



BEST PRACTICE: TABLE OF CONTENTS AND BOOKMARK HANDLING

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2 Revision History

When Ennov releases a new version of Ennov InSight, they issue Release Notes which explain the new features and updates. The Ennov Business Consulting Team 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, Ennov 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) (Refer to Release Notes for Full Description)
v7.3.1	28-Jun-2024	Update Best Practice for Ennov rebranding & for v7.3.1 – No Impact
v7.2	20-Jun-2023	Update Best Practice for v7.2 – No Impact
v7.1	13-Jan-2022	Update Best Practice for v7.1 – No Impact
v7.0	30-Apr-2021	Update Best Practice for v7.0 – 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

3 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.

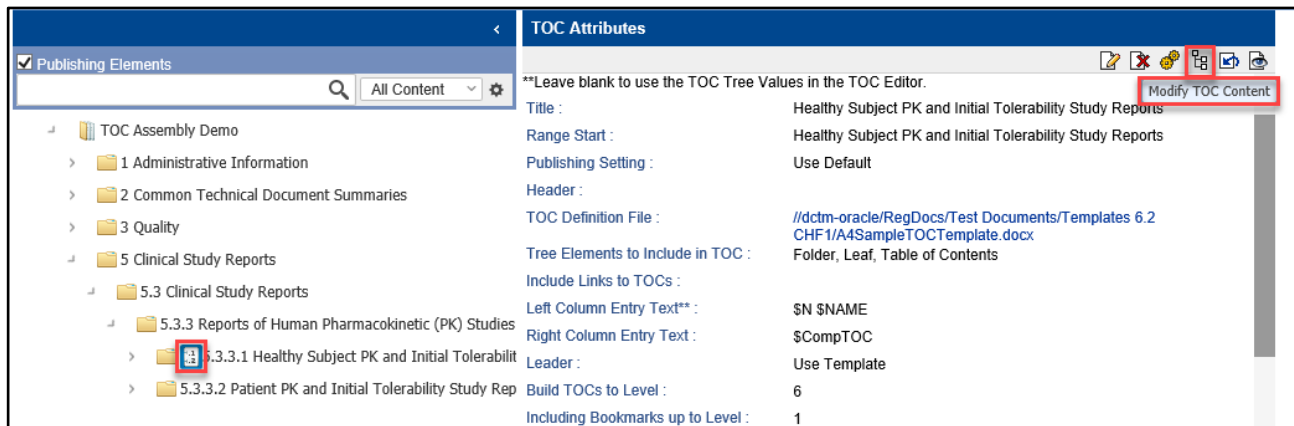
3.1 Scope

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.

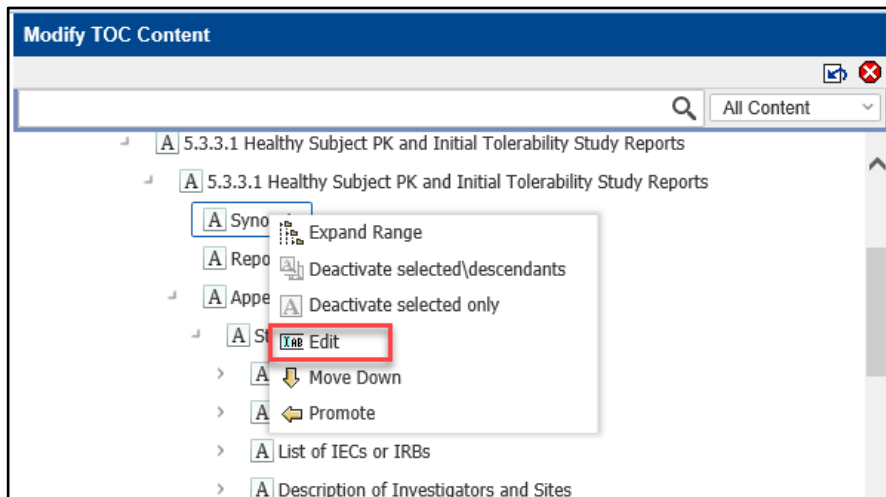
4 Manage Bookmarks from Modify TOC Content

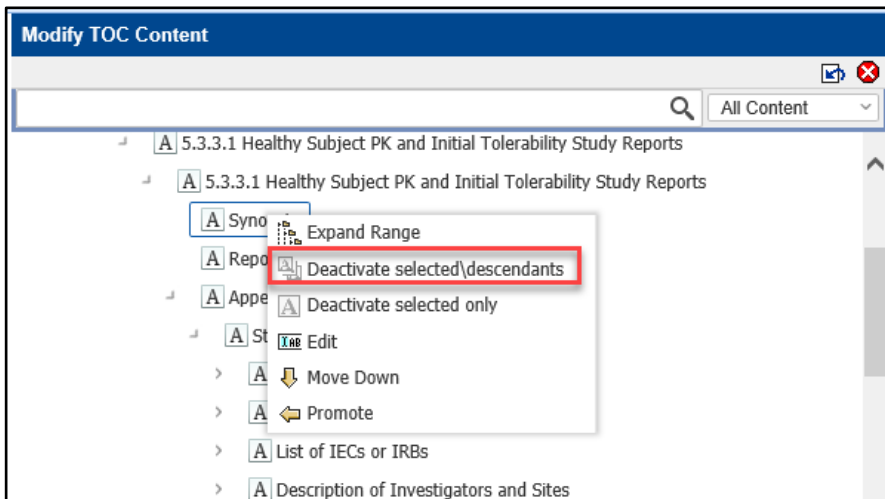
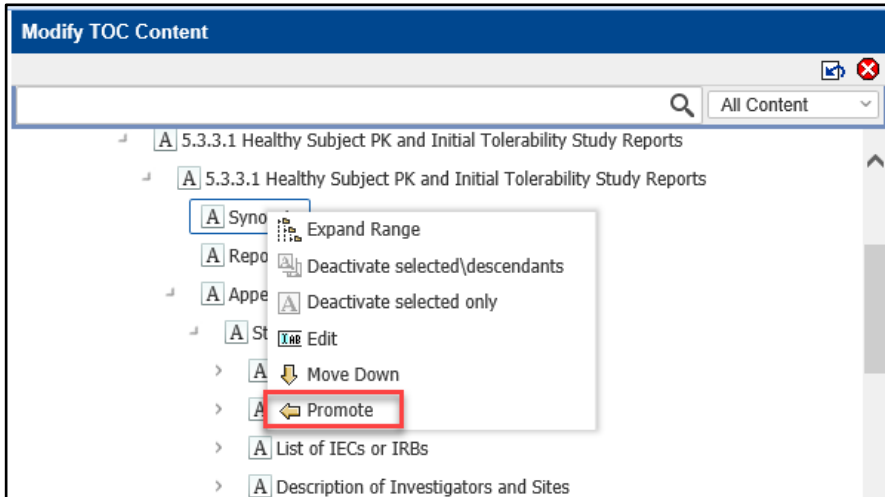
The TOC entries and bookmarks in published output can be managed directly through manipulating the activation/deactivation of items in the 'Modify TOC Content' screen.

1. After (report) content has been assigned, rendered, and extracted, select the TOC and choose 'Modify TOC Content'.

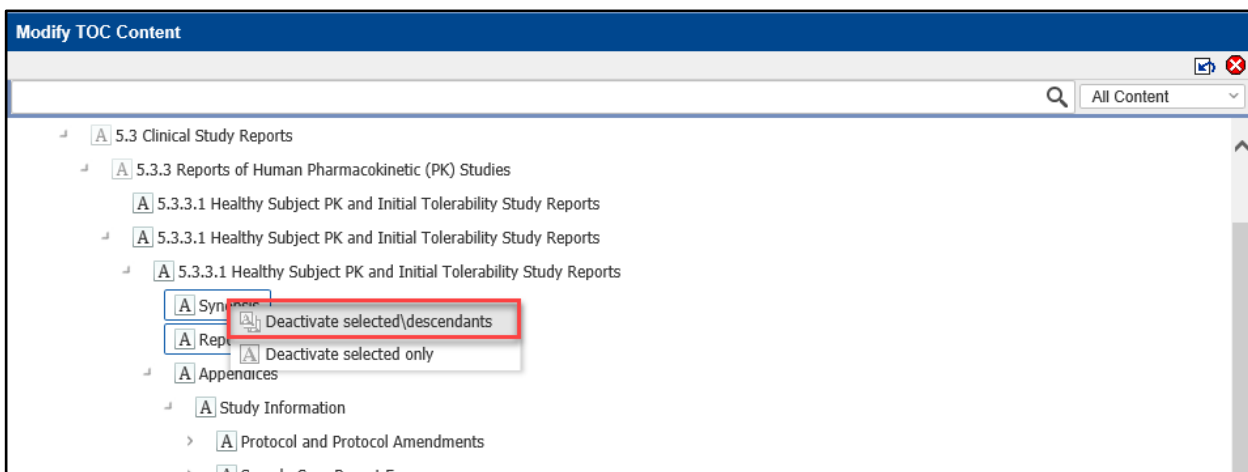


2. The TOC Entries are displayed and can be edited, deactivated, promoted, and/or demoted by right-clicking and selecting the desired operation.

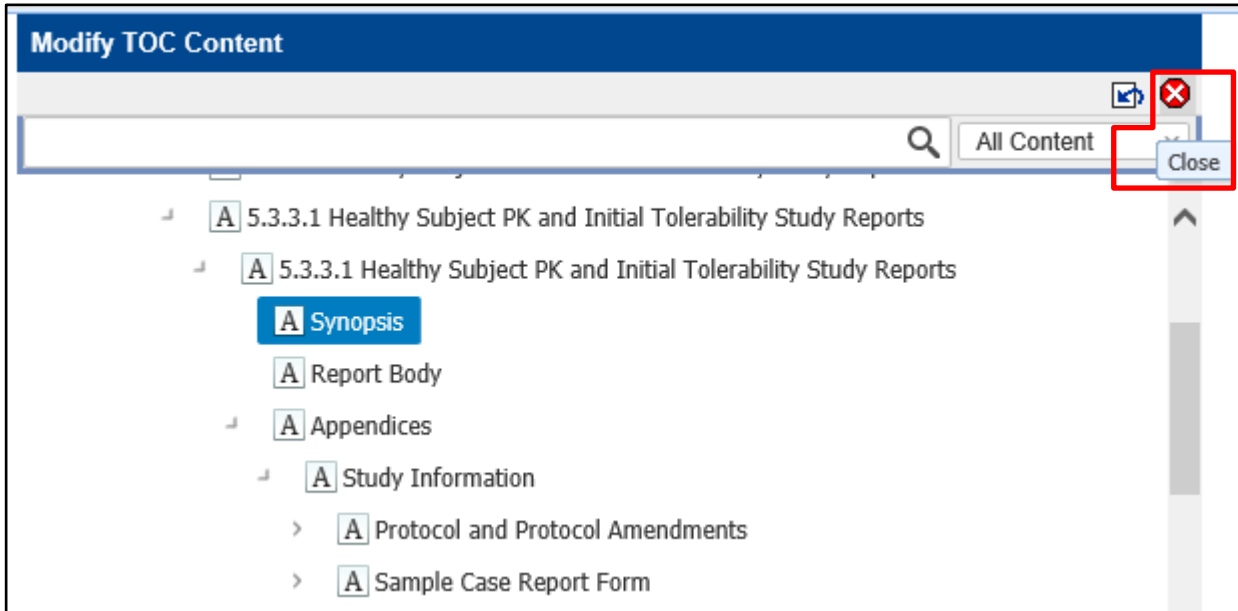




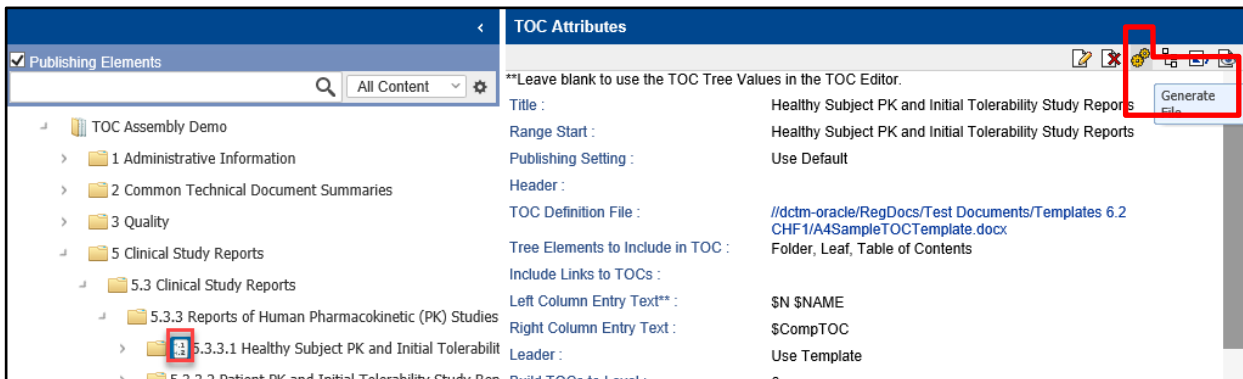
3. Items can be multi-selected with Shift + Click and deactivated.



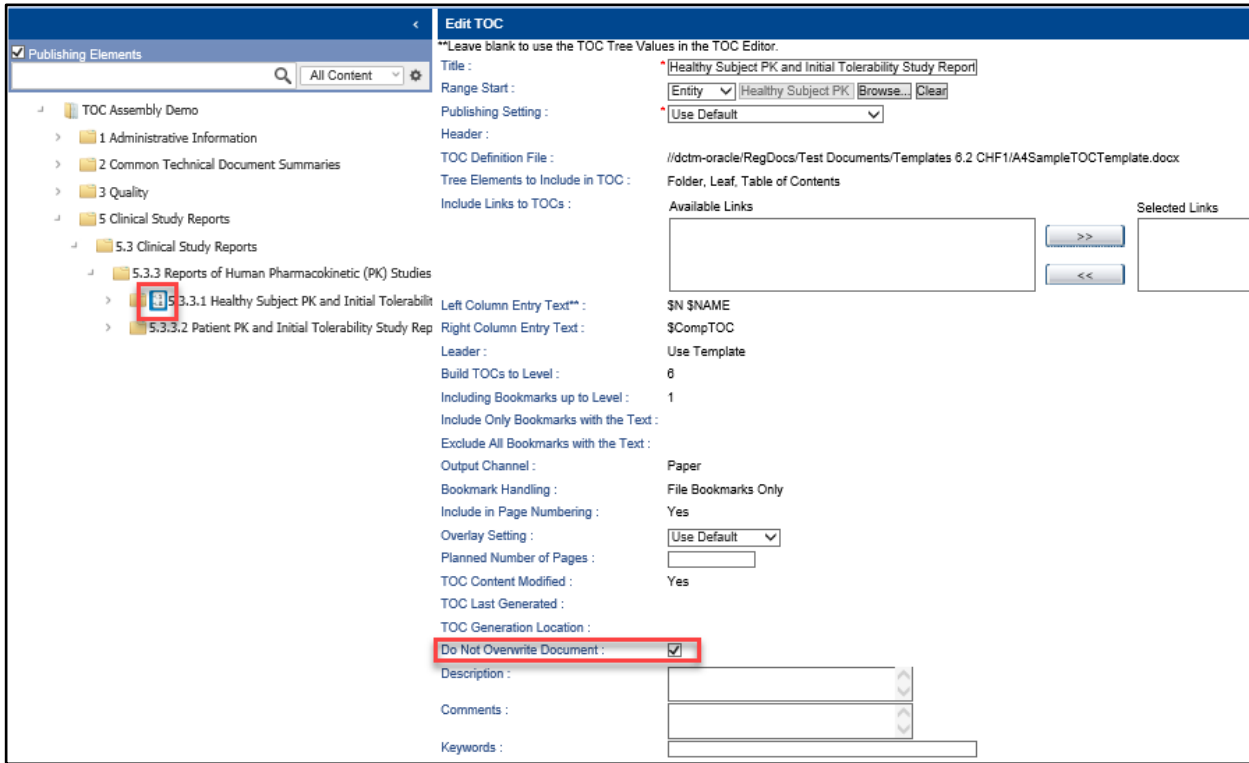
4. After elements have been edited, deactivated, promoted, and/or demoted as desired, click 'Close'.



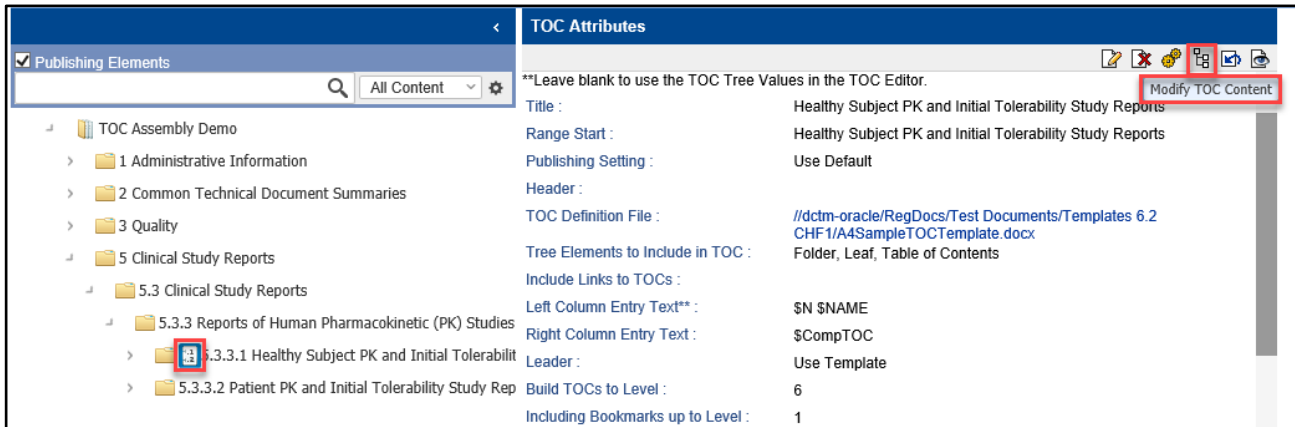
5. Select the TOC and choose 'Generate File'.



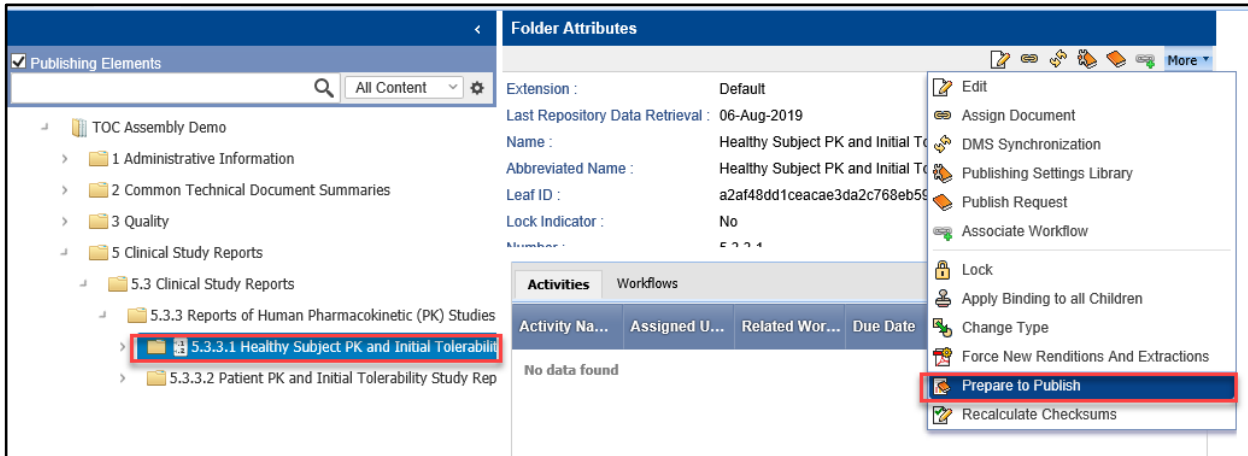
6. After the 'Generate File' request has completed, select Edit TOC and tick the checkbox for 'Do Not Overwrite Document', then click Save. This option ensures if another Prepare to Publish/Generate TOCs is performed, this TOC will not be regenerated.



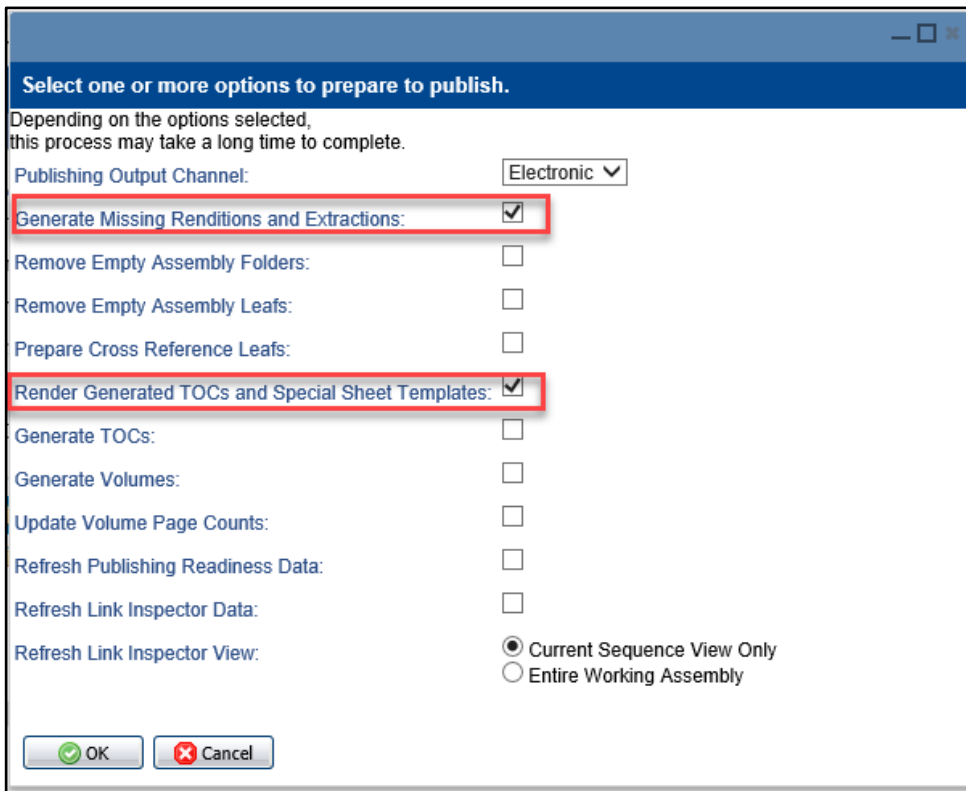
7. Select the TOC and choose 'Modify TOC Content' again to reactivate those items that should be included as bookmarks in the published output.



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



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

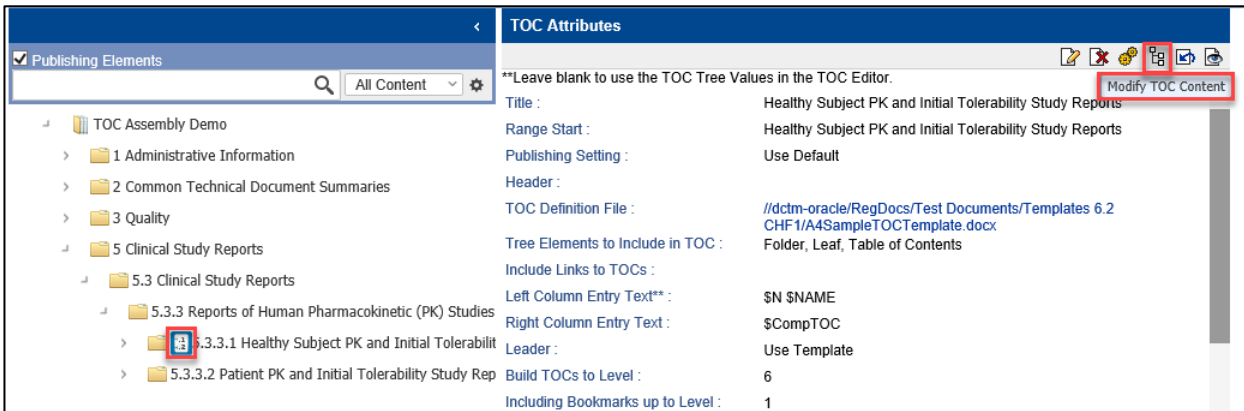


12. After the 'Prepare to Publish' completes, the assembly can be published.

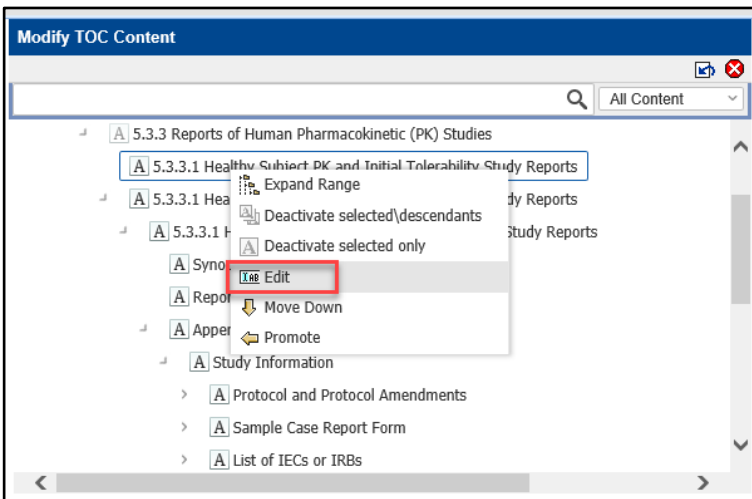
5 Modify Microsoft® Word TOC after Generation

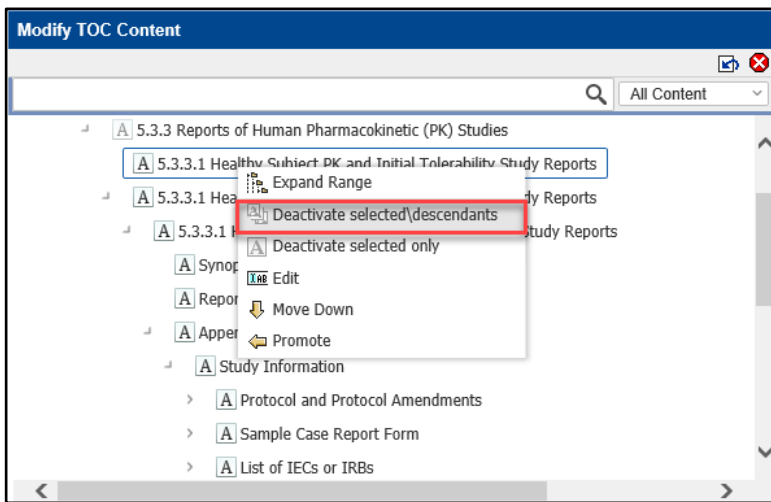
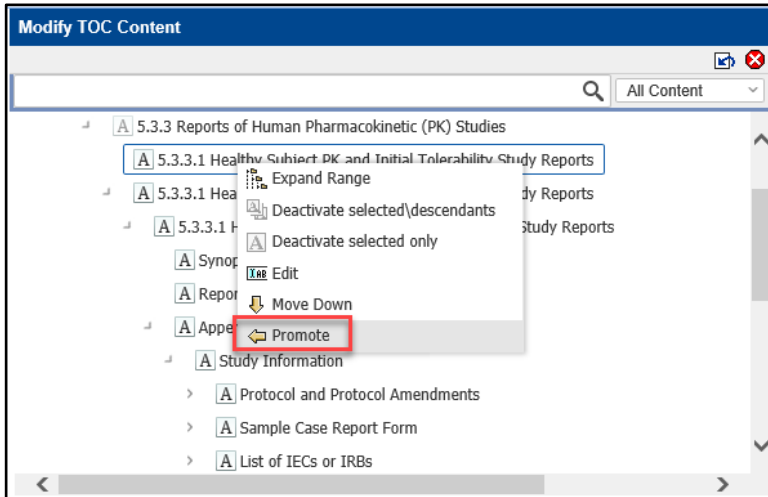
The TOC entries and bookmarks in published output can also be managed by first setting the desired final PDF bookmarks, generating the TOC, then modifying the Microsoft Word TOC that Calyx RIM generates to remove unwanted items from the TOC.

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

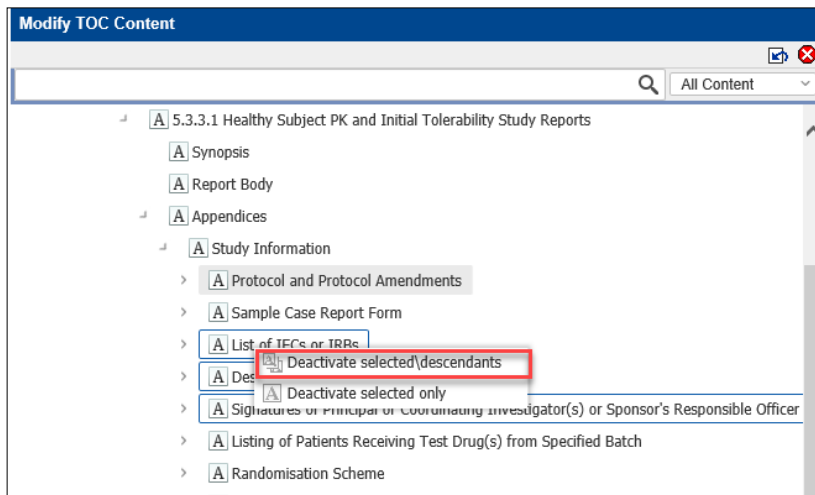


2. The TOC entries are displayed and can be edited, deactivated, promoted, and/or demoted by right-clicking and selecting the desired operation.

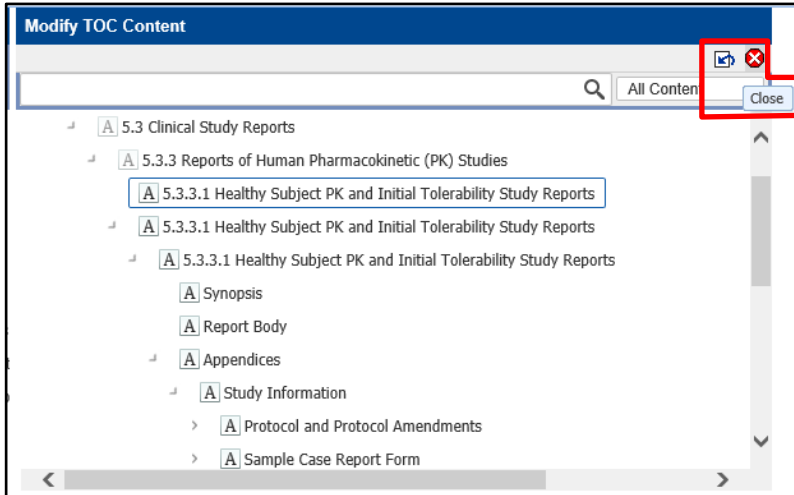




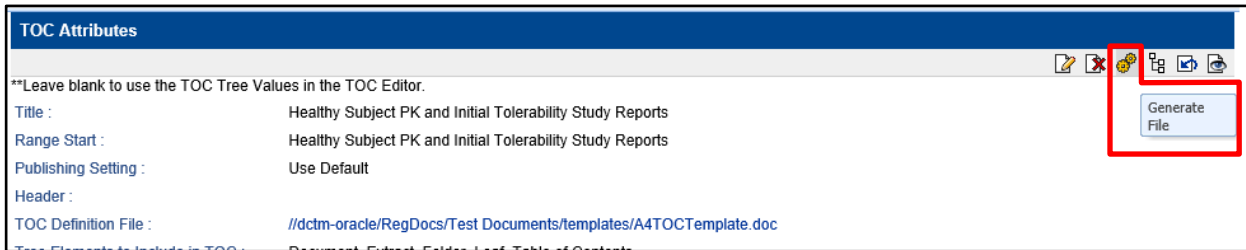
3. Items can be multi-selected with Shift + Click and deactivated.



- 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'.



- Select the TOC and choose '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 Attributes

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

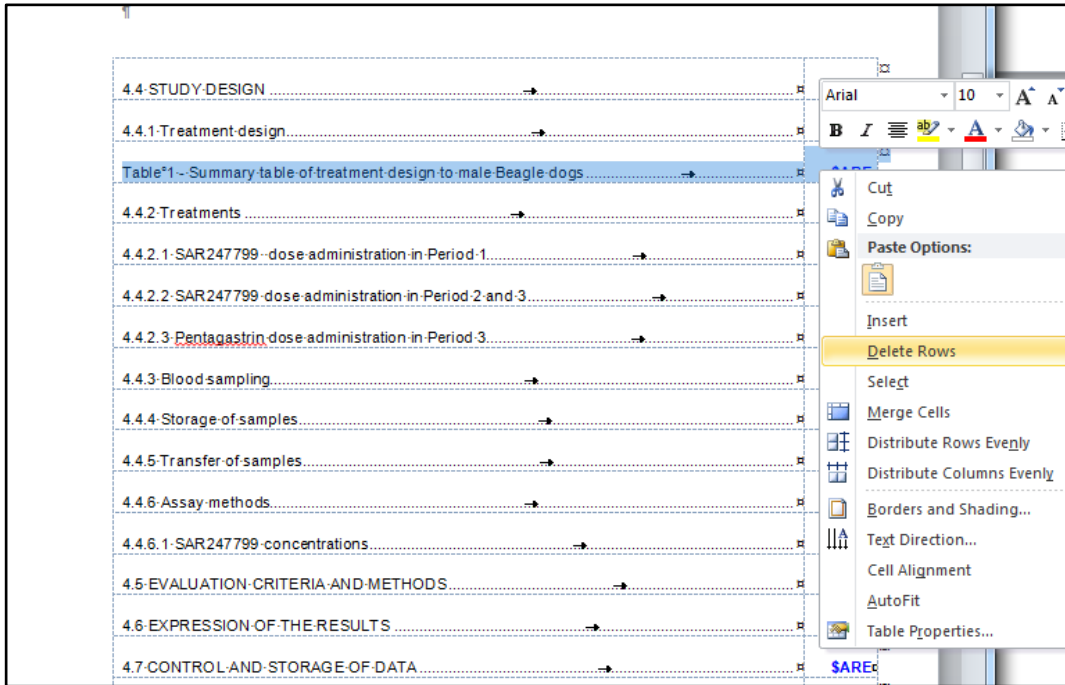
Title : Healthy Subject PK and Initial Tolerability Study Reports
Range Start : Healthy Subject PK and Initial Tolerability Study Reports
Publishing Setting : Use Default
Header :
TOC Definition File : //dctm-oracle/RegDocs/Test Documents/templates/A4TOCTemplate.doc
Tree Elements to Include in TOC : 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 :

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

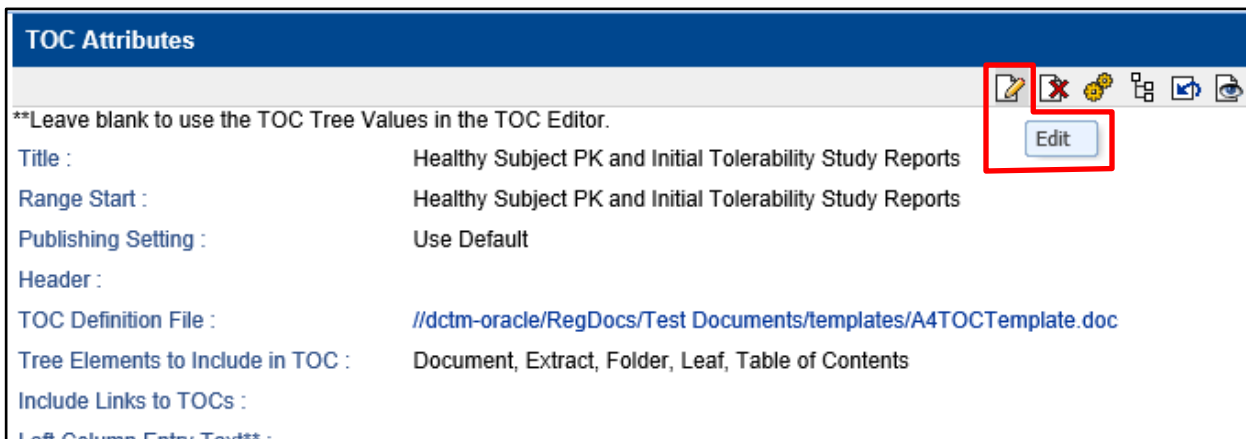
The screenshot shows a Windows File Explorer window titled 'preview'. The address bar shows the path: Network > ins60train > InsightShare > preview. The file list contains the following items:

Name	Date modified	Type	Size
Report Body_250075.doc	12/23/2016 2:29 PM	Microsoft Word 9...	26 KB
Guide_180927.doc	6/9/2016 10:05 AM	Microsoft Word 9...	88 KB
Guide_180753.doc	6/8/2016 5:34 AM	Microsoft Word 9...	91 KB

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



9. 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.



10. 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.

Output Channel :	Electronic, Paper
Bookmark Handling :	All TOC Bookmarks
Include in Page Numbering :	Yes
Overlay Setting :	Use Default <input type="button" value="v"/>
Planned Number of Pages :	<input type="text"/>
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 :	<input checked="" type="checkbox"/>
Description :	<input type="text"/>
Comments :	<input type="text"/>
Keywords :	<input type="text"/>

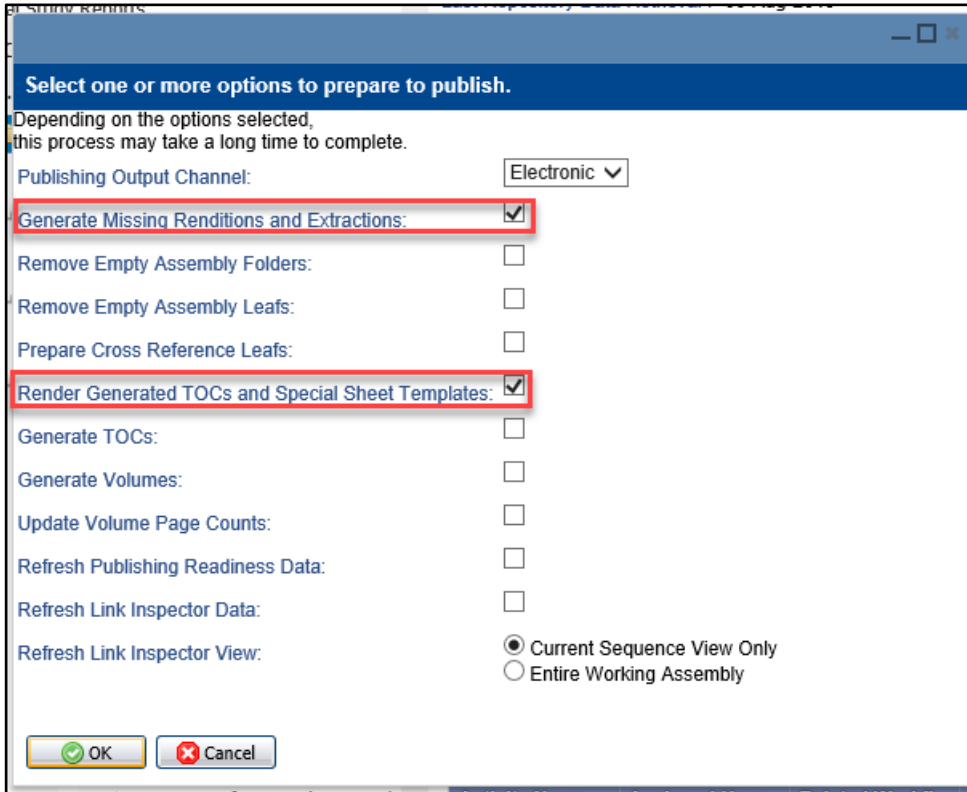
11. Select the element with the TOC, choose 'More' and Select 'Prepare to Publish'.

The screenshot shows a document management system interface. On the left, a tree view under 'Publishing Elements' shows a folder structure: '5 Clinical Study Reports' > '5.3 Clinical Study Reports' > '5.3.3 Reports of Human Pharmacokinetic (PK) S' > '5.3.3.1 Healthy Subject PK and Initial Tol'. The folder '5.3.3.1 Healthy Subject PK and Initial Tol' is selected. On the right, the 'Folder Attributes' panel displays the following information:

Extension :	Default
Last Repository Data Retrieval :	06-Aug-2019
Name :	Healthy Subject PK and Initial Tolerability Stu
Abbreviated Name :	Healthy Subject PK and Initial Tolerability Stu
Leaf ID :	a2af48dd1ceacae3da2c768eb59696785
Lock Indicator :	No
Number :	5.3.3.1
Owner :	swen
Due Date :	03-Oct-2006
Keywords :	
Description :	
Creation Date :	06-Aug-2019
Comments :	
Output Folder :	

A 'More' menu is open, showing options such as 'Edit', 'Assign Document', 'DMS Synchronization', 'Publishing Settings Library', 'Publish Request', 'Associate Workflow', 'Lock', 'Apply Binding to all Children', 'Change Type', 'Force New Renditions And Extractions', 'Prepare to Publish', and 'Recalculate Checksums'. The 'Prepare to Publish' option is highlighted with a red box.

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



13. After the 'Prepare to Publish' completes, the assembly can be published.