ImageNow Document Management
Created on Friday, October 01, 2010

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ImageNow Document Management

In this module, you will learn how to process documents and manage them in your workflow queue.

Note: Access to workflow queue functionality depends your user security.

Document Processing

This lesson describes the procedures for processing documents. Upon completion of the lesson, you will be able to:

- Edit Document Keys Manually
- Use Annotations
- Print Documents, and
- Void a Digital Signature

Editing Document Keys Manually

In this topic you learn how to populate the document keys manually. In most documents, the document keys will be populated by application linking. In the case that linking does not occur and the document gets stored into ImageNow without document keys, this lesson will show you how to input these document keys.

The document keys are represented by the **Student ID**, **Student Name**, **Term Year**, **Plan**, **Time Stamp** (system generated), and **Document Type** (see the table below for examples of each value). The Drawer will be populated and unable to be updated, however, the other document keys can be manually updated by the administrators.

In addition to the document keys Custom Properties may need to be updated manually. These include the **Sub-plan**, **Program**, **Alias 1**, **Alias 2**, **Alias 3**, and **Alias 4** (see the table below for examples of each value). The Sub-plan further defines the plan. The Alias fields will correlate to the Alias fields in PeopleSoft.

The following schematics for the document keys and custom properties will represent the values populated.

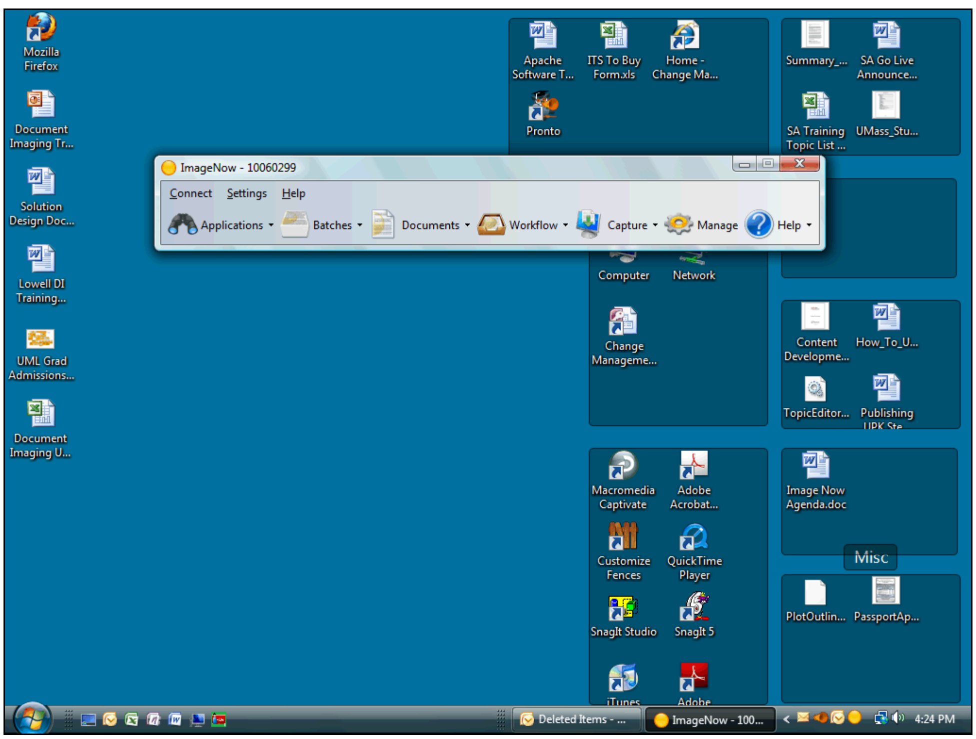
Document Key	Example
Student ID	10060299
Student Name (Last,First MI)	Smith,Jane H
Term Year	2010 Spring
Plan	Business Administration (MBA)
Time Stamp (system generated)	2010-07-13 10:53:30.880

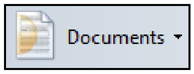
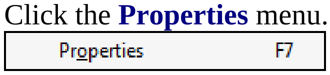
Custom Property	Value	Examp
Sub-Plan	Division of the Plan	Management
Program	Major	
Alias 1	Name Difference: Married Name, Maiden Name, etc.	Thomas,Jane H
Alias 2	Name Difference: Married Name, Maiden Name, etc.	Smith,Jane H
Alias 3	Name Difference: Married Name, Maiden Name, etc.	
Alias 4	Name Difference: Married Name, Maiden Name, etc.	
Checklist Status	Status of Checklist in PeopleSoft	In Progress

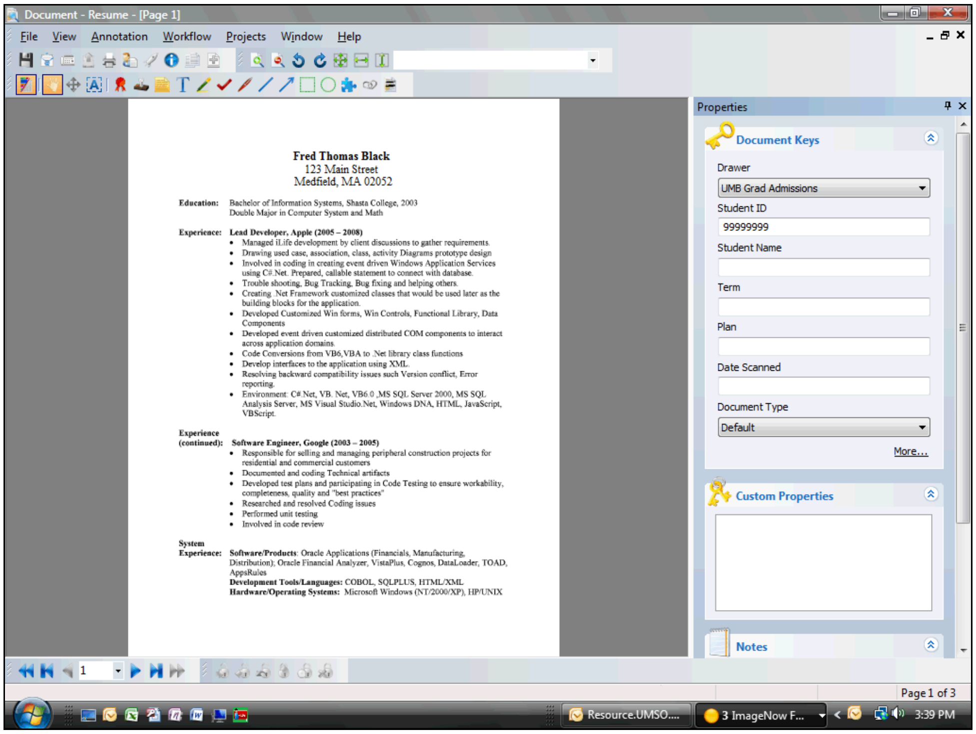
Procedure

Consider this Scenario:

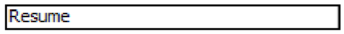
Your goal is to apply the document keys to a document manually.



Step	Action
1.	Click the **Documents** dropdown button to activate the ImageNow Explorer. 
2.	If a document does not have any document keys applied, you will notice this in the **Documents View**. There will be no values in a particular column. To apply these values you must open the document.
3.	Double-click the desired document.
4.	Click the **Fit Height** button to resize the document. 
5.	The document key values can be modified on the properties pane. If the properties pane does not display upon entering the document you can open it by clicking the properties icon or navigating through the View menu item. In this example, we will open the properties pane by using the menu navigation.
6.	Click the **View** menu. 
7.	Click the **Properties** menu. 
8.	The Properties pane displays to the right of the document. In the document key value fields that are blank, you can populate them with the appropriate values based on the student's information displayed in the document.
9.	Enter the desired information into the **Student ID** field. Enter "**99999999**".



Step	Action
10.	Enter the desired information into the **Student Name** field. Enter "**Black,Fred**". ***Important:*** The naming convention for the **Student Name** is "Last,First MI". There is no space between the last and first name. The middle name or middle initial is not required.
11.	Enter the desired information into the **Term** field. Enter "**2010 Spring**".
12.	Enter the desired information into the **Plan** field. Enter "**Business Administration (MBA)**".
13.	If there are unknown document key values, you can save the document and come back to populate them at a later time. The **Document Type** is important because most workflow processing is driven by the document type.
14.	Click the **Document Type** list.  Default
15.	Click the scrollbar box.

Step	Action
16.	Click the **Resume** list item. 
17.	Once the **Document Type** is populated the **Custom Properties** display. Populate these values as necessary.
18.	Enter the desired information into the **Sub-Plan** field. Enter "**Management**".
19.	Click the **Save** button. 
20.	Congratulations! You have successfully edited the document keys manually. **End of Procedure.**

Using Annotations

Use an annotation in ImageNow to mark up and comment on a document without affecting the original image. You can position annotations where you need in the document. ImageNow offers many types of annotations, you can mark the document electronically as you would a paper document with pens, highlighters and sticky notes. For example, in ImageNow, you can mark your review of a document by stamping it approved, you can write notes or ask questions by adding text, or you can highlight specific data you want others to view. You can also add sticky notes to add small notes to a document object.

Important: Annotations applied become part of the student's record and can be viewed by other users.

Note: Stamps are not able to be customized by the user.

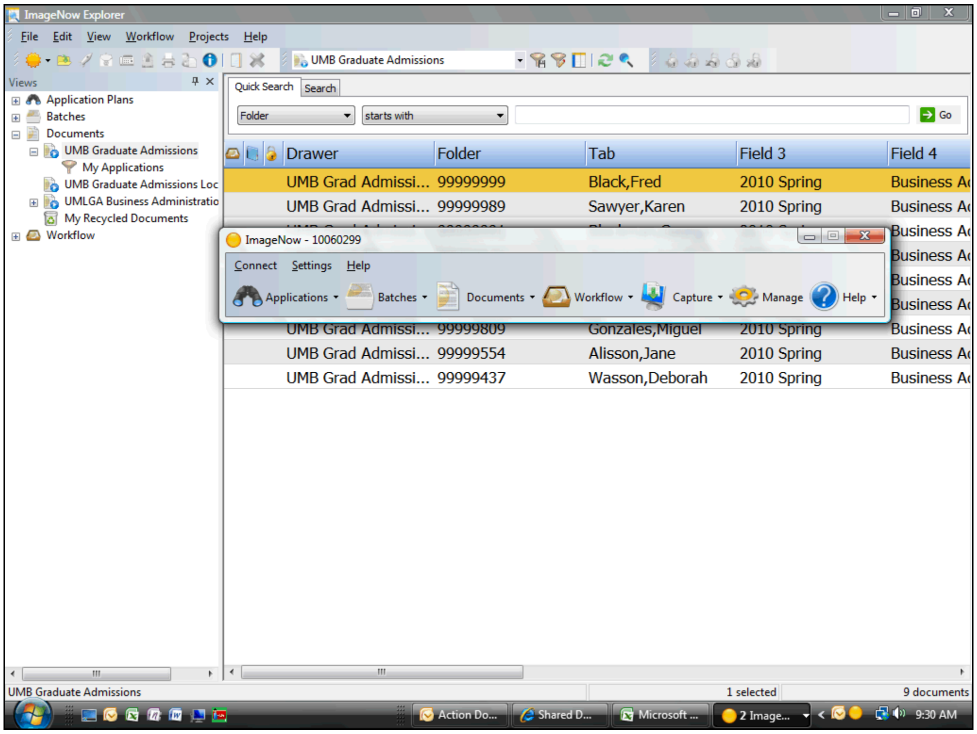
Annotation Button	Description
Stamp	Enables you to stamp predefined (Approved, Confidential, Rejected, and so forth) or custom messages on document images.
Sticky Note	Enables you to add small notes to document images.
Text	Enables you to place text on document images.
Highlight	Enables you to highlight an area on a document image.
Check	Enables you to place a checkmark on a document image.
Pen	Enables you to draw on a document image.
Line	Enables you to place a line on a document image.
Arrow	Enables you to place an arrow on a document image.
Rectangle	Enables you to place a rectangle on a document image. The rectangle annotation can appear hollow or filled, depending on the appearance defined in the annotation template.
Oval	Enables you to place an oval on a document image. The oval annotation can appear hollow or filled, depending on the appearance defined in the annotation template.
URL	Enables you to place a link to a URL address on a document image.

In this lesson you learn how to add various annotations to an application.

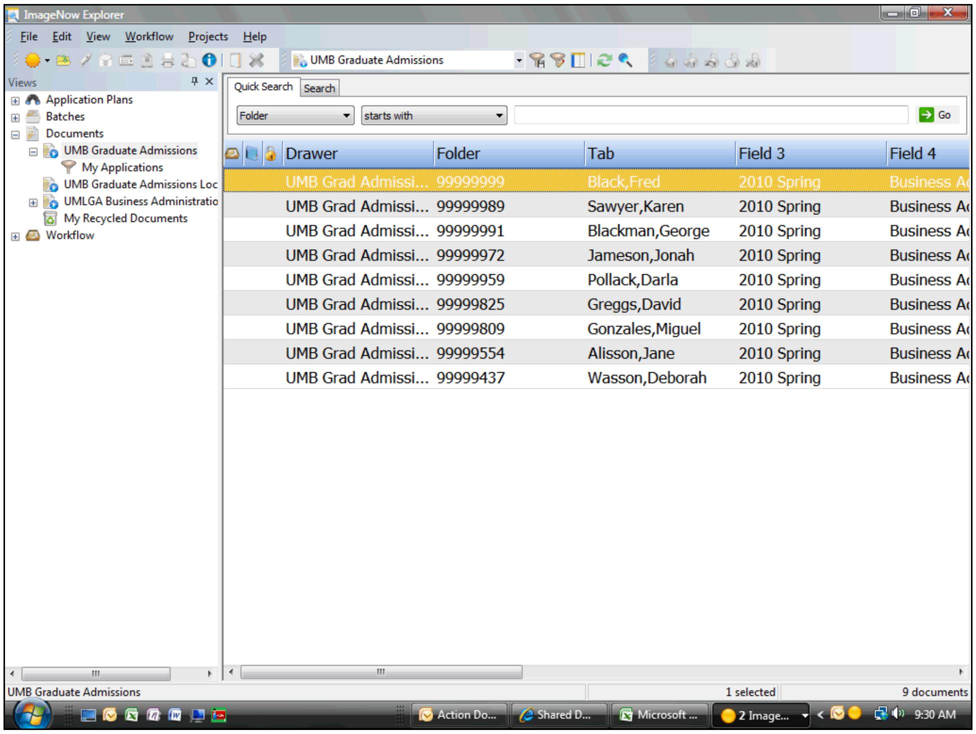
Procedure

Consider this Scenario:

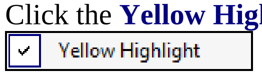
Your goal is to apply various annotations to a document.

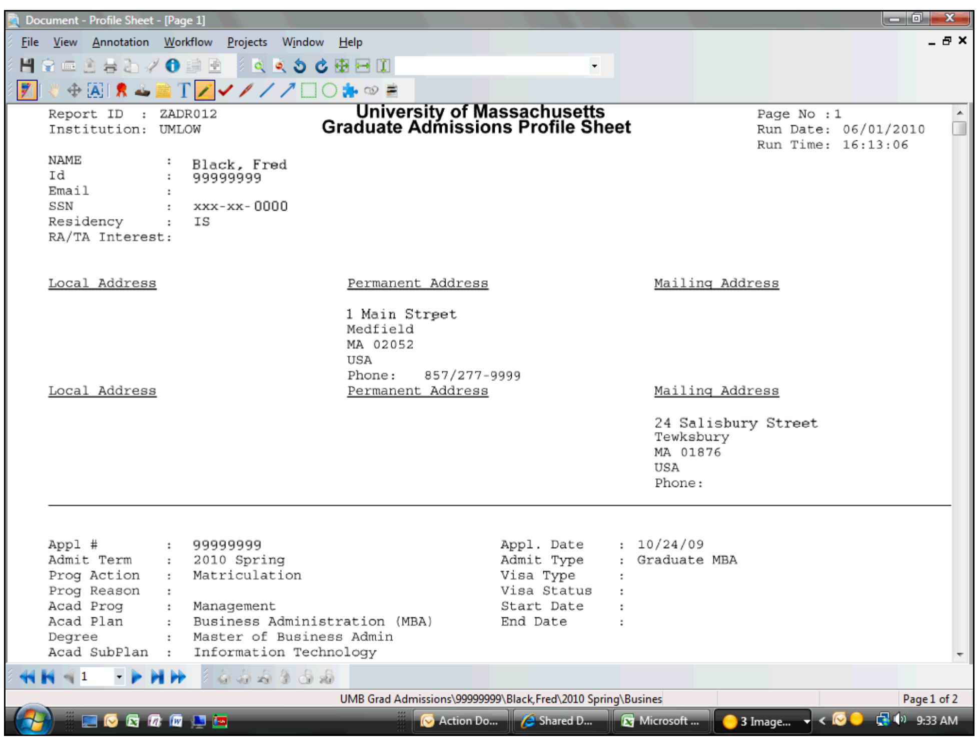


Step	Action
1.	To apply annotations, you begin by navigating to and opening a document in the **Documents View** or **Workflow**. Click the **Minimize** button. 

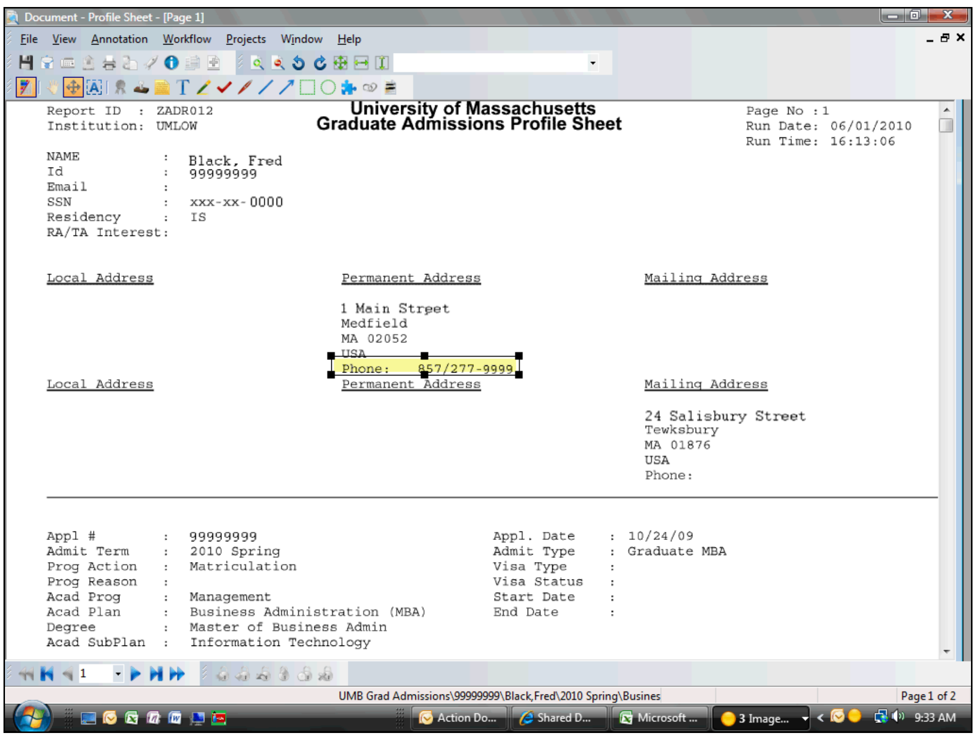


Step	Action
2.	Double-click in the **Document** row.
3.	To get a complete view of the document, you can close the **Related Documents** and **Properties** panes.
4.	Click the **Close** button on the **Related Documents** pane. ×
5.	Click the **Close** button on the **Properties** pane. ×
6.	Click the **View** menu. View
7.	Here is where you can click either the **Properties** or **Related Documents** menu items to open the panes again.
8.	Click the **View** menu again to close it. View

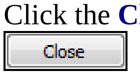
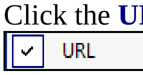
Step	Action
9.	The annotation buttons to be used are located just above the document. Just click on the annotation button you want to use and place in a location on the document to activate the annotation. After activating the annotation your cursor returns to a pointer. If you want to use an annotation repeatedly, double-click the annotation button to activate multiple annotations on the document. The availability of these buttons is based on your security. In this example, we will use the highlight, text, sticky note, and URL annotations.
10.	Some annotations have a variety of options. You can right click on that annotation to select the desired option. For example, the highlight annotation has blue, red, pink and green higlight options. To add a highlight to the document, right-click the **Highlight** button. 
11.	Click the **Yellow Highlight** list item. 



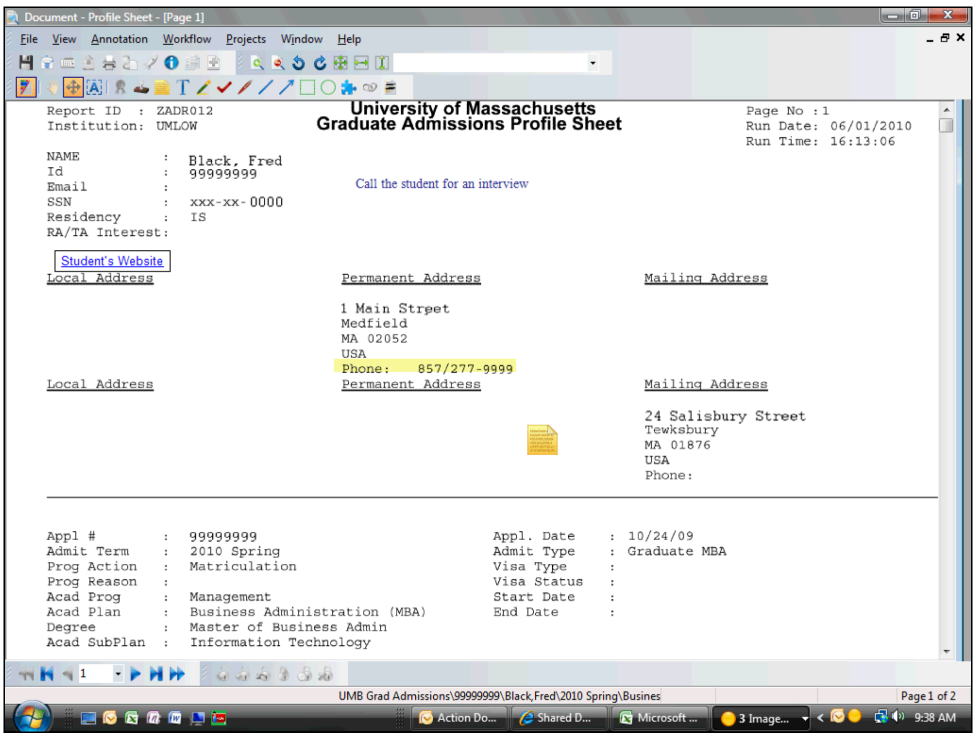
Step	Action
12.	In ImageNow you will be required to click and drag a line to place the highlight over the desired text. In this lesson, click the text where you want the highlight to display. `Phone:     857/277-9999`
13.	The highlight displays on the document. You may need to resize the highlight by moving the squares on the border around the highlight.



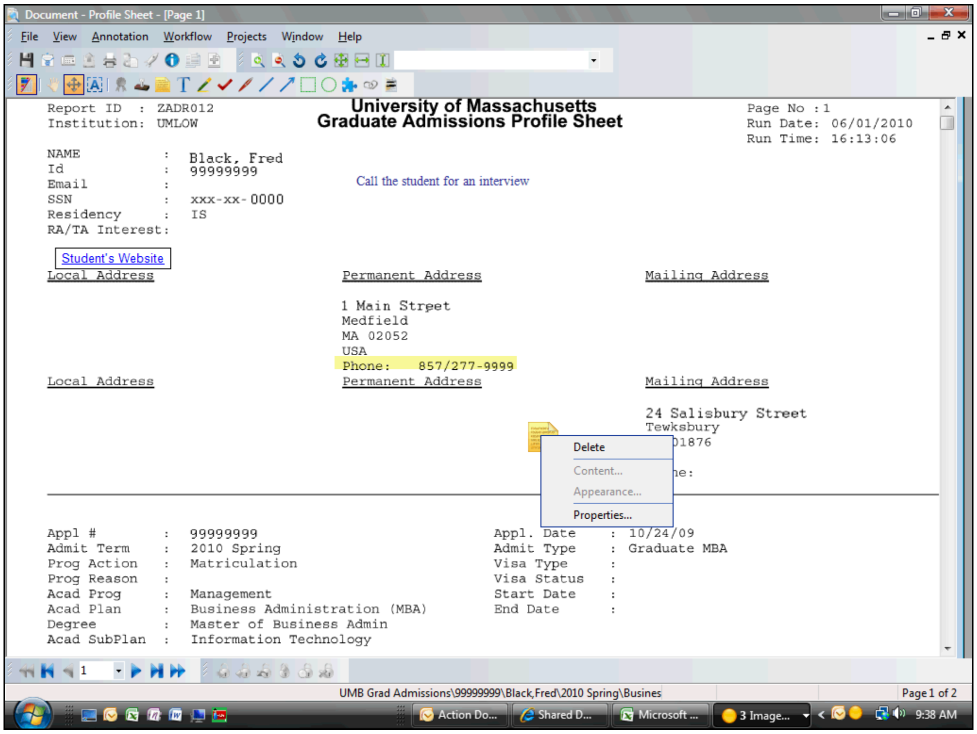
Step	Action
14.	To add a Text box, click the **Text** button. T
15.	Click the **document** where you want the text box to display.
16.	Enter the desired information into the **Add Text** field. Enter "**Call the student for an interview**".

Step	Action
17.	Click the **OK** button. 
18.	The text displays on the page.
19.	To add a **Sticky Note**, click the **Sticky Note** button. 
20.	Click the **document** where you want the sticky note to display.
21.	Enter the desired information into the **Enter Text** field on the **Sticky Note** dialog box. Enter "**Verify the Mailing Address - Steve McQueen**".
22.	Click the **Add** button. ***Note:*** After you add text, you cannot change it. 
23.	The **History** box will show your employee ID followed by the date and time. It is recommended that you add your name so it's clear who made the comment.
24.	Click the **Close** button. 
25.	The **Sticky Note** displays on the document. ***Notes:*** • To view the contents of an existing sticky note, double-click the sticky note on the document. • To print the text in an existing sticky note, double-click the sticky note on the document and, in the **Sticky Note** dialog box, click Print.
26.	To add a URL to the document, right-click the **URL** button. 
27.	Click the **URL** menu. 
28.	Click the **document** where you want the URL to display.
29.	Enter the desired information into the **Address** field. Enter "**http://fredblack.com**".

Step	Action
30.	Enter the desired information into the **Text to Display** field. Enter "**Student's Website**".
31.	Click the **OK** button. 
32.	The URL displays on the document.
33.	To delete an annotation, click the **Select Annotation** button. 



Step	Action
34.	Right-click the **annotation** that you want to delete. 



Step	Action
35.	Click the **Delete** list item. Delete
36.	Click the **Yes** button. Yes
37.	The annotation has been deleted.
38.	Click the **Save** button.
39.	Congratulations! You have successfully used annotations. **End of Procedure.**

Printing Documents

ImageNow allows you to print documents with the option to include annotations, document keys, and various header and footer options.

Upon completion of this topic, you will be able to print a document in ImageNow.

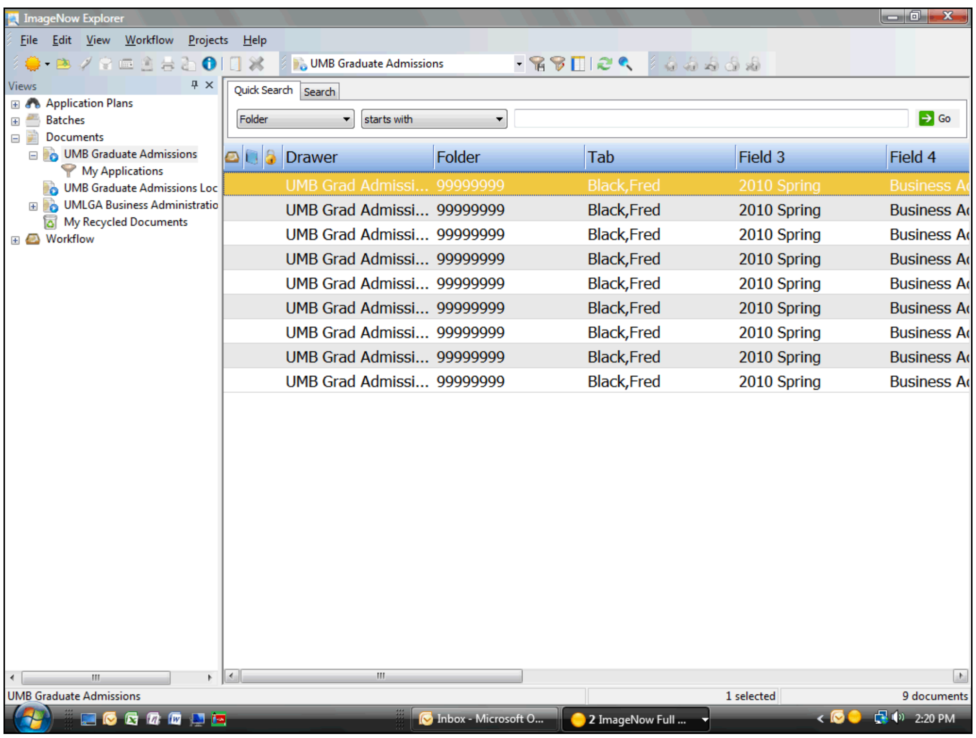
Note: This topic is for Graduate Admission Directors only.

Procedure

Consider this Scenario:

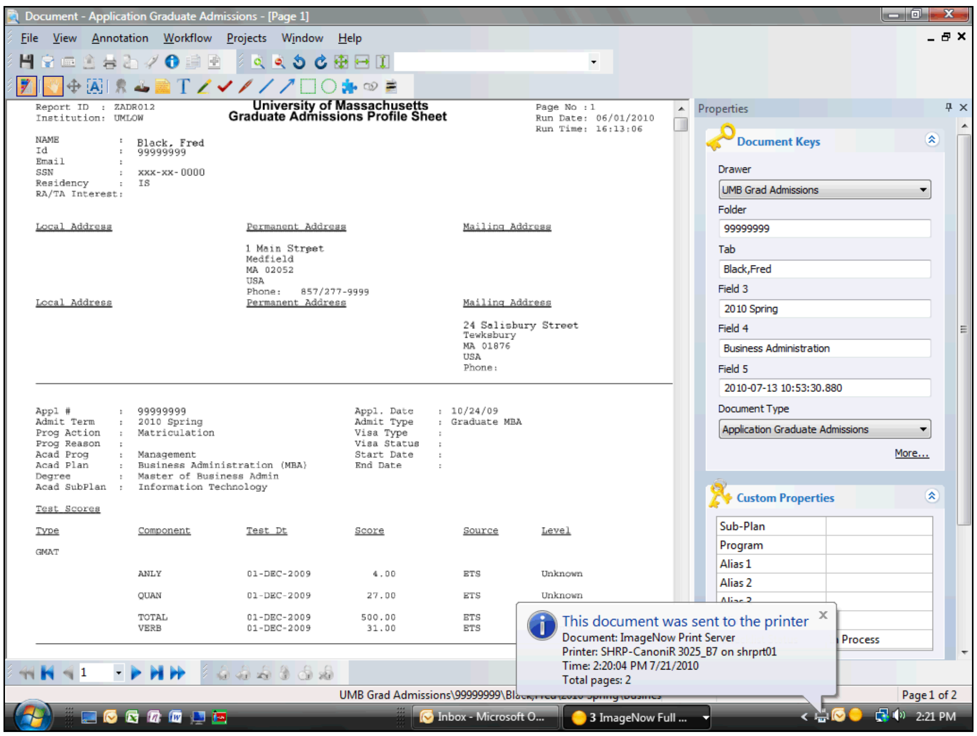
Your goal is to print a document in ImageNow.

Step	Action
1.	***Note:*** In order to be compliant with the data security policies, it is important to remember that when you are printing a document from ImageNow you are responsible for protecting the information and for destroying (e.g., shredding) the document.
2.	You can print documents in the **Documents View** by right clicking on the listed document or by opening a document and printing using the print icon. In this example, we will be printing by opening a document.

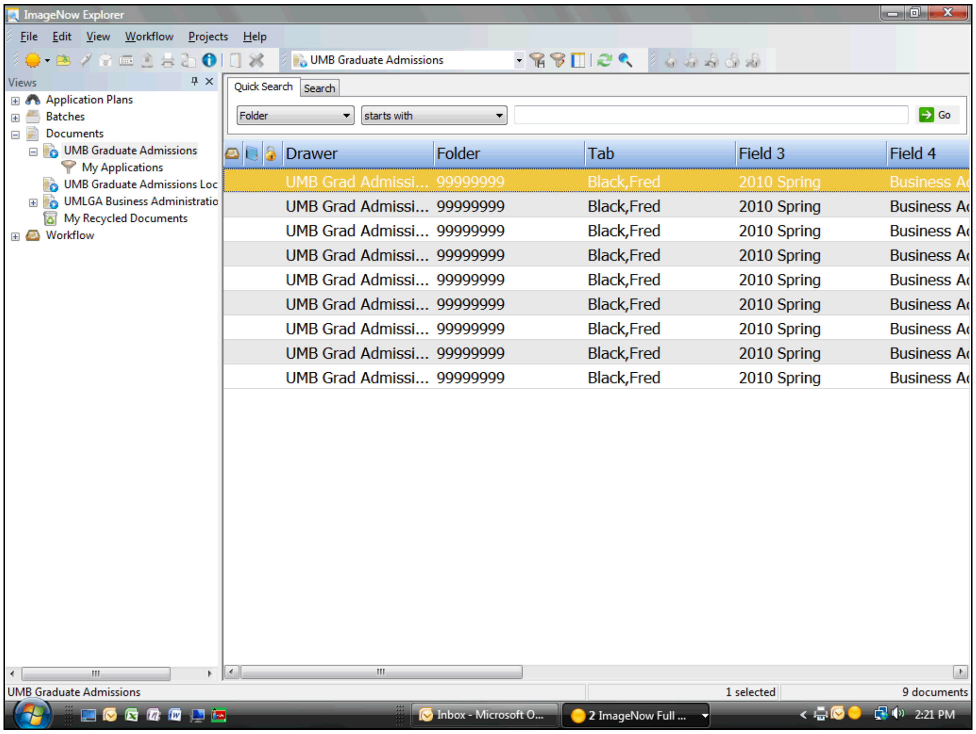


Step	Action
3.	Double-click the desired document.

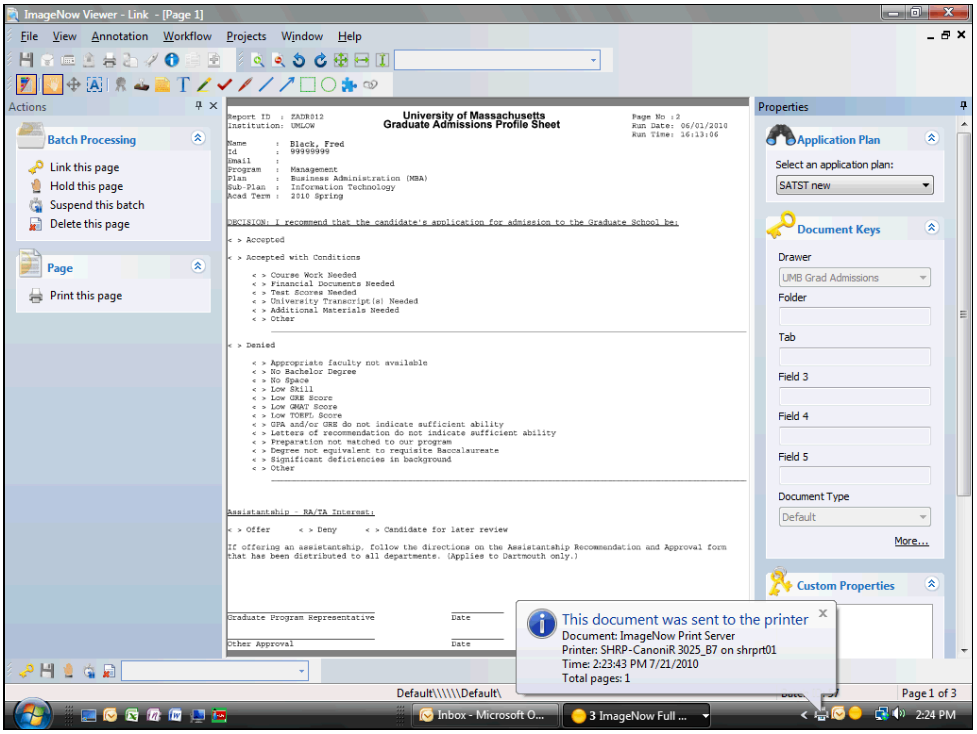
Step	Action
4.	Click the **Print** button. 
5.	Verify that the **Printer Name** value is accurate based on where you want to print. If it is not, select the configured printer in the **Name** drop-down list.
6.	Click the **Print** button. 



Step	Action
7.	Click the **Close** button. 
8.	The way that you print varies if you are printing a document in the **Documents View** or in the **Batches View**. Let's open the **Batches View** to print a document.



Step	Action
9.	Click the **Batches** option. Batches
10.	Click the **Ready for Linking** option. Ready for Linking
11.	Double-click the desired document.
12.	Click the **Print this page** list item. Print this page
13.	Once again, verify that the **Printer Name** value is accurate based on where you want to print. If it is not, select the configured printer in the **Name** drop-down list.
14.	Click the **Print** button. Print



Step	Action
15.	Click the **Close** button. 
16.	***Reminder:*** In order to be compliant with the data security policies, it is important to remember that when you are printing a document from ImageNow you are responsible for protecting the information and for destroying (e.g., shredding) the document.
17.	Congratulations! You have successfully printed a document in ImageNow. **End of Procedure.**

Voiding a Digital Signature

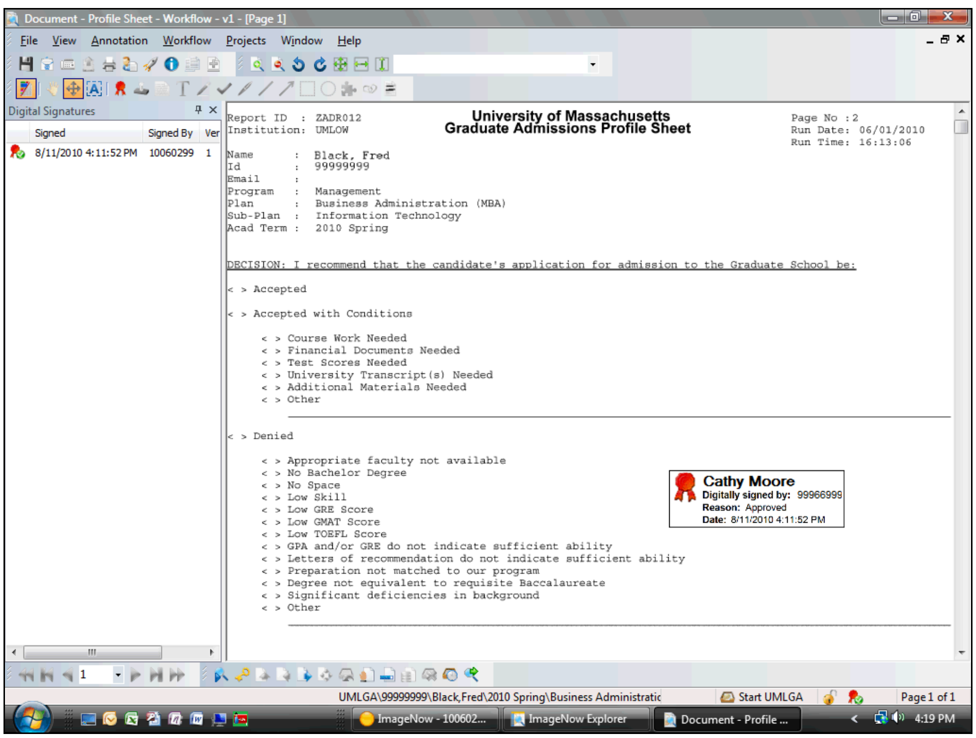
In this Topic, we will cover how to void a digital signature. A circumstance may arise that requires a digital signature be voided. Perhaps a digital signature was mistakenly applied to the wrong document or was prematurely applied to a document. In these cases, ImageNow will allow the digital signature to be voided by users who have been given the appropriate security level.

Procedure

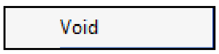
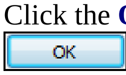
Consider this Scenario:

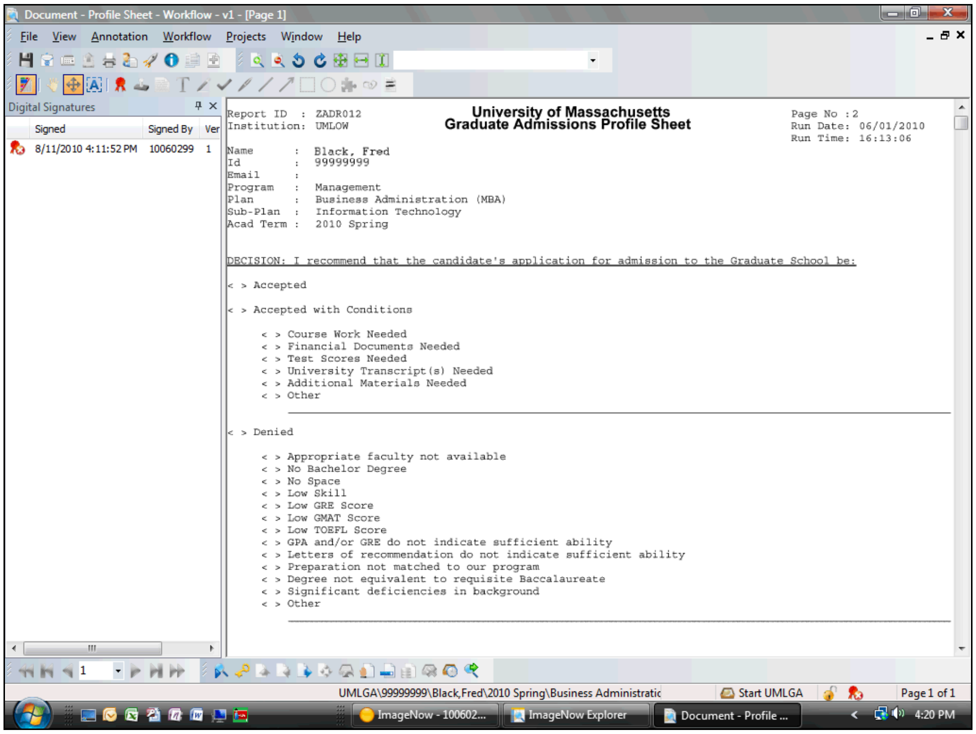
Your goal is to void a digital signature that has been applied to a document.

Step	Action
1.	This is a **Digital Signature** box.
2.	The ability to void a digital signature is based upon a user's security configuration. In this example, you are a Graduate Admissions Director. You are notified by the Graduate Program Director that he or she mistakenly applied a digital signature to the wrong profile sheet.



Step	Action
3.	Fred Black's Graduate Admissions Profile sheet has a digital signature that needs to be removed. Click the **Digital Signature** graphic.

Step	Action
4.	After clicking the **Digital Signature** graphic once, the border changes. Now you can right click on the object. Right-click the **Digital Signature** graphic.
5.	A dropdown menu appears with the **Void** and **Properties** fields active. **Properties** contains the details around the signature (e.g., timestamp, reason, history). **Void** will allow us to remove (or void out) the digital signature. Let's remove this digital signature.
6.	Click the **Void** menu. 
7.	Point to the **Select a reason** list.
8.	We are presented with a few choices of reasons to void the **Digital Signature**.
9.	Let's select **User mistakenly signed the document.** Click the **User mistakenly signed the document.** list item. 
10.	Click the **OK** button. 
11.	The **Digital Signature** has been removed from this document.



Step	Action
12.	Click the **Save** button. 
13.	Congratulations! You have successfully voided a Digital Signature. **End of Procedure.**

Linking

This lesson describes the procedures for linking documents. Upon completion of the lesson, you will be able to:

- Link Data from a Business Application, and
- Find Documents within the Business Application

Linking Document Keys from a Business Application

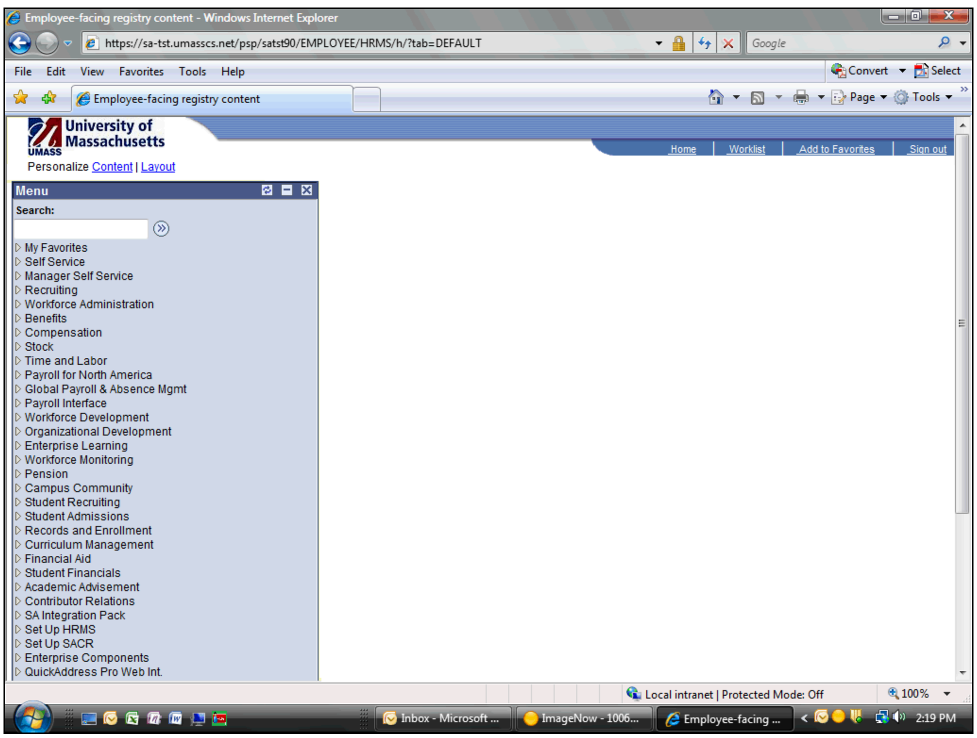
After quality assuring a document or a batch of documents, you need to link your documents to the appropriate records in your business application (e.g., PeopleSoft). Linking occurs when some or all of its document key values are copied from the selected record in the business application (e.g., PeopleSoft). These are the values that allow ImageNow to retrieve the linked document from the ImageNow Server whenever the matching record in the business application (e.g., PeopleSoft) is open.

Upon completion of this topic, you will be able to link a batch of documents from a business application (e.g., PeopleSoft).

Procedure

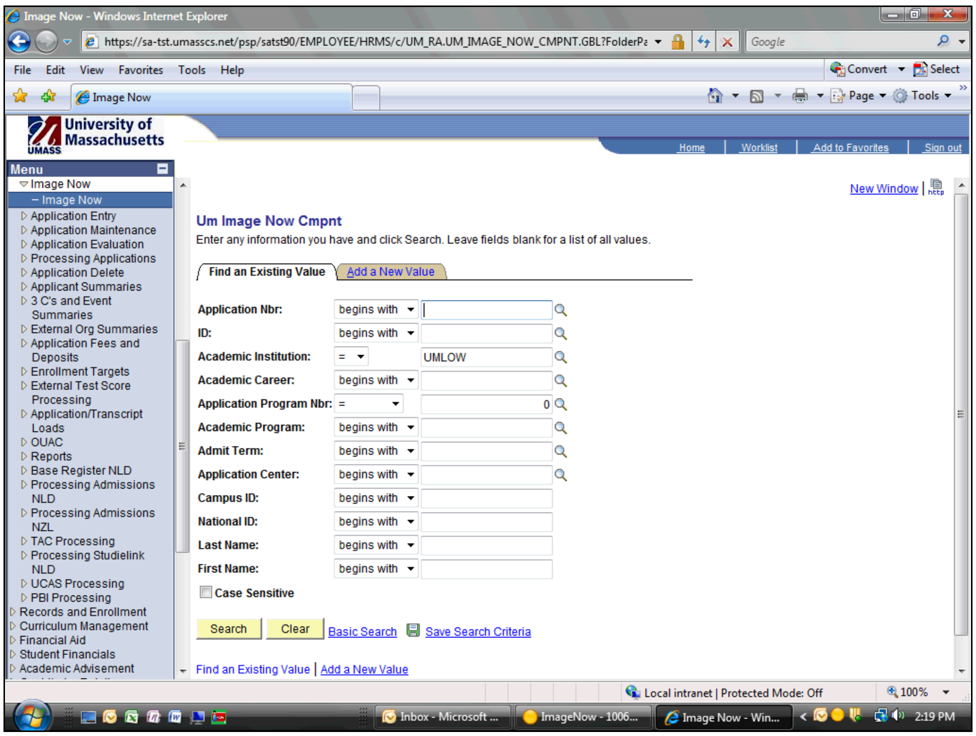
Consider this Scenario:

Your goal is to link data from a Business Application (e.g., PeopleSoft) to documents in ImageNow.

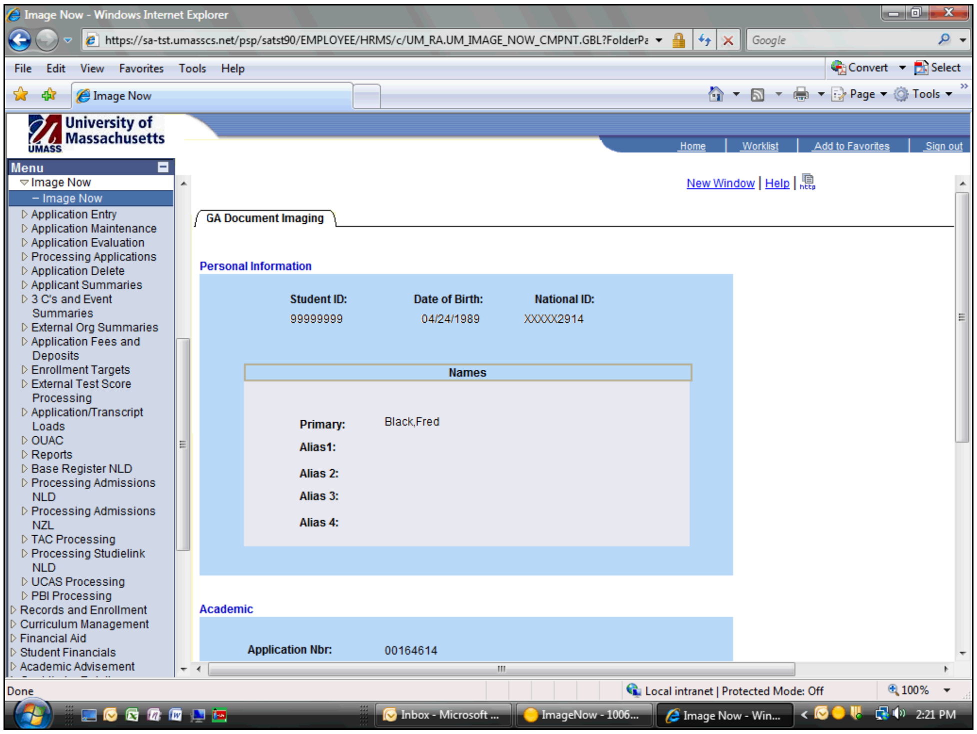


Step	Action
1.	Begin by navigating to the **GA Document Imaging** page. Click the **Student Admissions** link. ▷ Student Admissions
2.	Click the **Image Now** link.

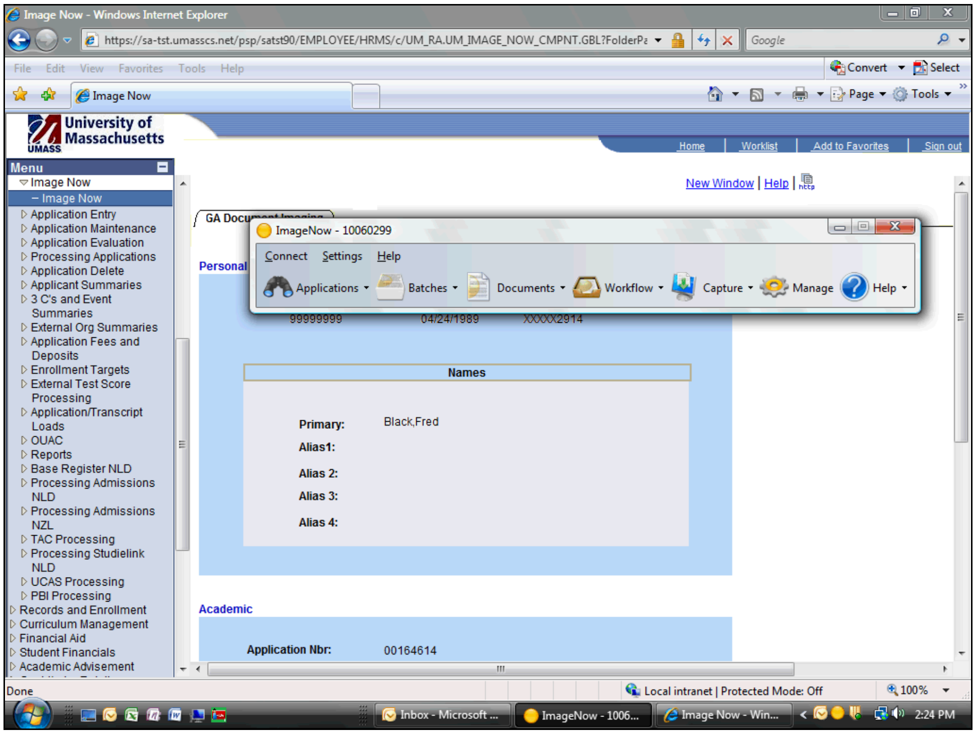
Step	Action
3.	Click the next **Image Now** link.
4.	The first time you access this page, you may want to add it to your favorites.
5.	If you do not know the student **ID** number, you can search by using the student's **Last Name** and/or **First Name**. In this example, we will search by the student **ID**.

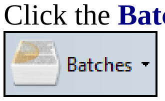
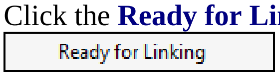


Step	Action
6.	Enter the desired information into the **ID** field. Enter "**99999999**".
7.	Click the **Search** button. Search

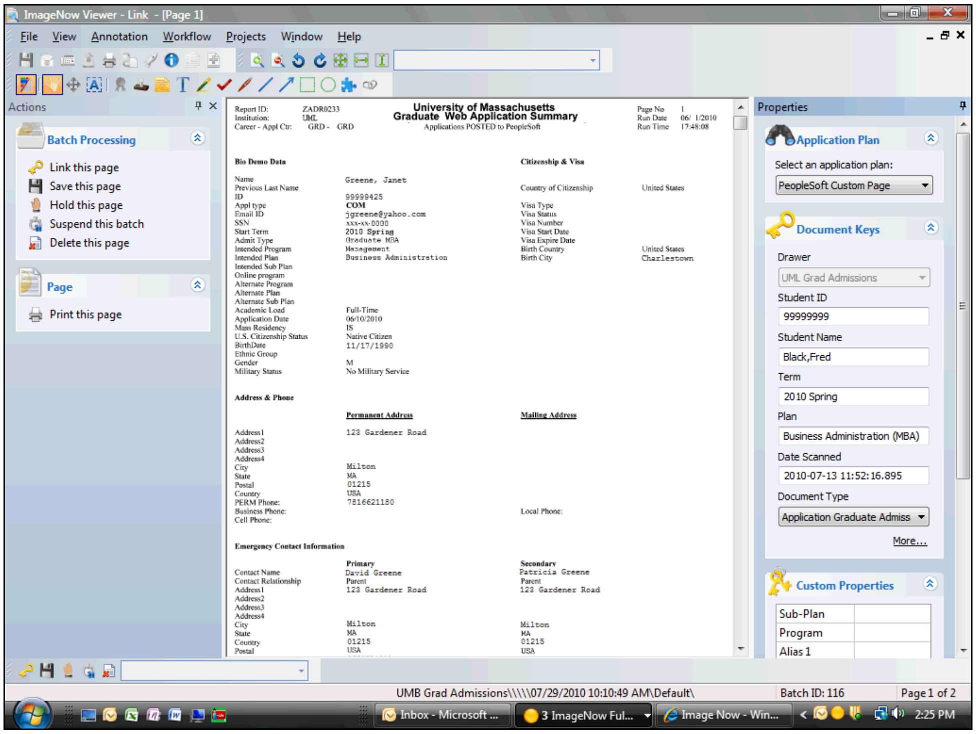


Step	Action
8.	Click the **ImageNow** Application. 

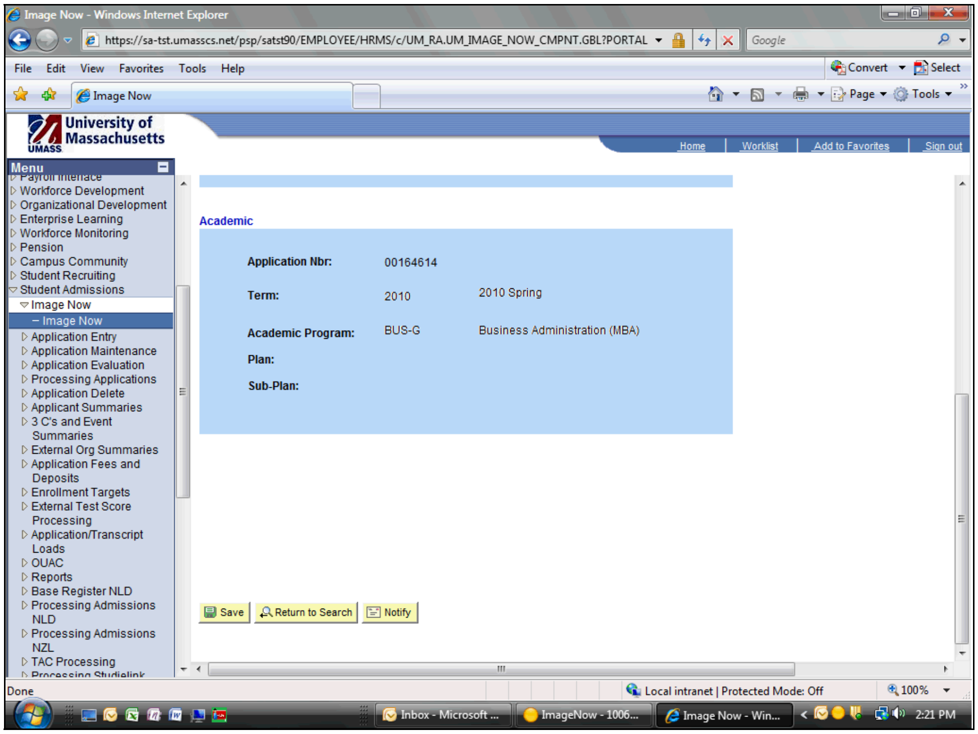


Step	Action
9.	Click the **Batches** dropdown button to activate the menu. 
10.	Click the **Ready for Linking** menu. 
11.	To begin linking you want to make sure that the **State** column for the QA step is set to "Completed".
12.	Double-click an entry in the **Document** row.
13.	The buttons used for linking are at the bottom of the page. They are defined left to right as follows: 1. **Link Page -** Links data from the Business Application to the document keys on the page. 2. **Save Batch Page -** Saves the page in the batch 3. **Hold Page -** Holds the page in the batch and moves on to the next page 4. **Suspend Batch -** Stops Link processing 5. **Delete Batch Page -** Deletes the page from the batch
14.	You may also utilize the buttons in the **Actions** pane as well.

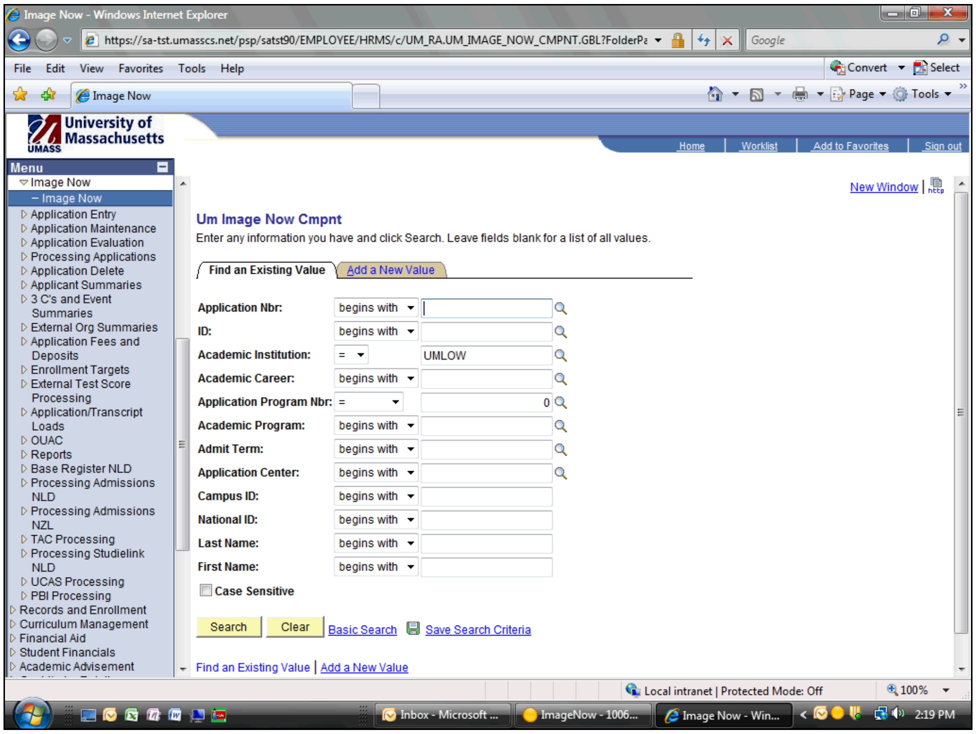
Step	Action
15.	Click the **Link Page** button.
16.	The **Student ID**, **Student Name**, **Term**, and **Plan** populated from PeopleSoft to the document keys on the **Properties** pane.
17.	Once the linking is complete, you must associate the document type. In this example, we are viewing an application, so we need to update the **Document Type** field accordingly. ***Note:*** This field is important because much of the workflow processing in ImageNow is driven from the **Document Type** field value.
18.	Click the **Document Type** list. Accept Decline Confirmation
19.	***Note:*** This **Document Type** list has what is called "smart list" functionality. This means if you type the first letter of the document type value, the first instance of document types beginning with that letter, will be highlighted in the list. For example, if you type the letter "e" on your keyboard the "Essay" **Document Type** will be highlighted.
20.	Click the **Application Graduate Admissions** list item. Application Graduate Admissions
21.	Click the **Save Batch Page** button.
22.	After clicking **Save**, the document goes away and is now stored in ImageNow based on the document key values (e.g., Student ID) that were just linked. Let's process the next page.
23.	Since this is the second page of the application for the same student, all of the document key values are the same. Therefore, all we need to do is **Save** the document. When the document keys are saved, if two pages have identical document key values, ImageNow will merge the two pages into the same document.
24.	Click the **Save Batch Page** button.
25.	This next page is an application for a different student. To link the document keys for Janet Greene, we need to open her record in PeopleSoft.

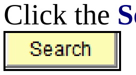


Step	Action
26.	Click the **PeopleSoft** application. 
27.	To scroll down to the bottom of the page, click the **Scroll bar**.



Step	Action
28.	Click the **Return to Search** button. Return to Search



Step	Action
29.	Enter the desired information into the **ID** field. Enter "**99999425**".
30.	Click the **Search** button. 
31.	Just like Fred Black, we have Janet Greene's record open in PeopleSoft. Now we can link this information to the document keys on her application in ImageNow.
32.	Click the **ImageNow** application. 
33.	Click the **Link Page** button. 
34.	Janet Greene's data appears correctly in the **Document Keys**. The only thing to watch for is the document type. If it has changed, you must update the document type value as needed. In this case, the document type is the same.
35.	Click the **Save Batch Page** button. 
36.	Click the **Save Batch Page** button. 

Step	Action
37.	When linked documents are saved, they no longer appear in the **Batches View**.
38.	Congratulations! You have successfully linked data from the Business Application (e.g., PeopleSoft) to documents in ImageNow. **End of Procedure.**

Finding Documents within the Business Application

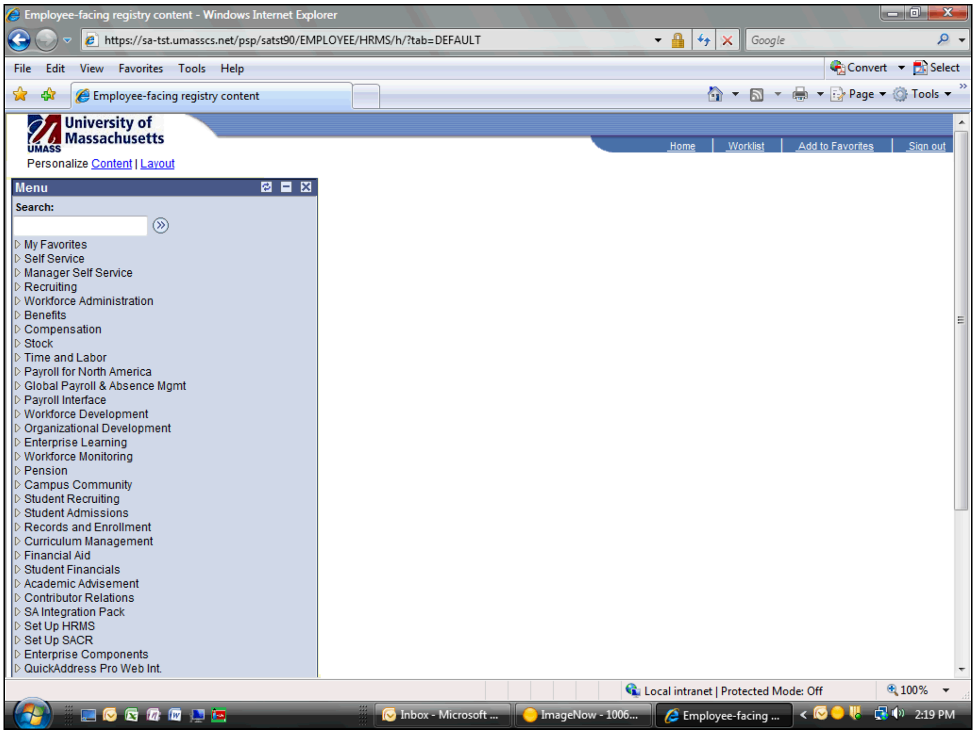
The Application Plan (Binoculars) in ImageNow is a feature that allows users that are working in a Business Application (e.g., PeopleSoft) to use ImageNow to access associated documents of the student being viewed in PeopleSoft. For example, if you open John Smith's record in PeopleSoft, you can open ImageNow and be able to bring up all ImageNow documents for John Smith. At this time, ImageNow can only open documents in ImageNow if you are viewing the **GA Document Imaging** page in PeopleSoft.

Upon completion of this topic, you will be able to find ImageNow Documents while in PeopleSoft.

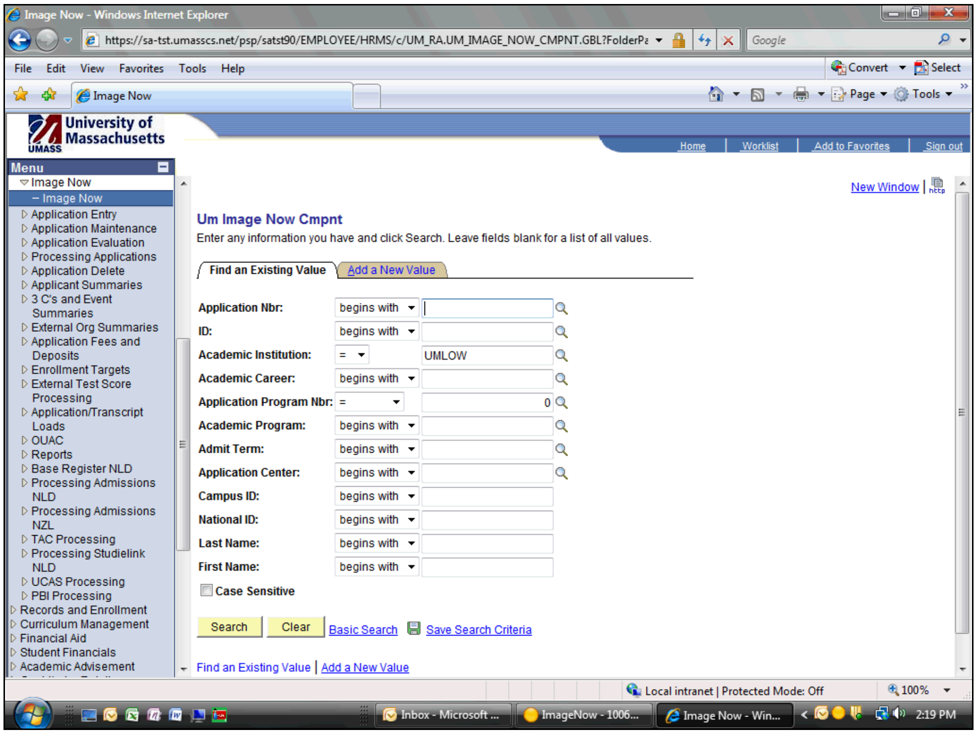
Procedure

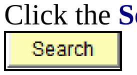
Consider this Scenario:

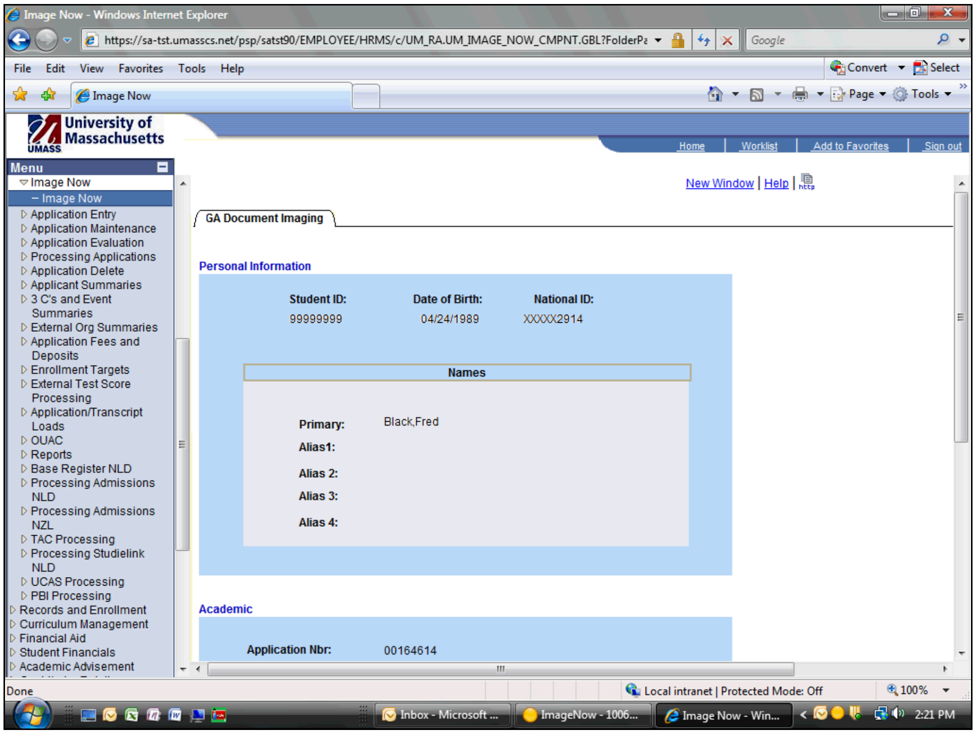
Your goal is to search for Fred Black in PeopleSoft and then retrieve all of his documents in ImageNow.



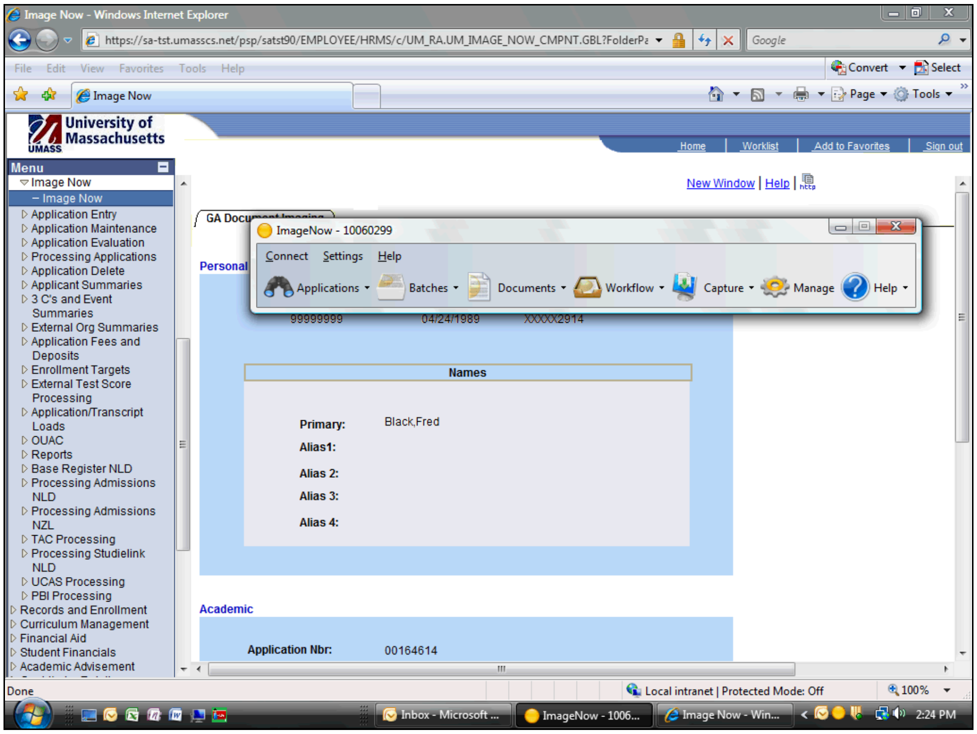
Step	Action
1.	Begin by navigating to the **GA Document Imaging** page in PeopleSoft. Click the **Student Admissions** link. Student Admissions
2.	Click the **Image Now** link.
3.	Click the next **Image Now** link.
4.	The first time you access this page, you may want to add it to your favorites.
5.	If you do not know the student **ID** number, you can search by using the student's **Last Name** and/or **First Name**. In this example, we will search by the student **ID**.



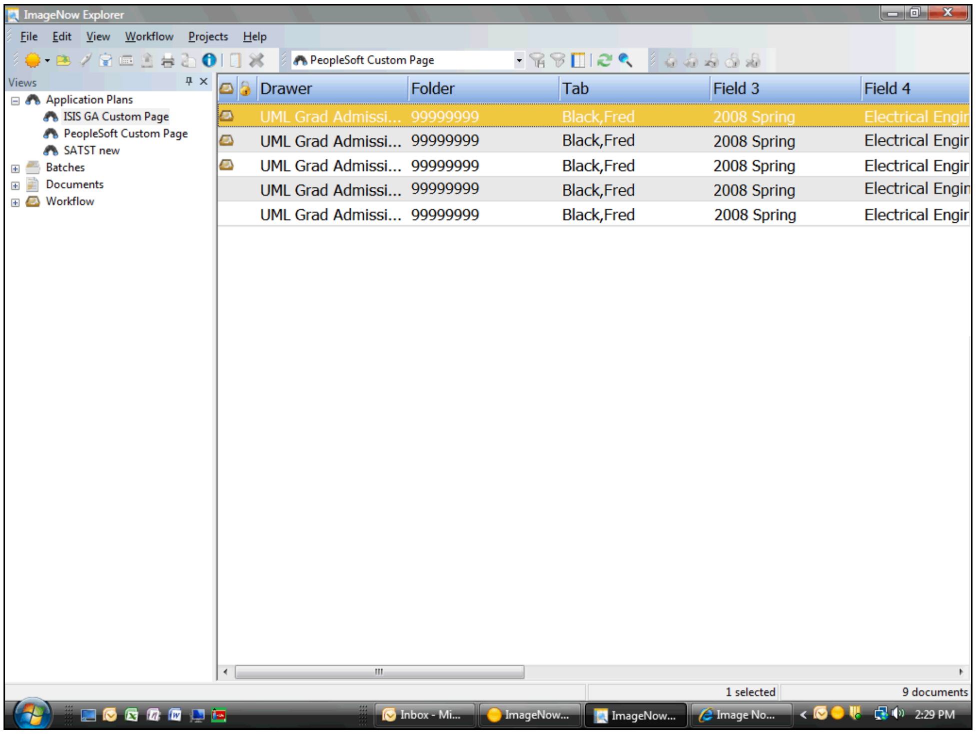
Step	Action
6.	Enter the desired information into the **ID** field. Enter "**99999999**".
7.	Click the **Search** button. 
8.	After opening Fred Black's Personal Information, you can open ImageNow to search for all of Fred Black's documents. In this example, ImageNow is already open. If it is not, you will need to open it and log in.



Step	Action
9.	Click the **ImageNow Application** on your status bar. 



Step	Action
10.	Click the **Applications (Binoculars)** dropdown button to activate the menu. 
11.	The Application Plan (Binoculars) for your campus will be available based on your security. The Application Plan (Binoculars) searches for documents in ImageNow based on data in PeopleSoft's **GA Document Imaging** page.
12.	Click the **ISIS GA Custom Page** menu. 
13.	By clicking the **ISIS GA Custom Page** Application Plan (Binoculars), ImageNow retrieved all of the documents for Fred Black. If applicable, you can now open the document.



Step	Action
14.	Double-click in the **Document** row.
15.	The document displays in the **Document Viewer**. Once you have opened the document, you can open the **Related Documents** pane to view all other applicable documents for this student.
16.	Click the **View** menu. View
17.	Click the **Related Documents** list item. Related Documents
18.	The documents that are listed in the **Related Documents** pane are accessible for viewing.
19.	Congratulations! You have successfully found all documents for a student in ImageNow from the Business Application (PeopleSoft). **End of Procedure.**

Workflow

This lesson describes the procedures for managing Workflow. Upon completion of the lesson, you will be able to:

- Understand How to Find a Document in a Queue
- Route Documents Forward, and
- Route Documents Anywhere

Understanding How to Find a Document in a Queue

Captured and faxed documents remain in workflow queues.

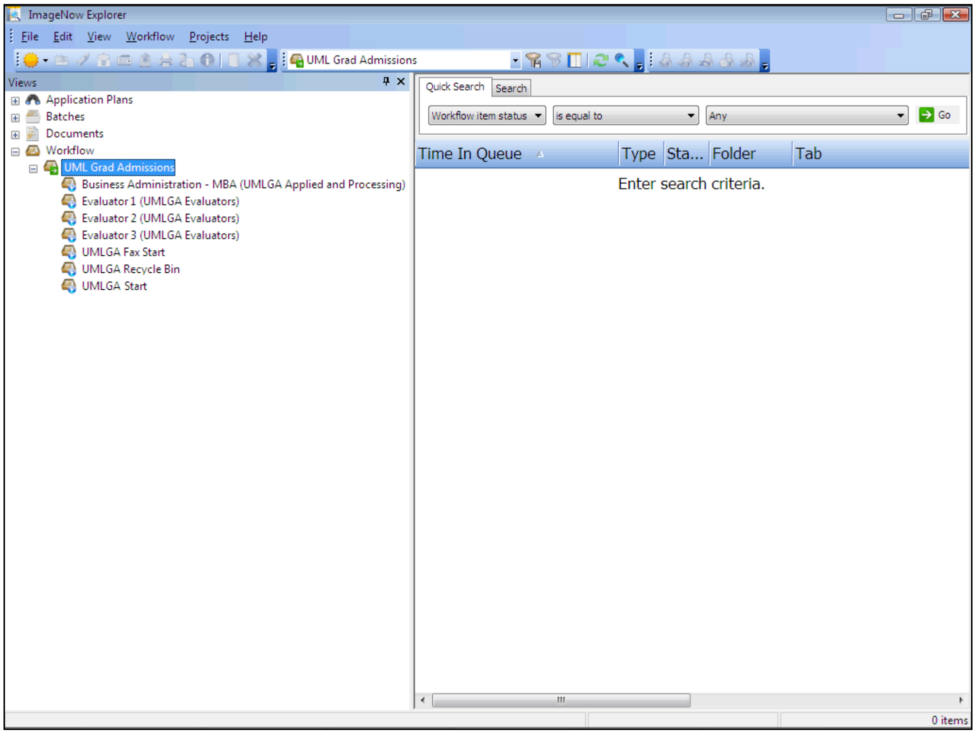
Evaluators determine the appropriate routing application for each document.

Procedure

Consider this scenario:

You will review how to find a document in workflow queues.

Step	Action
1.	For this example, we will review the Workflow queues for the UMass Lowell Graduate Admissions department since the process is the same in all three campuses.
2.	The document keys, Time in Queue, Status, etc., provide important information. For example, you may wish to investigate how long a document has been in this queue.
3.	The **Business Administration Graduate Administration Applied and Processing** queue stores all applications for the GPDs to process.
4.	The **Evaluator (1,2,3)** queues contain documents to be evaluated. Evaluators will either send a document to the File queue, to the Document Repository (Submit to Content), or to the Recycle Bin.
5.	The **Fax Start** queue contains all incoming fax documents that have automatically been uploaded to the system and that need to be evaluated.
6.	The **Start** queue receives all other documents that have either been scanned or imported.



Step	Action
7.	Click the **Business Administration - MBA (Applied and Processing)** item.
8.	Open a document in the Business Administration queue. Double-click an entry in the row.
9.	Evaluators will view the document and route it to the appropriate route application (to File, to the Document Repository (Submit to Content), or to the Recycle Bin). See the Routing topics for more details.
10.	Congratulations! You have reviewed understanding how to find a document in a queue. **End of Procedure.**

Routing Documents Forward

Using ImageNow Workflow, documents can be routed to the next queue in the workflow process.

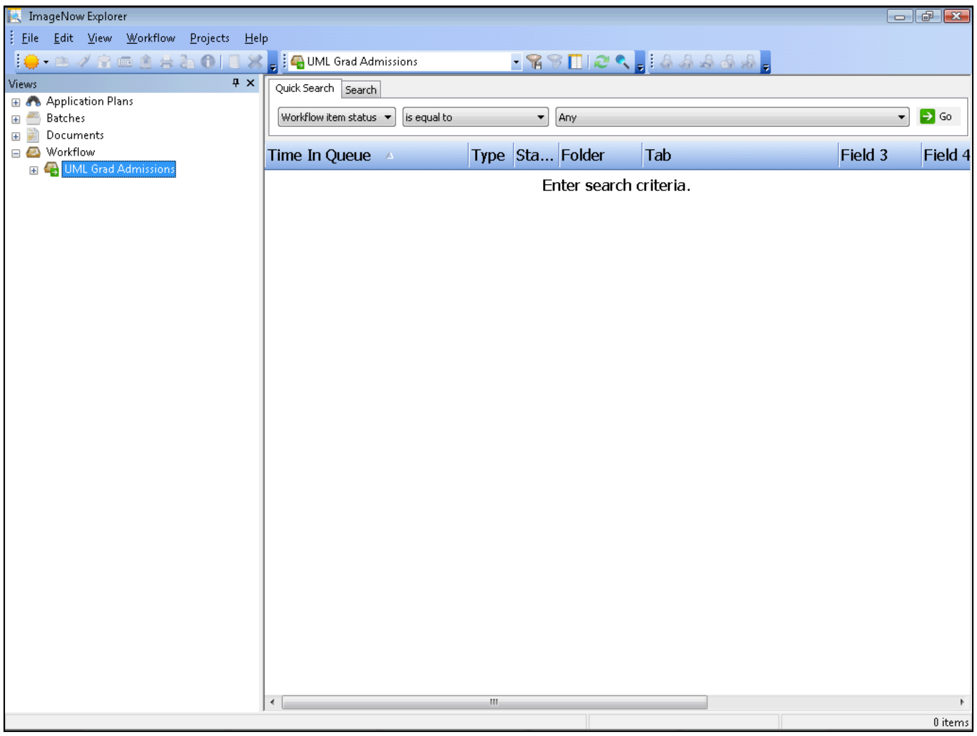
When the document will be sent to the next queue in the workflow process flow, it is Routed Forward.

Note: When only a single route is defined for the queue, the Route Forward dialog box does not appear and the item is automatically routed.

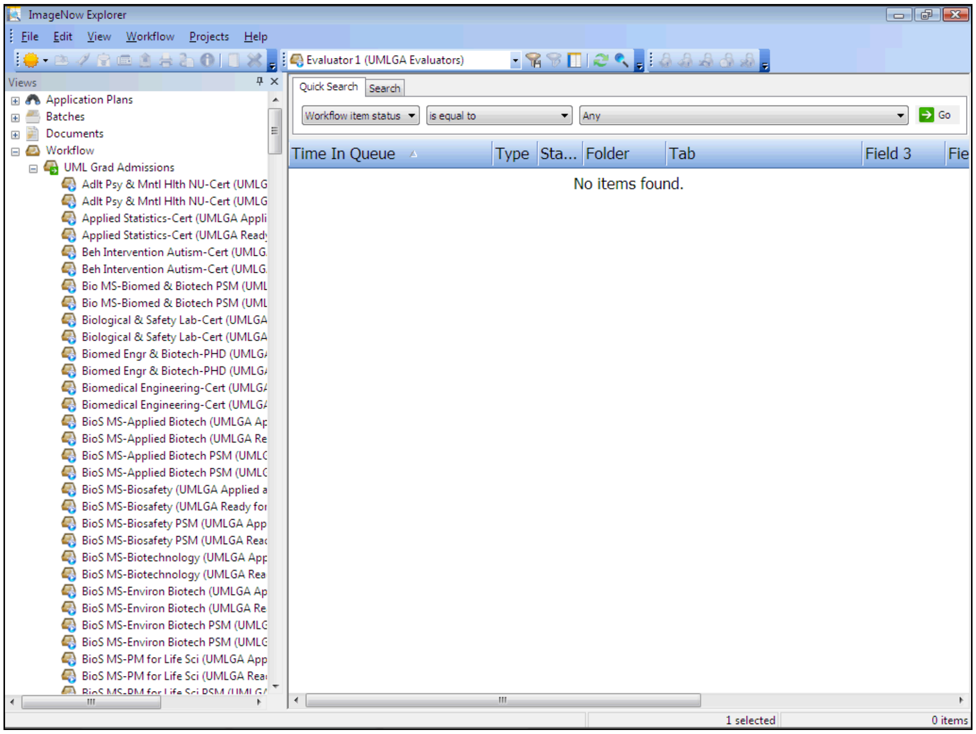
Procedure

Consider this scenario:

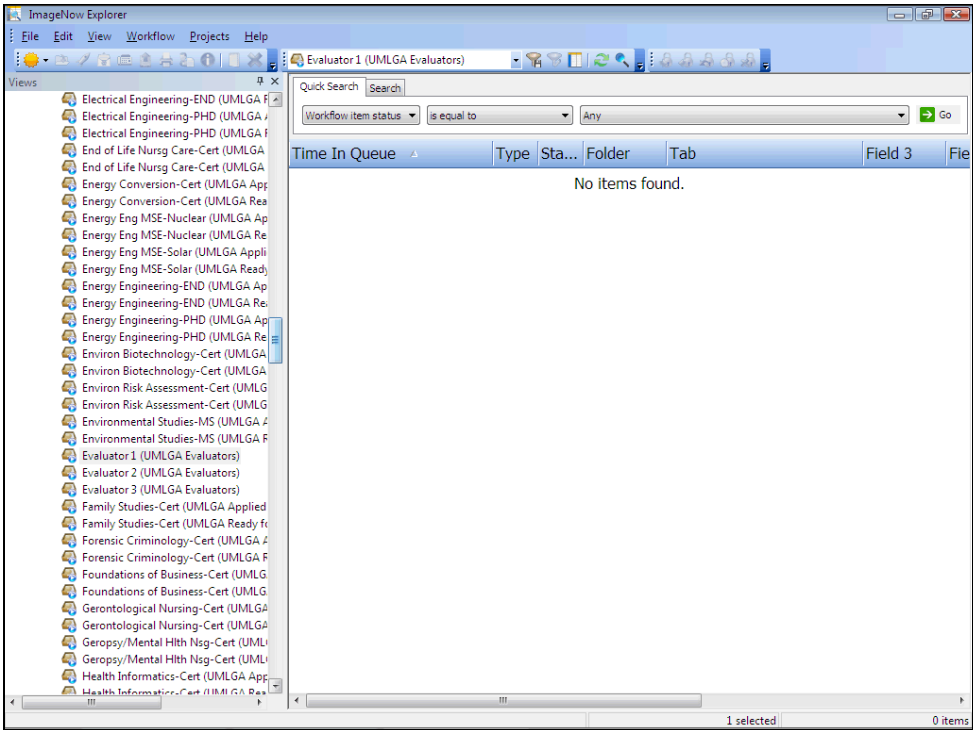
Your goal is to route a document forward to the next queue in the workflow process.



Step	Action
1.	Begin by navigating to a document that you wish to route to the next queue in a workflow. For this example, we will use UMass Lowell since the processes are the same for all three campuses. Click the **UML Grad Admissions** tree item. 



Step	Action
2.	Select the queue that you want. Click the **Vertical** scrollbar. 



Step	Action
3.	Click the **Evaluator 1 (UMLGA Evaluators)** tree item. Evaluator 1 (UMLGA Evaluators)
4.	Select the document that you want to route forward to the next queue. Double-click an entry in the **document** row.
5.	The document opens in a separate window.
6.	You want to send the document to the next queue in the workflow. Click the **Route Forward** button. 
7.	Select a queue in the next workflow process to which to send the document. Click the **UMLGA File** tree item. UMLGA File
8.	Click the **Route** button. Route
9.	The document is no longer in the **Evaluator 1 (UMLGA Evaluators)** workflow queue.

Step	Action
10.	Congratulations! You have routed a document forward to the next queue in the workflow. **End of Procedure.**

Routing Documents Anywhere

Using ImageNow Workflow, documents can be routed to a different queue.

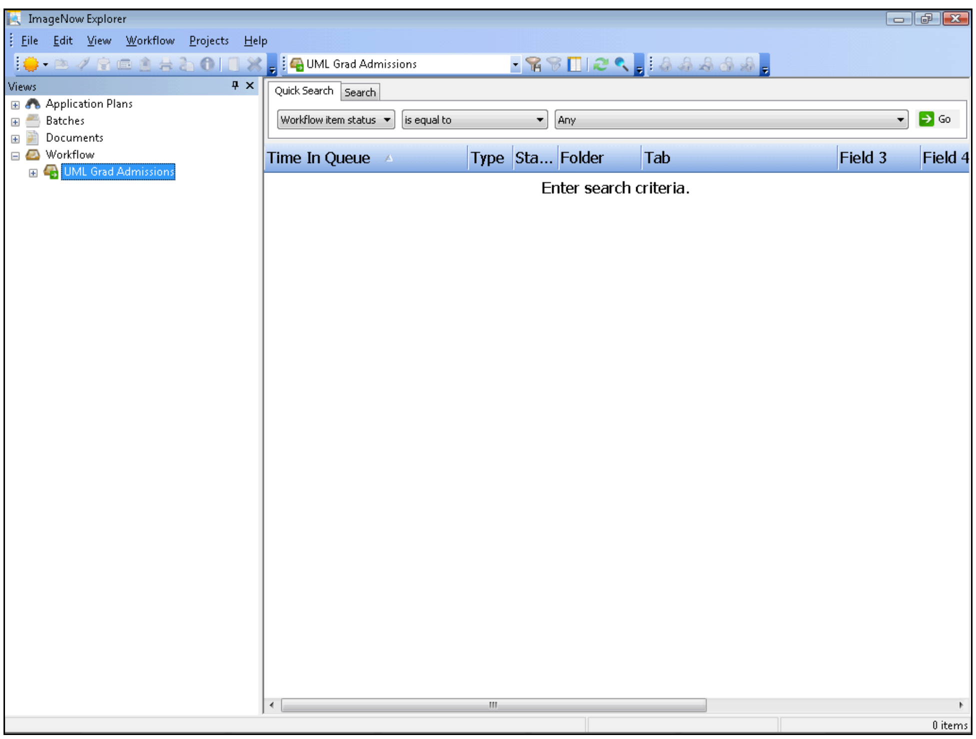
When the document will be sent to a specific queue it will use the Route Anywhere process.

Note: You will have the Route Anywhere process depending upon your security.

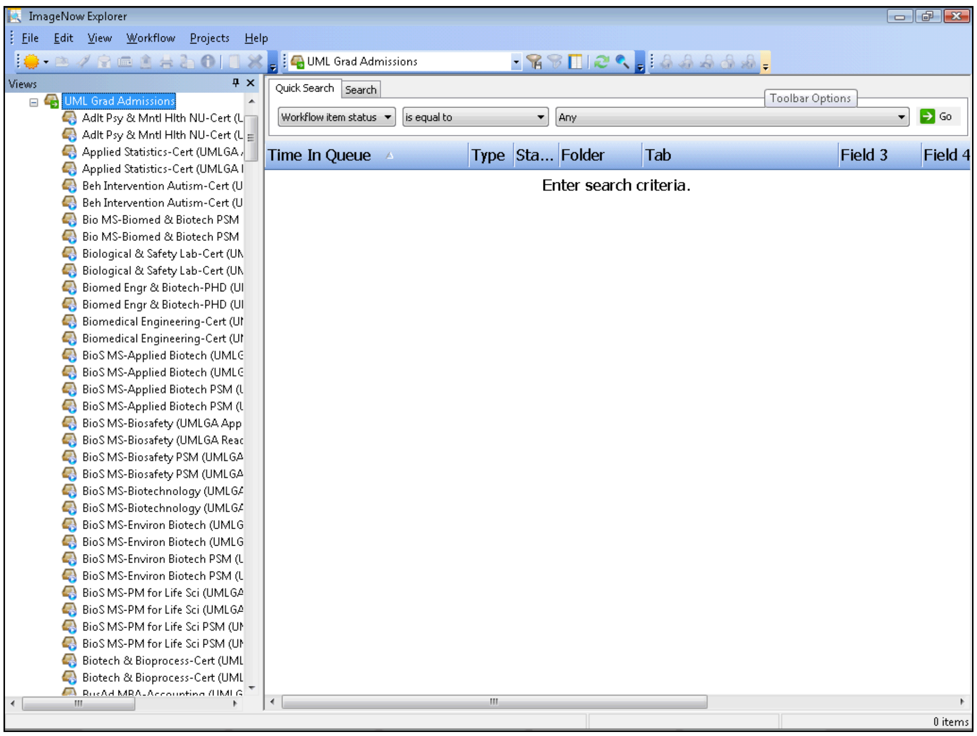
Procedure

Consider this scenario:

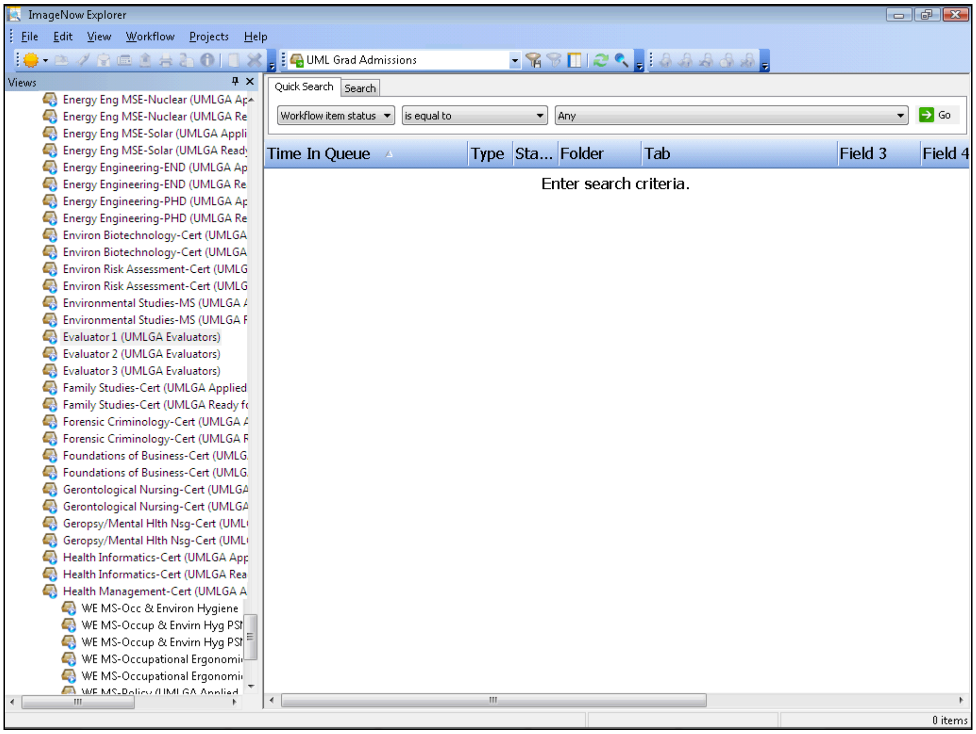
Your goal is to route a document to a specific queue.

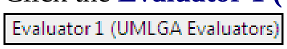


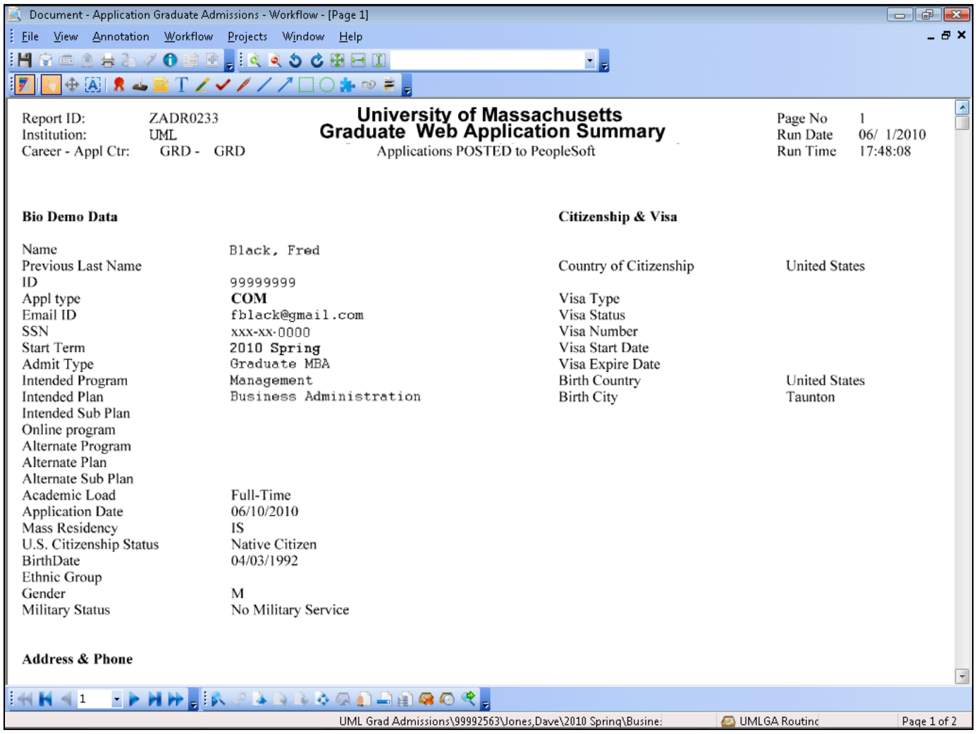
Step	Action
1.	Begin by navigating to a document that you wish to route to a specific queue in the workflow process. For this example, we will use the UMass Lowell since the processes are the same for all three campuses. Click the **UML Grad Admissions** tree item. UML Grad Admissions



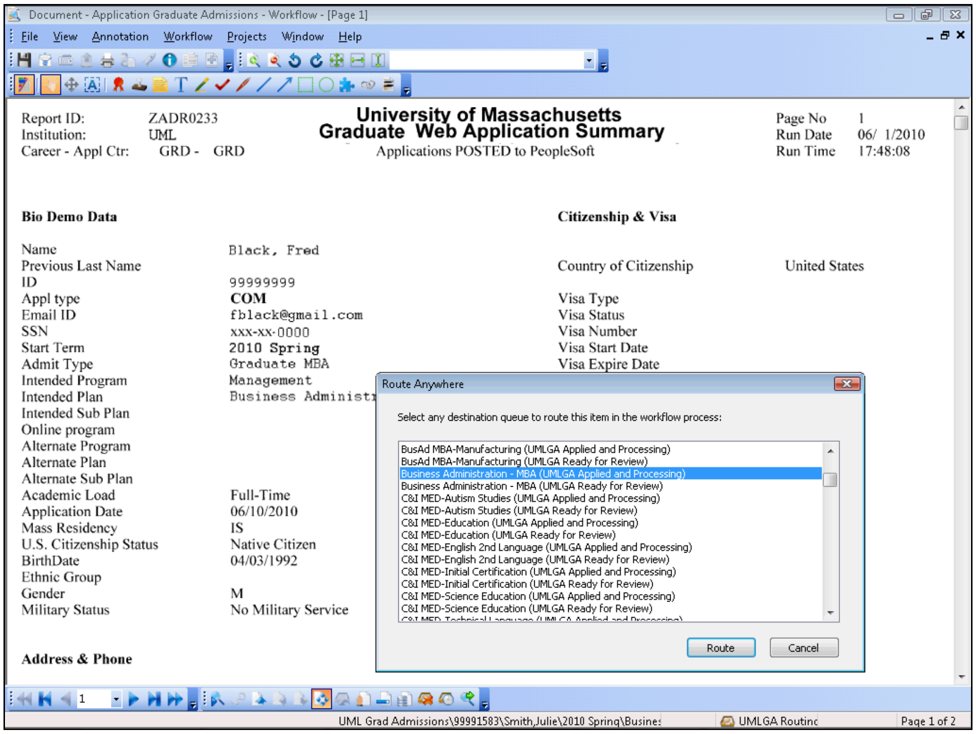
Step	Action
2.	Select the workflow queue that you want. Drag the **Vertical** scrollbar. 



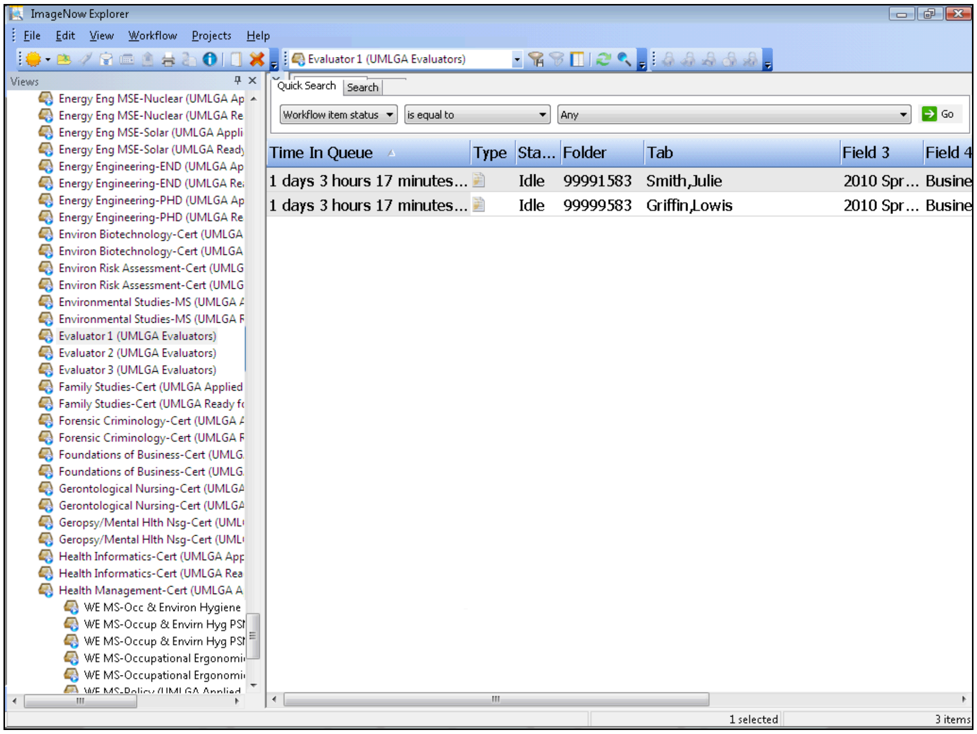
Step	Action
3.	Click the **Evaluator 1 (UMLGA Evaluators)** tree item. 
4.	Select the document that you want to route to a specific queue. Double-click the **document** row.

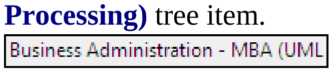


Step	Action
5.	The document opens in a new window.
6.	You want to select a specific queue in the workflow process to which to send the document. Click the **Route Anywhere** button. 



Step	Action
7.	You have a choice to select any available destination queue to route the document. In this example, you will route the document to **Business Administration - MBA (UMLGA Applied and Processing)**.
8.	Click the **Route** button. 
9.	The document is no longer in the **Evaluator 1 (UMLGA Evaluators)** queue.



Step	Action
10.	Confirm that the document is listed in the **Business Administration - MBA (UMLGA Applied and Processing)** queue. Click the **Vertical** scrollbar. 
11.	Click the **Business Administration - MBA (UMLGA Applied and Processing)** tree item. 
12.	The document is listed in the **Business Administration - MBA (UMLGA Applied and Processing)** queue.
13.	Congratulations! You have routed a document to a specific workflow queue. **End of Procedure.**