

ImageNow 6.0 Sunflower **Scanning** User Manual



Kansas Department on Aging
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Table of Contents

What is ImageNow	1
Image Now Sign-On	2
ImageNow Tool Bar	3
About the ImageNow Explorer Window	6
About the ImageNow Viewer Window	7
Document Processing Guidelines	9
Quality Assurance Batches	11
Quality Assurance Review Of A Document or Batch	13
Linking Documents To ASPEN.....	16
Move A Document.....	18
Delete A Document.....	18
Workflow	19
Route A Document In Workflow.....	22
Add an item to Workflow	23
Remove an item from Workflow	24
View an item in Workflow	25
Annotations.....	26
Add A Stamp Annotation.....	27
Show Or Hide Annotations.....	27
Move Or Resize An Annotation	28
Delete an Annotation	29
Viewing Documents – Through Aspen.....	30
Viewing Documents – Without Aspen	34
Search.....	34
Simple Search	35
Advanced Search	40
Sorting.....	44
Saving A Search Query.....	45
Run A Saved Search Query	46
Set A Default View	47
Resize A Document	48
Rotate A Document.....	49
Zoom In And Out Of A Document.....	50

What is ImageNow

Introduction

ImageNow adapts to business processes and ensures that all documents are secure, quickly retrievable, and tied to the records, with comments and annotations as needed.

Processing documents involves three essential tasks. To capture the documents into ImageNow, this is done by scanning the paper documents. Next, a review or a quality assurance check is done on each document to ensure they were captured successfully. Finally, the documents are linked to index keys so that they are matched to the appropriate records in ASPEN.

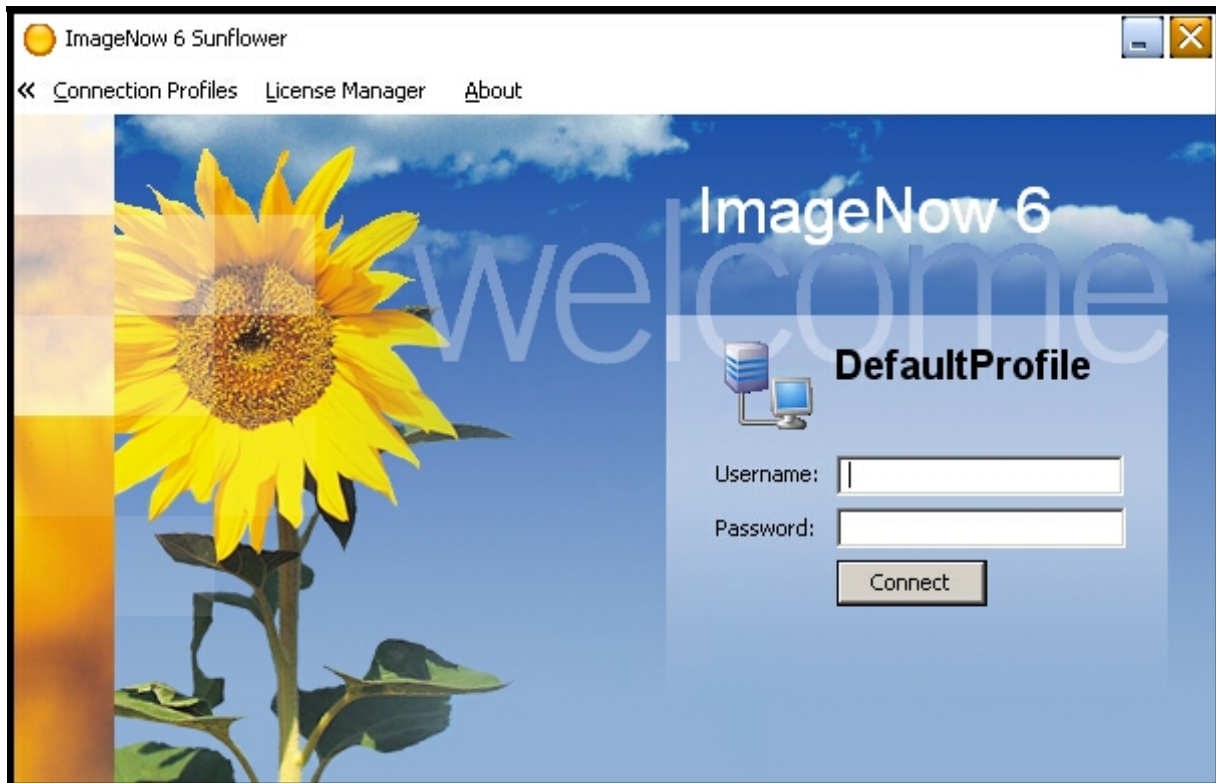
Note

In this document the use of the term ASPEN is being used as a generic term and includes Central Office (ACO), Complaints and Incident Tracking (ACTS).

Image Now Sign-On

Introduction

Below is the sign-on window of Image Now. The username and Password is the same as the users KDOA Network username and password. Only one sign-in is permitted per user.



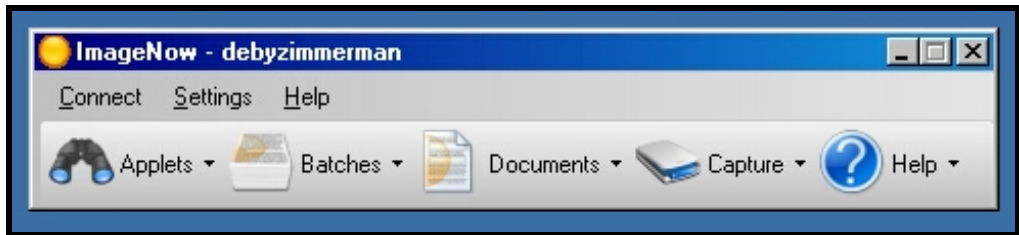
ImageNow Tool Bar

Introduction

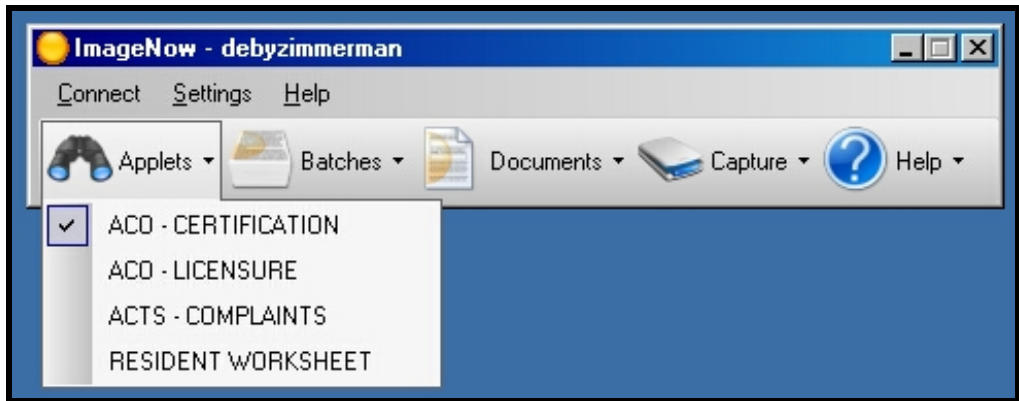
The ImageNow toolbar is the entry point into ImageNow. It gives a one mouse click access to the functions of ImageNow.

From the ImageNow toolbar, documents can be viewed, scanned, and searched, as well as perform administrative configuration and management tasks for the file system. These options are available depending on security privileges. The follow instructions will be assuming the security access level of scanning and view.

Viewing Toolbar



Applets



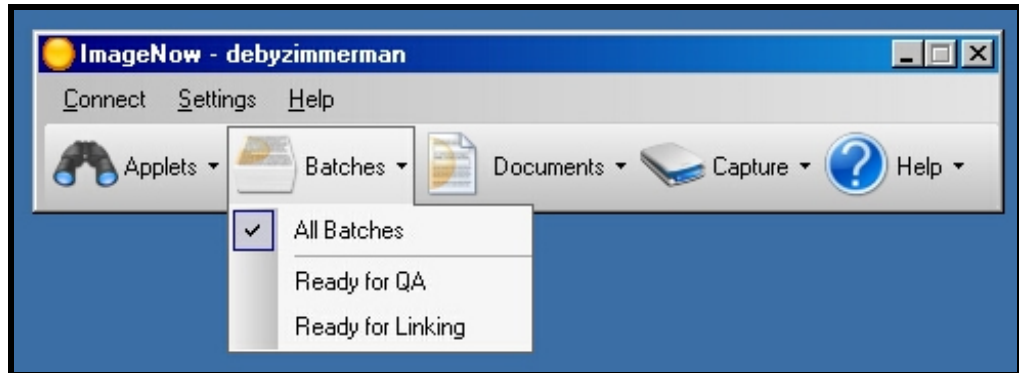
The **Applets** option is used as a quick access to the Applet list in the ImageNow Explorer, which is integrated with certain areas of ASPEN, such as a Resident Worksheet.

Whichever applet has a check mark next to it is the predefined (default) applet that will open simply by clicking the Applets button itself. Clicking the arrow next to the Applets button lets a different applet be selected when necessary.

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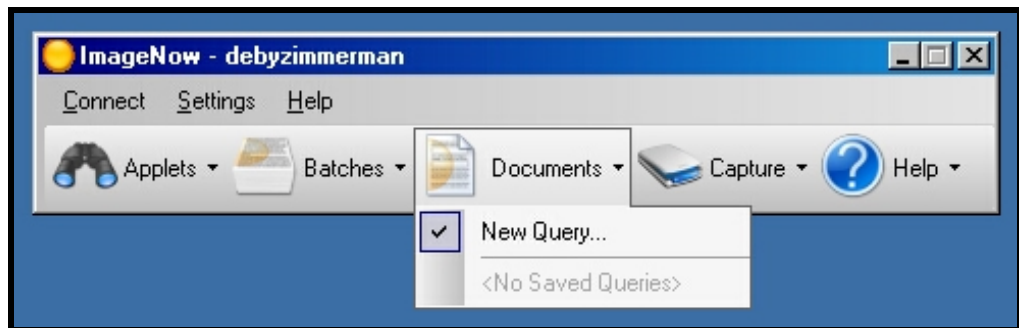
ImageNow Tool Bar, Continued

Batches



Batches view displays one or more groups of pages that are ready for Quality Assurance (QA) review or Linking.

Documents

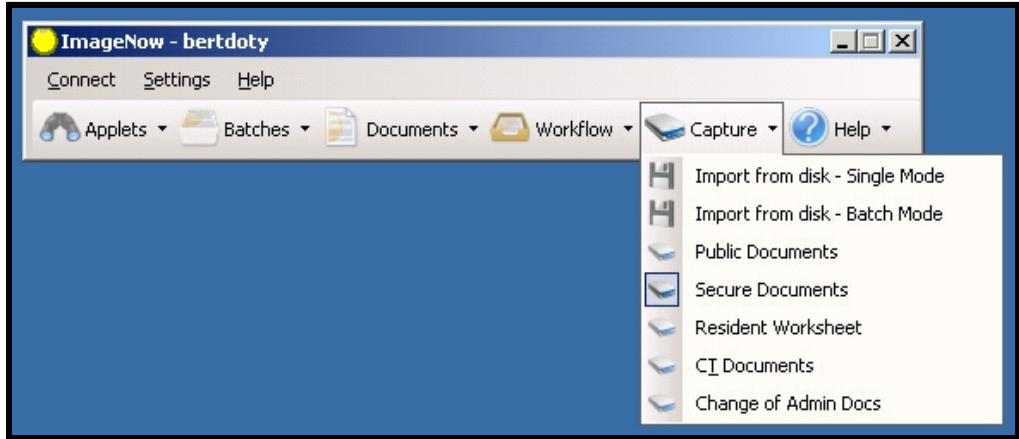


The **Documents** option is used to search or query for documents using index key fields.

Continued on next page

ImageNow Tool Bar, Continued

Capture (Scanning)



The **Capture** option is used to start the scanning of the documents and placing them in the correct queue to begin the Quality Assurance review.

Help

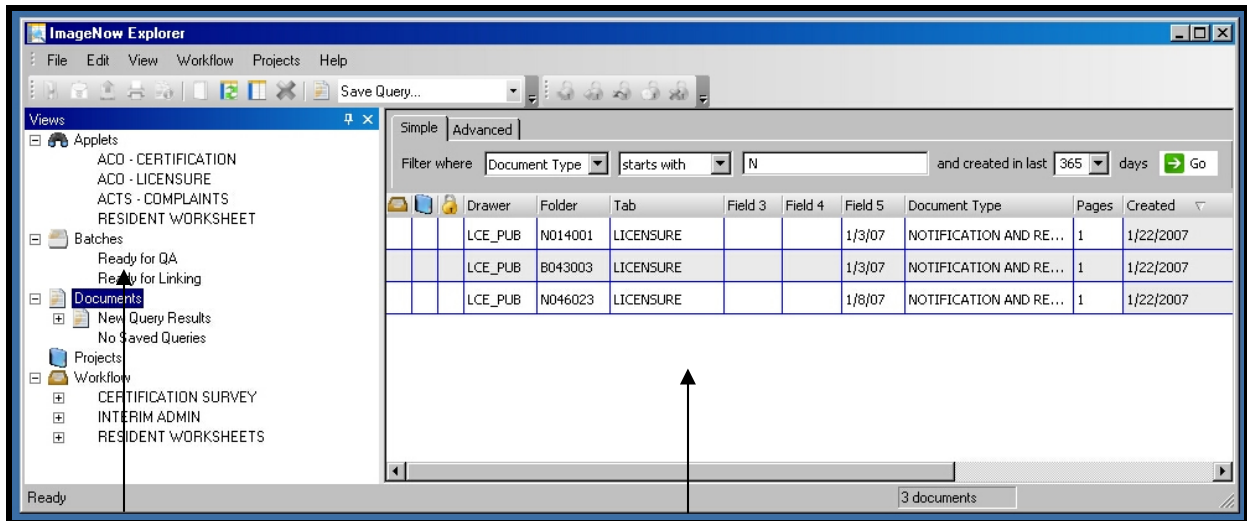
Displays the generic on-line help for ImageNow.



About the ImageNow Explorer Window

Introduction

The ImageNow Explorer allows a user to view and navigate through all of the ImageNow grids. Each row in the grid represents a document that resides in ImageNow or is in an intermediate status such as Quality Assurance or Linking. To access the document view, double-click on the row in the grid and the ImageNow Viewer window will be displayed.



View Pane

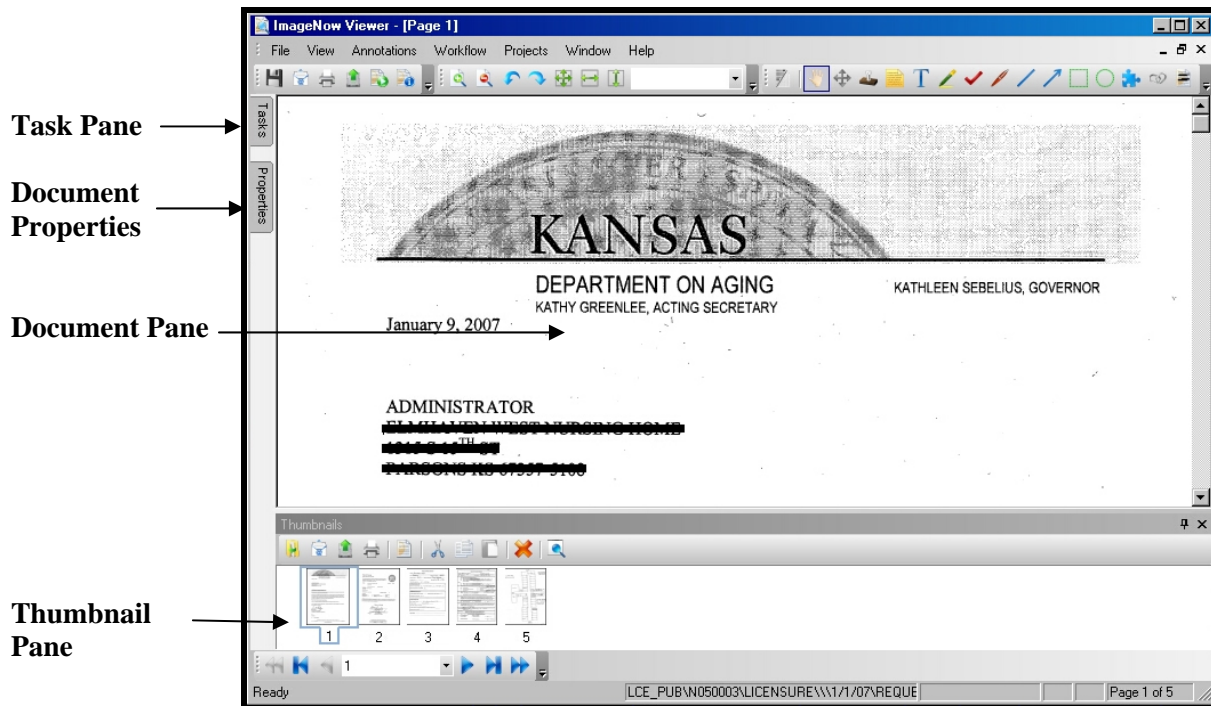
Document Pane

In the **Views** pane, allows different viewing options for the following groupings of documents:

- **Applets** displays the document row (specifically, the document key values) that match the record currently selected in ASPEN, such as Resident Worksheet or Certifications.
 - **Batches** displays the documents after they have been scanned and are ready to have quality assurance processed as well as linking the documents to the appropriate ASPEN area.
 - **Documents** displays the search results in a grid format.
 - **Projects** is not used at this time.
 - **Workflow** displays the documents that are in one of the Workflow process.
-

About the ImageNow Viewer Window

Introduction ImageNow Viewer allows the capability of expanding and displaying any item that appears in the grid of the ImageNow Explorer window.



Explanation In addition to a resizable view of the referenced document, the viewer window includes a Tasks, Properties, Documents and the Thumbnails panes.

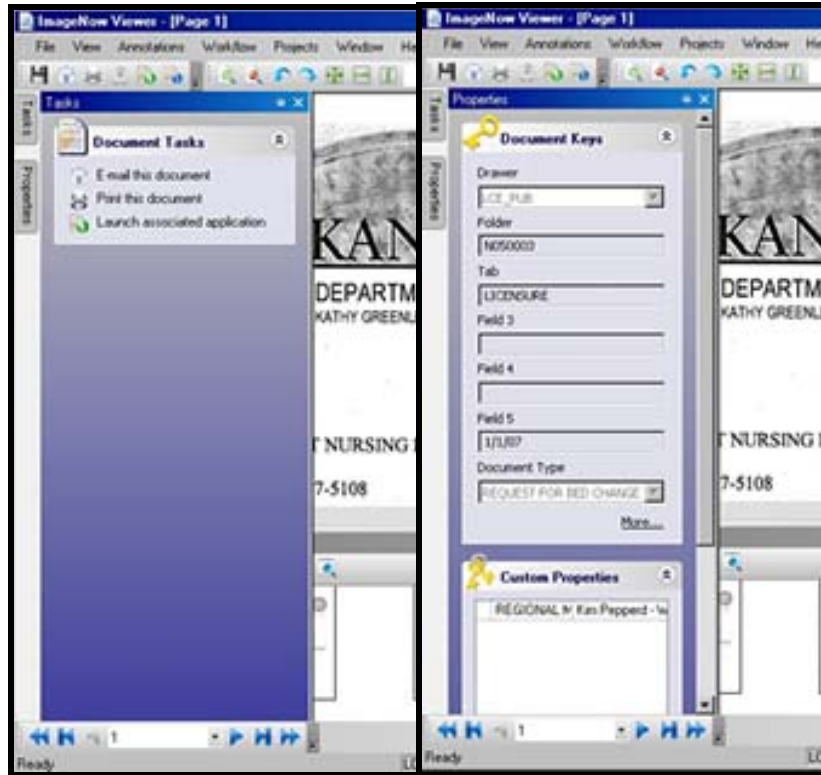
Both the Tasks and Properties panes are accessed by clicking on the tab. The pane will side out and over the document image.

- In the Tasks pane, routine tasks can be performed on the item displayed in the view pane.
- In the Properties pane, if the security access permits, the document keys values can be changed for the item displayed in the document pane.
- The Document pane displays the selected page in the thumbnail pane.
- In the Thumbnails pane, gives a view of the different pages of a multiple-page document is available to be viewed. There are also navigational arrows to forward through the document pages.

Continued on next page

About the ImageNow Viewer Window, Continued

Panes

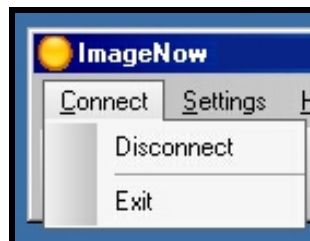


Note

Due to the complex nature of ASPEN, it can not be launched from within ImageNow.

To Exit

To exit ImageNow, click on Connect and select either Exit or Disconnect. Exit will close the ImageNow program completely. Disconnect will Log out the user from the ImageNow program but leaves the sign-in screen available.



Continued on next page

Document Processing Guidelines

Introduction

Processing documents involves the three essential tasks:

- **Capture** or scan the documents into ImageNow
 - **Quality Assurance** Review of the scanned documents.
 - **Linking** the documents to index keys that match records in ASPEN.
-

Scanning

ImageNow offers two methods of scanning documents.

- Scan each document in on a one-by-one basis by using the Single Mode method.
- Scan several documents at once using the Batch Mode method.

Each method allows the options of bypassing QA, by sending documents directly to a workflow and linking them to document index keys automatically.

Security

ImageNow has been configured to have two Security Groups that match the types of documents found in ASPEN.

- Public Documents
 - Secured Documents
-

Prior to Scanning

To avoid unnecessary and costly damage to the high speed scanners, it is vital that all documents be prepped prior to scanning. All documents must be check for the following items and if found the items will need to be removed.

- Rubber bands
 - Paper Clips
 - Staples
 - Stick Notes (If needed on the document then tape down all sides)
-

Continued on next page

Document Processing Guidelines, Continued

Scanner

All documents are to be scanned face up for proper placement within ASPEN. ImageNow uses high speed scanners which along with scanning approximately 50+ pages per minute it automatically duplexes at the same time as it feeds the documents through the scanner. The program will disregard the blank image if the paper is single sided.

Patch Sheets

Patch Code Sheets can be placed between documents to have ImageNow automatically separate the pages into different batches. This enables the scanning of large volumes of documents at one time.

Quality Assurance Batches

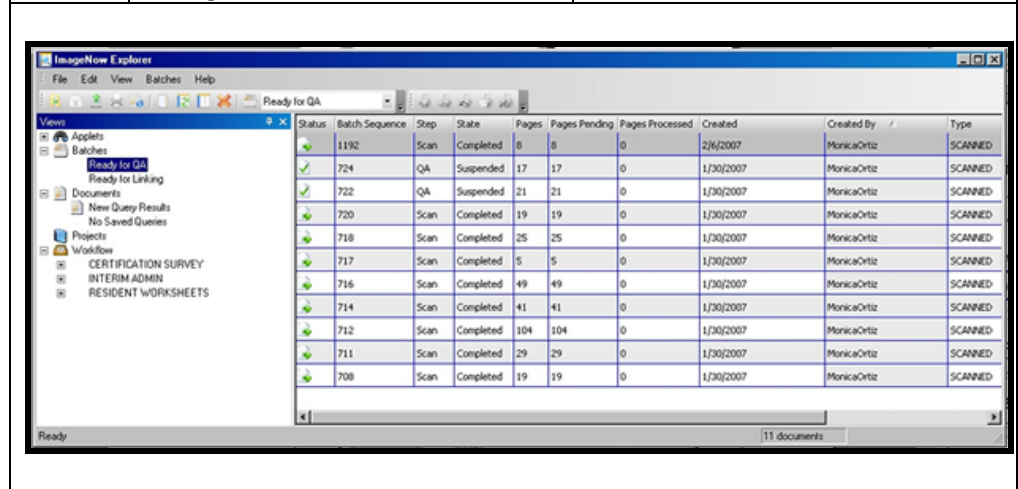
Introduction

Quality Assurance (QA) is the first step in processing documents after scanning. During QA verify that a document meets the standards of image quality required in order to store, view, and work with that document online. Quality assurance occurs in the ImageNow Viewer in QA Mode where the decision is made as to which pages to keep, discard, or rescan.

How to

To open a batch to start the QA process, follow the steps in the below table.

Step	Action	Result
1.	In the ImageNow Explorer window, in the Views pane, under Batches , select Ready for QA .	Batches of documents will be displayed.

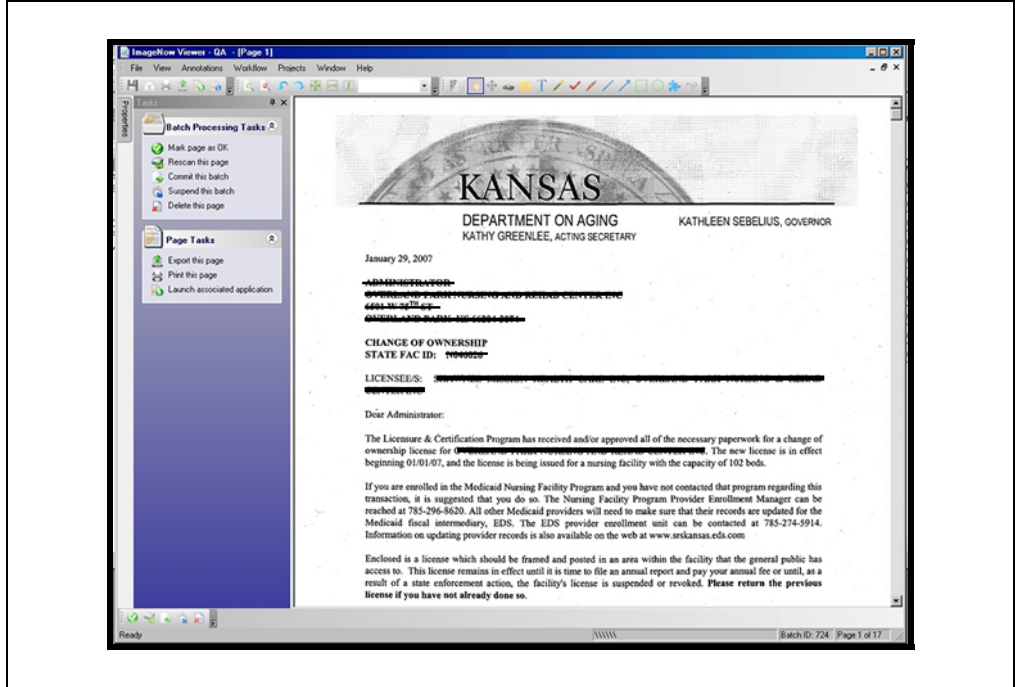


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Quality Assurance Batches, Continued

How to (continued)

Step	Action	Result
2.	In the grid, select the batch to process by double-clicking on the row.	The ImageNow Viewer will display with the tasks pane open.



Quality Assurance Review Of A Document or Batch

Introduction

Quality Assurance Review of documents is not required, but it is recommended. However, it has been decided due to the volume of some items needing processed at the same time that workflows will be used so that the QA is bypassed and go directly to linking.

QA on a document can only be done if it has been marked as scanned and the status is Ready for QA.

When a page does not meet standards of quality assurance, it can be rescanned and the previous version of the scan is automatically discarded.

How to


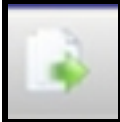
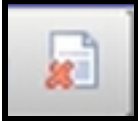

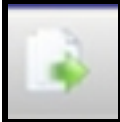
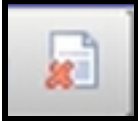

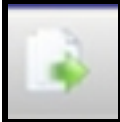
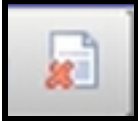
To complete a Quality Assurance review on a batch, follow the steps in the below table.

Step	Action	Result
1.	In the ImageNow Viewer , inspect the page or pages.	A document page is acceptable when it meets most or all of the following standards: <ul style="list-style-type: none">• The scanned or imported image resembles the original document.• No part of the page is missing due to a scanner misfeed.• All critical elements of the document legible• The document is properly oriented and aligned.

Continued on next page

Quality Assurance Review Of A Document or Batch, Continued



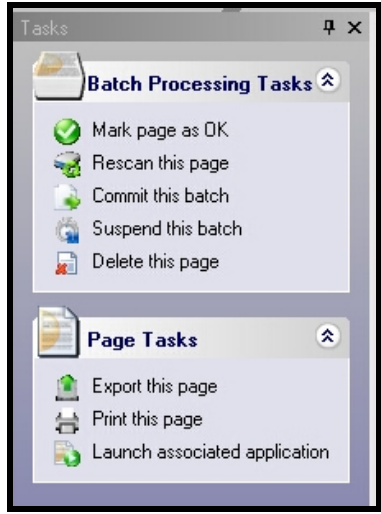
How to (continued)

Step	Action	Result								
2.	To complete the quality assurance review, click one of the following options in the below table.	Options are on the task pane of the ImageNow Viewer or on the toolbar.								
	<table border="1"> <thead> <tr> <th>Option</th> <th>Result</th> </tr> </thead> <tbody> <tr> <td> Mark page as OK.  </td> <td> If the batch was a single page document, then the window returns to the ImageNow Explorer. If the batch has multi-pages, the next page of the document appears. Mark page as OK must be selected until the QA is complete on all pages in the batch. </td> </tr> <tr> <td> Commit this batch.  </td> <td>Choose this option if the batch will bypass the QA without looking at all pages.</td> </tr> <tr> <td> Delete this page.  </td> <td> Discard the page if it is to be removed from the batch and the ImageNow server. If it should be replaced with a newly scanned version, click Rescan this page option instead. </td> </tr> </tbody> </table>	Option	Result	Mark page as OK. 	If the batch was a single page document, then the window returns to the ImageNow Explorer. If the batch has multi-pages, the next page of the document appears. Mark page as OK must be selected until the QA is complete on all pages in the batch.	Commit this batch. 	Choose this option if the batch will bypass the QA without looking at all pages.	Delete this page. 	Discard the page if it is to be removed from the batch and the ImageNow server. If it should be replaced with a newly scanned version, click Rescan this page option instead.	
Option	Result									
Mark page as OK. 	If the batch was a single page document, then the window returns to the ImageNow Explorer. If the batch has multi-pages, the next page of the document appears. Mark page as OK must be selected until the QA is complete on all pages in the batch.									
Commit this batch. 	Choose this option if the batch will bypass the QA without looking at all pages.									
Delete this page. 	Discard the page if it is to be removed from the batch and the ImageNow server. If it should be replaced with a newly scanned version, click Rescan this page option instead.									

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Quality Assurance Review Of A Document or Batch, Continued

How to (continued)

Step	Action	Result
	<p>Rescan this page.</p> 	<p>Rescan a page if it does not meet the standards of quality.</p> <p>Locate the original document and place it back into the scanner feed.</p> <p>Note: Leave the window open or it will be rescanned as a separate batch</p>
	<p>Suspend this batch.</p> 	<p>Choose this option if another batch needs to be reviewed and current QA session will be completed later.</p>
	<p>Task Pane</p> 	<p>The pane offers the same options as the toolbar buttons listed above.</p> <p>Note: The option of Launch associated application will not work with ASPEN due to it's complex nature.</p>

Linking Documents To ASPEN

Introduction

After quality assuring the documents, the next step is to link them to index keys that have been set up to work with ASPEN. This is done by matching the documents in ImageNow to records in ASPEN.

Linking occurs in ImageNow Viewer - Link Mode. When linking a document, some or all of its Document Key values are copied from the selected record in ASPEN. These are the values that allow ImageNow to retrieve the linked document from the ImageNow Server whenever the document's counterpart record in ASPEN is opened.

Linking also provides a way to group documents in ImageNow by storing them in Drawers. For example, documents scanned that are private or public are placed in corresponding drawers.

How to

To link documents to records in ASPEN, follow the steps in the below table.

Step	Action	Result								
1.	Open ASPEN or ACTS to the appropriate area.									
	<table border="1"> <thead> <tr> <th>Document Type</th> <th>Area</th> </tr> </thead> <tbody> <tr> <td>All other documents (Resident Worksheet, CT Documents, etc.)</td> <td>ASPEN - Facility, Survey, Citation Manager</td> </tr> <tr> <td>Administration Changes</td> <td>ASPEN - Facility, Properties</td> </tr> <tr> <td>Complaint</td> <td>ACTS - Facility, Intake, Investigation Tab</td> </tr> </tbody> </table>	Document Type	Area	All other documents (Resident Worksheet, CT Documents, etc.)	ASPEN - Facility, Survey, Citation Manager	Administration Changes	ASPEN - Facility, Properties	Complaint	ACTS - Facility, Intake, Investigation Tab	
Document Type	Area									
All other documents (Resident Worksheet, CT Documents, etc.)	ASPEN - Facility, Survey, Citation Manager									
Administration Changes	ASPEN - Facility, Properties									
Complaint	ACTS - Facility, Intake, Investigation Tab									
2.	On the ImageNow toolbar, click the arrow next to the Batch button and then click Ready for Linking .	ImageNow Explorer window will open under the Ready for Linking option.								

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Linking Documents To ASPEN, Continued

How to (continued)

Step	Action	Result
3.	In ImageNow Explorer grid, select the batch you want to link by double-clicking on the row.	Batch is displayed in the viewer window.
4.	In the ImageNow Viewer - Link window, identify the displayed page from its name, or other distinguishing information.	
5.	Position the ImageNow Viewer - Link window and the ASPEN record so they are both visible on the screen.	
6.	In the ImageNow Viewer - Link toolbar, click the Link this page button to create a link between ImageNow and ASPEN.	The Properties pane slides in from the right side of the window.
7.	In the Properties pane, under Document Keys , enter or verify the required values if necessary, and then, in the ImageNow Viewer - Link toolbar, click the Save this page button .	The next page in the batch is displayed.
8.	Repeat steps 4-7 as necessary until the entire batch is linked.	Once the linking of all batch pages are complete, the viewer closes and returns to the explorer window.

Move A Document

Introduction Moving a document means changing one or more of its document key values.

How to To move a document, follow the steps in the below table.

Step	Action	Result
1.	In ImageNow Explorer , perform a search that returns the document to be moved.	
2.	In the grid, select the document by double-clicking on the row..	The ImageNow Viewer opens with the document visible.
3.	In the ImageNow Viewer , in the Properties pane, under Document Keys , make the changes to the document by editing existing values or entering new ones in empty fields.	
4.	On the File menu, click Save .	

Delete A Document

How to To delete a document, follow the steps in the below table.

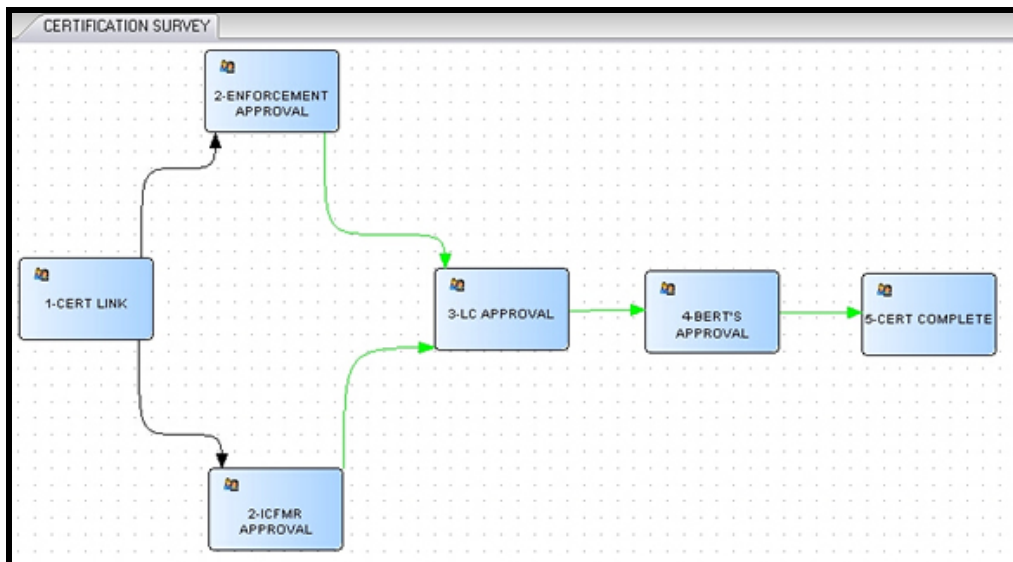
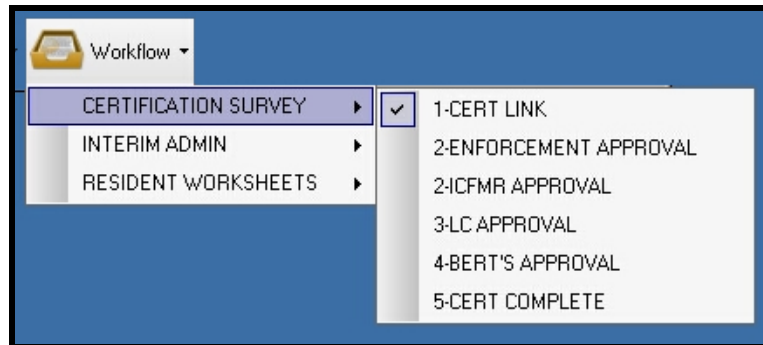
Step	Action	Result
1.	In the ImageNow Explorer window, double-click the document to be deleted.	
2.	In the confirmation dialog box, click Yes .	

Workflow

Introduction

ImageNow Workflow provides end-users with the ability to route a document through a business process from start to finish with a customizable set of options. As a user of workflow, documents can be placed into workflow and move them through the business processes. A document in a workflow can be routed, viewed or annotated.

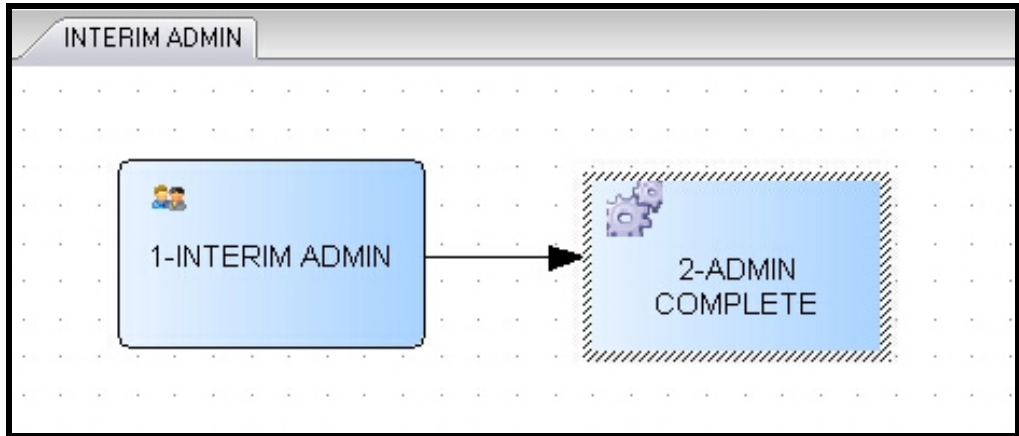
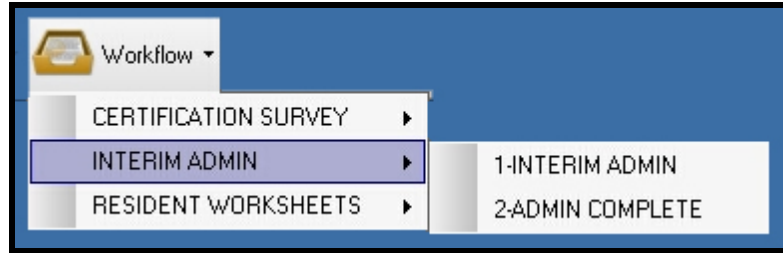
Certification Survey



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Workflow, Continued

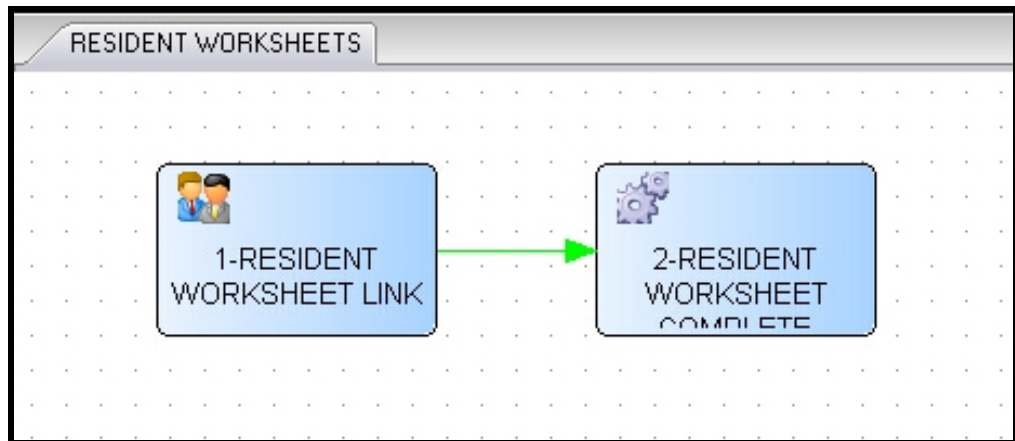
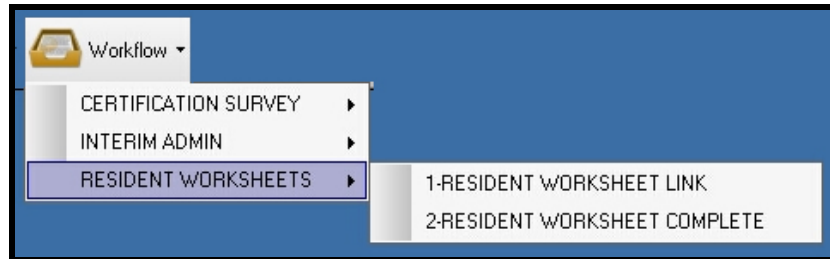
Interim Administrator



Continued on next page

Workflow, Continued

Resident Worksheet



Route A Document In Workflow

Introduction Workflow provides a process to route documents to specific persons for processing or approval.

How to To route a document, follow the steps in the below table.

Step	Action	Result										
1.	On the ImageNow toolbar, click Workflow .											
2.	In the ImageNow Explorer , in the left pane under Workflow , select the workflow queue you want.											
3.	In the Workflow grid, double-click a document to open it.											
4.	In the ImageNow Viewer , verify that this document is the one you want to route to a different queue.											
5.	Verify that the Workflow Tasks pane is open.											
6.	On the Workflow Tasks pane, perform one of the following:											
	<table border="1"> <thead> <tr> <th>Option</th> <th>Result</th> </tr> </thead> <tbody> <tr> <td>Route forward.</td> <td>To send the document to the next queue in the workflow.</td> </tr> <tr> <td>Route Up.</td> <td>To send the document back to any queue from which it came previously.</td> </tr> <tr> <td>Route Back.</td> <td>To send the document back to the previous queue.</td> </tr> <tr> <td>Route Anywhere.</td> <td>To select a queue in the workflow process to which to send the document.</td> </tr> </tbody> </table>	Option	Result	Route forward.	To send the document to the next queue in the workflow.	Route Up.	To send the document back to any queue from which it came previously.	Route Back.	To send the document back to the previous queue.	Route Anywhere.	To select a queue in the workflow process to which to send the document.	
Option	Result											
Route forward.	To send the document to the next queue in the workflow.											
Route Up.	To send the document back to any queue from which it came previously.											
Route Back.	To send the document back to the previous queue.											
Route Anywhere.	To select a queue in the workflow process to which to send the document.											

Add an item to Workflow

Introduction It is possible to add an existing document to a workflow if needed.

How to To add a document to a workflow, follow the steps in the below table.

Step	Action	Result
1.	On the ImageNow toolbar, click Documents .	
2.	In the ImageNow Explorer , on the Simple search tab, set the Search lists and field to the criteria you need to retrieve your document, and then click Go .	
3.	From the search results, double-click a document to open it.	
4.	In the ImageNow Viewer , verify that this document is the one you want to add to workflow.	
5.	Verify that the Document Tasks pane is open.	
6.	In the Document Tasks pane, click Add this document to workflow .	
7.	In the Add to Workflow window, select a process, select a queue, select a priority, and then click Add .	

Remove an item from Workflow

Introduction It is possible to remove a document from a workflow if needed.

How to To remove a document from a workflow, follow the steps in the below table.

Step	Action	Result
1.	On the ImageNow toolbar, click Workflow .	
2.	In the ImageNow Explorer , in the left pane under Workflow , select the workflow queue you want.	
3.	In the Workflow grid, double-click a document to open it.	
4.	In the ImageNow Viewer , verify that this document is the one you want to remove from workflow.	
5.	Verify that the Workflow Tasks pane is open.	
6.	In the Workflow Tasks pane, click Remove this item from workflow .	
7.	In the Remove from Workflow confirmation box, click Yes to remove the item.	

View an item in Workflow

Introduction

It is possible to view a document that is in a workflow to check the status of the document in the workflow process.

How to

To view a document in a workflow, follow the steps in the below table.

Step	Action	Result
1.	On the ImageNow toolbar, click Workflow .	
2.	In the ImageNow Explorer , in the left pane under Workflow , select the workflow queue you want.	
3.	In the Workflow grid, double-click a document to open it.	

Annotations

Introduction

You 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 so you can express the different points you want to make. For example, in ImageNow, you can express your review of a document by stamping it approved, signing off on it using a pen, or adding a check mark. You can also add sticky notes to add small notes to a document object, either inline or as a global comment on the document. You can add annotations on the following file types: TIFF, JPG, BMP, and PNG files.

Each ImageNow annotation requires an annotation template that is created and customized for any supported annotation type. Security options are also available based on the template. For example, you can create a Stamp template with the following text: “Received by Accounts Payable”. Your ImageNow administrator can set the template security so that only users in the Accounts Payable group can use, modify, or delete annotations created using that Stamp template. If your ImageNow administrator does not grant ImageNow users in the Human Resources access to view stamps created using that stamp template, those users cannot view, modify, or delete this annotation.

A redact is a solid graphic that covers a portion of an image or document so that the covered information is no longer visible to the viewer. This redaction enables you to alter the document, or a copy of the document, and permanently remove legally significant information. Additionally, when you add a redact annotation, you retain the original while creating a redacted copy for users. Contact your ImageNow administrator if you need new annotation templates.

Add A Stamp Annotation

Introduction In **ImageNow Viewer**, the **Stamp** icon annotation enables you to stamp predefined (Approved, Confidential, Rejected, and so forth) or custom messages on document images.

How to To open a document in the QA Mode, follow the steps in the below table.

Step	Action	Result
1.	In ImageNow Viewer , open a document.	
2.	On the toolbar, right-click the Stamp icon , and then select a stamp annotation from the list.	
3.	Click the document image where you want the stamp to appear.	

Show Or Hide Annotations

Introduction The **Show/Hide Annotations** icon enables you to hide or restore all annotations. Hiding annotations enables you to view the original unmarked document without deleting the placed annotations.

How to To open a document in the QA Mode, follow the steps in the below table.

Step	Action	Result
1.	In ImageNow Viewer , locate the document with the annotation you want to show or hide.	
2.	On the toolbar, click the Show/Hide Annotations icon.	
3.	To show or hide a specific annotation, right-click the annotation and select Show or Hide	

Note: Closing the document with the annotations hidden does not delete the annotations. The annotations appear on the document the next time it is opened.

Move Or Resize An Annotation

How to Move To move an annotation on a document, follow the steps in the below table.

Step	Action	Result
1.	In ImageNow Viewer , on a document image, click and hold the mouse button on the selected annotation, drag the annotation to the location you want, and then release the mouse button.	
2.	Click outside of the annotation to deselect it.	

How to Resize To resize an annotation on a document, follow the steps in the below table.

Step	Action	Result
1.	In ImageNow Viewer , on a document image, click the annotation you want to resize. The annotation is outlined by a dotted line with large black squares.	
2.	Click and hold the mouse button on one of the black squares, drag to resize the annotation as needed, and then release the mouse button.	
3.	Click outside of the annotation to deselect it.	

Note: The Stamp, Text, and Sticky Note annotations cannot be resized.

Delete an Annotation

Introduction

You can delete individual annotations or delete all annotations. To temporarily remove the annotations while viewing a document, hide them.

Note: Only the user who placed the annotation is permitted to delete it.

How to

To delete an annotation from a document, follow the steps in the below table.

Step	Action	Result
1.	In ImageNow Viewer , locate the document with the annotation you want to delete.	
2.	Right-click the annotation, and then select Delete .	
3.	In the confirmation dialog box, click Yes .	

Viewing Documents – Through Aspen

Introduction With ImageNow, documents that are linked to records in ASPEN can be viewed. For example, if a survey record is being reviewed in the ASPEN program, documents related to that survey that have been scanned into ImageNow can also be reviewed.

Using the Applets button To display documents in ImageNow that are linked to ASPEN records, the applet will be selected that was defined for that area in the Applets drop-down list.

How to Follow the steps in the table below to view a document in ImageNow through ASPEN.

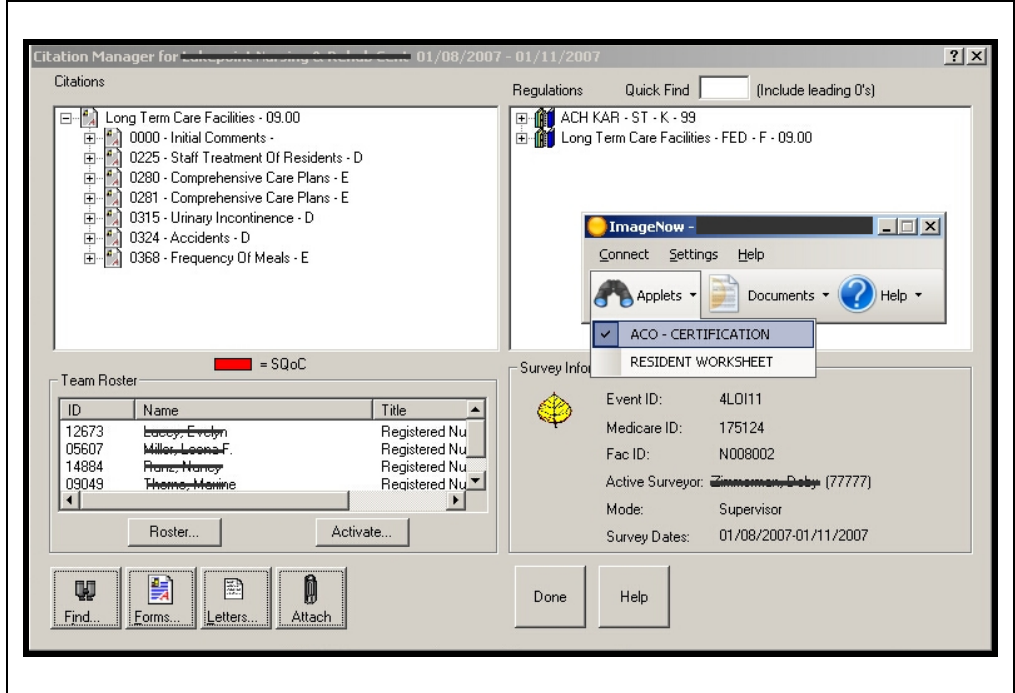
Step	Action	Result								
3.	Open the appropriate ASPEN program to a specific record.									
4.	Open the ASPEN location.									
	<table border="1"><thead><tr><th>Document Type</th><th>ASPEN Location</th></tr></thead><tbody><tr><td>License / Certification</td><td>Facilities Properties</td></tr><tr><td>Survey</td><td>Citation Manager for the specific survey date.</td></tr><tr><td>Complaint/Incident</td><td>ACTS</td></tr></tbody></table>	Document Type	ASPEN Location	License / Certification	Facilities Properties	Survey	Citation Manager for the specific survey date.	Complaint/Incident	ACTS	
Document Type	ASPEN Location									
License / Certification	Facilities Properties									
Survey	Citation Manager for the specific survey date.									
Complaint/Incident	ACTS									

Continued on next page

Viewing Documents – Through Aspen, Continued

How to (continued)

Step	Action	Result
5.	On the ImageNow toolbar, select the drop down arrow on Applet.	

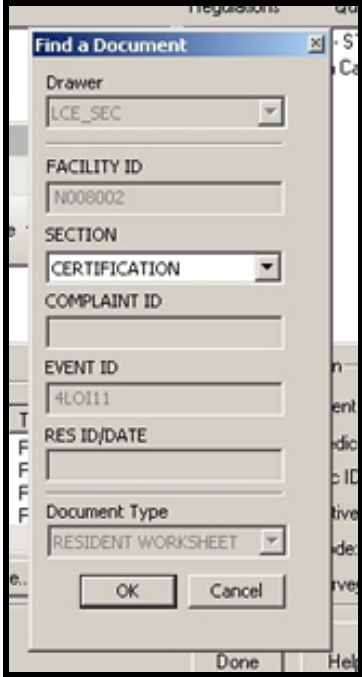


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Viewing Documents – Through Aspen, Continued

How to (continued)

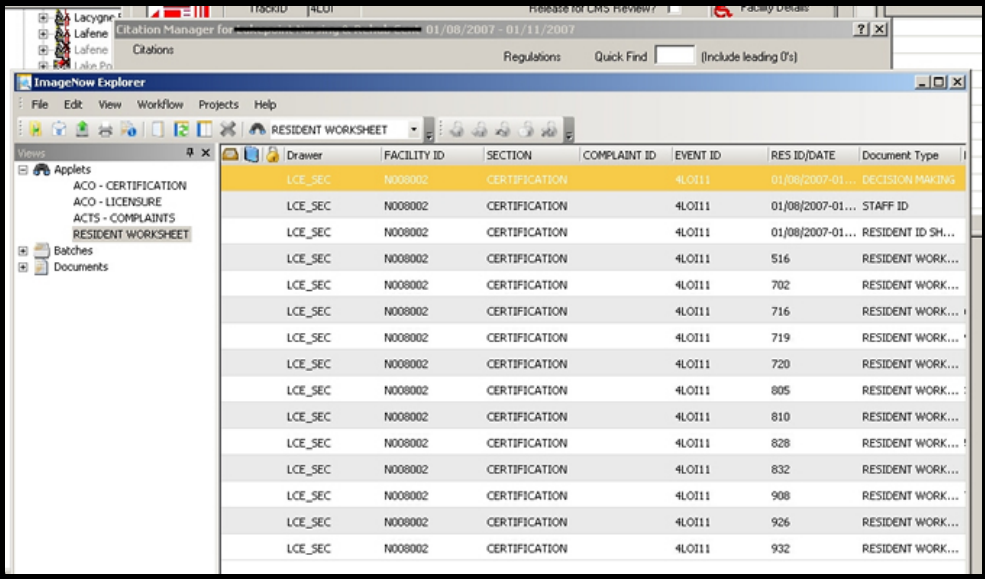
Step	Action	Result
6.	Select the corresponding applet.	The find a document dialog box will be displayed.



Continued on next page

Viewing Documents – Through Aspen, Continued

How to (continued)

Step	Action	Result
7.	Click on OK	A grid of any linked documents appears in ImageNow Explorer.
		
8.	Double-click a row in the ImageNow Explorer.	The Document is displayed in the ImageNow Viewer.

Viewing Documents – Without Aspen

Introduction With ImageNow, documents can be viewed that are linked to records in ASPEN but without the ASPEN program installed or available. The search function is used to access these documents.

Search

Introduction Using ImageNow, a simple search for one condition or a more advanced search with multiple conditions can be performed. These features are available in the Document View of the ImageNow Explorer with the proper search privileges.

Definitions The search function uses the Document Key Indexes (DocKeys) to categorize the documents into groups. Below are the Document Keys and what each index represents.

Document Key	Represents
Drawer	<ul style="list-style-type: none">• LCE_SEC (Secured documents)• LCE_PUB (Public documents)
Folder	<ul style="list-style-type: none">• Facility ID• Resident Worksheet ID
Tab	<ul style="list-style-type: none">• Type of File:<ul style="list-style-type: none">• Complaint• Certification• Licensure
Field 3	<ul style="list-style-type: none">• Complaint ID
Field 4	<ul style="list-style-type: none">• Complaints = ASPEN Survey ID• Certification =
Field 5	<ul style="list-style-type: none">• Depends on the Document Type:<ul style="list-style-type: none">• Complaints = Exit Date• Resident Worksheet = Resident ID• Certification or Licensure = Date

Continued on next page

Search, Continued

Document Key	Represents
Document Type	<ul style="list-style-type: none">• Complaint Form• Resident Worksheet• Resident ID Sheet• Request for Bed Change• Remodeled to Existing Facility• Notification and response letters• Initial Application / Amended• Change of Location or Name• Decision Making• 2567 POC• 2567 B
Any Document Type	<ul style="list-style-type: none">• A global search for any document.
Custom Properties	<ul style="list-style-type: none">• A pre-defined search option will display and will be by Regional Manager.

Simple Search

Introduction

In a simple search, a query can be done for documents that contain a DocKey, like Drawer, Folder, Tab, Field 3, Field 4, Field 5, or Document Type, or a custom property that matches a condition supplied.

Available conditions in a simple search include:

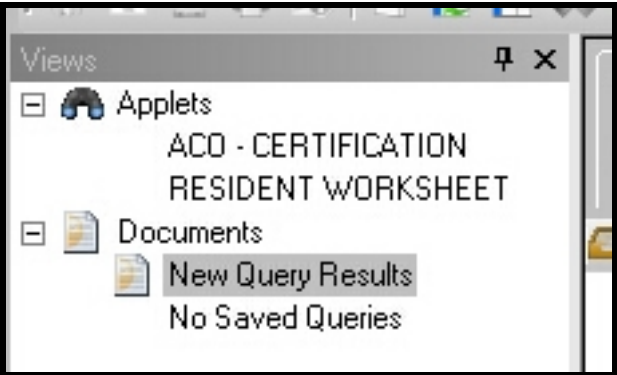
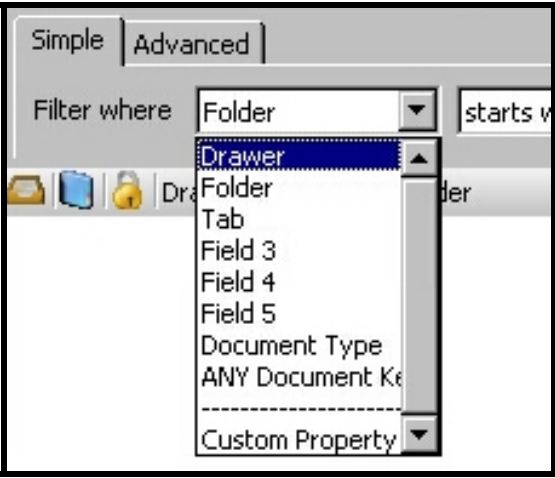
- is equal to
- is not equal to
- is greater than
- is less than
- is greater than or equal to
- is less than or equal to

Continued on next page

Simple Search, Continued

How to

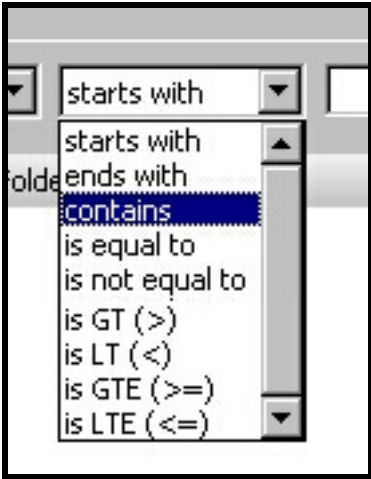

To create a simple search, follow the steps in the below table.

Step	Action	Result
1.	Open the ImageNow Explorer	Explorer opens with the Views pane is displayed.
2.	In the Views pane, select Documents .	
		
3.	On the Simple tab, in the Filter where list, choose one of the Document Key Indexes to search.	See the next section if the Custom Property is selected.
		

Continued on next page

Simple Search, Continued

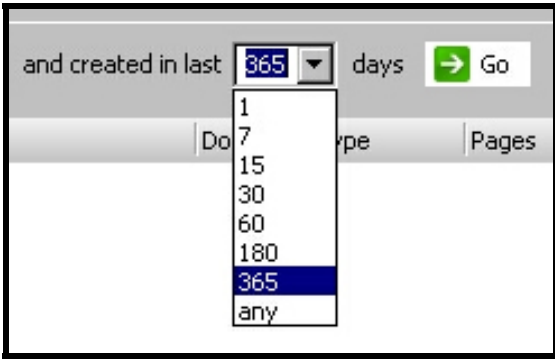
How to (continued)

Step	Action	Result
4.	Select an Operator	It is recommended to use the operator "contains" for a partial search.
		
5.	Type text in the field to compare the criteria.	Example: Facility ID
		

Continued on next page

Simple Search, Continued

How to (continued)

Step	Action	Result
6.	To limit the search to a certain time period, type or select the number of days the search will encompass.	If the option any is selected, it will return all matching documents without a time limitation.
		
7.	Click Go .	The document pane grid will display any results.

Custom Property Selection

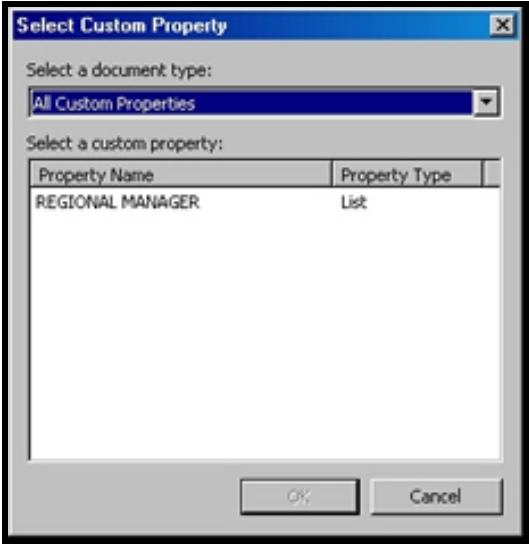

A custom property is a pre-defined system query. To use the custom property option, follow the steps in the below table.

Step	Action	Result
1.	Once the Custom Property option is selected, a dialog box will be displayed.	Will contain all the pre-defined property searches for selection.

Continued on next page

Simple Search, Continued

Custom Property Selection (continued)

Step	Action	Result
2.	Select one of the pre-defined searches. At this time only one is available. The Regional Manager property.	Will select documents automatically within the Regional Manager assigned area.
		
3.	Select the option and click on OK .	The selection is populated in search grid.
		
4.	Select the appropriate Regional Manager from drop down list	
5.	Press Go	Documents within the region selected will be displayed.

Advanced Search

Introduction

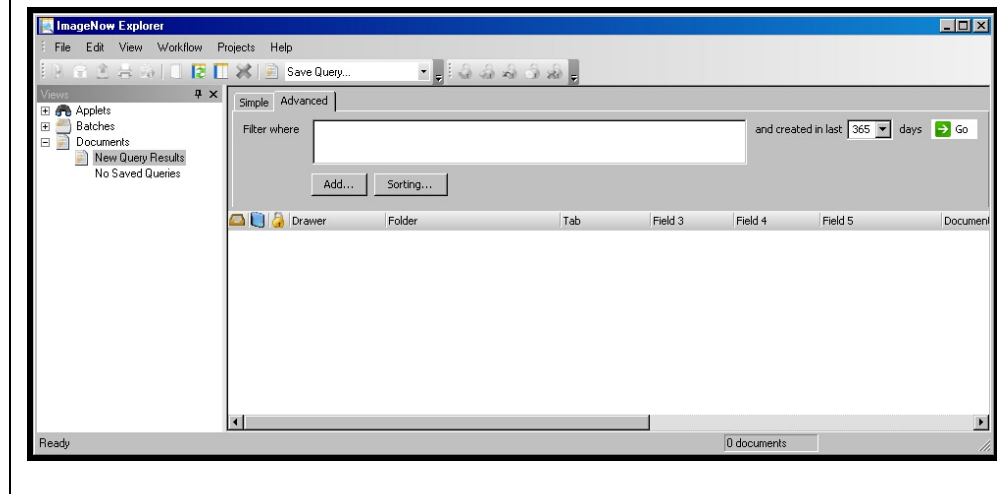
In an advanced search, a search can be done for documents that meet several different criteria with additional operators. In addition to searching for DocKey comparisons, in advanced search, can search for specific document properties, a specified user who created, modified, or was the last to view the document; the date of creation, modification, or last viewed.

Document status is another category on which can be used to query documents that are in workflow or in process of quality assurance.

How to

To create an advance search, follow the steps in the below table.

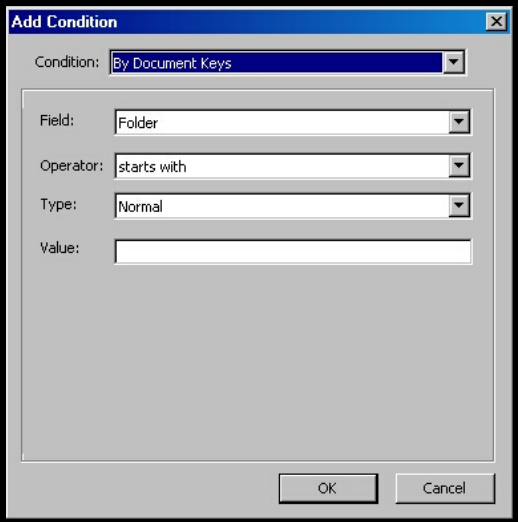
Step	Action	Result
1.	In the ImageNow Explorer , verify that the Views pane is displayed.	
2.	In the Views pane, select Documents .	



Continued on next page

Advanced Search, Continued

How to (continued)

Step	Action	Result
3.	On the Advanced tab, click Add .	The Add Condition dialog box will be displayed.
		
4.	Click on the down arrow and select the condition area.	Depending upon the condition area selected, the fields to select vary. See the table below for the fields available per condition area.

Continued on next page

Advanced Search, Continued

How to (continued)

Step	Action	Result
	Condition	Fields Available
	By Document Keys	Drawer Folder Tab Field 3 Field 4 Field 5 Document Type ANY Document Key
	By Document Properties	Pages Notes Document ID Creation Date Current Version Check-Out User Check-Out Date Creation User Creation Date Modification User Modification Date Last View User Last View Date Workflow Queue Workflow Status Workflow User Workflow Item ID
	By Document Status	Is in Workflow Is in a Project Is Version Controlled Is Checked-Out
	By All Fields	All the above options are available
	** Option not used	

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Advanced Search, Continued

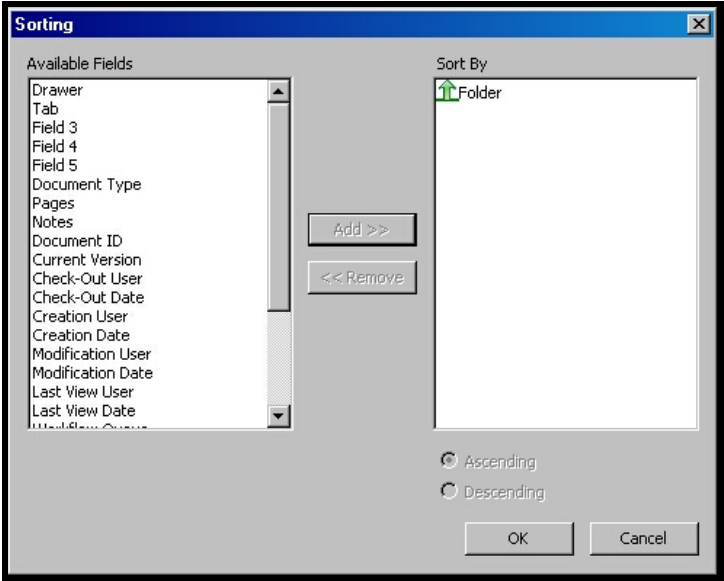
How to (continued)

Step	Action	Result
5.	In Operator , select a comparison operator.	
6.	In Type , select Normal or Prompted .	If Prompted is selected, a Prompt Conditions dialog box appears requesting any the information needed for the search. For example: User Name, etc.
7.	In Value , type or select the value for the field compared.	Depending upon the Field selected this will be either a text field or a drop down listing.
8.	Click on OK	Returns back to the Advanced search grid.
9.	Optional. Click Add to add another condition.	ImageNow places an AND between the two conditions. This can be manually changed to OR as needed.
10.	Optional. Sorting of the results.	If the results are to the sorted see the next selection for instructions.
11.	In the and created in last <number> days field select the number of days the search will encompass. Selecting any to return all matching documents without a time limitation.	Limits the search to a certain time period.
12.	Click on Go .	The search will begin.

Sorting

How to

To create a sort on the advance search, follow the steps in the below table. This is optional.

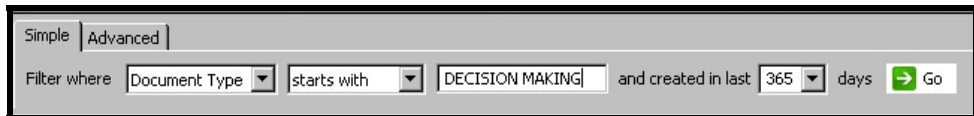
Step	Action	Result
1.	To sort the returned documents, click Sorting .	Sorting dialog box will be displayed.
2.	In Available Fields , select a field and then click Add . Add additional fields as needed.	The selected field is moved to the Sort By column.
		
3.	In Sort By , select the field and choose Ascending or Descending .	This is indicating the direction of the sort.
4.	Click OK .	
5.	In the and created in last <number> days field select the number of days the search will encompass. Selecting any will return all matching documents without a time limitation.	Limits the search to a certain time period.
6.	Click Go .	The search will begin.

Saving A Search Query

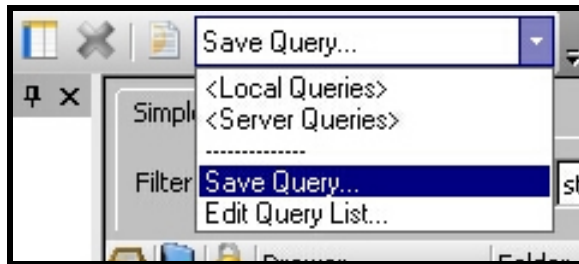
How to

To save a simple or advanced advance search, follow the steps in the below table.

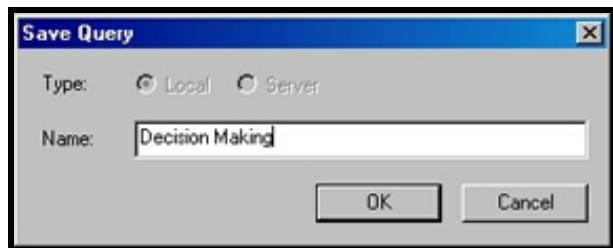
Step	Action	Result
1.	Open ImageNow Explorer .	
2.	In the Views pane, click Documents .	
3.	In the Documents grid, on any search tab, create the query to be saved.	



4.	On the toolbar, in the query list, click Save Query .	Save Query Dialog box will be displayed.
----	--	--



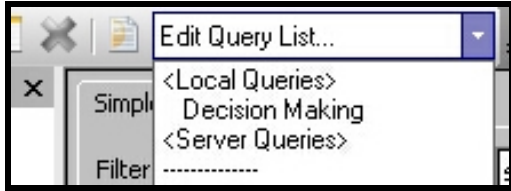
5.	In the Save Query dialog box, in the Name box, type a name for the query.	The Query is saved locally, not on the server.
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Continued on next page

Saving A Search Query, Continued

How to (continued)

Step	Action	Result
6.	Click OK .	Query will now be available on the toolbar, query list.
		

Run A Saved Search Query

Introduction In the query list, the saved queries are grouped by Local and Server. The security privileges determine the queries that appear in this list.

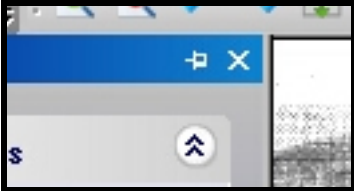
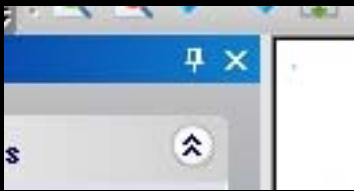
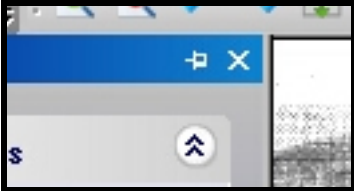
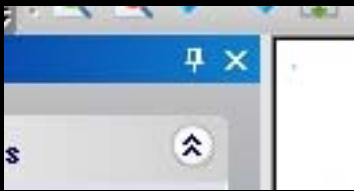
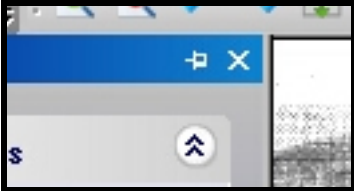
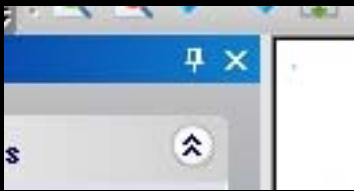
How to To run a previously saved search, follow the steps in the below table.

Step	Action	Result
7.	Open ImageNow Explorer .	
8.	In the Views pane, click Documents .	
1.	Click on the query list on the toolbar	Listing will drop down for selection.
2.	Select the query desired.	
3.	Press Go .	Results will be displayed.

Set A Default View

How to

To set the window with a default view, follow the steps in the below table.

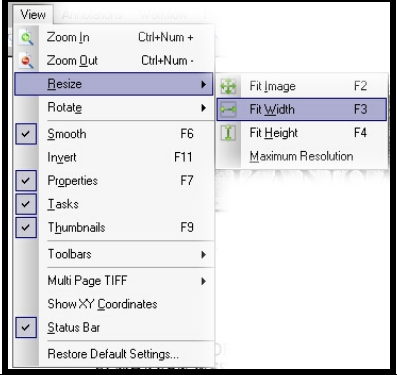

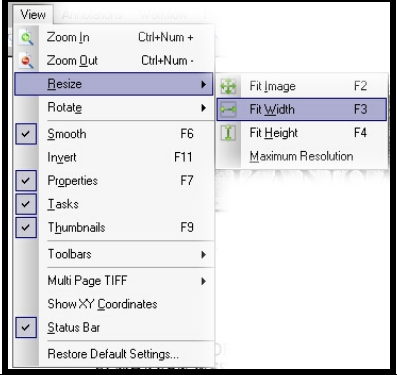

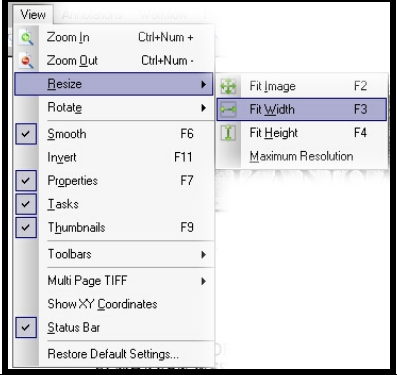

Step	Action	Result														
1.	In ImageNow Explorer , double-click any document.															
2.	In the ImageNow Viewer , arrange the panes(such as Tasks, Properties, Thumbnails) as follows:															
	<table border="1"> <thead> <tr> <th>Pane</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Open a Pane.</td> <td>On the View menu, select the pane.</td> </tr> <tr> <td>To have the pane to automatically minimize</td> <td>Click the tack button in the upper right corner so that it changes to a side position</td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td>To have the pane remain in the window.</td> <td>Click the tack button in the upper right corner so that it changes to a down position</td> </tr> <tr> <td></td> <td></td> </tr> <tr> <td>Change positions of the panes.</td> <td>Drag each pane to the default position desired.</td> </tr> </tbody> </table>	Pane	Action	Open a Pane.	On the View menu, select the pane.	To have the pane to automatically minimize	Click the tack button in the upper right corner so that it changes to a side position			To have the pane remain in the window.	Click the tack button in the upper right corner so that it changes to a down position			Change positions of the panes.	Drag each pane to the default position desired.	
Pane	Action															
Open a Pane.	On the View menu, select the pane.															
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To have the pane remain in the window.	Click the tack button in the upper right corner so that it changes to a down position															
																
Change positions of the panes.	Drag each pane to the default position desired.															
3.	Close ImageNow Viewer .	When reopened, the panes reappear where left.														

Note: To return **ImageNow Viewer** to its default state, on the **View** menu, click **Restore Default Settings**, and then in the **Restore Default Settings** dialog box, click **OK**.

Resize A Document

How to

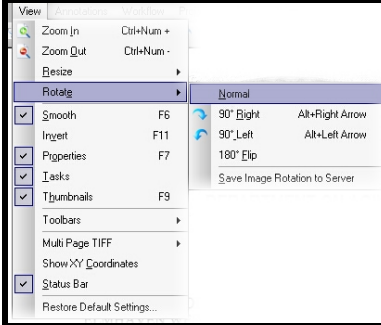

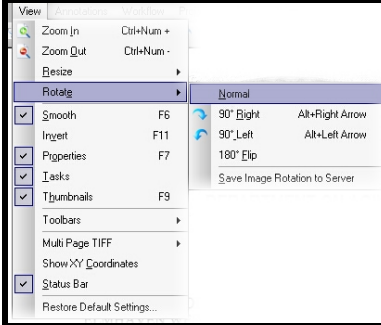

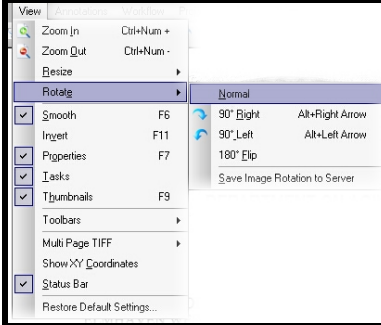

To resize a document in the view pane, follow the steps in the below table.

Step	Action	Result						
1.	In ImageNow Explorer , double-click the document image to be resized.	ImageNow Viewer and the document will be displayed.						
2.	There are two options of how to resize a document in the ImageNow Viewer.	Use one of the options listed in the below table.						
	<table border="1"> <thead> <tr> <th>Option</th> <th></th> </tr> </thead> <tbody> <tr> <td>On the Menu bar. Select View then Resize</td> <td>  </td> </tr> <tr> <td>Button on the Toolbar</td> <td>  </td> </tr> </tbody> </table>	Option		On the Menu bar. Select View then Resize		Button on the Toolbar		
Option								
On the Menu bar. Select View then Resize								
Button on the Toolbar								
3.	With either option, select the option on how to resize the document, by width, height or both (fit image).	Document will be resized.						

Rotate A Document

How to

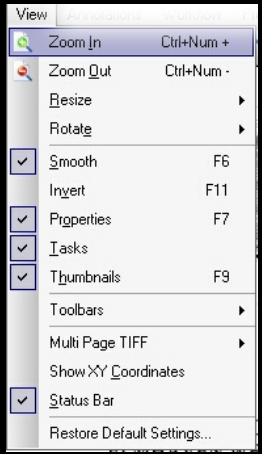

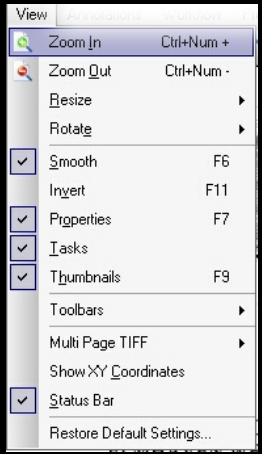

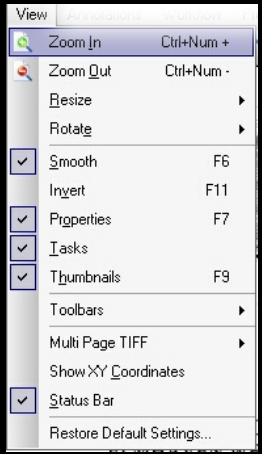

To rotate a document in the view pane, follow the steps in the below table.

Step	Action	Result						
1.	In ImageNow Explorer , double-click the document image to be rotated.	ImageNow Viewer and the document will be displayed.						
2.	There are two options of how to rotate a document in the ImageNow Viewer.	Use one of the options listed in the below table.						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="570 722 976 758" style="text-align: center;">Option</th> <th data-bbox="976 722 1386 1087" style="width: 50%;"></th> </tr> </thead> <tbody> <tr> <td data-bbox="570 758 976 1087"> <p>On the Menu bar. Select View then Rotate</p> </td> <td data-bbox="976 722 1386 1087">  </td> </tr> <tr> <td data-bbox="570 1087 976 1213"> <p>Button on the Toolbar</p> </td> <td data-bbox="976 1087 1386 1213">  </td> </tr> </tbody> </table>			Option		<p>On the Menu bar. Select View then Rotate</p>		<p>Button on the Toolbar</p>	
Option								
<p>On the Menu bar. Select View then Rotate</p>								
<p>Button on the Toolbar</p>								
3.	With either option, select the option on how to rotate the document, by 90° left or right, 180° flip.	Document will be rotated.						

Zoom In And Out Of A Document

How to

To resize a document in the view pane, follow the steps in the below table.

Step	Action	Result						
1.	In ImageNow Explorer , double-click the document image to zoom in or out.	ImageNow Viewer and the document will be displayed.						
2.	There are two options of how to zoom a document in the ImageNow Viewer.	Use one of the options listed in the below table.						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">Option</th> <th style="width: 40%;"></th> </tr> </thead> <tbody> <tr> <td>On the Menu bar. Select View then Resize</td> <td style="text-align: center;">  </td> </tr> <tr> <td>Button on the Toolbar</td> <td style="text-align: center;">  </td> </tr> </tbody> </table>			Option		On the Menu bar. Select View then Resize		Button on the Toolbar	
Option								
On the Menu bar. Select View then Resize								
Button on the Toolbar								
3.	With either option, select the option on how to zoom the document, in or out.	Display of the Document will be resized.						
4.	Repeat step 3 to continue to zoom in or out.							