

How to Merge A Document

1. **The first thing to note: You cannot merge a document from the Workflow Tab. If you are in the workflow tab this function will not show.**
2. Instead we need to pull them up from the retrieve tab.
 - a. If the documents you want to merge are in the workflow tab click on the workflow button the left (see image below).
 - b. Otherwise do a search to bring both documents up.

DocStar® Home Retrieve Capture Workflow Reports Forms Packages Admin Merge Search

Items & Locations

Show: Folders Inboxes Documents Packages

Look In: Include Subfolders

Content Type:

Predefined Search: All Alerts Workflows Approvals

Search Fields

Text

Word / Phrase: Merge*

Suggested Vocabulary:

Actions Limit: 40 -- New -- Clear Search

	Edit	Type	Title	Annotation Text	Created On	Keywords
<input checked="" type="checkbox"/>			Merge 1		3/23/2018 11:55 AM	
<input type="checkbox"/>			Merge 2nd		3/23/2018 11:55 AM	

Click here to Merge Workflow Documents

Page 1 of 1 Viewing 1 -

3. Next check off your first document (this one will be on the top and all merged documents will have this title and keywords).

Actions Limit: 40 -- New --

	Edit	Type	Title
<input checked="" type="checkbox"/>			Merge 1
<input type="checkbox"/>			Merge 2nd

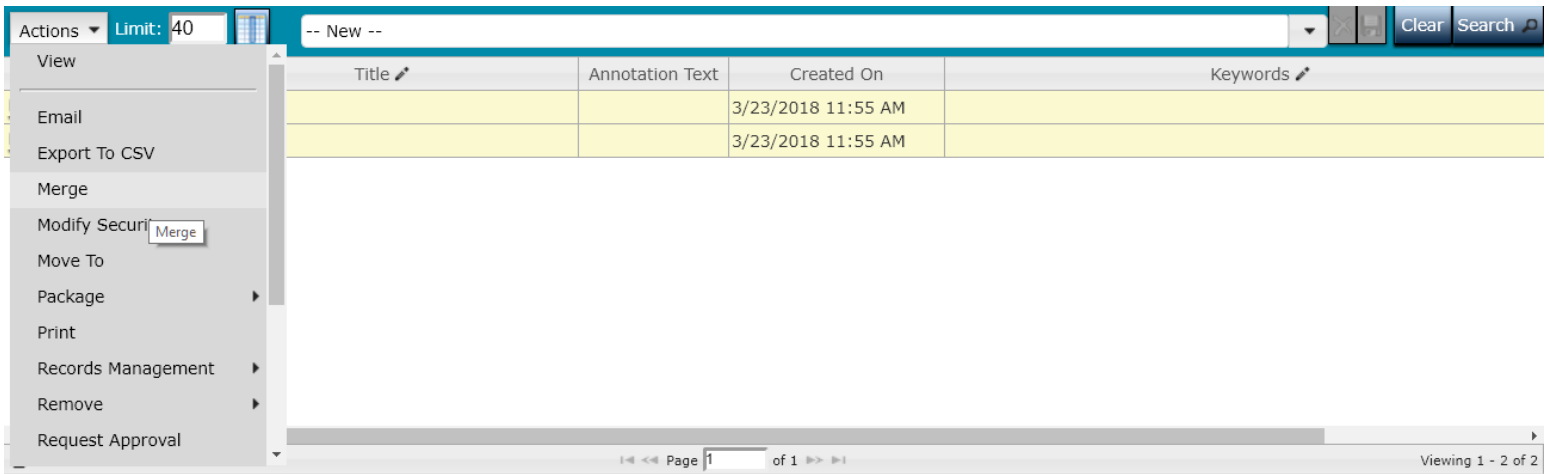
1st Selection

4. Next check off your second, third, fourth, and so on.

<input checked="" type="checkbox"/>	Edit	Type	
<input checked="" type="checkbox"/>			Merge 1
<input checked="" type="checkbox"/>			Merge 2nd

2nd Selection

5. Lastly, on the left hand side, go to Actions -> Merge



The screenshot shows the DocStar interface with the 'Actions' menu open. The 'Merge' option is highlighted. The background shows a table with columns: Title, Annotation Text, Created On, and Keywords. The 'Created On' column shows two entries for '3/23/2018 11:55 AM'. The 'Limit' is set to 40, and the search bar contains '-- New --'. The status bar at the bottom indicates 'Page 1 of 1' and 'Viewing 1 - 2 of 2'.

6. You will get a confirmation pop up letting you know which documents will merge. Just click okay here and you're good to go!

