DOCUMENT IMAGING GR ImageNow Fundamentals
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DOCUMENT IMAGING GR ImageNow Fundamentals

Welcome to ImageNow Fundamentals! In this Module you will learn how to logon, navigate and search for documents.

Navigating Overview

In this lesson you will learn about:

- Logging in to ImageNow
- Basic Navigation
- Document Keys
- Creating Filters
- Application Linking
- Searching for documents

Logging in to ImageNow

Upon navigating to the ImageNow System, you will be prompted to enter a User name and Password. The User name is your primary campus e-mail address (i.e., John Smith from UMass Dartmouth would enter in jsmith@umassd.edu). The Password is the password affiliated with your primary campus e-mail address.

Procedure

Consider this Scenario:

Your goal is to log in to ImageNow.

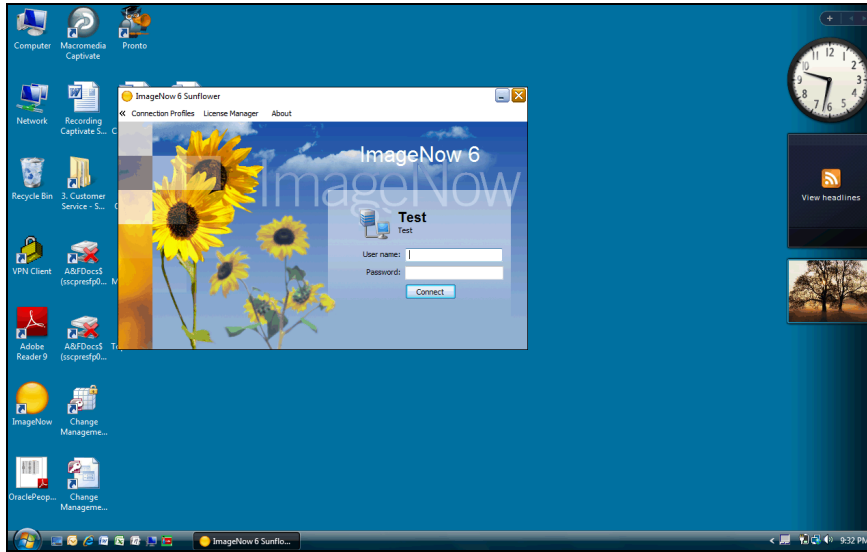**Key Information:**
User name: jsmith@umassd.edu
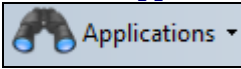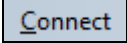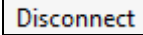Password: Catmouse1!

Step	Action
1.	The **User name** for ImageNow is your primary campus email address. In this example, John Smith is an employee at the UMass Dartmouth campus so you will enter jsmith@umassd.edu.

Step	Action
2.	Enter the desired information into the **User name** field. Enter "**jsmith@umassd.edu**".
3.	The **Password** is the password affiliated with your campus e-mail account. Enter the desired information into the **Password** field. Enter "**Catmouse1!**".
4.	Click the **Connect** button. Connect
5.	Your ImageNow toolbar appears. Click the **Applications** dropdown button to activate the menu. Applications ▾
6.	Once you have completed your tasks, log out of the system. Click the **Connect** menu. Connect
7.	You would select the **Disconnect** button to disconnect from the system. *Note:* You can also use the exit button to exit from the system. Do not use the **X** to close out, as this does not fully log you off of the system and may delay the success of your next attempt to access the system. Disconnect

Step	Action
8.	Congratulations! You have successfully logged in to ImageNow. **End of Procedure.**

Understanding ImageNow

In this topic, you will review the basic setup of the ImageNow System, including basic navigation and document views.

Procedure

Consider this Scenario:

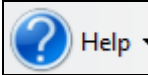Your goal is to understand the general layout of the ImageNow system.

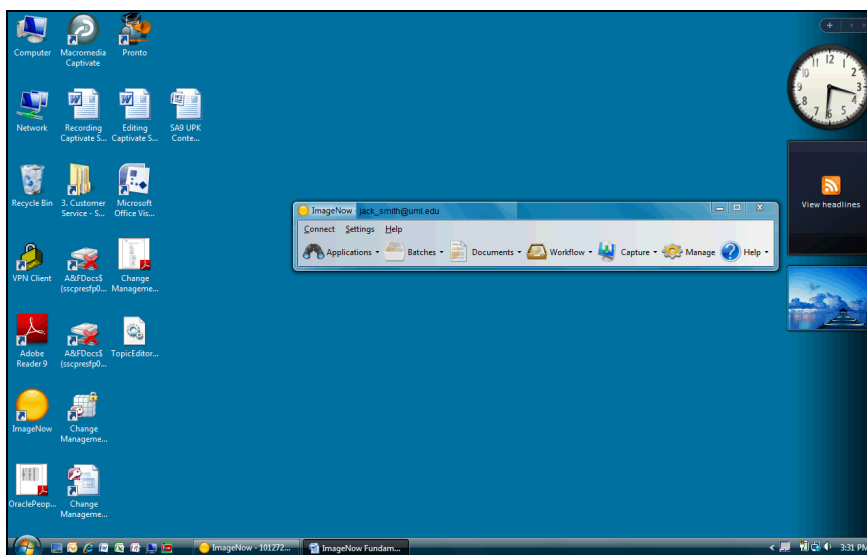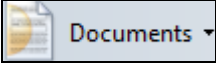| Step	Action
1.	When you first login to ImageNow, you are presented with the **ImageNow toolbar**. Let's review the tools provided on the ImageNow toolbar. *Note:* User security will determine what tools you have access to and/or will be able to view on the toolbar.
2.	The **Applications** tool provides you with access to documents that are linked to records in external business applications such as the SA PeopleSoft application. This means that all documents in this view have undergone the application linking process.
3.	The **Batches** tool provides you with access to documents that are ready for **QA** or **Linking**.
4.	The **Documents** tool provides you with access to documents within specific document views and filters.
5.	The **Workflow** tool provides you with access to any documents that reside in workflow and your designated queues.
6.	The **Capture** tool provides you with access to capturing profiles.
7.	The **Manage** button provides you with access to any pertinent administrative functions. *NOTE:* This button is viewable based on user security permissions.
8.	The **Help** tool provides you with access to information regarding the ImageNow system. *Note:* The information is Perceptive Software Generic information, not specific to UMASS business processes.
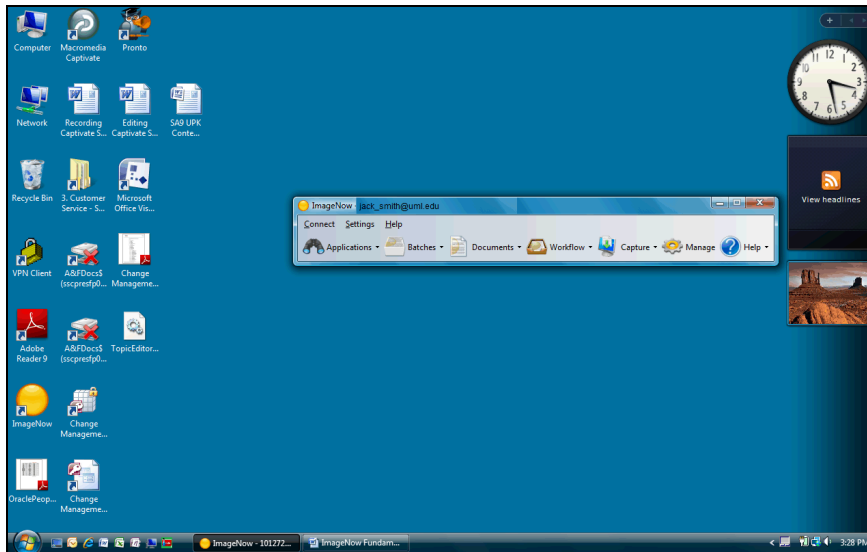
Step	Action
9.	Let's take a look at the **Help** page. Click the **Help** button.
10.	The **Help** page provides you with details regarding all ImageNow functionality. Click the **Close** button to close the window.

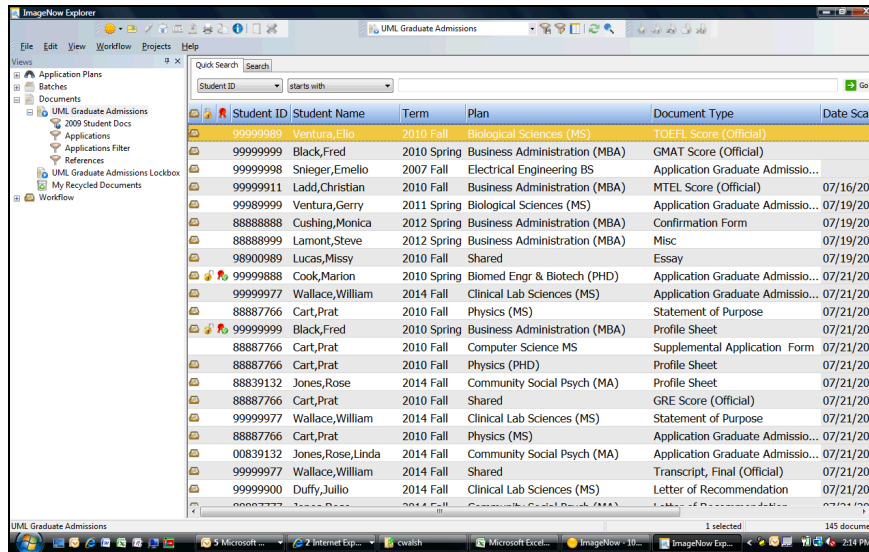| Step	Action
11.	Let's access a **Documents** view. Click the **Documents** button. Documents ▾
12.	Minimize the ImageNow toolbar. Click the **Minimize** button.
13.	All your **Navigating** options are available in the **Views** pane.
14.	The **Explorer Toolbar** is available at the top left of your screen. This toolbar allows you to display, create copies of, and print documents. You can also send a document URL to another ImageNow user utilizing the E-mail icon. *Note:* Security settings will determine your access to the various **Explorer Toolbar** icons.
15.	The **Current View** toolbar is located on the top right of your screen. This toolbar allows you to save and edit filters, display documents, customize your column appearance, perform searches, and refresh the current view.
16.	Congratulations! You have successfully reviewed the basic navigation of the stem. **End of Procedure.**

Understanding Document Keys

Document Keys are index values pulled from a business application (e.g., PeopleSoft) and linked to a document. These Document Keys are used to store and retrieve documents. For example, all Graduate Admissions documents have key values such as Student ID and Student Name that were applied to the document to help you locate a document specific to a student in the SA PeopleSoft system.

Note: Document Keys will vary based upon your department's business needs. The following topic displays the document keys utilized by the Graduate Admissions office.

Procedure

Consider this Scenario:

Your goal is to review Document Keys.

Step	Action
1.	Let's hide the Views pane so you can see all Document Key columns in the ImageNow Explorer window. Click the **Close** button. ⊠
2.	To show the **Views Pane**, click the **View** menu and select the **Views** option.
3.	ImageNow displays all documents related to the document view you selected. All documents are displayed in a grid with important business values or Document Keys displayed in a column format. Document Keys are index values pulled from a business application (e.g., PeopleSoft) and linked to a document. These keys are used to store documents within ImageNow and help you find documents that are directly related to each other (e.g., all documents related to a specific Student). For example, all Graduate Admission documents have key values such as Student ID and Student Name that were applied to the document to help you locate a document specific to a student in the SA PeopleSoft system.
4.	You want to expand a Document Key Column (i.e., Student Name). Use the right end of the column to drag and expand. Press the left mouse button and drag the mouse to the desired location.
5.	The Student Name column is now expanded.

Step	Action
6.	You can sort the documents based on a specific **Document Key**. In this example you will sort documents by the Student Name. Click the **Student Name** column header. Student Name
7.	The documents are now sorted in ascending order. You can click the column header again to sort the documents in descending order.
8.	**Document Keys** provide important business information regarding a document that allow you to not only identify documents but search for documents within the system. Please refer to the **Searching for a Document** topic for more information.
9.	Congratulations! You have successfully reviewed document keys. **End of Procedure.**

Understanding Application Linking

The **Application Linking** process applies data from a business application to documents within the ImageNow system. Linking ensures that data remains consistent and accurate across systems.

For example, all Graduate Admissions documents are linked to the associated Student Records in SA PeopleSoft. A student's application will be identified by the same key information that is found in PeopleSoft (e.g., Student ID, Student Name).

Procedure

Consider this scenario:

Your goal is to understand the process of application linking.

Step	Action
1.	As reviewed in **Understanding Document Keys**, each document has key information called **Document Keys** associated with it. These **Document Keys** were copied from a business application and applied to the document. All documents that you view will already contain this key information.

Step	Action
2.	**So how is this information applied to a document?** Before a document appears in your **Document View** or **Workflow Queue**, it goes through three steps in the **ImageNow** system. The ImageNow system is utilized to capture and manage document images. 1. The document is captured (e.g., scanned, faxed). 2. The document is quality assured (e.g., the capture team verifies that it is readable). 3. The document is linked to business application data.
3.	**What does application linking mean?** Well, quite simply, you review the scanned document and identify key information associated with an existing record in the business application (e.g., SA PeopleSoft). You then access the business application and navigate to a record within that application. Once you have confirmed the document is associated with the record, you return to ImageNow and click the **Link page** button. The data from the business application is copied and applied to the **Document Keys** associated with that document.
4.	For example, the Graduate Admissions (GA) Office receives an application for a prospective student, Fred Black. The document is scanned as a document image and then quality assured. The GA staff member accesses the student's record information through a custom document imaging page in PeopleSoft (**SA PeopleSoft GA Document Imaging** page displayed). This page provides key information about the applicant, including the Student ID and Primary Name. Once the staff member has confirmed that the application information matches up with Fred's information in the system, he or she applies the information to the document.
5.	The purpose of linking is to ensure that your documents reflect the information provided within a business application. This keeps data consistent and accurate across systems.
6.	**Where does the linked information appear?** The linked information from the business application is applied to the document keys. These **Document Keys** display in your document views, helping you search for and identify a document. Please refer to the **Understanding Document Keys** topic for more information on document keys.
7.	Congratulations! You have successfully reviewed application linking. **End of Procedure.**

Searching for a Document

In this topic, you will learn how to search for a document. You can search for documents by the Document Keys associated with documents (e.g., Student Name or Student ID). There are two types of document searches: **Quick Search** and **Search**.

Use **Quick Search** to search on one value (e.g., Student Name or Student ID).

Use the **Search** tab to conduct a more advanced search by setting up multiple search conditions. For example, you can search for a specific person and only pull back specific documents related to that person (e.g., Letter of Recommendation).

Procedure

Consider this Scenario:

Your goal is to search for a document.

Key Information:

You will first conduct a quick search and then search on multiple conditions.
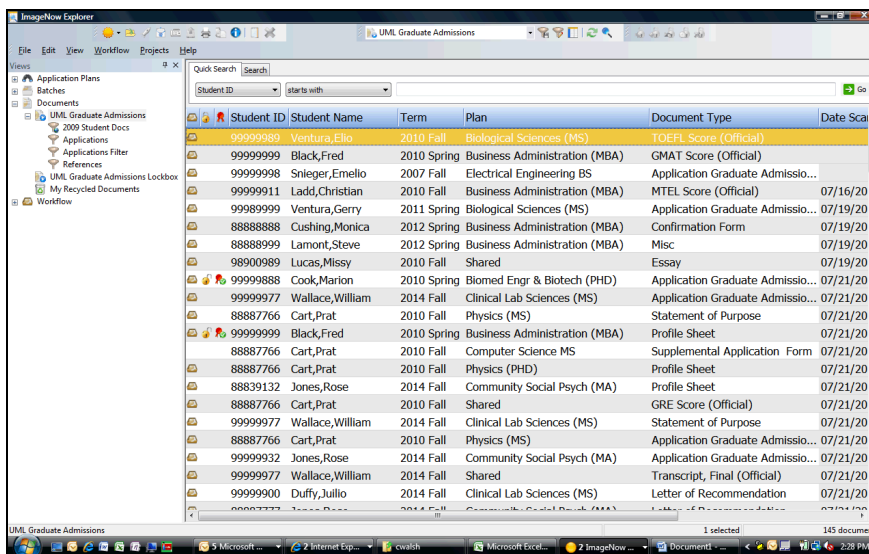
Step	Action
1.	Navigate to the Document view of your choice. In this example, we will use the **UML Graduate Admissions** view.

Step	Action
2.	Use the **Property** dropdown list to select which **Document Key** (column) you want to search on. In this example, you will search on the default key, **Student ID**.
3.	The **Operator** drop-down list allows you to search on a specific comparison. You can search for results based on one of the following comparisons: "is equal to", "is not equal to", "is less than", "is greater than", "is less than or equal to", "is greater than or equal to", or "starts with". *Important:* When searching on "is equal to", you must enter the full value. For example, if you search on a Student Name, you must enter the entire Student Name in the correct format (i.e., Black, Fred). If you only enter the student's last name in the value field, the search will not retrieve any results. For that reason, we recommend using the "starts with" comparison.
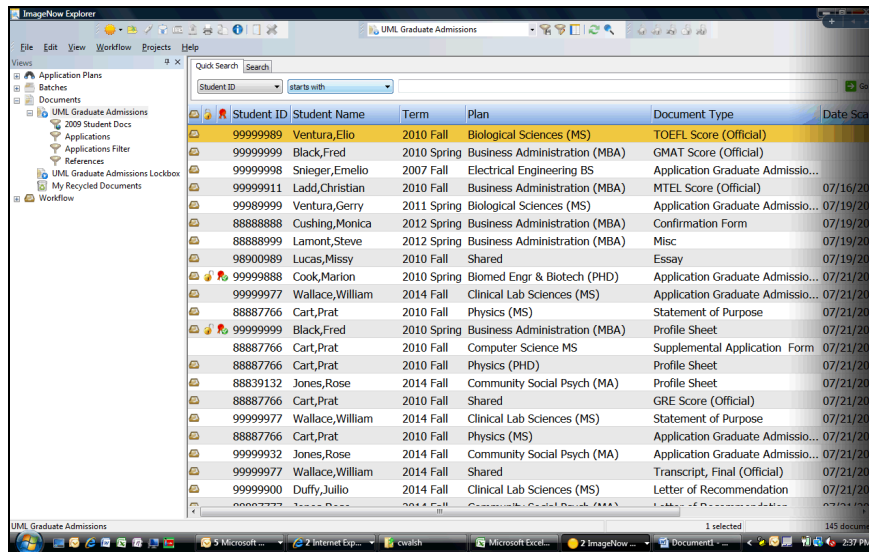
Step	Action
4.	Click the **Operator** list. starts with
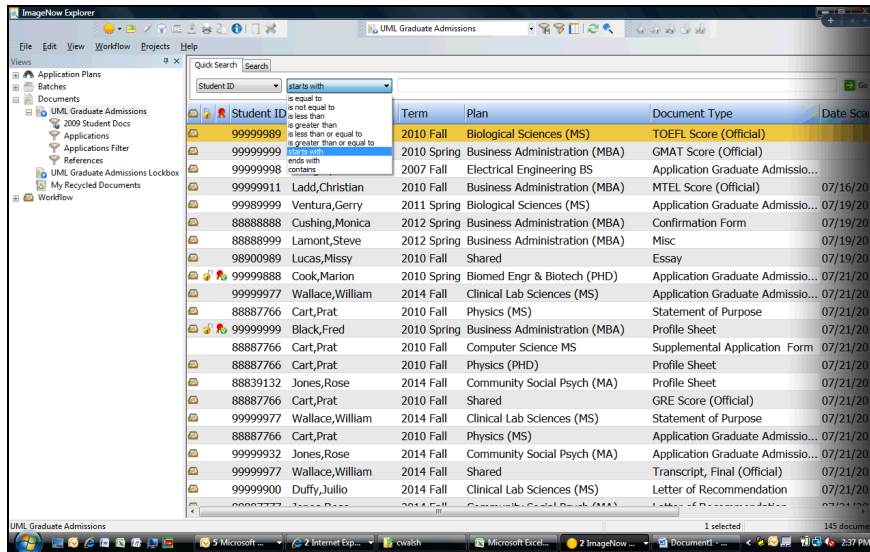
Step	Action
5.	In this example, you will use the **Operator** dropdown list default value (starts with). Click the **starts with** list item. starts with
6.	Enter the desired information into the **Value** field. Enter "**999999**".
7.	Click the **Go** button. → Go
8.	The search results display in the **ImageNow** window. You can double click a result to review that document.
9.	In some cases, your search may retrieve a large number of documents.
10.	To help manage your returned data, you can click on the column headings to further sort your results.
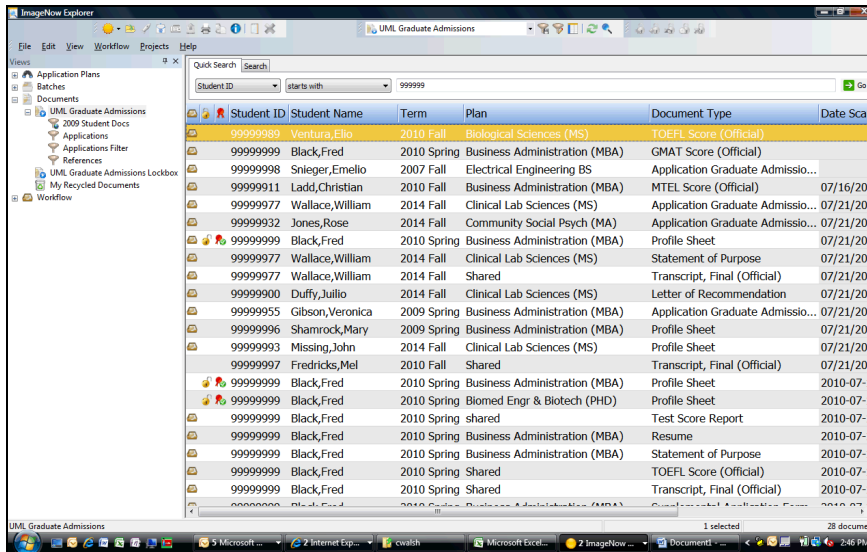
Step	Action
11.	Click the **Student Name** tab. Student Name
12.	The documents are now displayed by **Student Name** in ascending alphabetical order.
13.	Use the **Search Tab** when you would like to use multiple conditions in your search.
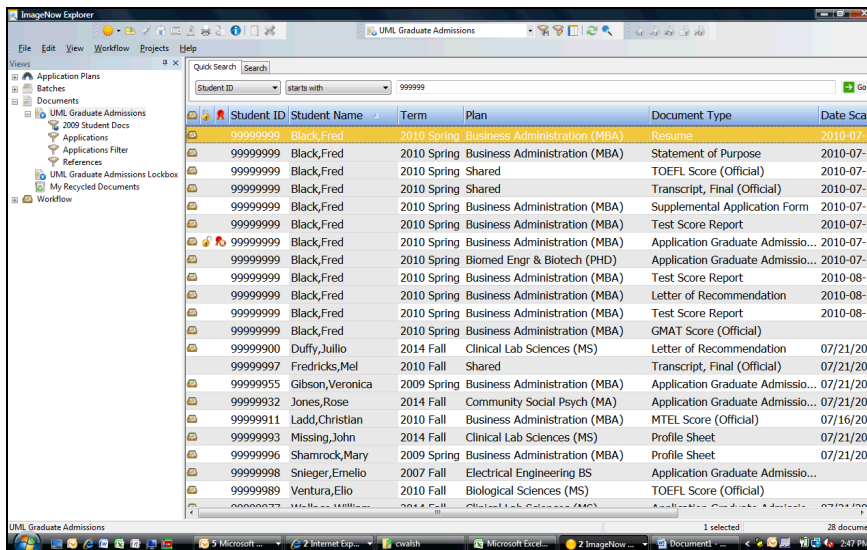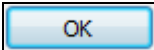
Step	Action
14.	Click the **Search** tab. Search

Step	Action
15.	Click the **Add** button.
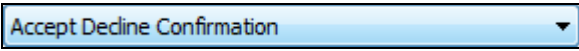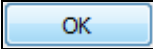
Step	Action
16.	Use the **Add Condition** box to identify your search criteria.
17.	Use the **Constrain by** field to identify the constraint you want to set up. The **Constrain by** field will populate the values in the **Field**, **Operator**, and **Value** dropdown lists. In this example, you want to use the default value of Document Key. Other constraints include **Status** and **User**.
18.	Use the **Type** field to select the type of search: **Normal**, **Prompted**, or **Variable**. In this example, you will have the **Type** as the default of **Normal**.
19.	Click the **Field** list item.
	Drawer
20.	Use the **Field** dropdown list to identify which field you want to search on. In this example, you are searching for a student by the student's name.
21.	Click the **Student Name** list item.
	Student Name
22.	Click the **Operator** list.
	is equal to
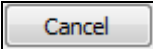
Step	Action
23.	Use the **Operator** field to select the comparison you want to search on. *Important:* When searching on a name, it is recommended that you do not use the "is equal to" field, unless you know the exact formatting of the name.
24.	Click the **starts with** list item. starts with
25.	Use the **Value** field to enter a value you want compared to the document field.
26.	Enter the desired information into the **Value** field. Enter "**Black**".
27.	Click the **OK** button. OK
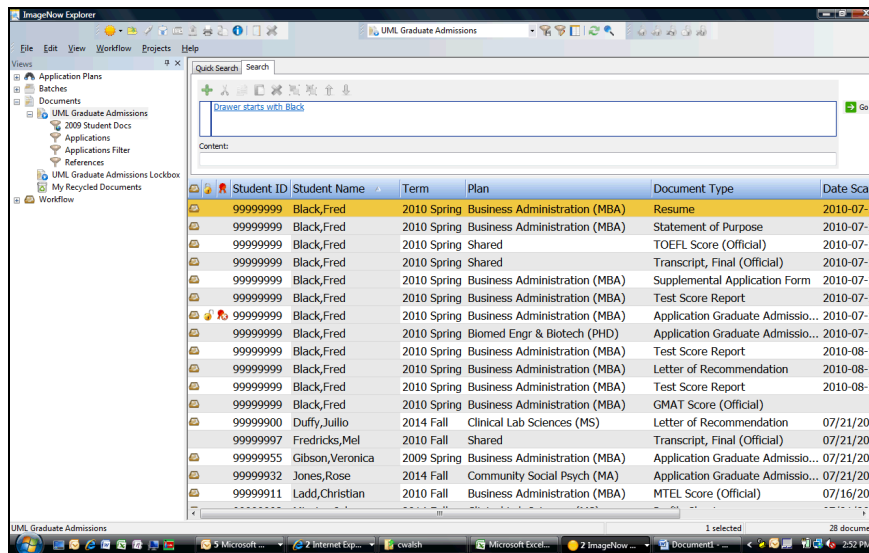
Step	Action
28.	Your first search condition is added to the criteria box. You want to add a second search condition to search on **Document Type** as well.
29.	Click the **Add** button.
30.	Click the **Field** list. Drawer
31.	Click the **Document type** list item. Document type

Step	Action
32.	Click the **Value** list.
	Accept Decline Confirmation ▼
33.	Click the **Letter of Recommendation** list item.
	Letter of Recommendation
34.	Click the **OK** button.
	OK
35.	Click the **Go** button.
	➜ Go
36.	Fred Black's Letter of Recommendation documents are returned.
37.	The search conditions display as links.
	Use the link to re-access the **Add Condition** box and update the search condition.
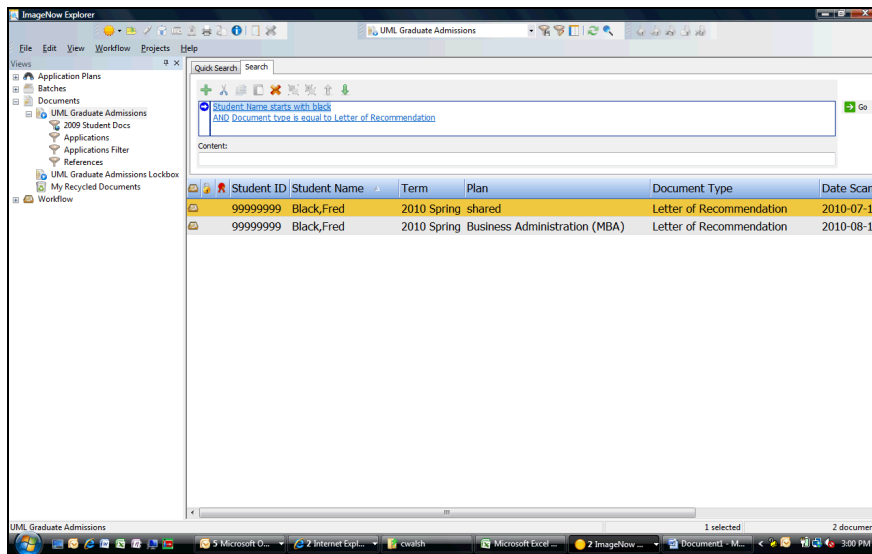
Step	Action
38.	Click the **Student Name starts with Black** Condition.
	Student Name starts with black
39.	The **Add Condition** box will appear and you can re-define your criteria if you wanted to.
	We will not change this criteria.
	Click the **Cancel** button.
	Cancel

Step	Action
40.	If you decide you no longer want to use the second search condition, you can delete it. Float your mouse over the column to the left of the search condition. You will notice a blue arrow appears. Click the **Blue Arrow** button.
41.	The search condition is highlighted. Four buttons on the **Search Toolbar** become active: **Add**, **Cut**, **Delete** and **Move Up**. **Add** allows you to add another condition to your search criteria. **Cut** will remove the condition, yet allow you to paste it in another search. **Delete**, removes the condition permanently. **Move Up** will re-order your conditions. (*NOTE:* If we had selected the first condition, the **Move Down** button would of become highlighted.) Lets **Delete** the "Document type is equal to Letter of Recommendation". Click the **Delete** button.
42.	Congratulations! You have successfully searched for a document. **End of Procedure.**

Creating Filters

Use the **Filters** feature on the **Quick Search** or **Search** Tabs to create **Documents View** private filters.

Private filters allow you to view a specific search condition on a regular basis rather than continuously searching for the same data. It makes retrieval of documents quick and easy.

Public filters are pre-defined filters created by your ImageNow Administrator.

Procedure

Consider this Scenario:

Your goal is to create a filter.
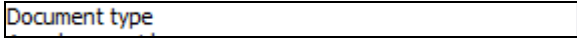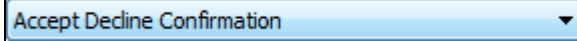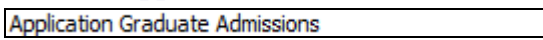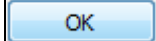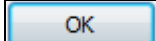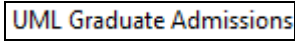
Key Information:

Document Type: Application Graduate Admissions

Step	Action
1.	You may find that you need to use the same search criteria on a regular basis. Instead of conducting a search each time, you can create a private filter (which only you will be able to view/use), or a sub-view of a predefined search condition. You can create and save a private filter from a quick search on the **Quick Search** tab or multiple conditions on the **Search** tab. For example, you work in a Graduate Program office. You want to monitor Graduate Admissions Applications on a continuous basis. You decide to set up a filter that shows only the document type of **Application Graduate Admissions**. This filter will cut down on the amount of time it takes you to find a specific type of document. *Note:* You may have access to pre-defined public filters in your **Document View**s that were set up by your Campus Administrator.
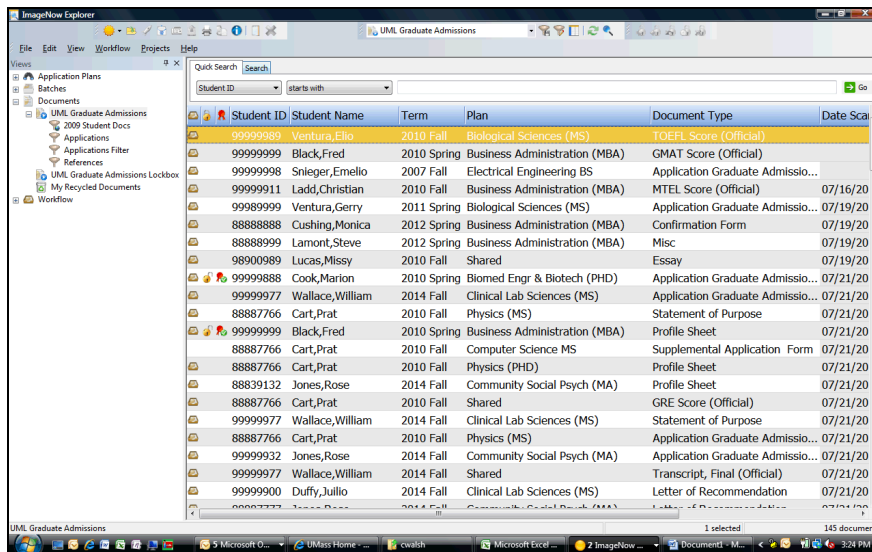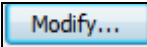
Step	Action
2.	Click the **Search** tab. Search
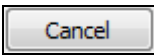
Step	Action
3.	In this example, you will create a filter from search conditions defined on the **Search** tab. Click the **Add** button.
4.	Click the **Drawer** list item. Drawer ▼
5.	Click the **Document type** list item. Document type
6.	Click the **Value** list. Accept Decline Confirmation ▼
7.	Click the **Application Graduate Admissions** list item. Application Graduate Admissions
8.	Click the **OK** button. OK
9.	Click the **Save Private Filter** button.
10.	Enter the desired information into the **Name** field. Enter "**My Graduate Admissions Applications**".
11.	Enter the desired information into the **Description** field. Enter "**This document view will display all applications.**".
12.	Click the **OK** button. OK
13.	The **My Graduate Admissions Applications** filter now displays in your Views pane for future use.
14.	You can edit your private filter by going to the "Parent" tree view. Click the **UML Graduate Admissions** tree item. UML Graduate Admissions
15.	Click the **Edit Private Filters** button.
16.	The **Edit private filters** window displays all your current filters. You can modify or Delete your private filters.

Step	Action
17.	Select the Filter that you would like to modify.
	Click the **Applications** list item.
18.	You can **Modify** or **Delete** the filter that you have selected.
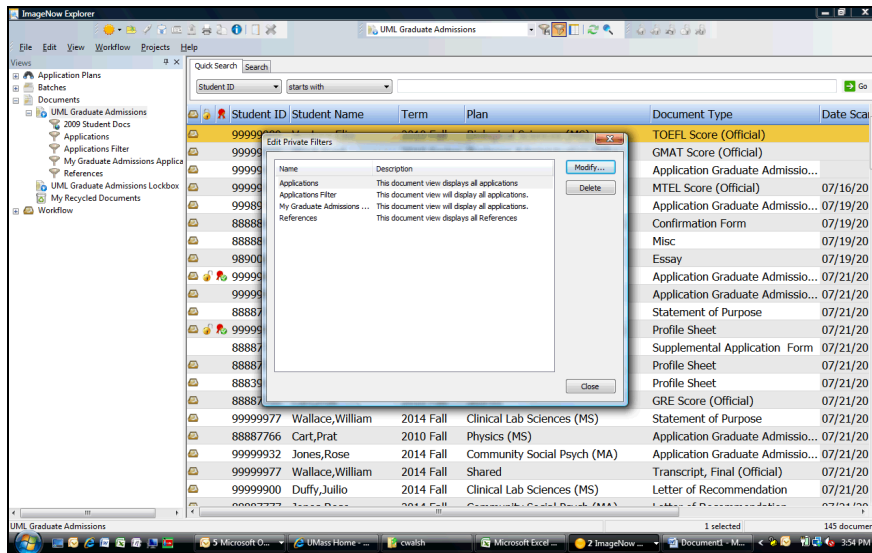
Step	Action
19.	Let's Modify the **Applications** filter.
	Highlight the **Applications** filter.
	Click the **Modify** button.
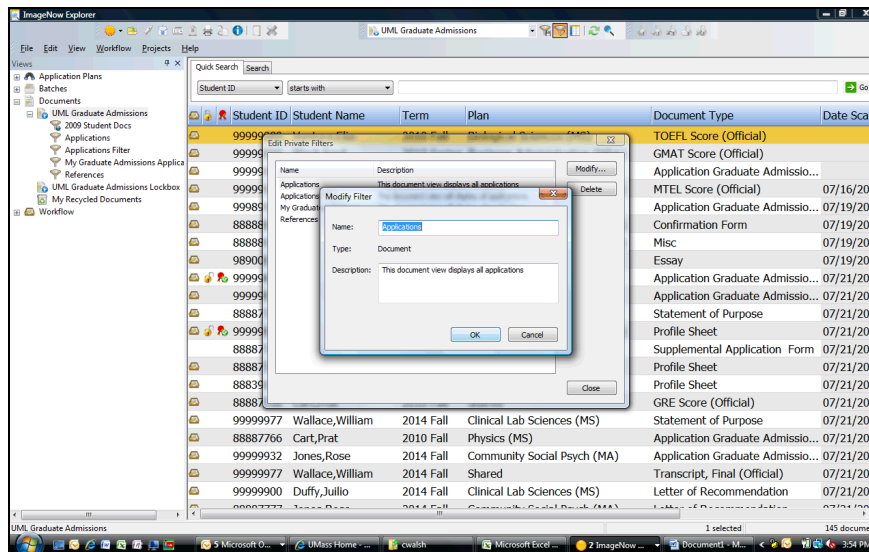
Step	Action
20.	You can update the Filter's **Name** or **Description**.
	We will not make any changes to this filter.
	Click the **Cancel** button.
	![Cancel]
21.	Congratulations! You have successfully created and learned how to edit a filter. **End of Procedure.**

Using Content Search

Use the **Content Search** feature to search for documents that contain certain text.

For example, you may want to search for all documents containing the word "application".

Content Search will retrieve those documents and highlight any references to that word in each document.

Procedure
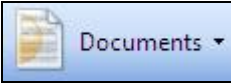
Consider this scenario:

Your goal is to search for documents containing specific content.

Key Information:

You will first search for documents containing a specific word. You will then conduct a search for documents containing multiple words.

Step	Action
1.	Begin by navigating to the appropriate **Documents View**.
	In this example, you will navigate to the **UML Graduate Admissions** view.
	Click the **Documents** list item.
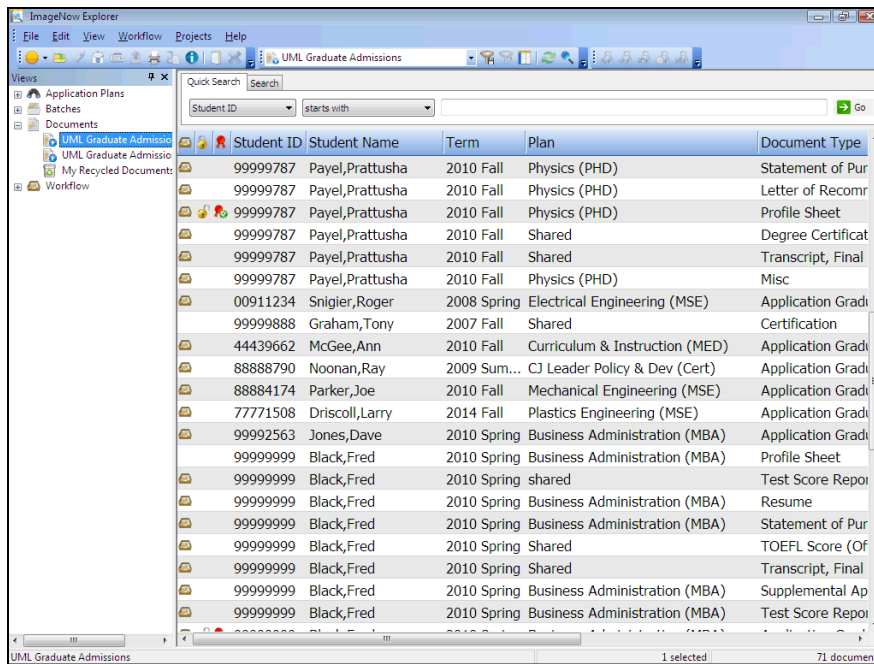
Step	Action
2.	Click the **Property** list. Student ID
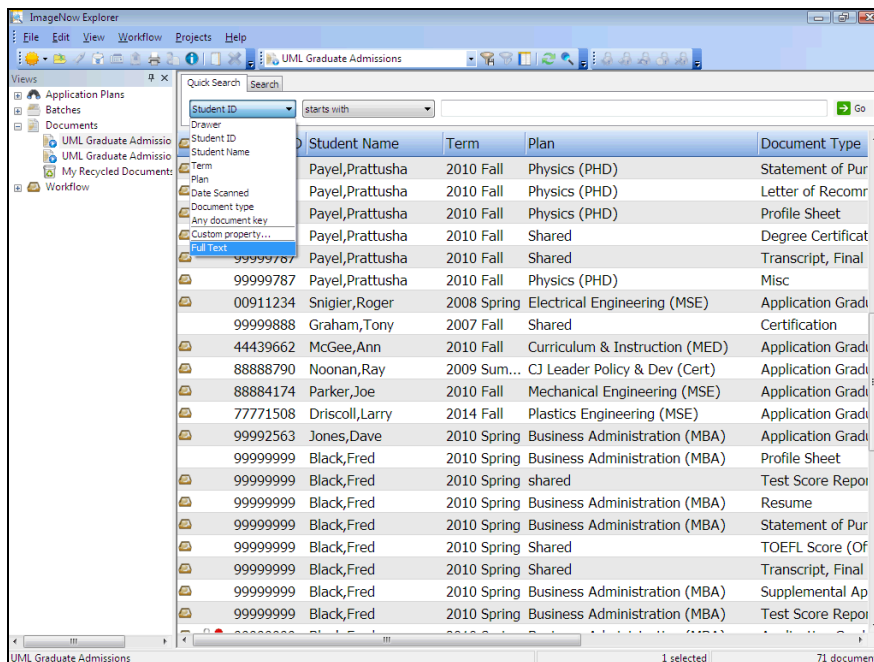
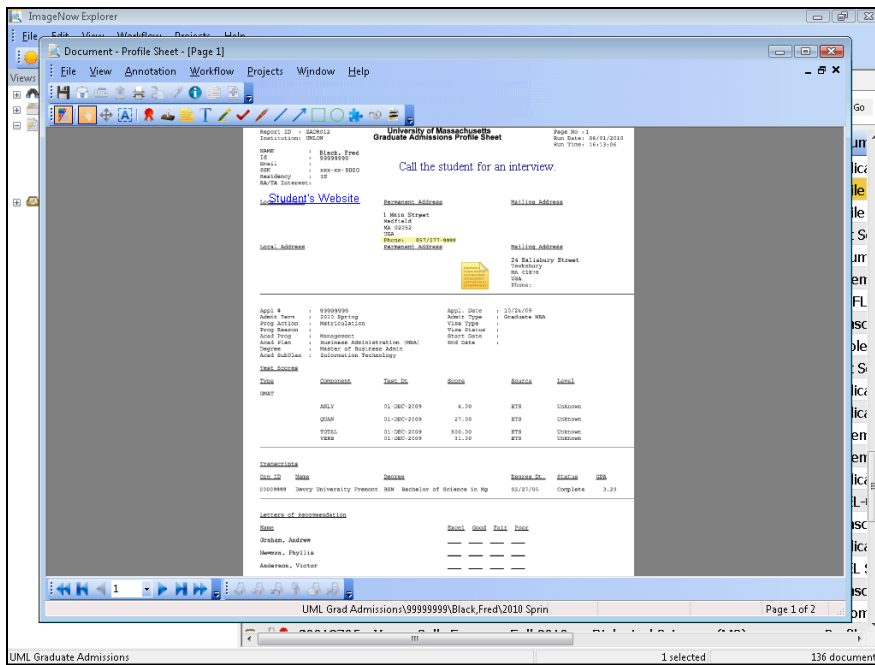| Step	Action
3.	Click the **Full Text** list item. `Full Text`
4.	Use the **Value** field to enter the text that you want to search for within the current document view. For example, you can search for any documents that refer to the word "information technology".
5.	*Important:* You should use all lowercase characters when conducting a content search to retrieve the most search results (e.g., "information technology", "arts & sciences").
6.	Let's search for the word "information technology" in the current **Documents View**. Enter the desired information into the **Value** field. Enter "**information technology**".
7.	Click the **Go** button. `Go`
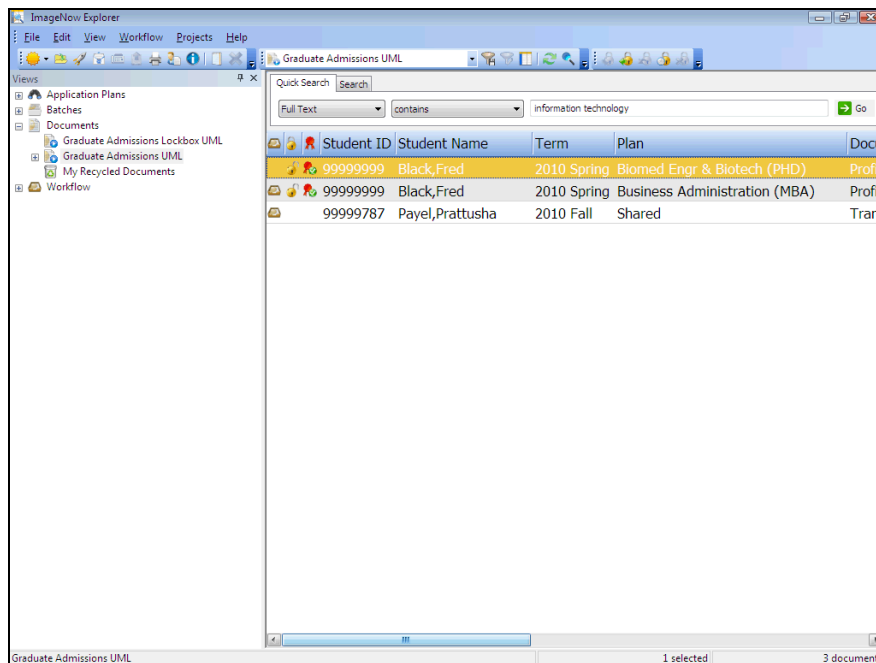
Step	Action
8.	The search results display.
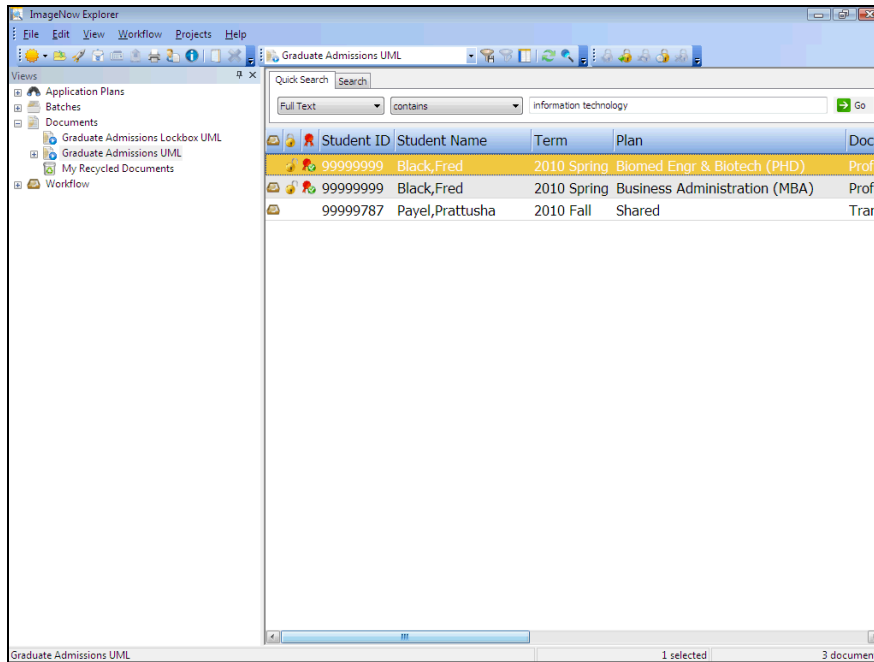
Step	Action
9.	Note: The amount of documents retrieved is displayed in the lower right corner of the ImageNow Explorer window. In this example, your search has retrieved 3 documents.
10.	Find the document you wish to review. Double-click an entry in the row.
11.	The **Content Search Results** window displays.
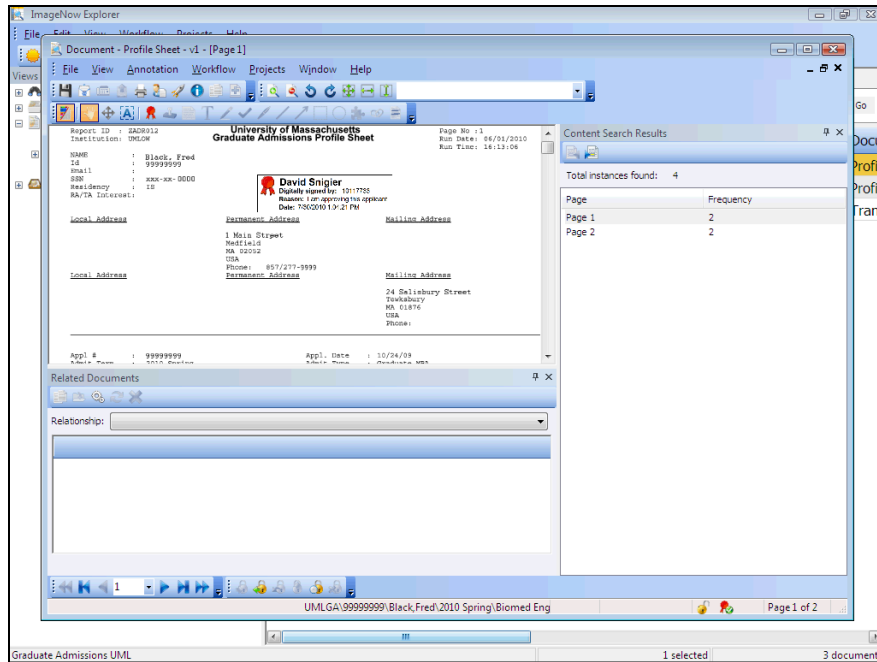
Step	Action
12.	Click the scrollbar.
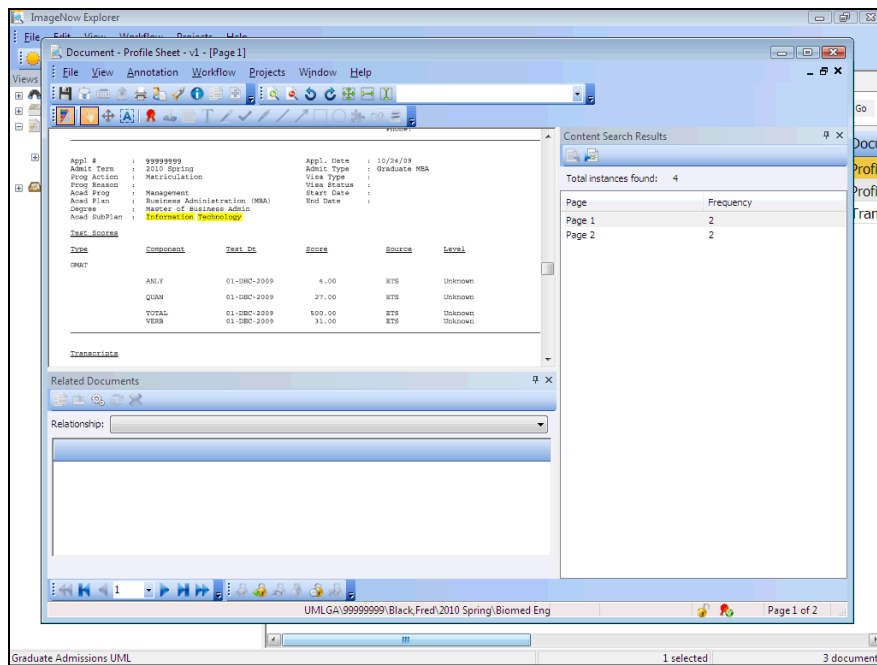
Step	Action
13.	In this example, one instance of the word "information technology" was found in Fred Black's Graduate Admissions Profile Sheet. The instance is highlighted in yellow on the document image.

Step	Action
14.	Click the **Close** field. ![Close button]
15.	Let's do a content search based on multiple text values.
16.	To search on multiple values, separate the text with commas. It does not matter if you put a space between the comma and the next value. The search will retrieve the same results if entered as "framingham state college,arts & sciences" or "framingham state college, arts & sciences". In this example, you will search for documents containing the text "framingham state college" and/or "arts & sciences".
17.	Enter the desired information into the **Value** field. Enter "**framingham state college, arts & sciences**".

Step	Action
18.	Click the **Go** button. → Go
19.	Double-click a document to view the content search results.
20.	Congratulations! You have successfully used content search. **End of Procedure.**

Viewing a Document in ImageNow

To view a document in the WebNow Explorer, you double-click on the document. The document opens in the **ImageNow Viewer**. The **ImageNow Viewer** provides you with various options, including zooming in and out of a document, navigating through document pages, and viewing document properties. Additional functionality such as applying annotations will be available depending on your user security.

Procedure

Consider this scenario:

Your goal is to view a document.

Step	Action
1.	Begin by navigating to the appropriate **Documents View**. In this example, you will navigate to **UML Graduate Admissions** view. Click the **UML Graduate Admissions** tree item. UML Graduate Admissions
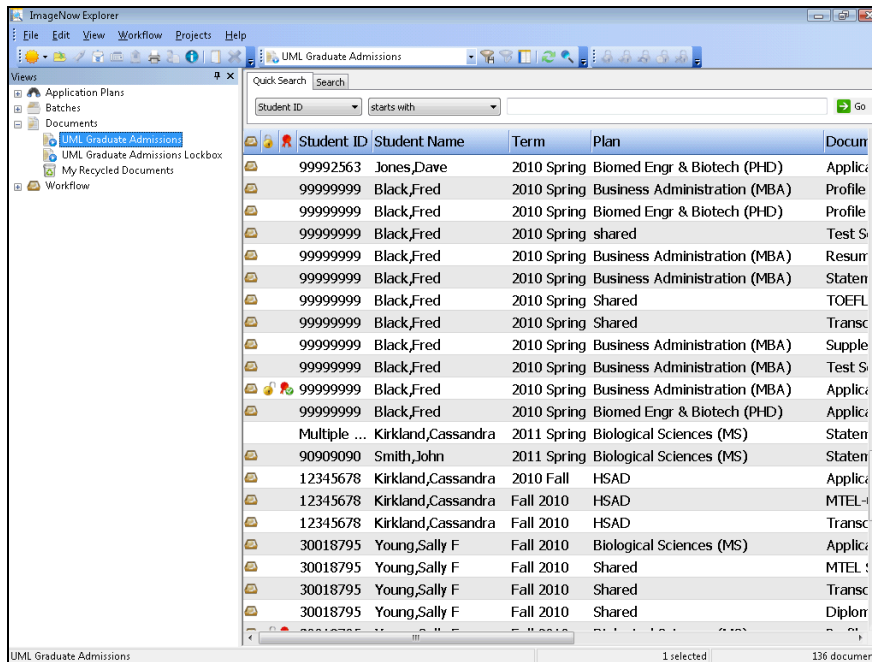
Step	Action
2.	Find the document you wish to review in the **ImageNow Explorer**. In this example, you will review the Profile for Fred Black. Double-click the **document** list item.
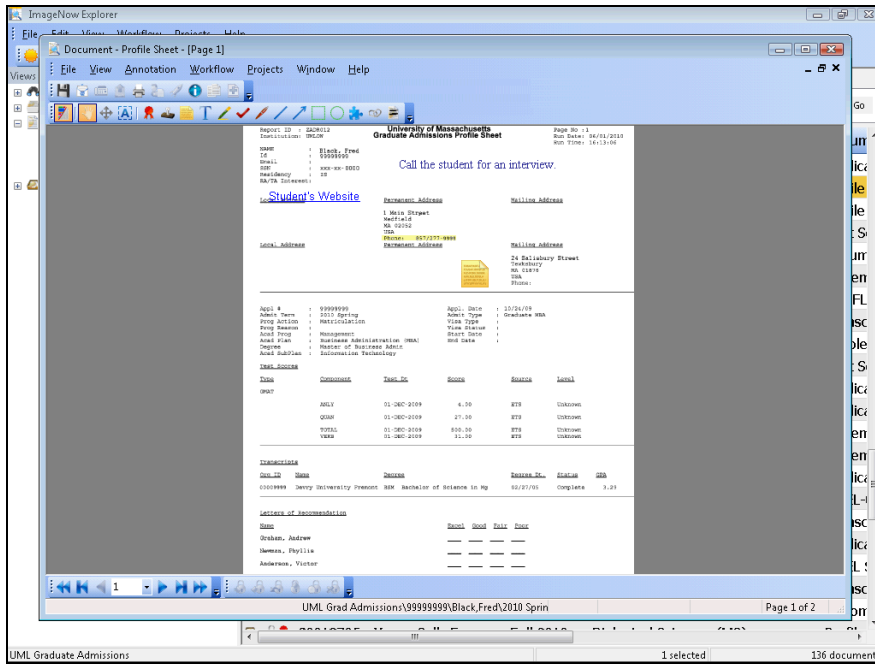
Step	Action
3.	The **Image Now Viewer** opens in a new window. The document you selected is displayed.

Step	Action
4.	Expand the window. Click the **Maximize/Restore** button.

Step	Action
5.	The **Viewer Menu** provides you with seven dropdown lists: **File**, **View**, **Annotation**, **Workflow**, **Project**, **Window**, and **Help**. In this topic, you will utilize the **View** dropdown list to access toolbars and views.
6.	The **File Toolbar** allows you to complete an action in relation to the current document, such as saving the document or sending the document URL to another ImageNow user via e-mail. *Please Note:* Several functions in this toolbar are grayed out as they are not utilized, including faxing or exporting documents. These features have been disabled to ensure documents are kept safe and secure.
7.	Use the **Annotations Toolbar** to apply annotations to a document, including stamps, sticky notes, and a digital signature. *Important:* This toolbar displays based on your user security.

Step	Action
8.	Use the **Navigate Toolbar** to navigate between pages of a multiple page document.
	You can also use the double arrow icons to navigate to the previous or next document in the **ImageNow Explorer** view.
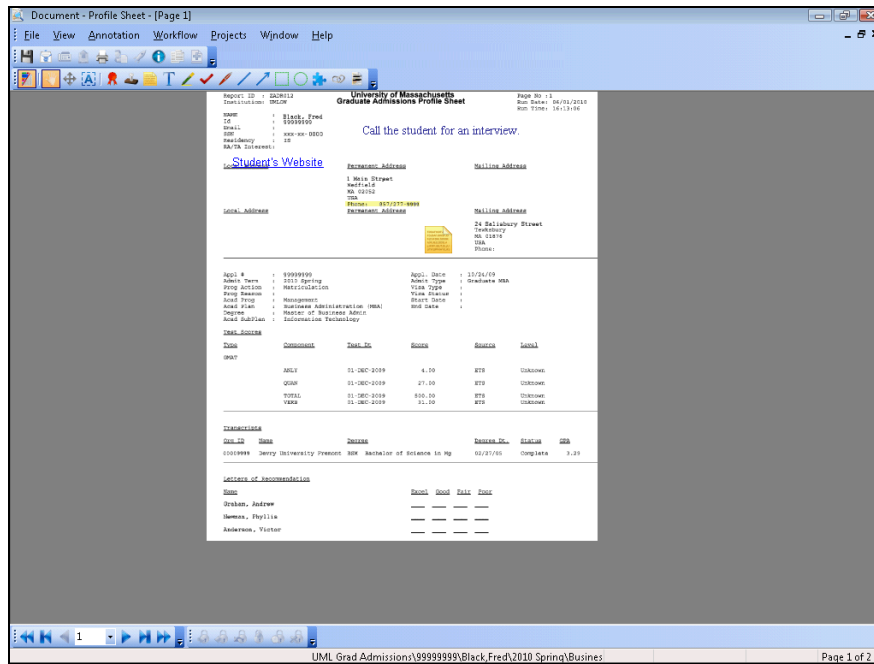
Step	Action
9.	Navigate to the next page of the document.
	Click the **Next Page** button.
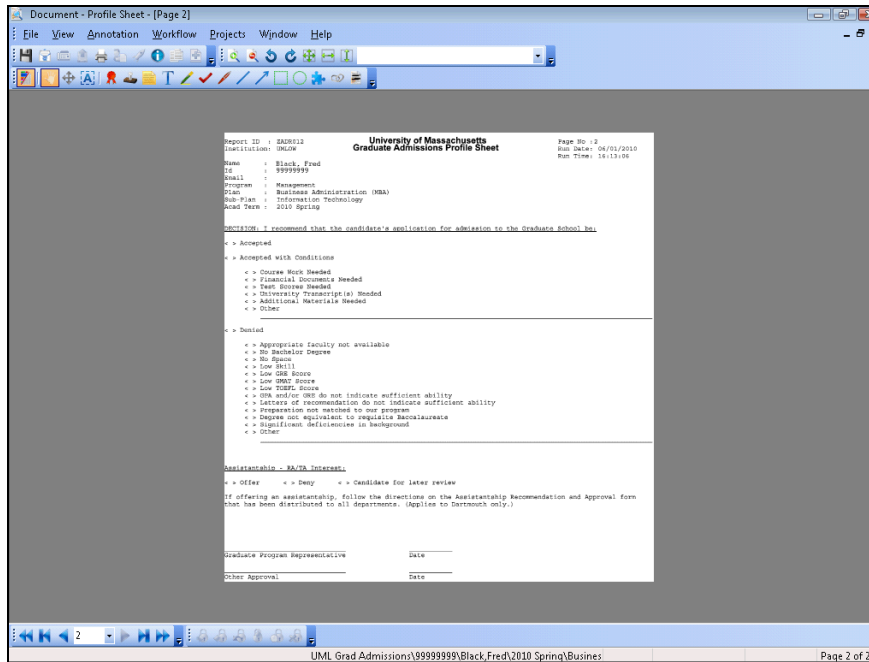
Step	Action
10.	Navigate back to the first page of the document. Click the **First page** button.
11.	In some cases, you may want to zoom in on the document. The viewing features are provided on the **View Toolbar**, which is currently not visible. Let's add the **View Toolbar** to your current toolbar options.
12.	Click the **View** menu.
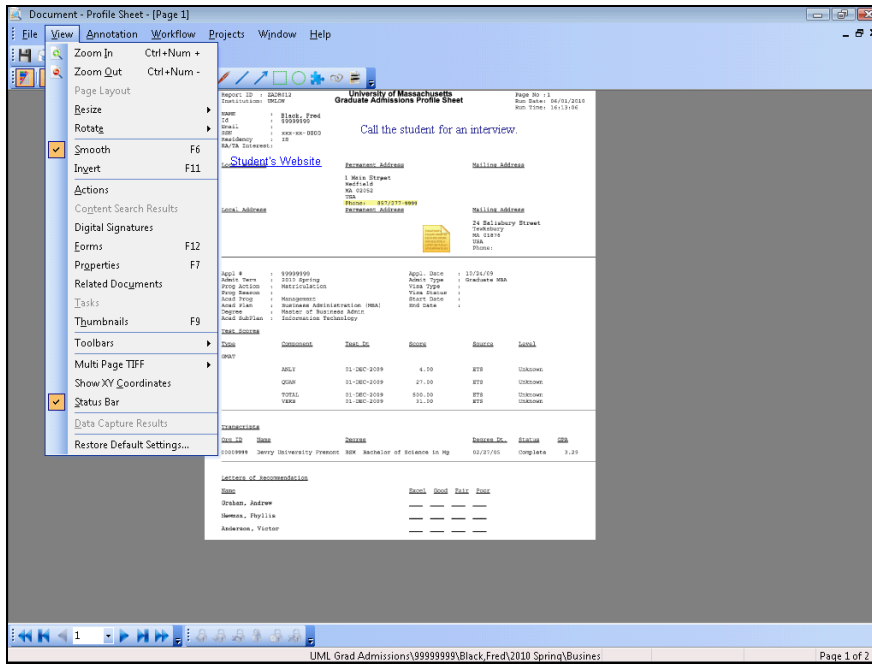
Step	Action
13.	Point to the **Toolbars** menu.
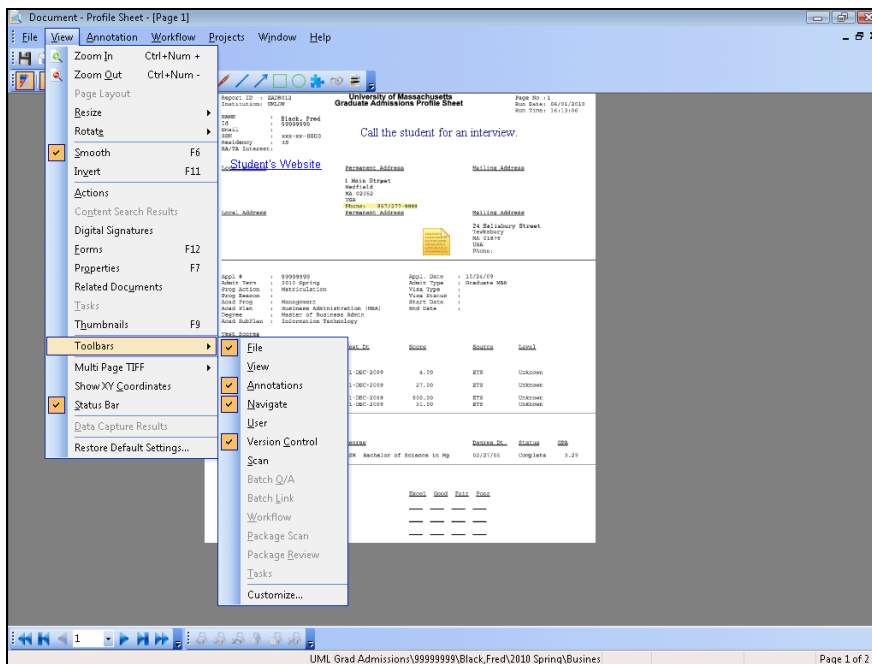
Step	Action
14.	The **Toolbars Menu** expands. Click the **View** option. View
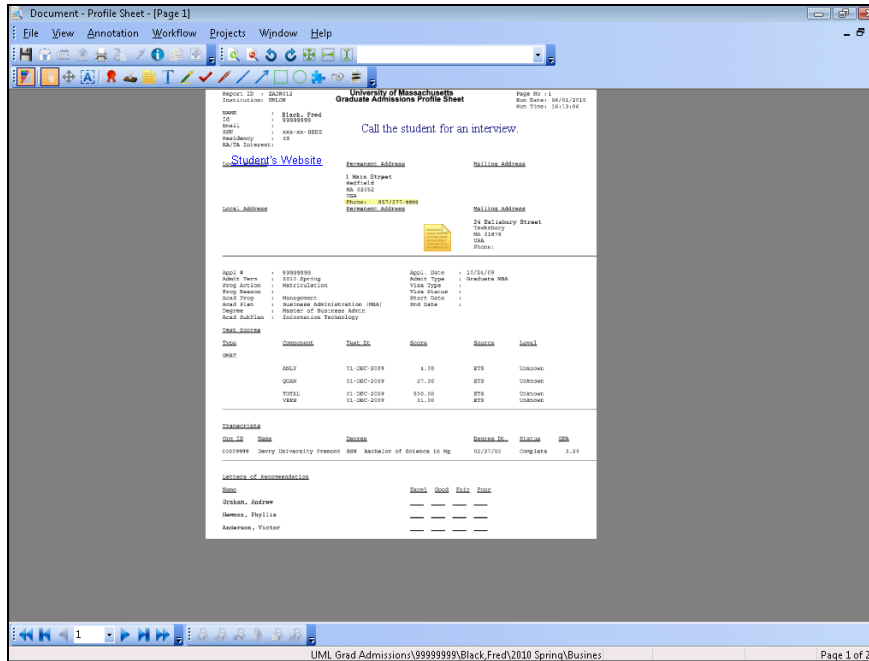
Step	Action
15.	The **View Toolbar** now displays at the top of the **ImageNow Viewer**.
16.	Click the **Zoom In** button.

Step	Action
17.	The **ImageNow Viewer** zooms in on the document. You can use the scrollbar to the right to scroll up and down the document.
18.	You want to view the document properties. Click the **View** menu. View
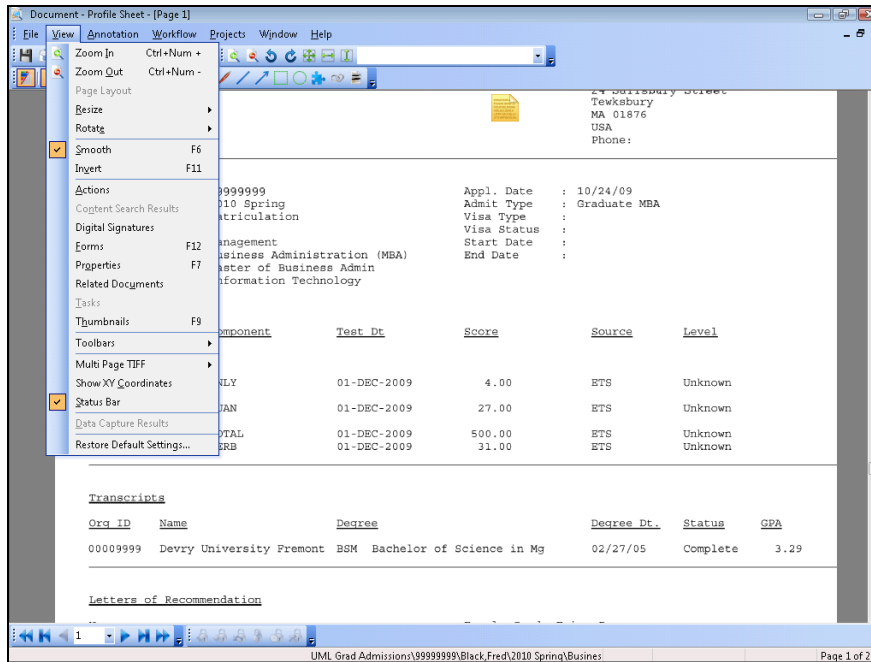
Step	Action
19.	Click the **Properties** option.
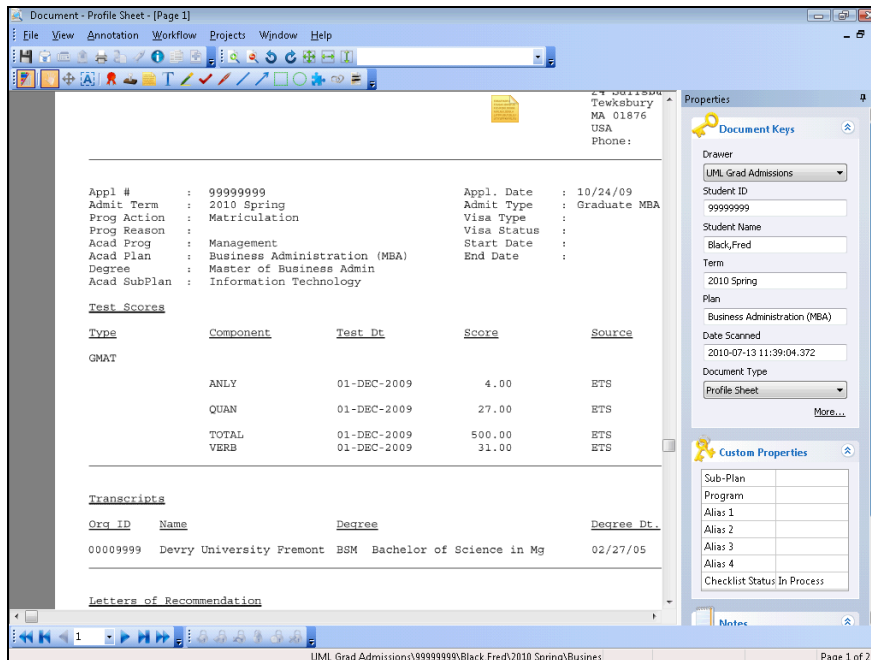
Step	Action
20.	The **Properties** pane displays the **Document Keys**, **Custom Properties**, and any **Notes** provided by ImageNow users.
21.	Let's shrink the width of the **Properties** pane.
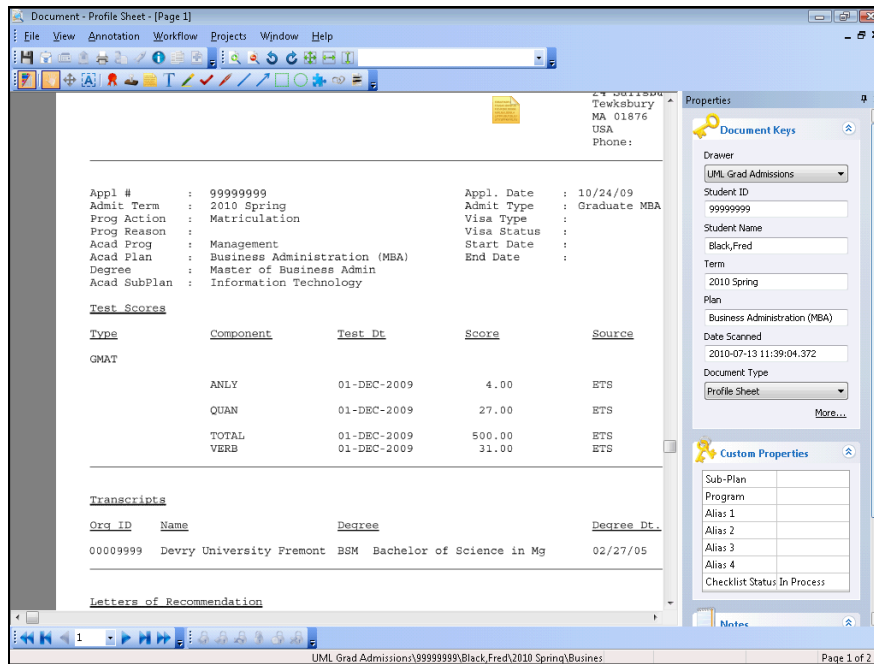
Step	Action
22.	Drag the **Vertical Ruler** on the left side of the **Properties** pane to the right.
	Press the left mouse button and drag the mouse to the desired location.
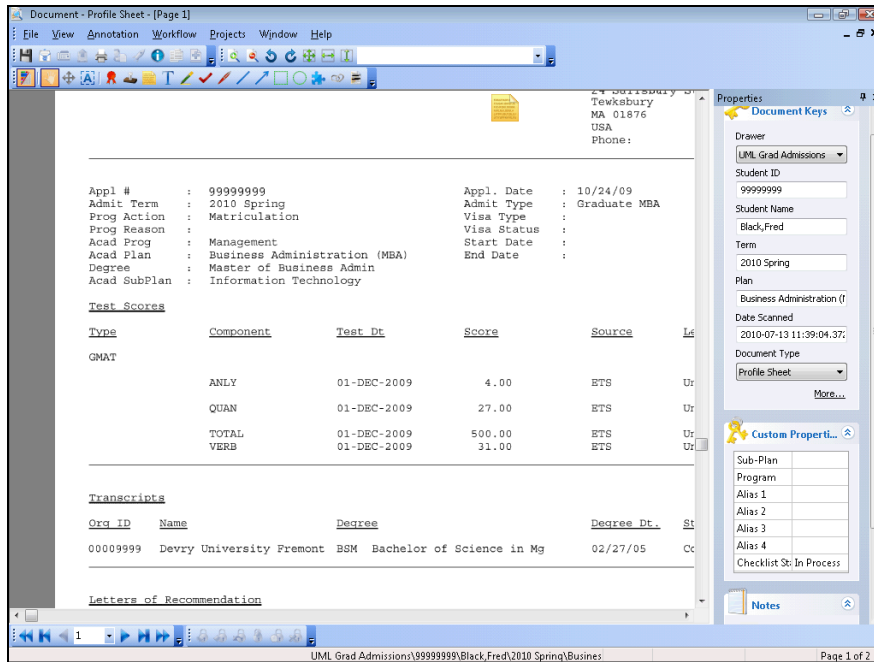
Step	Action
23.	Now let's see if there are any documents related to this document (e.g., documents with the same **Student ID**). Release the mouse button.
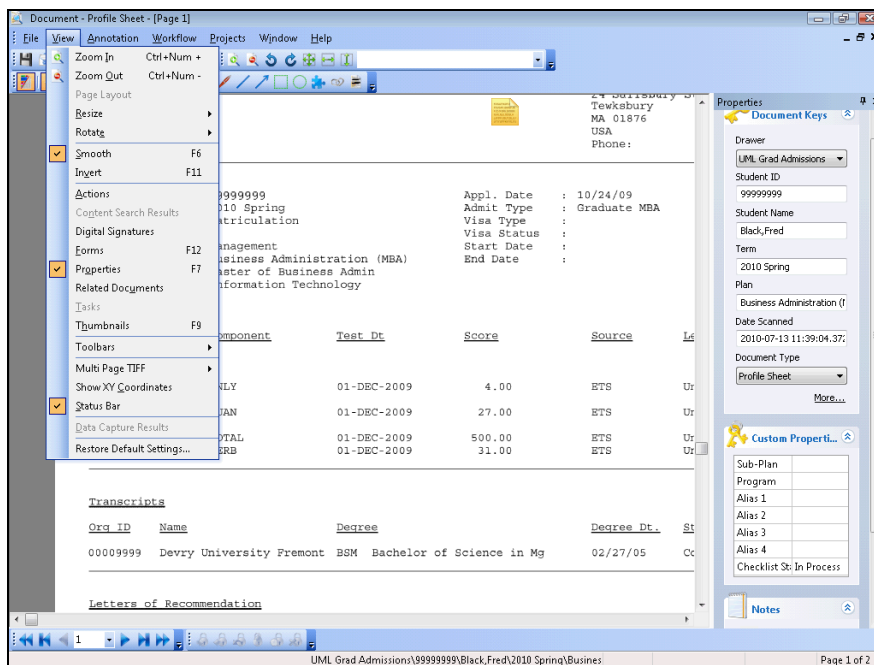
Step	Action
24.	Click the **Related Documents** option.

Step	Action
25.	The **Related Documents** window opens. Use the **Related Documents** window to find documents associated to the document you are currently viewing. Any documents with the same primary document key will be retrieved. In this example, when you select a **Relationship**, the system will retrieve any Graduate Admissions documents with the same Student ID.
26.	Click the **Relationship** list.
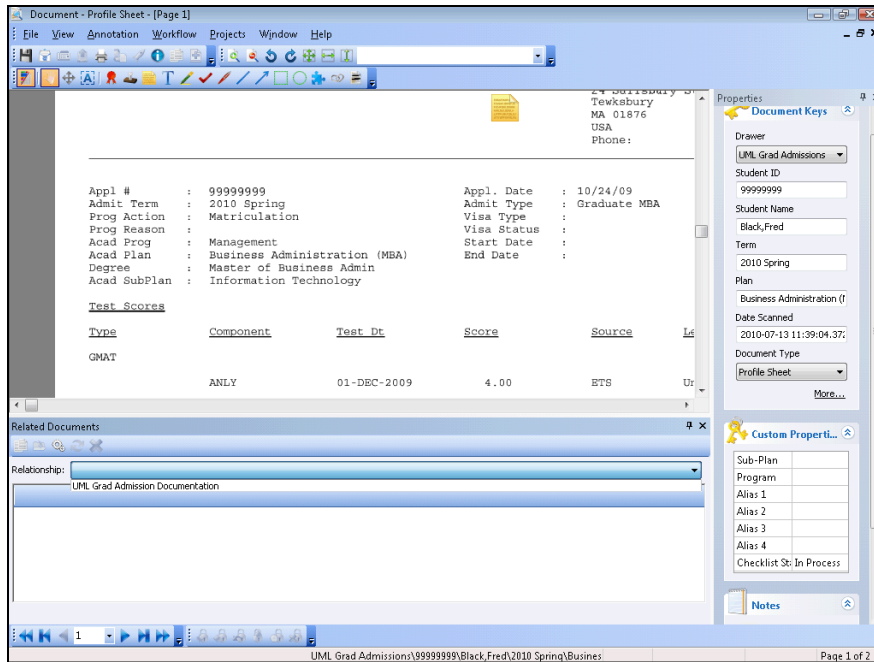
Step	Action
27.	Select the **Documents View** in which you want to search for related documents. In this example, you will search for related documents within the **UML Grad Admission Documentation** view. Click the **UML Grad Admission Documentation** list item.

Step	Action
28.	The related documents in the **UML Grad Admission Documentation** view display. Select a related document that you wish to view. In this example, you want to view the **Test Score Report** document. Double-click the **Test Score Report** cell. Test Score Report
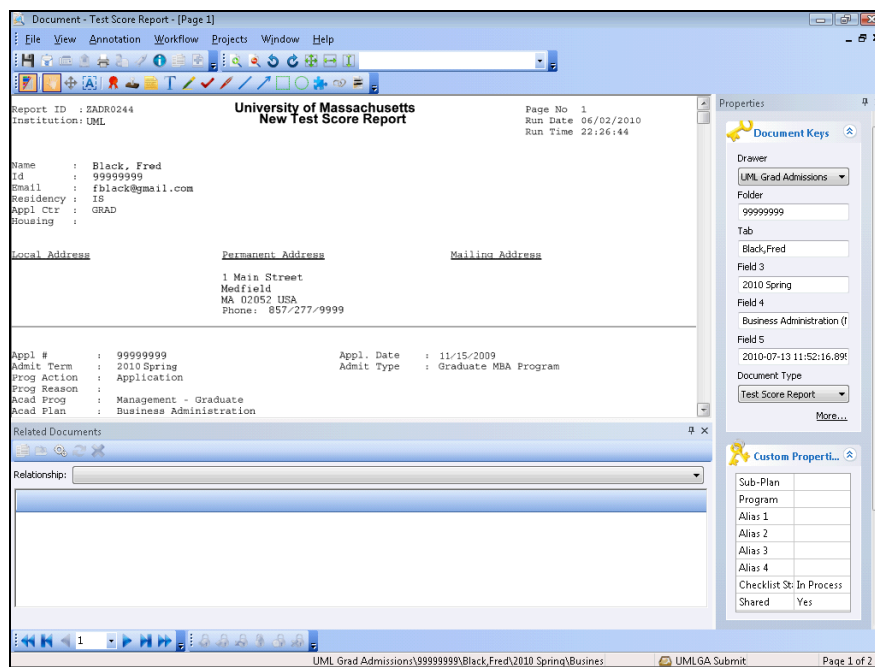
Step	Action
29.	The related document opens in a new window.
30.	Hide the **Related Documents** pane for a better view of the related document. Click the **Close** button.

Step	Action
31.	Review the related document and close the window once your review is complete.

Click the **Close** button.

 |

Step	Action
32.	Close the original document.
	Click the **Close** button.
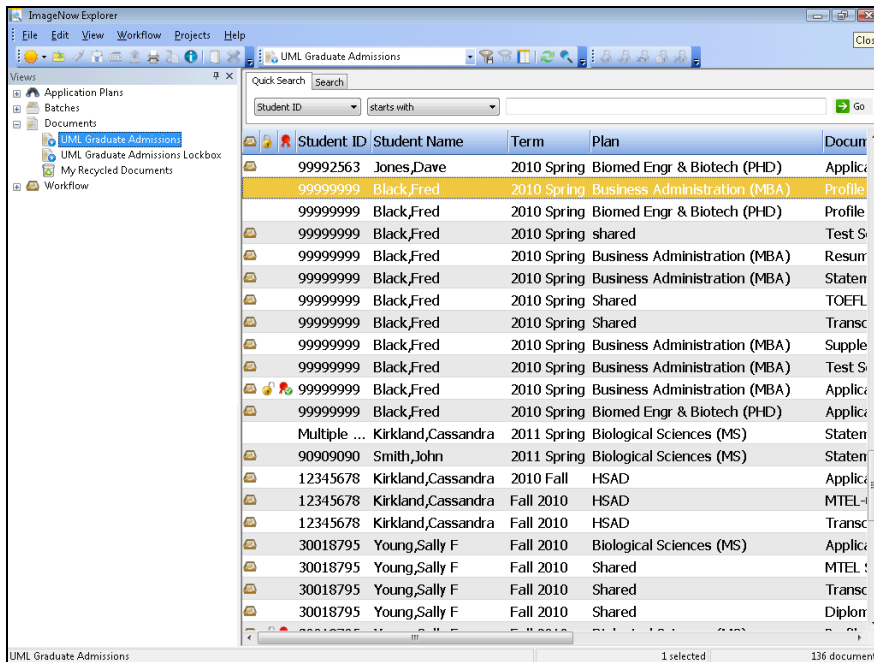
Step	Action
33.	You are returned to the **ImageNow Explorer** window. You can open and view additional documents as needed.
34.	Congratulations! You have successfully viewed a document. **End of Procedure.**

Setting Your User Preferences

Upon completion of this lesson you will be able to:

- Set Related Documents to Automatically Populate in ImageNow

Setting Related Documents to Automatically Populate

In ImageNow, you can set previously viewed related documents to automatically populate when viewing a document.

Procedure

Consider this scenario:

Your goal is to set related documents to automatically populate.

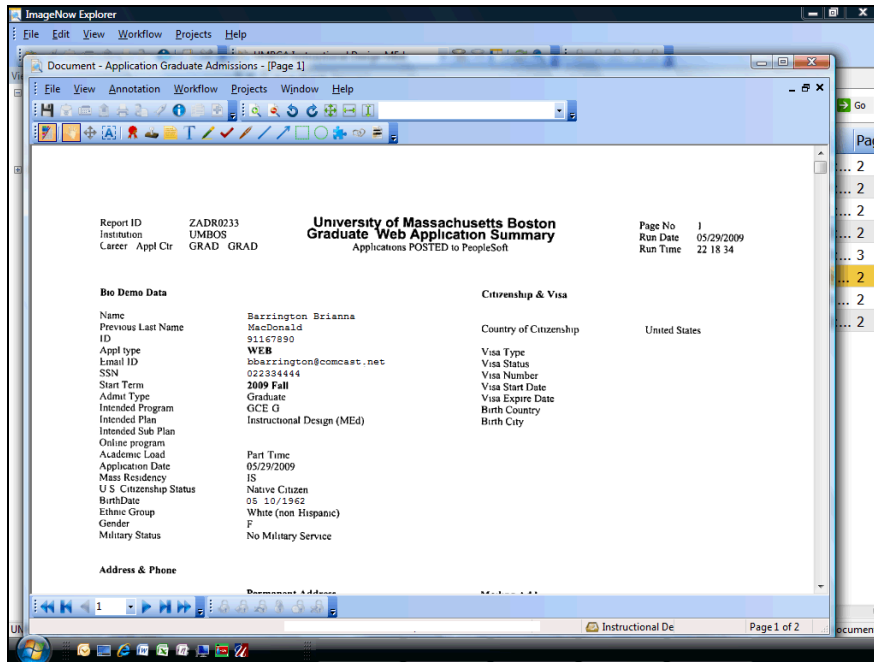| Step	Action
1.	Begin by navigating to the appropriate **Documents** view. In this example, you will navigate to the **UMBGA Instructional Design MEd** view. Click the **UMBGA Instructional Design MEd** tree item. UMBGA Instructional Design MEd

Step	Action
2.	Find the document you wish to review in the ImageNow Explorer

In this example, you will review the document for Brianna Barrington.

Double-click the **document** list item.
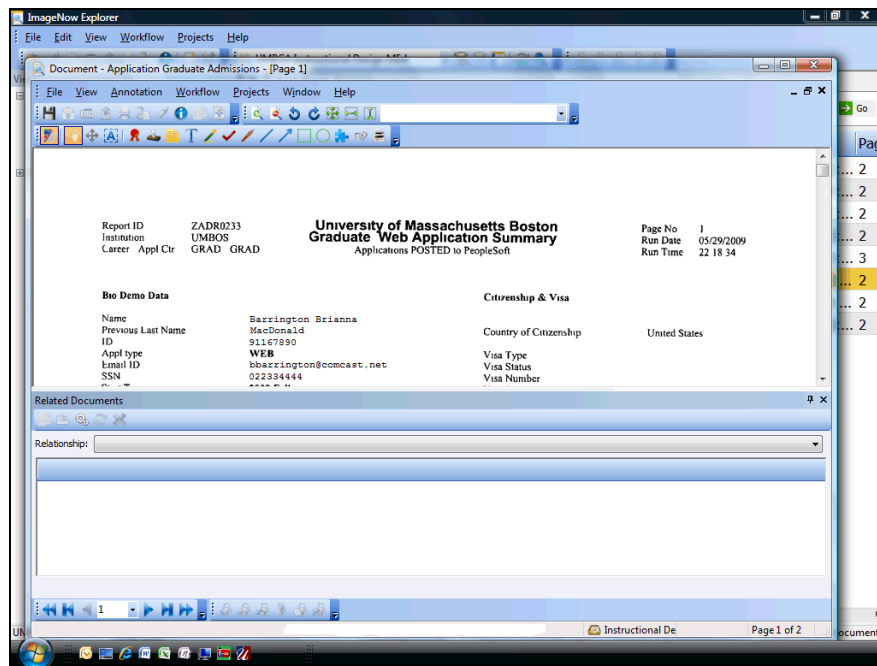
Barrington,Brianna |

Step	Action
3.	The **ImageNow** Viewer opens in a new window. The document you selected is displayed.
4.	If the **Related Documents** pane is not already visible, click the **View** menu.
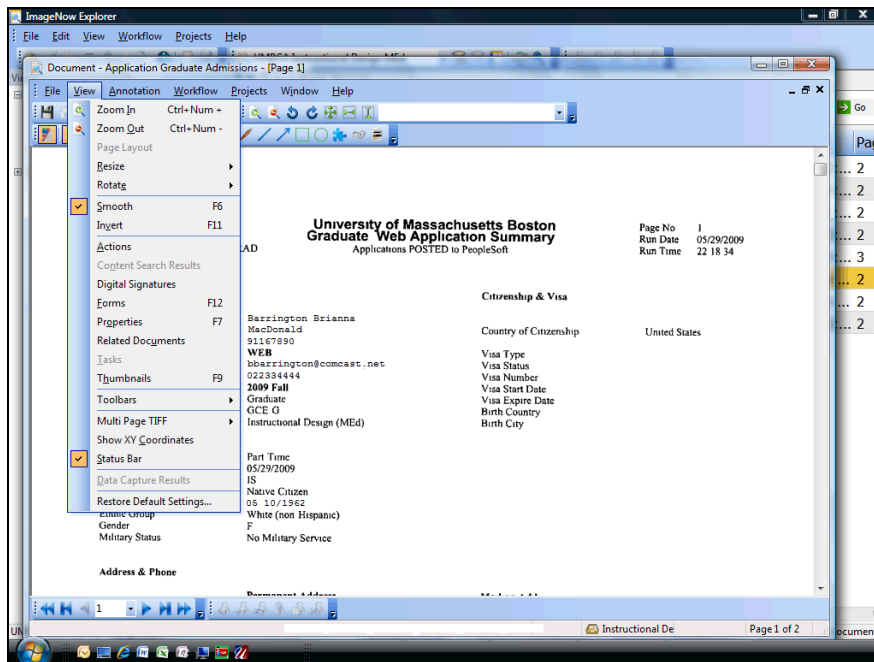
Step	Action
5.	Click the **Related Documents** menu.
	Related Documents

Step	Action
6.	Click the **Relationship** list.
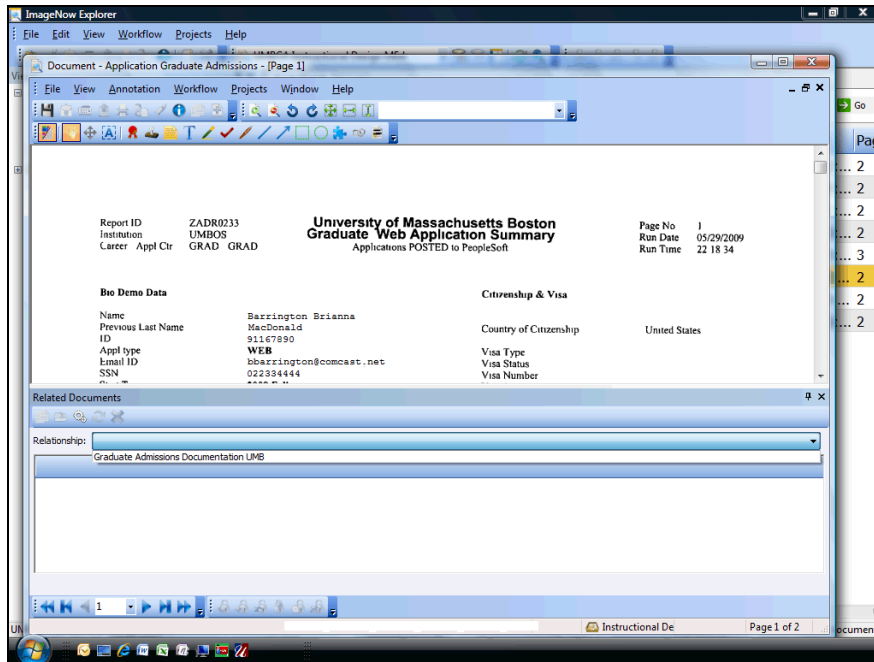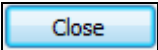
Step	Action
7.	Click the **Graduate Admissions Documentation UMB** list item.
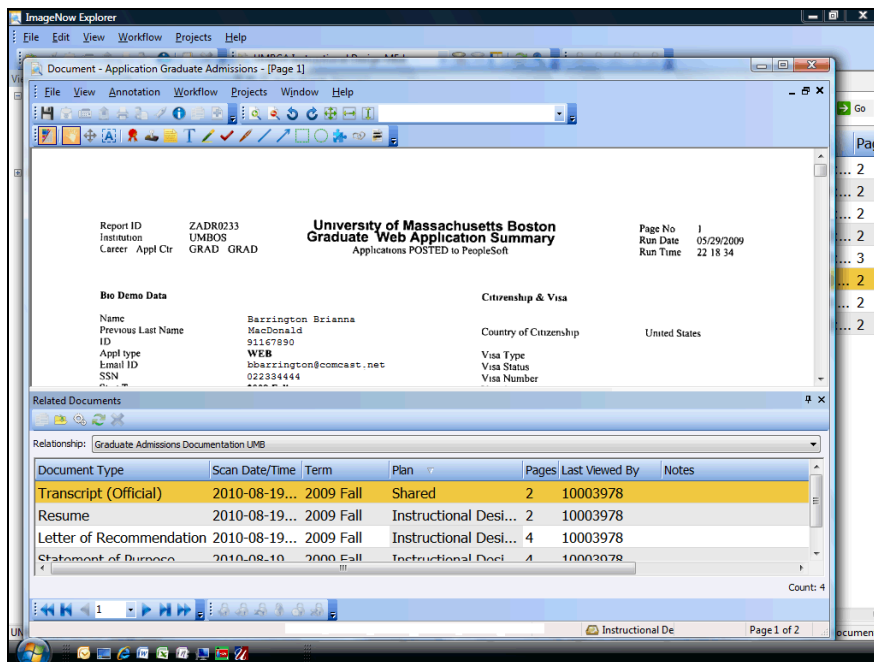
Step	Action
8.	In the **Related Documents** pane, click the **Manage** button.
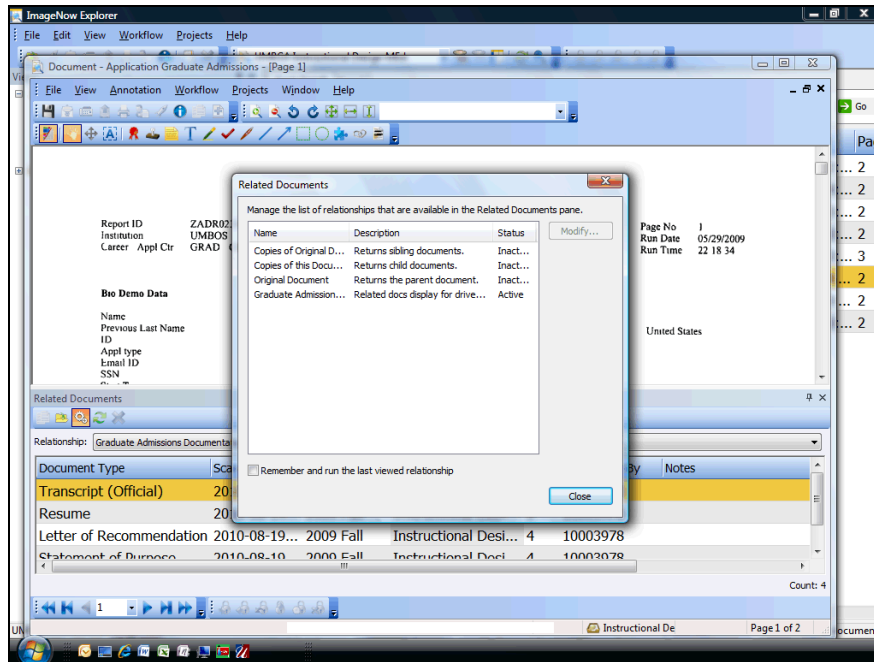
Step	Action
9.	Click the **Remember and run the last viewed relationship** option.
10.	Click the **Close** button.
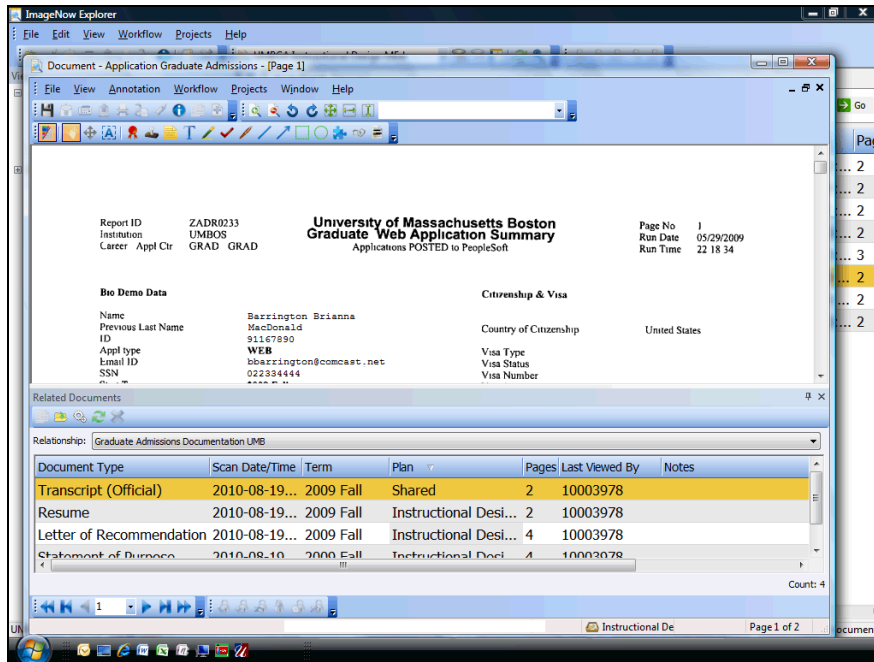
Step	Action
11.	Click the **Save** button.
12.	Congratulations! You have successfully set related documents to automatically populate. **End of Procedure.**