



Caliber  
Documentation

## Homeowner's Guide to Caliber Web

(Revised: Jun-14)

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### Introduction

Caliber Web is a web portal product offered by Reef Point Technology as a web extension to its Caliber accounting and property management software. Caliber Web enables homeowners and board members to log in and perform the following tasks:

### Homeowner Functions:

- Update mailing address
- Update email address
- Update phone numbers (home, work, mobile, other)
- Set which phone numbers are primary and secondary if management company contact is necessary
- Update "in care of" field
- Update date of birth
- Modify password
- Maintain family member information (name, date of birth)
- Update mailing and "opt-out" preferences for routine management company correspondence
- View accounting information
- Make online payments
- View compliance issues related to your account
- View maintenance issues related to your account and in common areas
- Submit a maintenance service request
- View "web links"
- View documents

### Board Member Functions:

- Update mailing address
- Update email address
- Update phone numbers (home, work, mobile, other)
- Change option to keep board member address information in sync with homeowner address information
- Upload/modify/remove profile picture
- Modify password
- Upload/remove signature image (if an authorized signer)
- View compliance issues for the entire association
- View maintenance issues for the entire association
- Submit a maintenance service request
- View delinquencies for the entire association
- View and approve invoices
- View "web links"
- View documents



This document will describe in detail the homeowner functions only. A separate document, "Board Member's Guide to Caliber Web" provides details for the board member functions listed above.

### Logging in to Caliber Web

This section discusses the procedures for logging into Caliber Web.

#### Who Can Log Into Caliber Web

Before getting started with log in procedures, let's take a moment to discuss who can log into Caliber Web. In a nutshell, "homeowners" and "board members" can log in. But there are some scenarios that may require some additional configuration.

#### *Homeowners*

By default, each primary homeowner account in Caliber is provided with a single Caliber Web username and password. However, Caliber can be configured to have a separate username/password for husband and spouse/partner. Caliber can also be configured to allow additional owners (if applicable) to have separate Caliber Web logins. Generally, having only a single login for each primary homeowner account is sufficient. But if, for example, the husband is on the HOA board of directors, it would be prudent to have a separate login for the spouse since the spouse shouldn't have access to board business.

#### *Board Members*

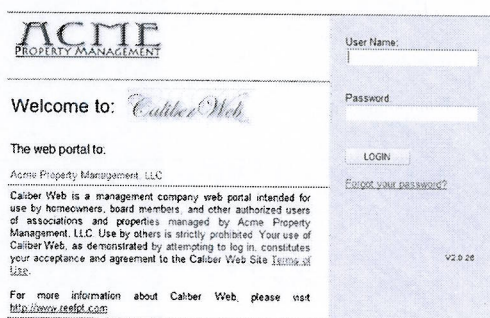
Caliber can be configured to allow a board member, who is also a homeowner, to log into Caliber Web under a single username/password. In such cases, Caliber Web will display an "Owner Area" tab and a "Board/Committee Area" tab. By default, when a board member is set up in Caliber, the board member's login will be the same as their homeowner login. If the board member is married, and the spouse is not also a board member, then your management company should either create a separate Caliber Web login for the spouse, or require that the board member use a separate login when accessing Caliber Web for board related business. The former is the preferable option, but Caliber can be configured either way.

### Login Procedures

Caliber Web is designed to support the latest versions of Internet Explorer, Firefox, Chrome and Safari. Depending on browser type, you might have to disable pop-ups to the Caliber Web site in order to enjoy full functionality. Refer to your browser's help files for assistance with disabling pop-ups.

You will be given a website address for Caliber Web by your community manager. That address will take you to a web page that looks like one of the following screens (see Figures 1 & 2 below):





The image shows a web browser window displaying the login page for Caliber Web. At the top left is the ACME PROPERTY MANAGEMENT logo. Below it, a welcome message reads 'Welcome to: Caliber Web'. Underneath, it says 'The web portal to:' followed by 'Acme Property Management, LLC'. A paragraph of text explains that Caliber Web is a management company web portal for homeowners, board members, and authorized users, and that use by others is strictly prohibited. A 'LOGIN' button is present. To the right of the text is a login form with fields for 'User Name:' and 'Password:', a 'LOGIN' button, and a link for 'Forgot your password?'. At the bottom right of the form, it says 'V2.0.26'. At the bottom left, there is a link for more information: 'http://www.cesoft.com'.

Figure 1 - Large login screen



The image shows a smaller version of the login screen. It contains the same elements as Figure 1: 'User Name:' and 'Password:' input fields, a 'LOGIN' button, a 'Forgot your password?' link, and the version number 'V2.0.26'.

Figure 2 - Small login screen

You will also be provided with a username and password. For security reasons, if you do not have your username and password, or have forgotten them, you must contact your management company for assistance.

### Owner Area

The "Owner Area" tab contains all homeowner-related functions within Caliber. If you don't see the "Owner Area" tab, then you're logged into Caliber Web as a board member only. If you are logged into Caliber Web as both a homeowner and a board member, you will see the "Owner Area" tab AND the "Board/Committee Area" tab.

### Main Screen

Upon successful login, you will be taken to the Owner Area main screen which looks like the following (see Figure 3 below):

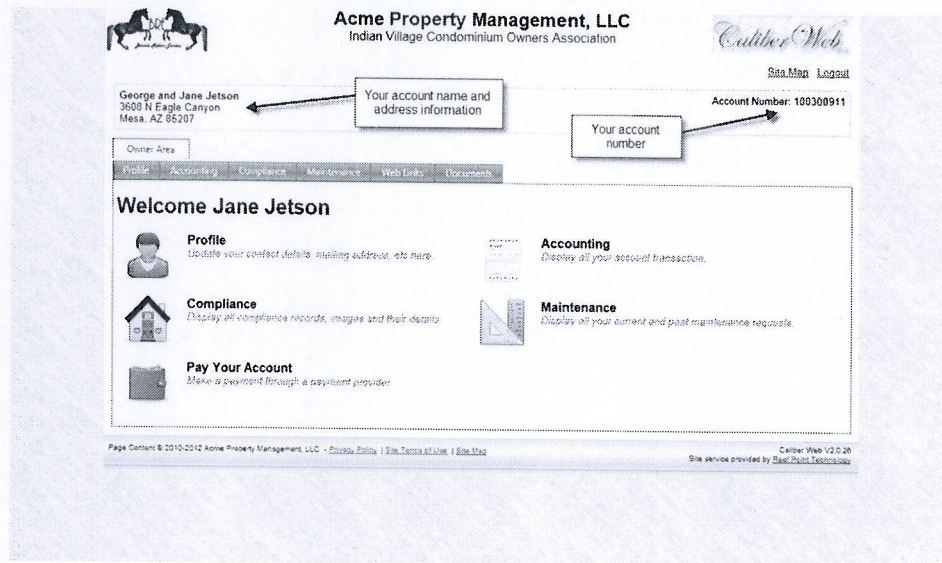


Figure 3 - Owner Area Main Screen

The main screen in the Owner Area contains the following tabs:

- Profile
- Accounting
- Compliance
- Maintenance
- Web Links
- Documents

The icons, titles and descriptions underneath the Welcome <username> banner are clickable and link to their respective areas inside each tab. For example, clicking the Compliance icon will open the compliance tab. Clicking the Pay Your Account icon opens the online payment window.

The functionality within each tab is described in the following sections.

### Profile Tab

The Profile tab opens a screen that looks like the following:



Acme Property Management, LLC  
Indian Village Condominium Owners Association

George and Jane Jetson  
3608 N Eagle Canyon  
Mesa, AZ 85207

Account Number: 100300911

Owner Area

Profile | Accounting | Compliance | Maintenance | Web Tools | Documents

Owner/Resident Names: Jetson, George  
Jetson, Jane  
Address Mail To: George and Jane Jetson

Main Information | Address Information | Personal/Web Info | Relationships | Mailing Preferences

Internet

George Email (Work): support@neefot.com  
George Email (Personal):  
Jane Email (Work):  
Jane Email (Personal):

Phone Numbers

Home: 480-555-9875  
Business:  
Mobile:  
Other:

Primary Alternate  
Primary Alternate  
Primary Alternate  
Primary Alternate

Save Changes Cancel

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Caliber Web V2.0.20  
Site service provided by Best Patch Technology

### 'Owner/Resident Names' Section

Notice immediately below the Profile tab is the Owner/Resident Names section. This is read only. If a correction needs to be made, please contact your community manager.

### 'Address Mail To' Section

Caliber Web enables you to modify the way in which correspondence is addressed to you. If you prefer "Mr. & Mrs. George Jetson" instead of "George and Jane Jetson", you can enter your change here. Make sure to click the 'Save Changes' button before leaving this screen.

### Additional Tabs

The Profile tab has the following additional tabs:

- Main Information
- Address Information
- Personal/Web Info
- Relationships
- Mailing Preferences

#### Main Information

The Main Information tab enables you to review and modify your email addresses and phone numbers. Work and personal email addresses for both you and your spouse are available and can be modified in the Internet section.

Phone numbers can be modified, as well as your Primary and Alternate preferences, in the Phone Numbers section. Setting a phone number as "Primary" or "Alternate" simply lets your community manager know what phone number(s) to try first in case they need to contact you.



## Homeowner's Guide to Caliber Web

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### Address Information

The address information tab contains the Unit Address, "in care of" field, and Mailing Address.

#### *'Unit Address' Section*

The Unit Address is always read-only. If an error exists with the Unit Address, please contact your community manager.

#### *'In-Care-Of' Field*

This is an optional field that should be used only if required as part of your mailing address. You may not be able to modify this if the management company has disabled the ability for homeowners to make changes to their mailing addresses, in which case you will need to contact your community manager to make changes.

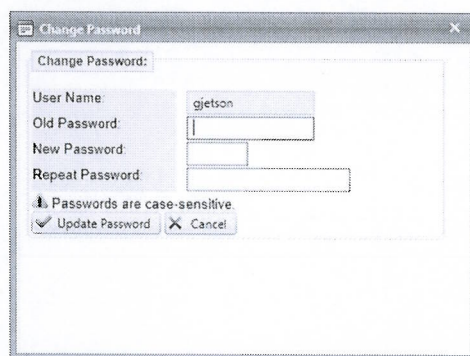
#### *'Mailing Address' Section*

This section enables you to update your mailing address. You may not be able to modify this if the management company has disabled the ability for homeowners to make changes to their mailing addresses, in which case you will need to contact your community manager to make changes.

Be sure to click the 'Save Changes' button before leaving this screen.

### Personal/Web Info

This tab enables you to enter your and your spouse's dates of birth. Your login ID is displayed in the Website Info section, and you have the ability to modify your password by clicking the 'Change Password' link. For security reasons, you must know and enter your old password in order to change it. Clicking the 'Change Password' link brings up the following screen:



Click the 'Update Password' button when finished with your changes, or 'Cancel' to cancel your changes.

### Relationships

The Relationships tab enables you to enter information about your family members. This is useful for purposes such as pool access systems and gatehouse monitoring systems.

### Related Family Member Records

Add new record				
Name	Birthday	Age		
Elroy	1/28/2012	1	X	

To add a new family member, simply click the 'Add new record' button, enter the family member's name and date of birth, and then click the Insert button (checkmark) when finished. To delete a family member from this list, simply click the Delete button (X icon) to the right of the family member's date of birth. To edit a family member record, simply click the Edit button (pencil icon), make your changes, and then click the Update button (checkmark) when finished. While adding or editing a family member record, you can click the Cancel button (X icon), which is to the right of the button with the checkmark.

### Mailing Preferences

The mailing preferences tab enables you to notify the management company what your preferences are for routine correspondence.

### Mailing Preferences

Correspondence	Mail	Email	
Statements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Compliance Letters	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Delinquency Letters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Email Blast	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Caliber Web Letter	<input type="checkbox"/>	<input type="checkbox"/>	
New Miscellaneous Letter	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 4 - Mailing Preferences

Your choices are to have correspondence sent via mail, email or both. You can also opt-out of correspondence, except for Statements, Compliance Letters, and Delinquency Letters. Statements, Compliance Letters and Delinquency Letters must have a preference of 'Mail', 'Email', or both.

To change your preferences, click the Edit button (pencil icon) to the right of the correspondence you wish to change, make your desired change, and then click the Update button (checkmark) when finished. You may cancel out of your changes by clicking the 'X' button when in edit mode.

### Accounting Tab

The Accounting tab provides you with real-time access to your homeowner account(s) (see Figure 5 below).



**Acme Property Management, LLC**  
Indian Village Condominium Owners Association

George and Jane Jetson  
3008 N Eagle Canyon  
Mesa, AZ 85207

Account Number 100300911

Site Map Logout

Owner Area Board/Committee Area

Profile Accounting Compliance Maintenance Web Links

Transaction Account: Assessments and Dues  
ARC Deposit  
Assessments and Dues  
Fines/Compliance

Print

Possibly multiple transaction accounts.

Current Balance: \$106.17

Date	Description	Amount	Balance
4/1/2010	Assessment 2010	\$47.00	\$47.00
4/21/2010	Payment, Thank You	(\$45.00)	\$2.00
6/15/2010	Key Fee	\$25.00	\$27.00
6/15/2010	REVERSAL - [Key Fee]	(\$25.00)	\$2.00
7/1/2010	Assessment 2010	\$47.00	\$49.00
11/28/2010	Payment, Thank You	(\$70.00)	(\$21.00)
1/1/2011	Quarterly Assessment	\$47.00	\$26.00
4/1/2011	Quarterly Assessment	\$47.00	\$73.00
4/5/2011	Payment, Thank You	(\$50.00)	\$23.00
9/22/2011	Quarterly Assessment	\$83.17	\$106.17

Select Payment Method:  
☐ Pay by Check  
☒ Pay with Credit Card or ACH through Community Assoc Banc

Page Content: 6/20/10 © 2010 Acme Property Management, LLC - Privacy Policy | Site Terms of Use | 100300911

Caliber Web V2.0 © 2009  
 Site Admin: [Name] | Help | Print | Technology

Figure 5 - Accounting Tab

### Transaction Accounts

In most circumstances, your management company will maintain only one transaction account for each homeowner. However, in some cases, and definitely in states that require it by law, the management company will separate assessments from other types of charges, such as fines, or deposits of fees for architectural changes. By default, your Assessments account will be displayed.

From the Transaction Account dropdown, you can select a different transaction account. The ledger details for the selected transaction account then appears underneath.

### Tabular Data

Based on your select of transaction account, the tabular data area will display all transactions on record for this account. If the data spans across multiple pages, the last page, showing the current balance will be displayed. You can then use the navigation buttons to move from page to page. The 'Print' button just above and to the left of the tabular data area enables you to print out the entire account for your records.

### Select Payment Method

The options that appear in this area of the Accounting screen depend on selections made by the management company. At a minimum, the 'Pay by Check' option will appear. If this is selected and then you click the 'Pay Account' button, a screen displaying the remittance address will appear. Other options include 'Pay with Credit Card or ACH through PayLease' or 'Pay with Credit Card or ACH through Community Assoc Banc'. These options are only available if the management company has relationships with PayLease or Community Association Banc, respectively. Other bank payment options may be available in the future.

After clicking the 'Pay Account' button, and having a 'Pay with Credit Card or ACH...' option selected, a screen such as the following will appear.



George and Jane Jelson  
3500 N Eagle Canyon  
Mesa, AZ 85207

Account Number: 100300911

**Payment Processing**

[Return to Account](#)

This transaction is running within a secure SSL protected frame. Your information is being encrypted.

**Mutual of Omaha Bank Online Payments**

**Make a Payment**

Home • One-Time Payment

**Ready to lower your mortgage payment?**  
Easy refinancing with competitive rates and flexible terms.  
[Get Started](#)

**\* Required Fields**

**Personal Information**

Title: \_\_\_\_\_  
\* First Name: George  
MI: \_\_\_\_\_  
\* Last Name: Jelson

**Contact Information**

\* Email Address: support@reelpt.com  
\* Home Phone: (480) 555-9875 (900) 992-0000  
\* Work Phone: (900) 992-0000

Figure 6 - Caliber Web Payment Processing Screen

The online payment screen for the payment provider is displayed in a frame which is embedded into the Caliber Web Payment Processing screen (see Figure 6 above).

PLEASE NOTE THAT THE PAYMENT PROVIDER'S SCREEN IS A SECURE, SSL-PROTECTED SCREEN AND THAT THE INFORMATION YOU'RE PROVIDING IN THIS SCREEN IS BEING ENCRYPTED.

When you've completed your transaction, click the 'Return to Account' button. Please consult with your management company or the payment provider for details regarding the provider's payment screens.

### Compliance Tab

The compliance tab in the Owner Area enables homeowners to view current and past compliance violations.

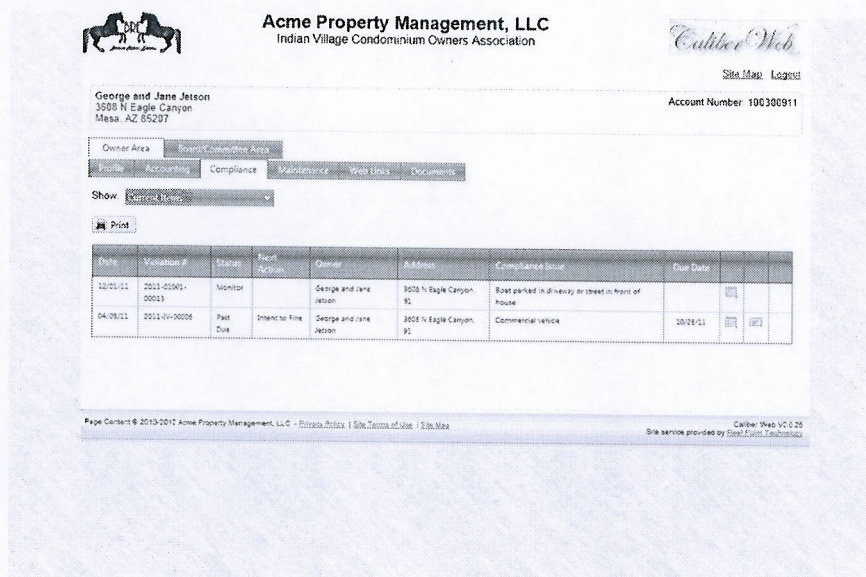


Figure 7 - Compliance Tab

Listed in the compliance screen are violations that pertain only to your unit. Board members can view compliance issues for all units in the association, but individual owners can only view their own.

By default, the Show: Current Items is selected in the dropdown. This will display only compliance issues that are open. The other "Show" option is "All Items" which enables you to view all compliance issues, regardless of status, for your unit.

The print button enables you to print the compliance issues that are displayed on the screen in a report type format.

The last three columns in this screen will display an icon that can be clicked to reveal additional information. Just to the right of the Due Date column is the 'Show Details' icon, followed by the 'Show Letters' and 'Show Pictures' icons, respectively.

### **Show Details Icon**

All compliance issues will display the show details icon. Clicking this icon opens another screen that enables you to view more details about the selected issue.



The screenshot shows a window titled "View Compliance Details" for violation # 2011-IV-00006. It contains the following information:

Details for Violation # 2011-IV-00006	
Lot Number:	91
Primary Owner:	George and Jane Jelson
Unit Address:	3608 N Eagle Canyon, 91
Violation #	2011-IV-00006
Inspector:	Ken Wilson
Inspection Date/Time	4/9/2011 6:02 AM

Category: Vehicles  
Item: Commercial vehicle

Status: Past Due  
Follow-up By: 10/28/2011  
Next Action: Intent to Fine  
Pending Fine: \$150.00 (total amount fined to date \$0.00)  
Appeal Date:  
Hearing Date:

Required Action: Please park your vehicle somewhere else.

Notes:

Actions:  
(4/9/2011) Created open violation.  
(4/9/2011) Ready to send 'Courtesy Notice' letter.  
(10/18/2011) Ready to send 'Second Notice' letter.  
(10/18/2011) Sent 'Second Notice' letter.

Applicable CC&R:

Close

Figure 8 - Compliance: Show Details Screen

This detail screen enables you to view all information regarding the violation including required actions, notes, a history of all previous actions, and the applicable CC&R language from your association's governing documents.

Click the 'Close' button to close this window.

### **Show Letters Icon**

The show letters icon enables you to view letters that have been sent to you by your association regarding this compliance issue.

The screenshot shows a window titled "View Documents" for violation # 2011-IV-00006. It contains a table with the following data:

Date	Document Name	FileName	View
10/18/2011	Second Notice	3_69_587_108.pdf	

Close

Figure 9 - Compliance: Show Letters Screen

Clicking the 'View' icon for a specific letter will open that letter up in a PDF viewer (this requires Adobe Acrobat Reader).

Click the 'Close' button to close this window.

### **Show Pictures Icon**

Clicking the show pictures icons opens a screen that displays pictures that have been taken and linked to the selected compliance issue.



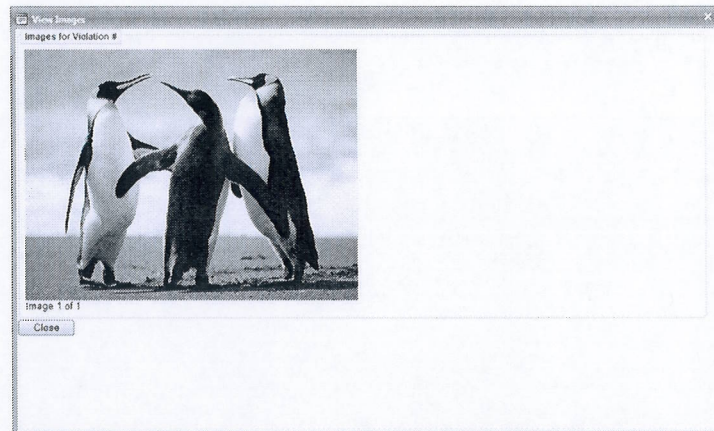


Figure 10 - Compliance: Show Pictures Screen

Click the 'Close' button to close this window.

### Maintenance Tab

The maintenance tab in the Owner Area enables homeowners to view current and past maintenance issues.



Date	Work Order #	Status	Location	Maintenance Issue	Due Date			
08/13/12	2012-01001-00012	Open	North Open Area	Grass needs mowing	08/18/12			
07/26/12	2012-01001-00011	Open	North Open Area	Fix Mailbox	08/09/12			
05/10/12	2012-01001-00010	Open	South Open Area	Gate Equipment	01/01/00			
04/14/12	2012-01001-00009	Open	3608 N. Eagle Canyon, 91	Leaking Roof	01/01/00			
03/15/12	2012-01001-00008	Open	South Open Area	Sprinkler head broken	03/20/12			
02/21/12	2012-01001-00005	Open		Pothole	02/26/12			
02/21/12	2012-01001-00007	Open		Pothole	02/26/12			
02/21/12	2012-01001-00006	Open		Pothole	02/26/12			
02/21/12	2012-01001-00004	Open		Tree down or broken	02/26/12			
01/12/12	2012-01001-00002	Open	3608 N. Eagle Canyon, 91	Dead Plants	01/01/00			

Figure 11 - Maintenance Tab

Listed in the maintenance screen are maintenance problems that pertain to your unit and maintenance issues in common areas. Board members can view maintenance problems for all units in the association, but individual owners can only view their own.

By default, the Show: Current Items is selected in the dropdown. This will display only maintenance problems that are open. The other "Show" option is "All Items" which enables you to view all maintenance problems, regardless of status, for your unit and in the common areas.

The print button enables you to print the maintenance problems that are displayed on the screen in a report type format.

The last three columns in this screen will display an icon that can be clicked to reveal additional information. Just to the right of the Due Date column is the 'Display Details' icon, followed by the 'Display Documents' and 'Display Pictures' icons, respectively.

### *Display Details Icon*

All maintenance problems will display the show details icon. Clicking this icon opens another screen that enables you to view more details about the selected issue.

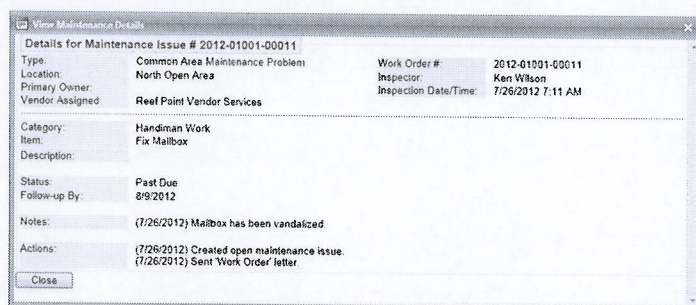


Figure 12 - Maintenance: Show Details Screen

This detail screen enables you to view all information regarding the maintenance issue including the assigned vendor, notes, and a history of all previous actions.

Click the 'Close' button to close this window.

### *Display Documents Icon*

The display documents icon enables you to view work orders that have been sent to the assigned vendor(s) by your association regarding this maintenance problem.

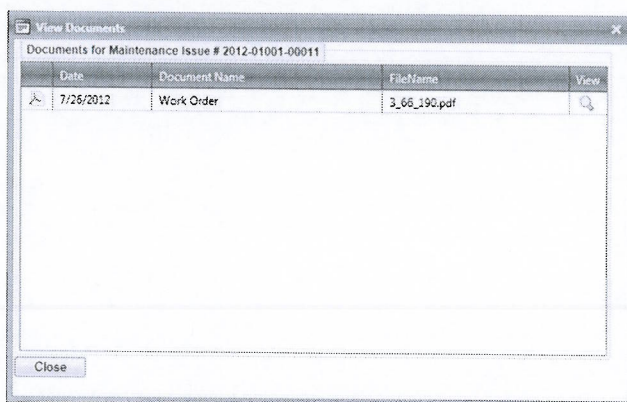


Figure 13 - Maintenance: Display Documents Screen



Clicking the 'View' icon for a specific document will open it up in a PDF viewer (this requires Adobe Acrobat Reader).

Click the 'Close' button to close this window.

### *Display Pictures Icon*

Clicking the show pictures icons opens a screen that displays pictures that have been taken and linked to the selected maintenance problem.

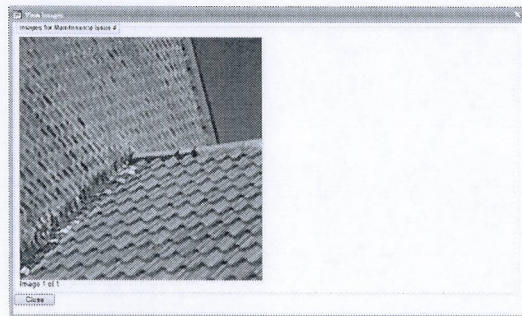


Figure 14 - Maintenance: Display Pictures Screen

Click the 'Close' button to close this window.

### *Submit New Request Button*

Homeowners (and board members) have the ability to submit new maintenance requests. By clicking the 'Submit New Request' button, the following screen will appear:

A screenshot of a web browser window titled 'Submit Maintenance Request'. The form is divided into several sections. At the top, it says 'Details for Maintenance Request'. Below this, there are fields for 'Type' (a dropdown menu), 'Location' (a dropdown menu), and 'Primary Owner' (a text field). To the right of these fields, there is a section for 'Work Order #' with sub-fields for 'Generated when Submitted', 'Inspector', and 'Inspection Date/Time'. Below the 'Primary Owner' field, there is a 'Category' dropdown menu and a 'Maintenance Item' dropdown menu. Below these, there is a 'Description/Notes' text area and a 'Location of Issue' text area. At the bottom of the form, there are two buttons: 'Submit Request' and 'Cancel'.

Figure 15 - Submit Maintenance Request Screen

The purpose of this screen is to report maintenance issues to the association and/or the management company so that appropriate actions can be taken. Before submitting a new request, you should first check the list of current maintenance problems to see if this has already been reported. If the issue has already been reported, please don't submit the issue again. If you have questions or concerns about the issue, then please contact your management company or association through your usual channels.



When submitting a new request, please keep in mind that the more information you provide, the better chance that the issue will be understood, the location will be more quickly found, and the issue will get responded to faster.

In the screen shown in Figure 15, you can create a new maintenance service request. First, select the type. Choices are 'Unit', 'Common Area', or 'Ad-hoc'.

### Unit Type

By selecting 'Unit' as the request type, this maintenance request will be associated with your unit. In other words, if you wish to report a problem with your unit, then selecting 'Unit' as the type would be the correct option. In the 'Location' dropdown, only your unit will be available for selection.

### Common Area Type

If the maintenance problem has to do with something in a common area, you should select this option. Then in the 'Location' dropdown, you will see a list of all common areas that have been defined in the Caliber database for your association. For example, if a swing is broken in the playground, you would select 'Common Area' as the Type and 'Playground' as the Location.

### Ad-Hoc Type

A maintenance problem that is not associated with a unit or common area is called an 'ad-hoc' maintenance problem. For example, if a wind storm blew a stop sign down at your street corner, you can submit an ad-hoc maintenance request because that stop sign, while it technically is located in a common area, has not been defined in Caliber as a common area. Your best bet is to try selecting 'Common Area' first and if there is not an appropriate 'Location' in the location dropdown, change the type to 'Ad-hoc' and then provide location details in the 'Location of Issue' field.

After selecting the type and location of the maintenance problem, select a 'Category' and then a 'Maintenance Item'. The selection of 'Maintenance Item' should be as close to describing the issue as possible. If you need to provide amplifying information, you can do so in the 'Description/Notes' field and the 'Location of Issue' field.

When finished, click the 'Submit Request' button. You should now see your submission on the list of current maintenance problems. Your submission will be transmitted immediately into Caliber where your association or management company will be able to view and take action on it. Submissions are moderated, meaning they don't get entered into Caliber as an 'Open' maintenance problem. They show as 'Service Request' and will remain in that status until it has been reviewed and accepted by the association or management company. Once a maintenance problem has been moved to the 'Open' status, a vendor can be assigned to fix the problem and a work order can be generated.

### Web Links Tab

The web links tab displays URL links and email links that may be of interest to you.



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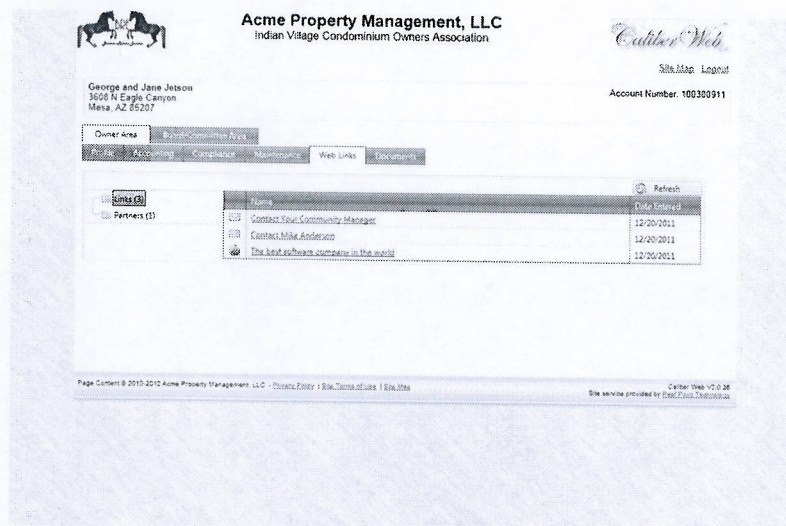


Figure 16 - Web Links Tab

These various links can be categorized in a hierarchical fashion. In Figure 15, the 'Links' folder is selected. Two email links and one URL link are displayed. The other folder is 'Partners' and you can see in Figure 15 that 1 link is listed in that category.

### Documents Tab

The documents tab displays documents that may be of interest to you.

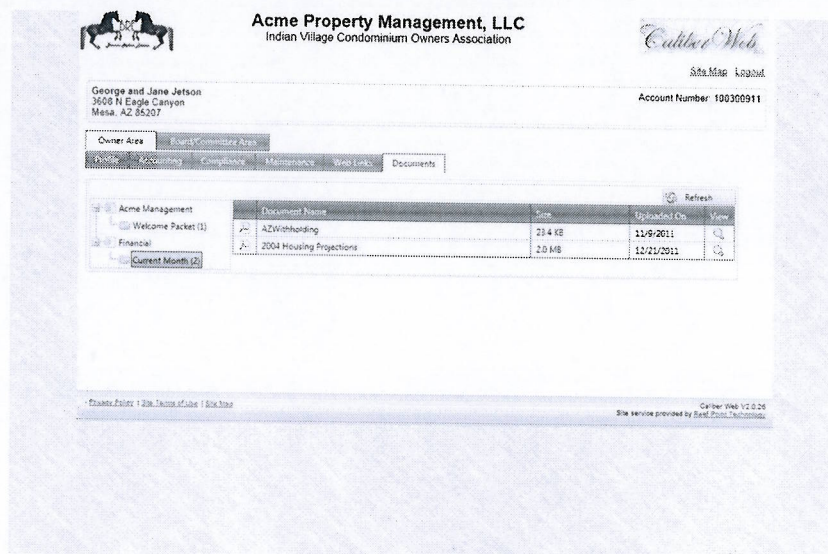


Figure 17 - Documents Tab

Documents can also be grouped in a hierarchical fashion using categories and folders. In Figure 16, the 'Current Month' folder, under the 'Financial' category is selected, revealing 2 documents. Click the 'View' icon to open the document.