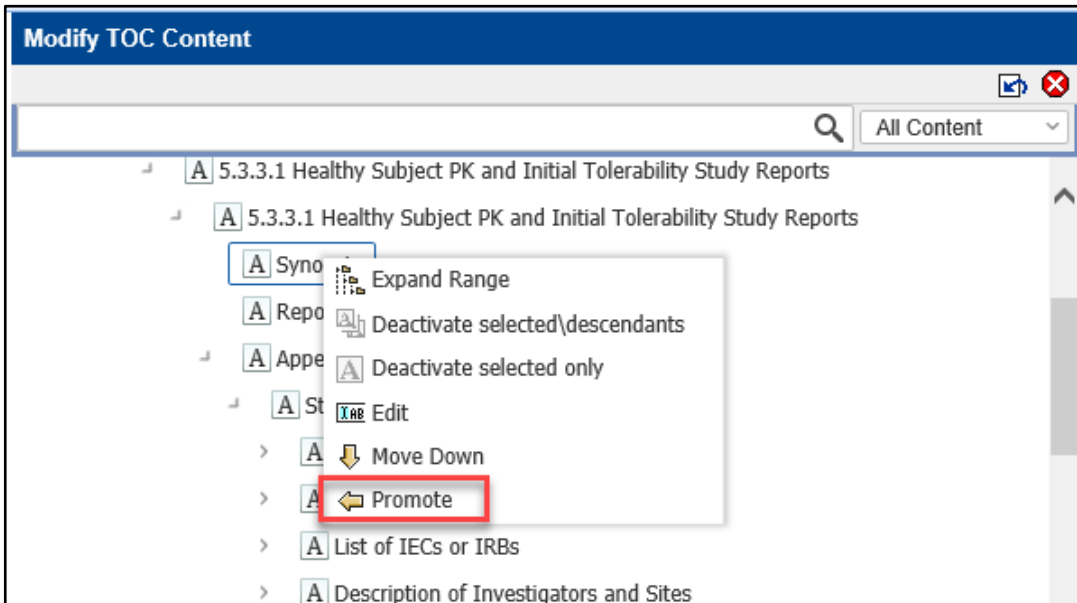


The TOC Entries are displayed and can be edited, deactivated, promoted, and/or demoted by right-clicking and selecting the desired operation.

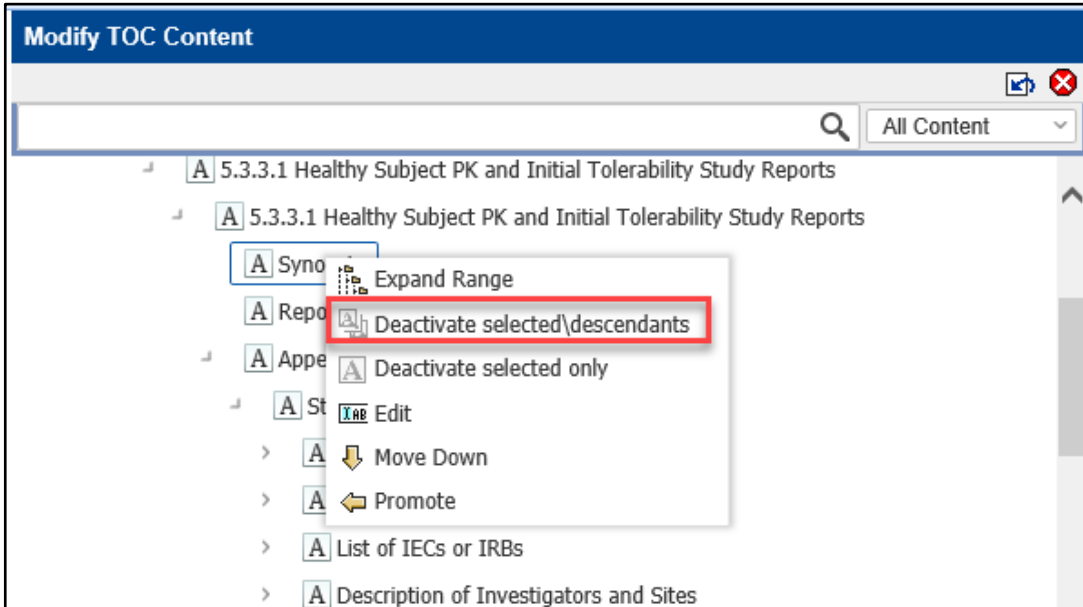
Edit TOC entries



Promote/demote TOC entries

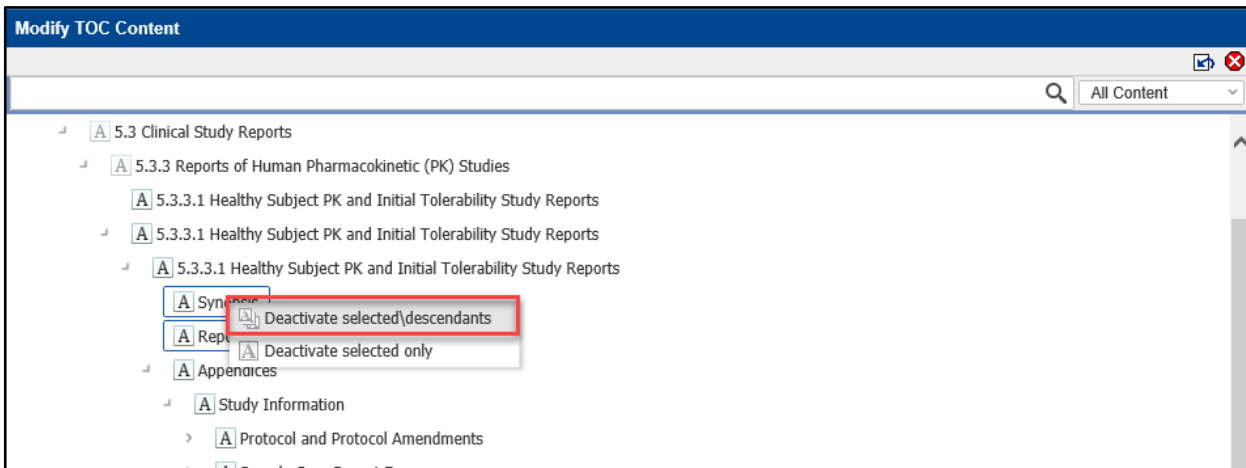


Deactivate TOC entries



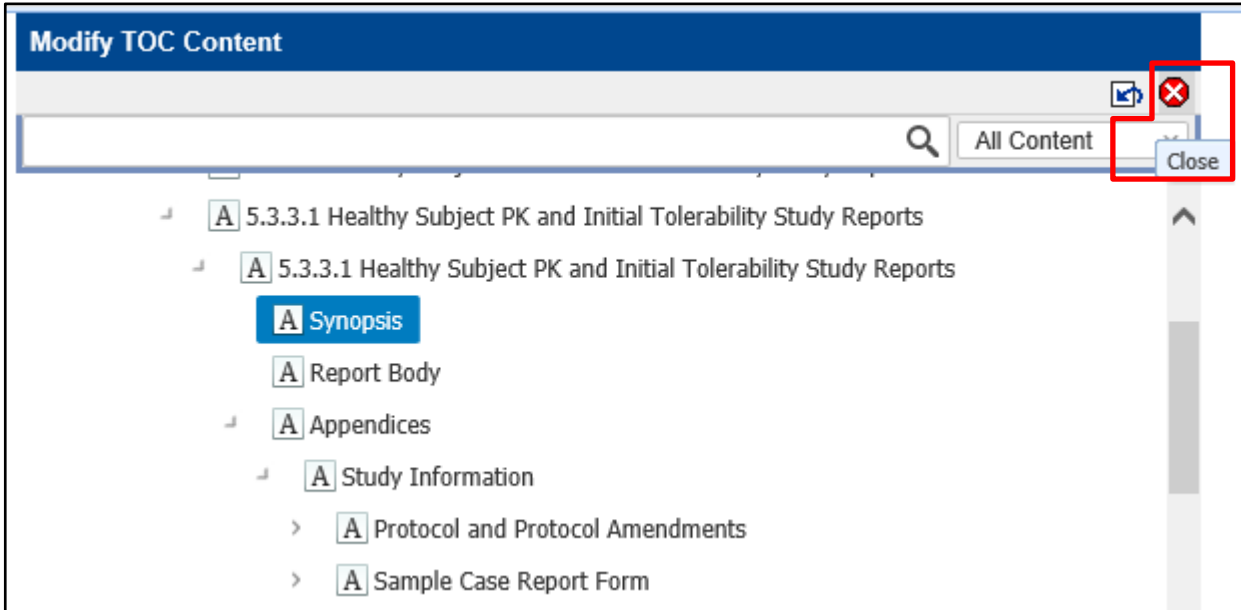
Items can be multi-selected with Shift + Click and deactivated.

Select and modify multiple TOC entries



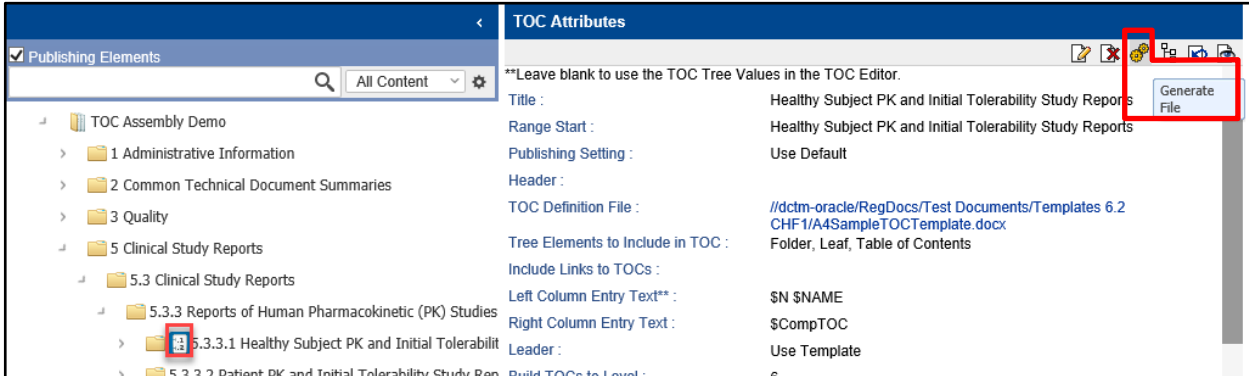
After elements have been edited, deactivated, promoted, and/or demoted as desired, click ‘Close’.

Close Modify TOC Content



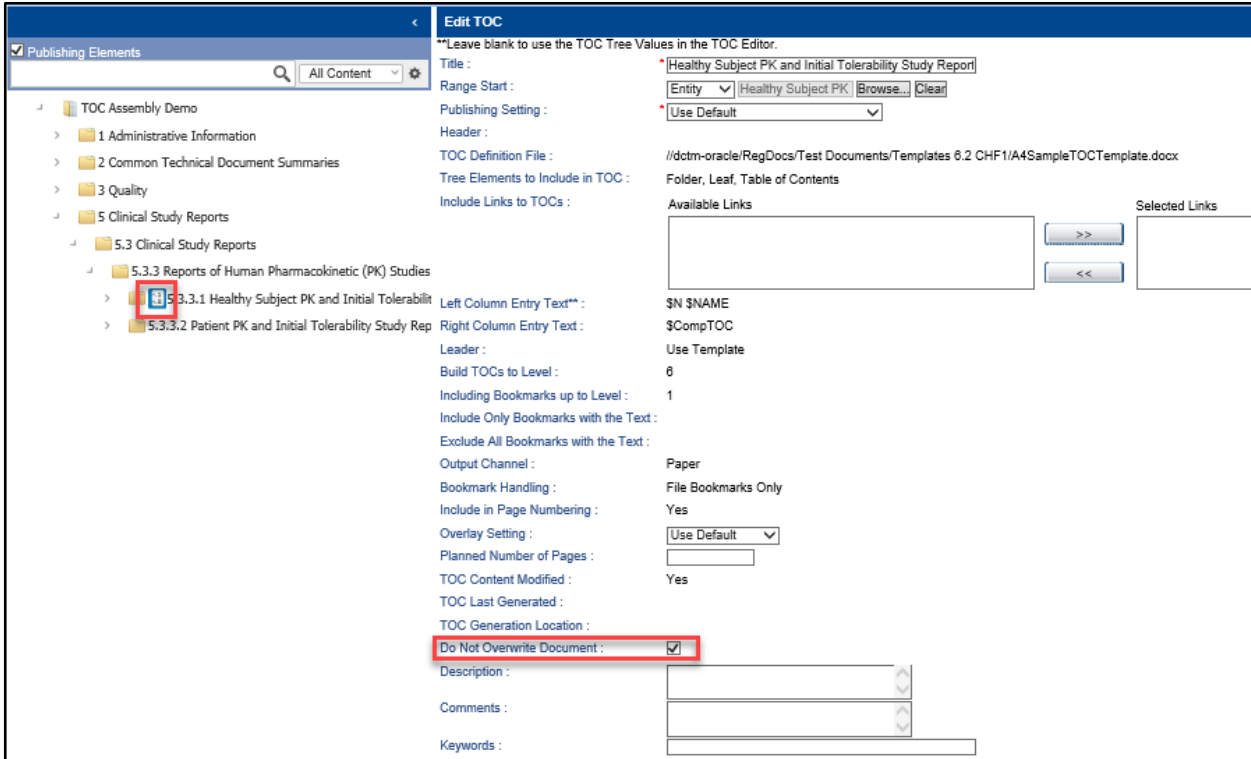
Select the TOC and choose ‘Generate File’.

Generate File



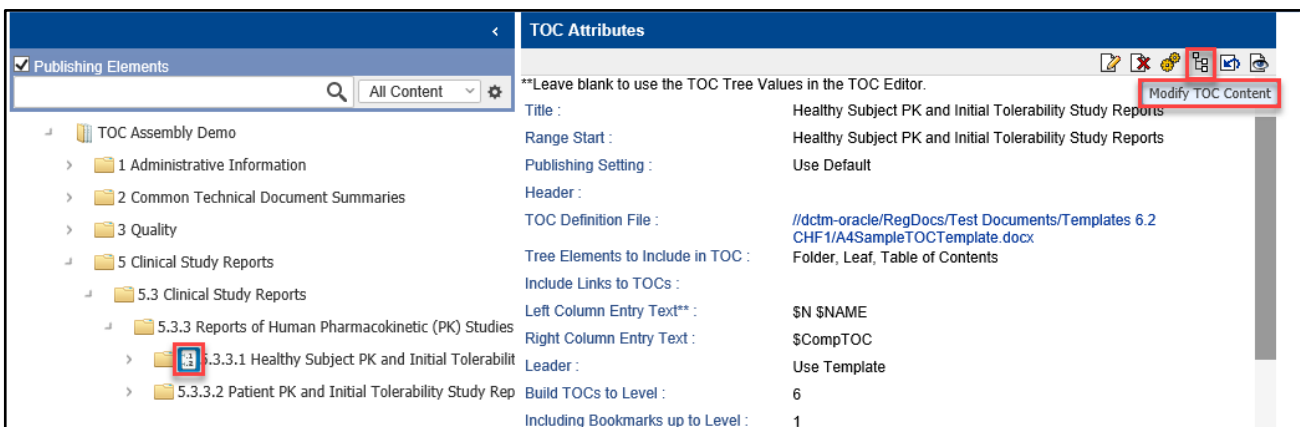
After the ‘Generate File’ request has completed, select Edit TOC and tick the checkbox for ‘Do Not Overwrite Document’, then click Save. This option ensures if another Prepare to Publish/Generate TOCs is performed, this TOC will not be regenerated.

Edit TOC – Do Not Overwrite Document



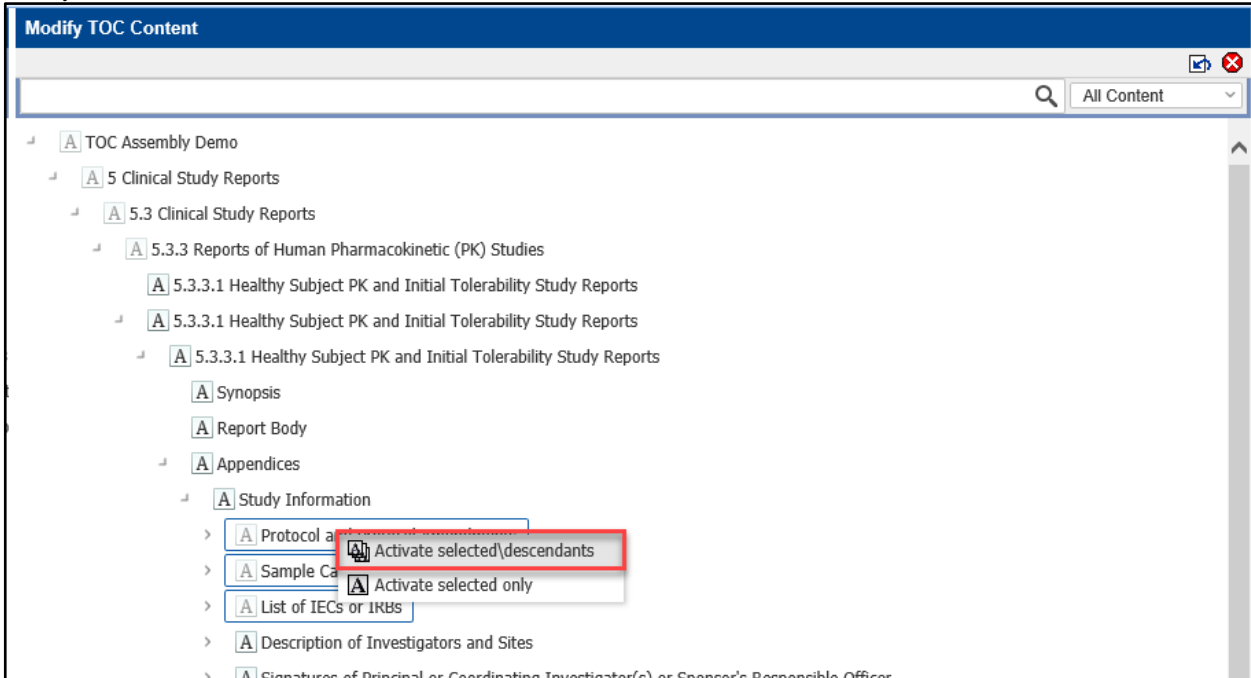
Select the TOC and choose ‘Modify TOC Content’ again to reactivate those items that should be included as bookmarks in the published output.

TOC Attributes - Modify TOC Content



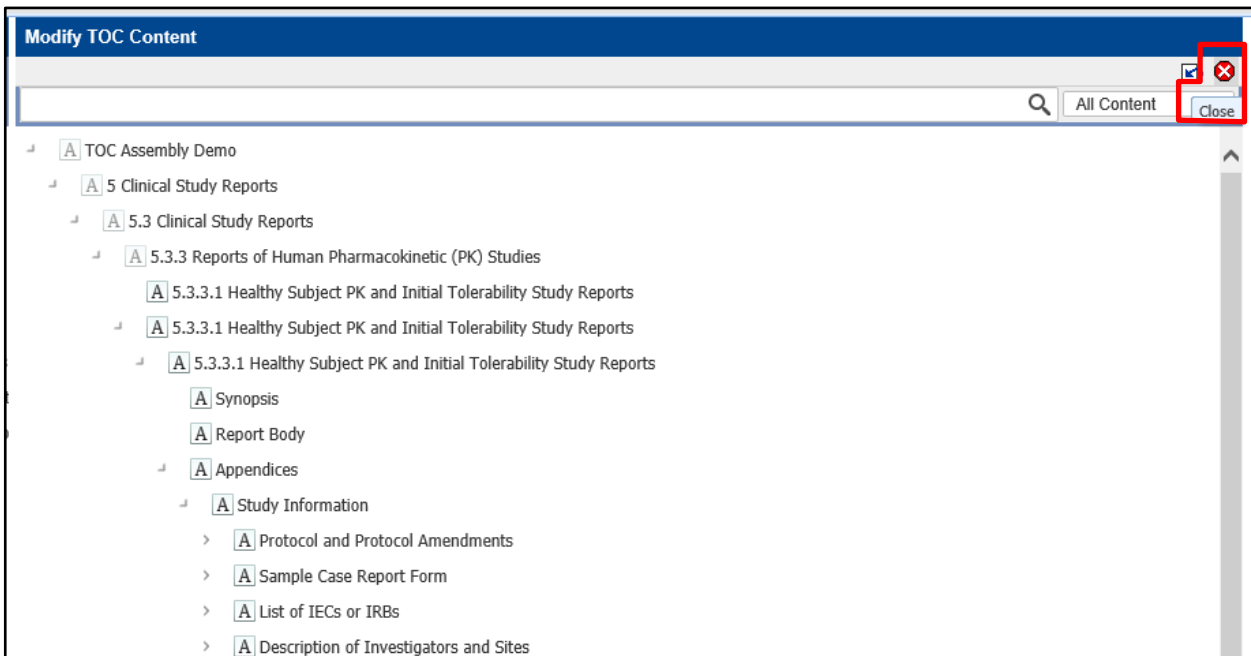
In the ‘Modify TOC Content’ screen, right-click on the items that should be included as bookmarks that were previously deactivated.

Modify TOC Content – Activate selected



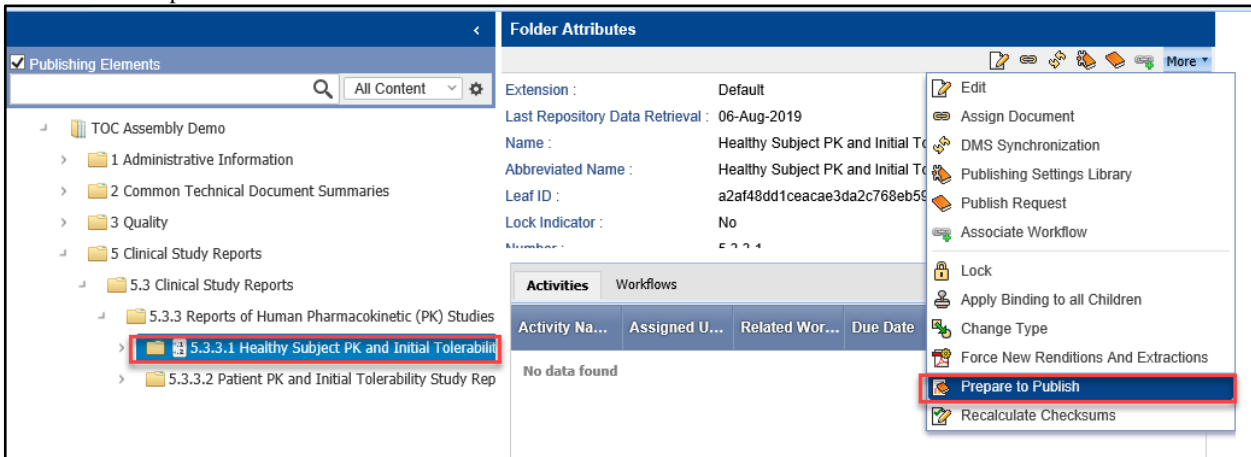
After all desired bookmark elements have been activated/deactivated/edited, click ‘Close’.

Close Modify TOC Content



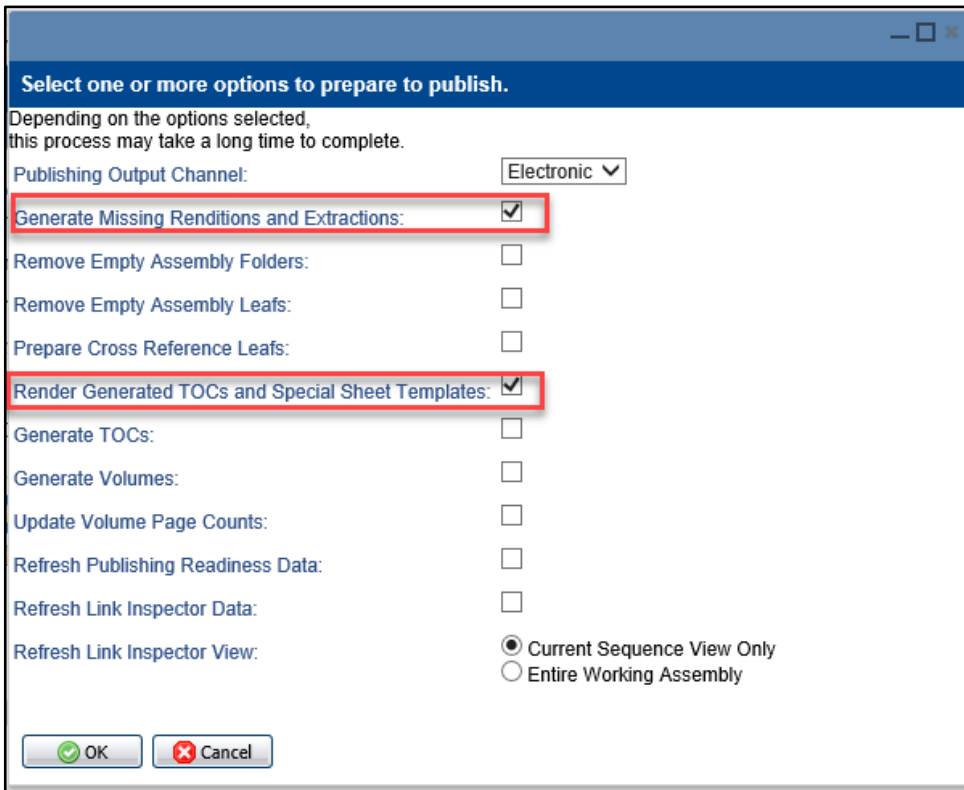
Select the element with the TOC, choose ‘More’ and Select ‘Prepare to Publish’.

More menu – Prepare to Publish



Tick the checkboxes for ‘Generate Missing Renditions and Extractions’ and ‘Render Generated TOCs and Special Sheet Templates’, then click ‘OK’.

Prepare to Publish - options



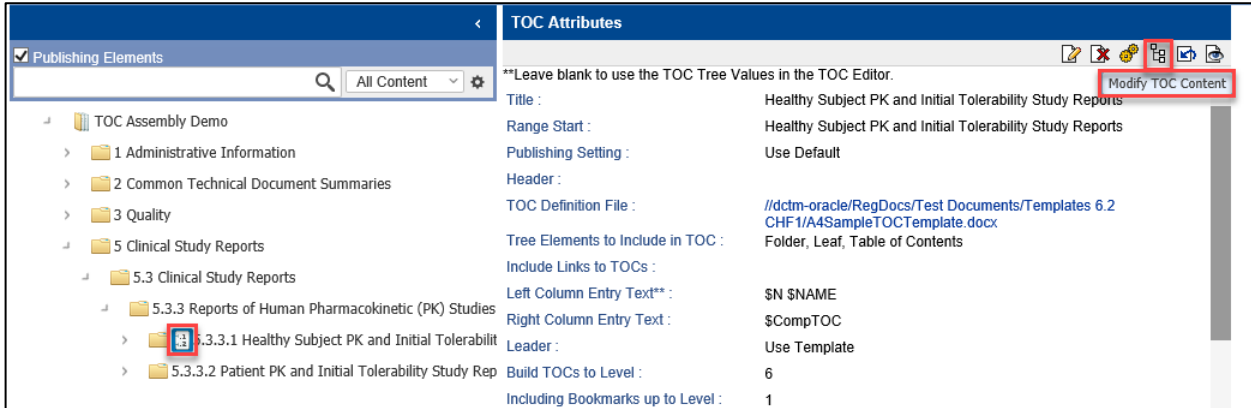
After the ‘Prepare to Publish’ completes, the assembly can be published.

5 Modify Microsoft® Word TOC after Generation

The TOC entries and bookmarks in published output can also be managed by first setting the desired final PDF bookmarks, generating the TOC, then modifying the Microsoft Word TOC that Calyx RIM generates to remove unwanted items from the TOC.

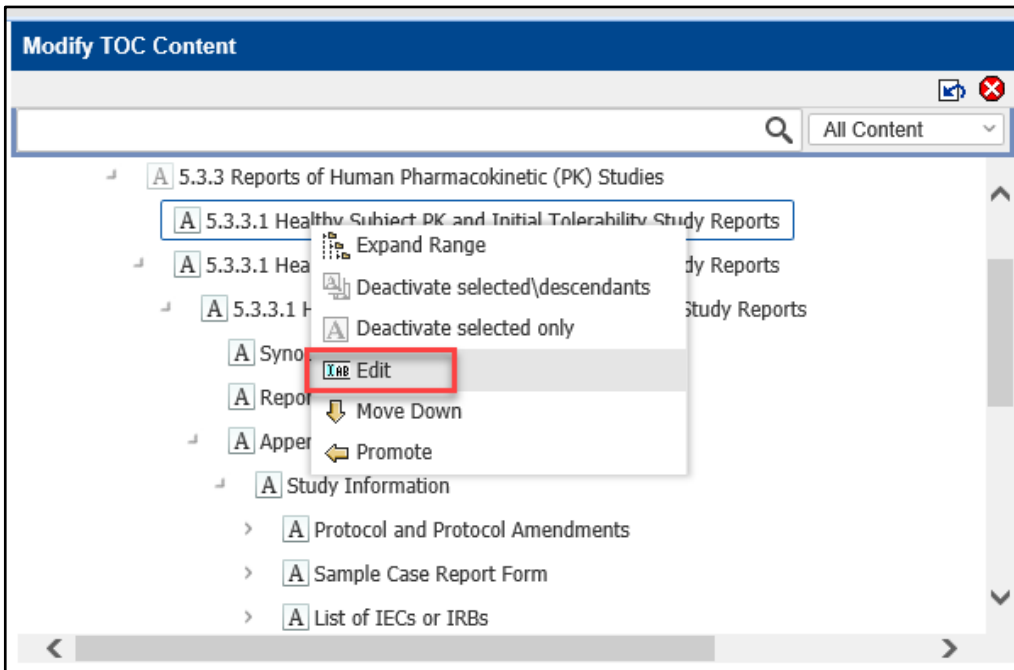
Before generating the TOC, highlight it and select 'Modify TOC Content'.

Modify TOC Content

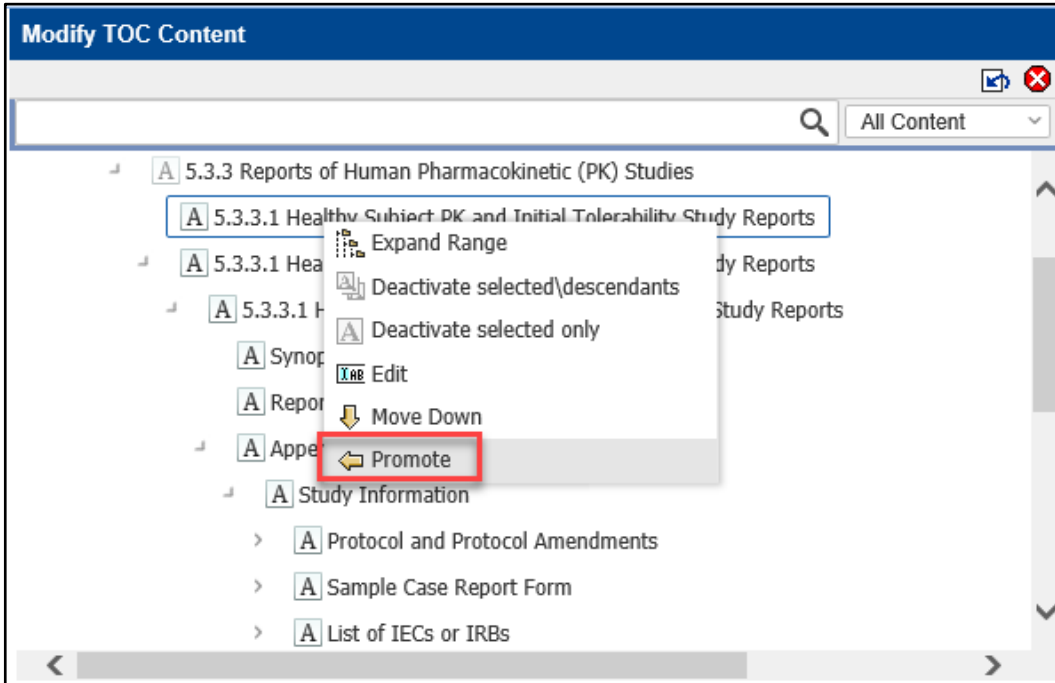


The TOC entries are displayed and can be edited, deactivated, promoted, and/or demoted by right-clicking and selecting the desired operation.

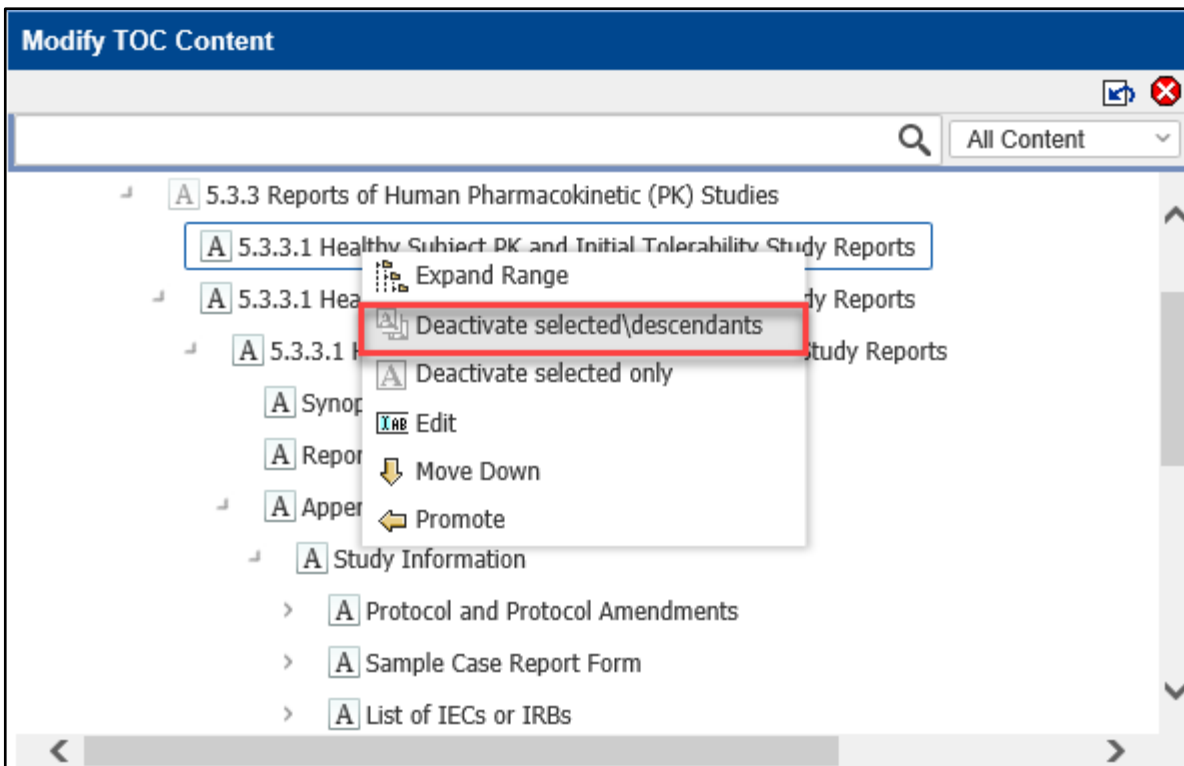
Edit TOC entries



Promote/demote TOC entries

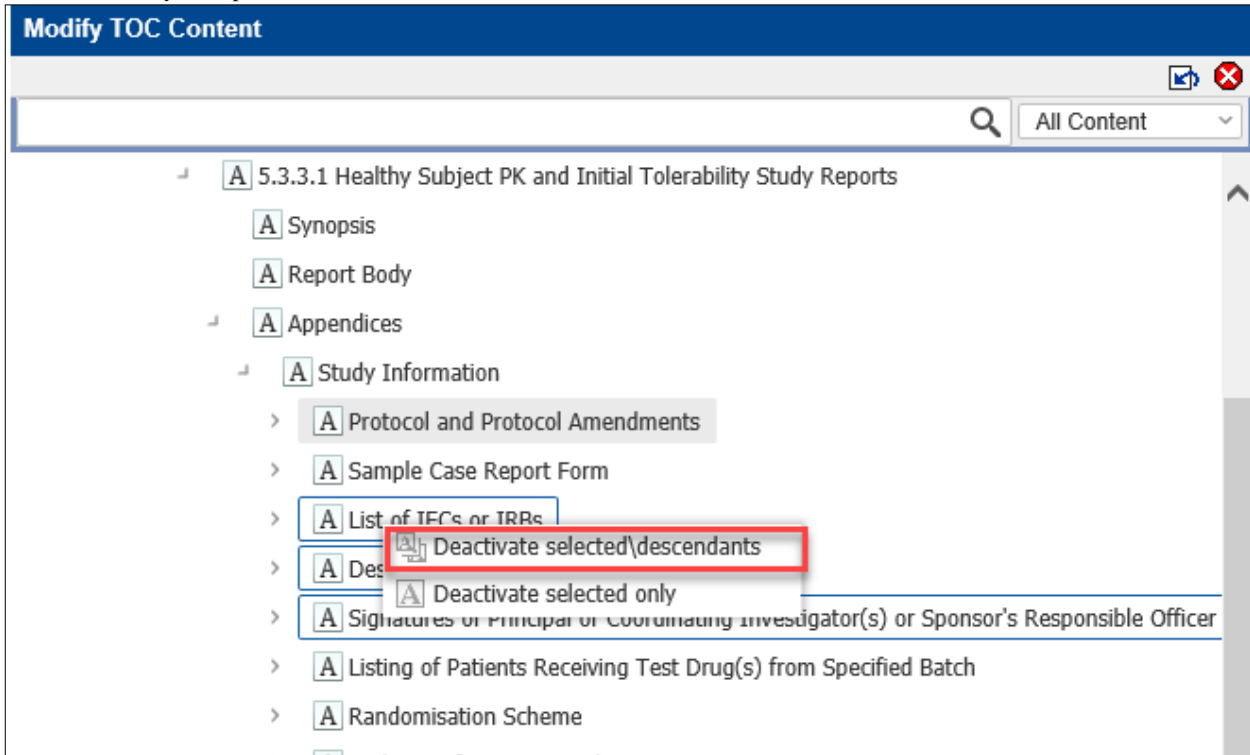


Deactivate TOC entries



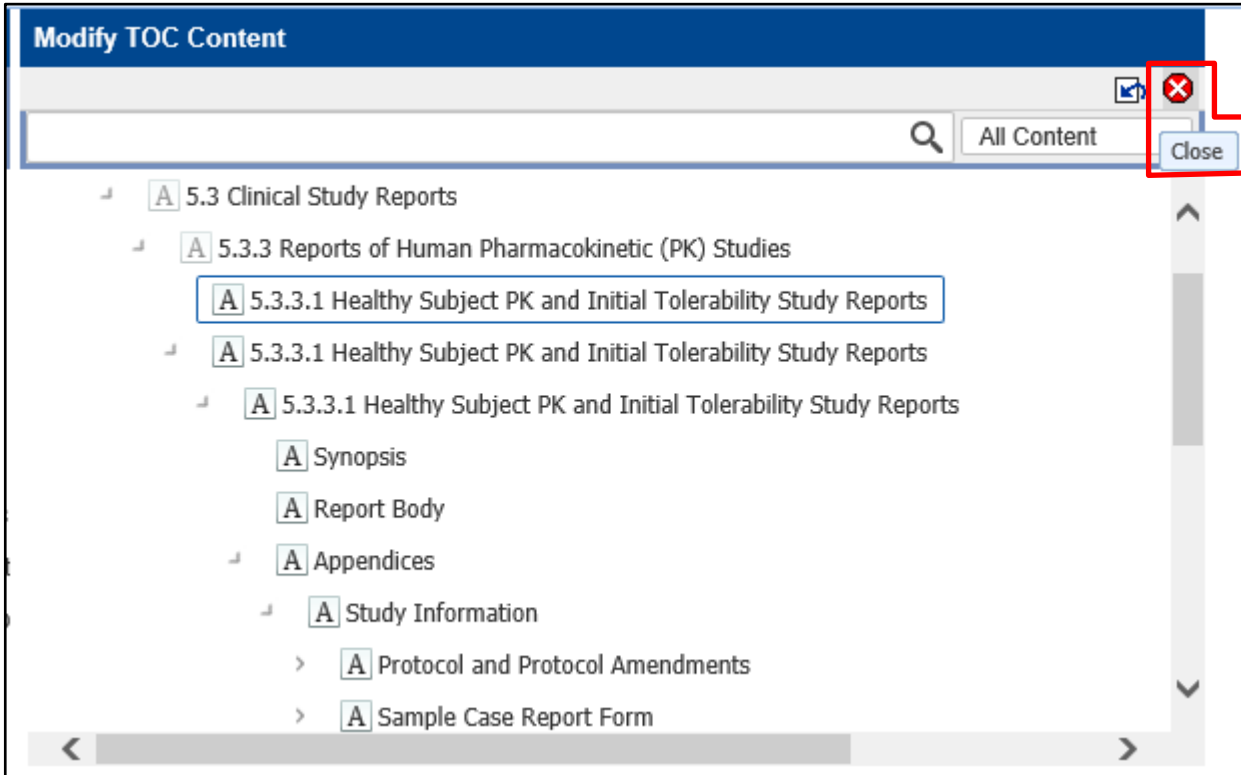
Items can be multi-selected with Shift + Click and deactivated.

Select and modify multiple TOC entries



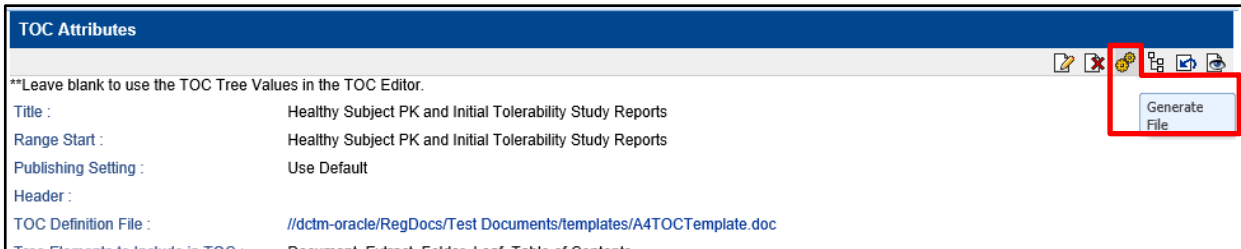
Omit only those entries that are not desired in the bookmark output. Any entries that are applicable for bookmarks but not the TOC should remain active in the TOC editor. After the entries have been updated as needed to reflect the desired bookmark hierarchy, click 'Close'.

Close Modify TOC Content



Select the TOC and choose 'Generate File'.

Generate File



After the Generate operation completes, the TOC attributes will show the filename and location of the generated TOC and when it was last generated.

TOC Last Generated

TOC Attributes

**Leave blank to use the TOC Tree Values in the TOC Editor.

Title : Healthy Subject PK and Initial Tolerability Study Reports

Range Start : Healthy Subject PK and Initial Tolerability Study Reports

Publishing Setting : Use Default

Header :

TOC Definition File : //dctm-oracle/RegDocs/Test Documents/templates/A4TOCTemplate.doc

Tree Elements to Include in TOC : Document, Extract, Folder, Leaf, Table of Contents

Include Links to TOCs :

Left Column Entry Text** :

Right Column Entry Text : xxx

Leader : Use Template

Build TOCs to Level : 4

Including Bookmarks up to Level : 1

Include Only Bookmarks with the Text :

Exclude All Bookmarks with the Text :

Output Channel : Electronic, Paper

Bookmark Handling : All TOC Bookmarks

Include in Page Numbering : Yes

Overlay Setting : Use Default

Planned Number of Pages :

TOC Content Modified : Yes

TOC Last Generated : 06-Aug-2019 21:25:19

TOC Generation Location : //dctm-oracle/RegDocs/IndividualPubArea/Swen/Healthy Subject PK and Initial Tolerability Study Reports_575422.doc

Do Not Overwrite Document : Yes

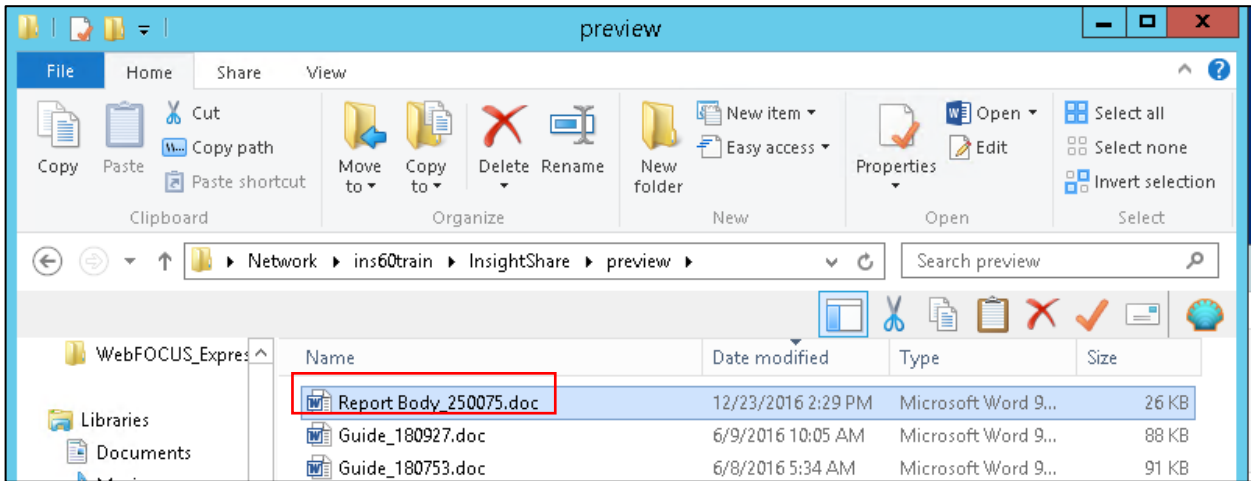
Description :

Comments :

Keywords :

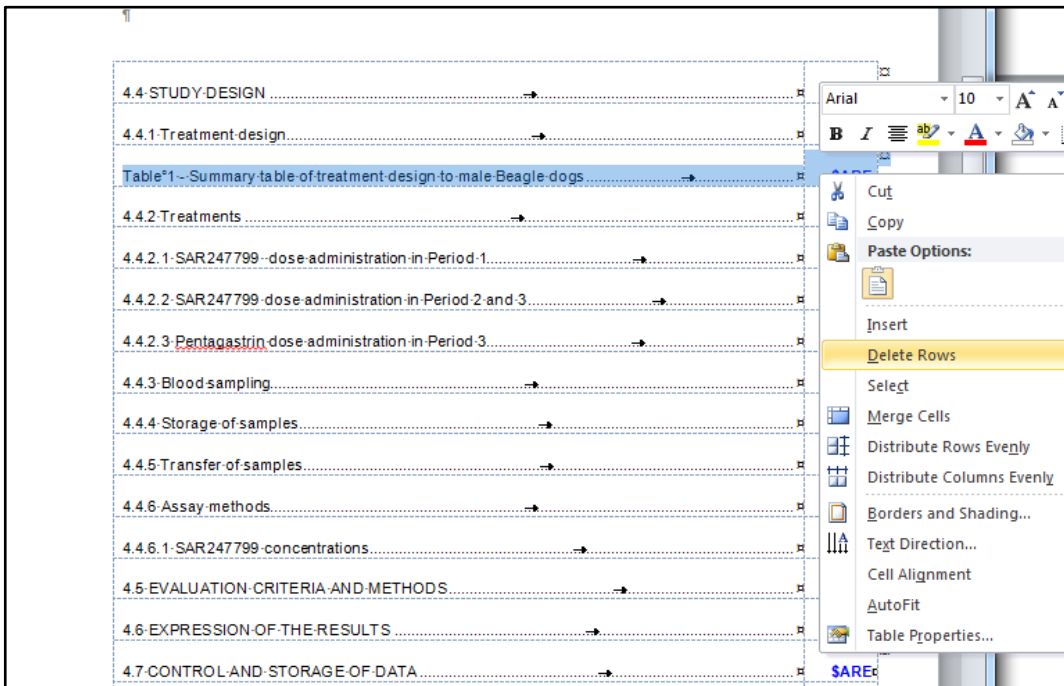
Navigate to the generated TOC and open it in Microsoft Word.

File Explorer



In the Word document, select and Delete the rows for entries that are not desired in the TOC.

Modify Word doc TOC



After removing all unwanted rows for TOC entries, Save and Close the Word document. In Calyx RIM, select the TOC element and click 'Edit' on the Action menu.

TOC Attributes - Edit

TOC Attributes

**Leave blank to use the TOC Tree Values in the TOC Editor.

Title : Healthy Subject PK and Initial Tolerability Study Reports

Range Start : Healthy Subject PK and Initial Tolerability Study Reports

Publishing Setting : Use Default

Header :

TOC Definition File : //dctm-oracle/RegDocs/Test Documents/templates/A4TOCTemplate.doc

Tree Elements to Include in TOC : Document, Extract, Folder, Leaf, Table of Contents

Include Links to TOCs :

Left Column Entry Text:

Tick the checkbox for 'Do Not Overwrite Document', then click Save. This option ensures if another Prepare to Publish/Generate TOCs is performed, this TOC will not be regenerated.

Do Not Overwrite Document option

Output Channel : Electronic, Paper

Bookmark Handling : All TOC Bookmarks

Include in Page Numbering : Yes

Overlay Setting : Use Default

Planned Number of Pages :

TOC Content Modified : Yes

TOC Last Generated : 06-Aug-2019 21:25:19

TOC Generation Location : //dctm-oracle/RegDocs/IndividualPubArea/Swen/Healthy Subject P

Do Not Overwrite Document :

Description :

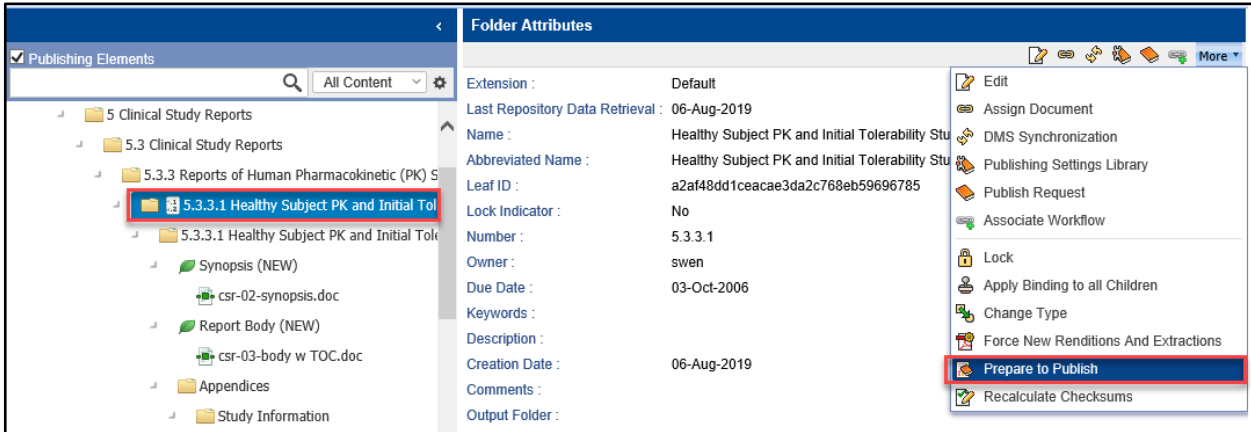
Comments :

Keywords :

Save Cancel

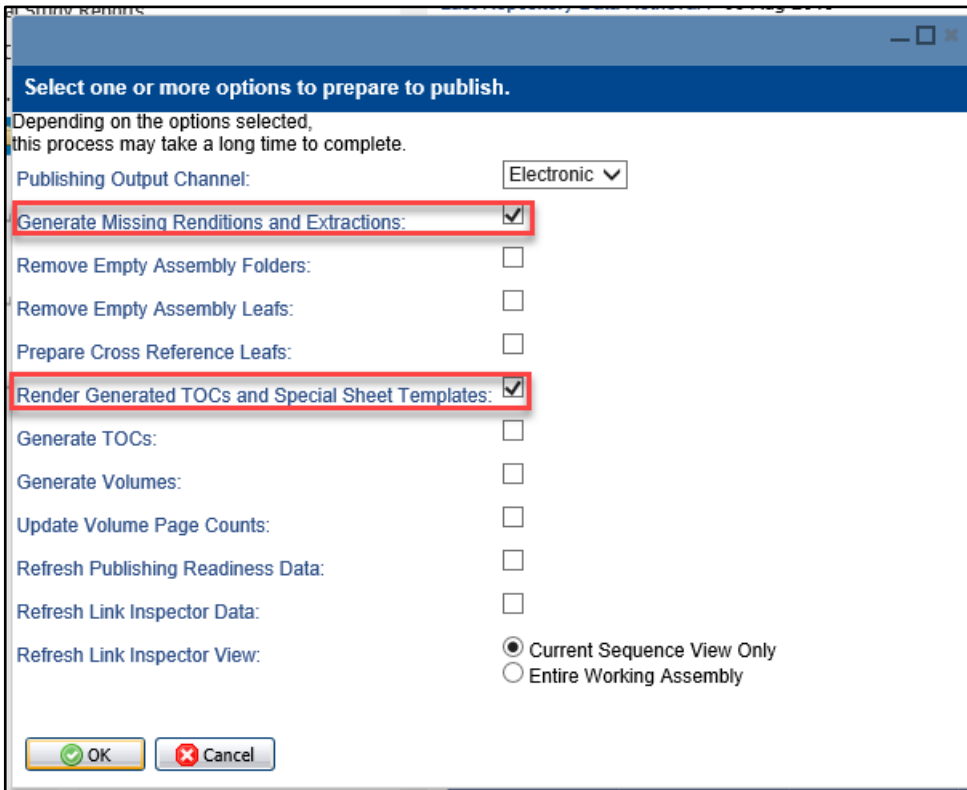
Select the element with the TOC, choose ‘More’ and Select ‘Prepare to Publish’.

More menu – Prepare to Publish



Tick the checkboxes for ‘Generate Missing Renditions and Extractions’ and ‘Render Generated TOCs and Special Sheet Templates’, then click ‘OK’.

Prepare to Publish - options



After the ‘Prepare to Publish’ completes, the assembly can be published.