

ImageNow 6.0 Sunflower **Viewing User Manual**



Kansas Department on Aging
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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.

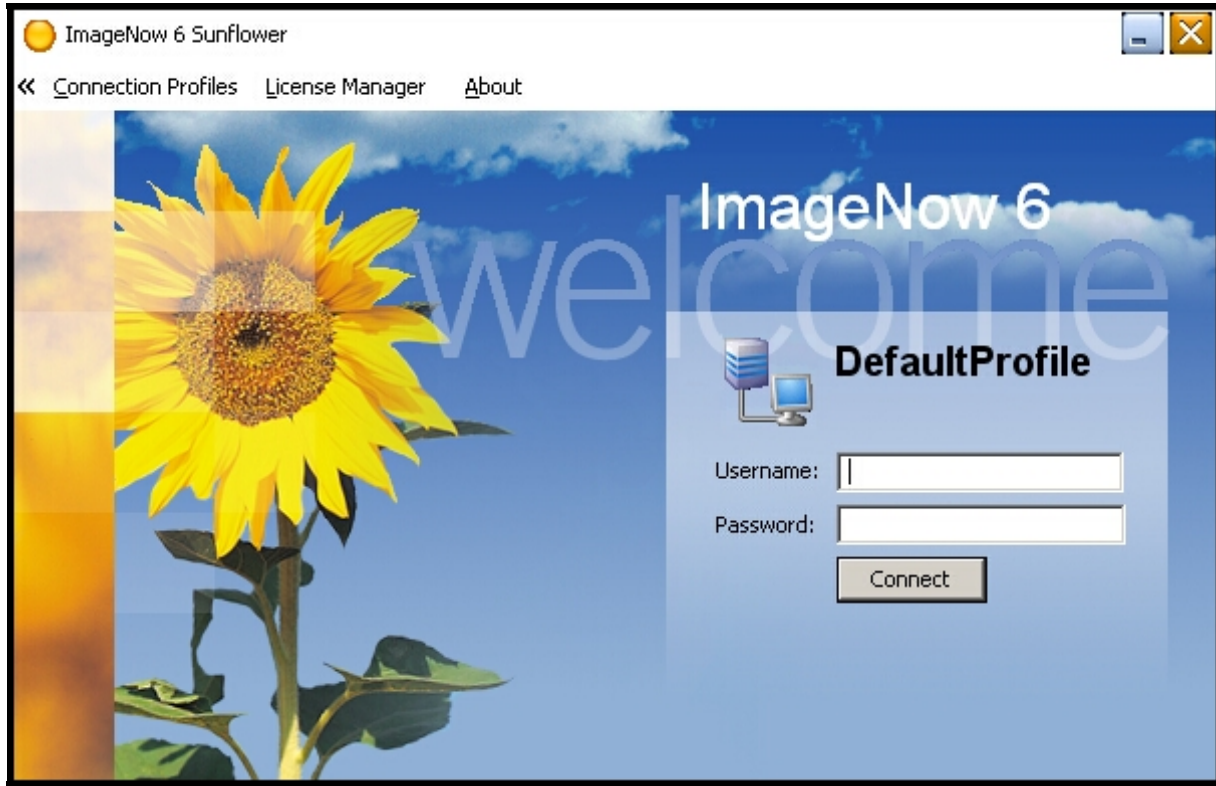
Note

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.



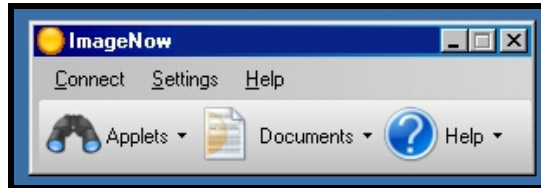
ImageNow Tool Bar

Introduction

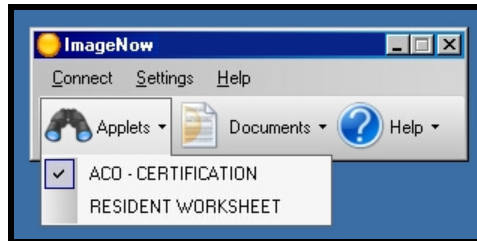
The ImageNow toolbar is the entry point into ImageNow. It gives a one mouse click access to the functions of ImageNow.

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 view only.

Viewing Toolbar



Applets



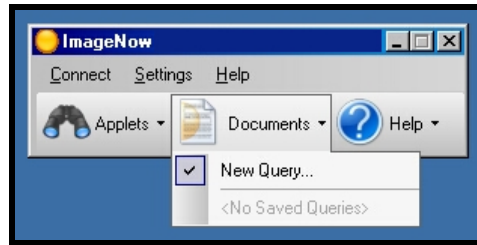
The **Applets** option is used as a quick access to the Applet list in the ImageNow Explorer, which is integrated with certain areas of ASPEN, such as a Resident Worksheet.

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.

Continued on next page

ImageNow Tool Bar, Continued

Documents

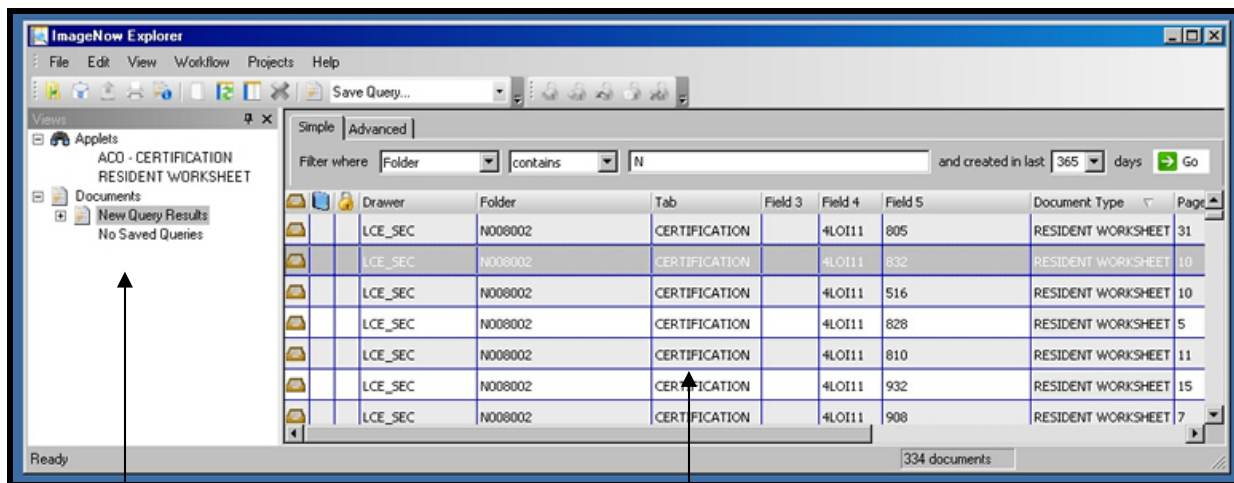


The **Documents** option is used to search or query for documents using index key fields.

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

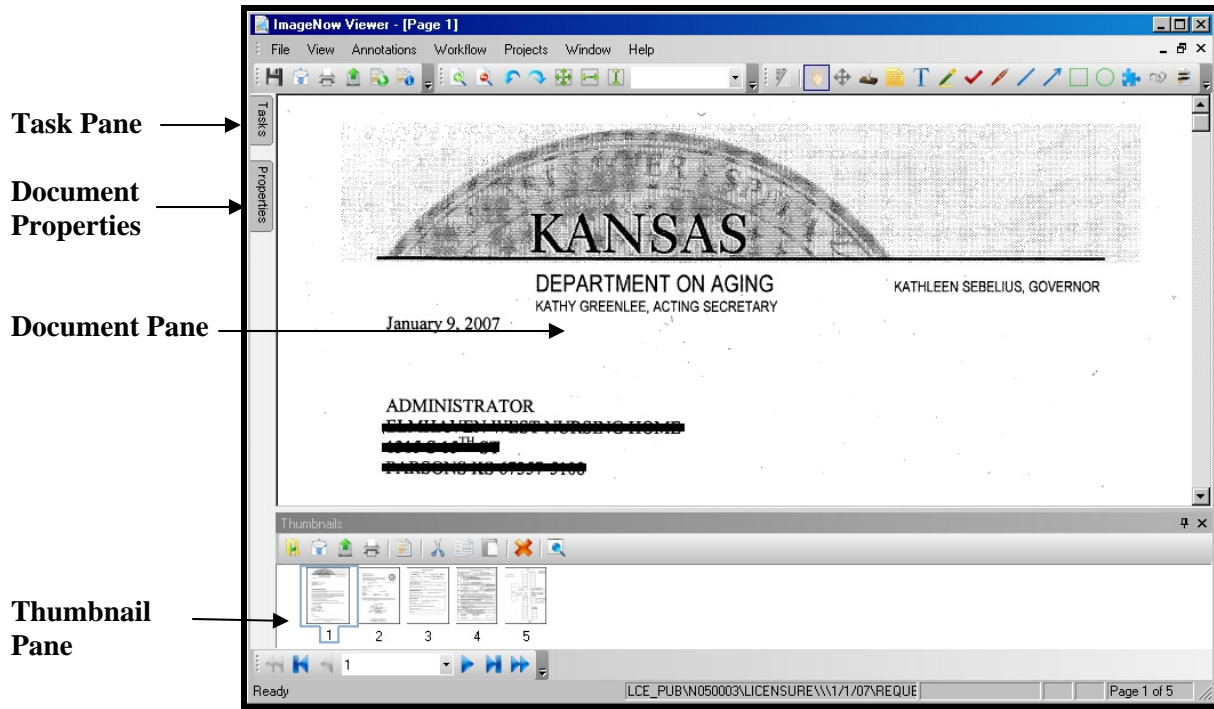
In the **Views** pane, allows different viewing options for the following groupings of documents:

Applets displays the document row (specifically, the document key values) that match the record currently selected in ASPEN, such as Resident Worksheet or Certifications.

Documents displays the search results in a grid format.

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.

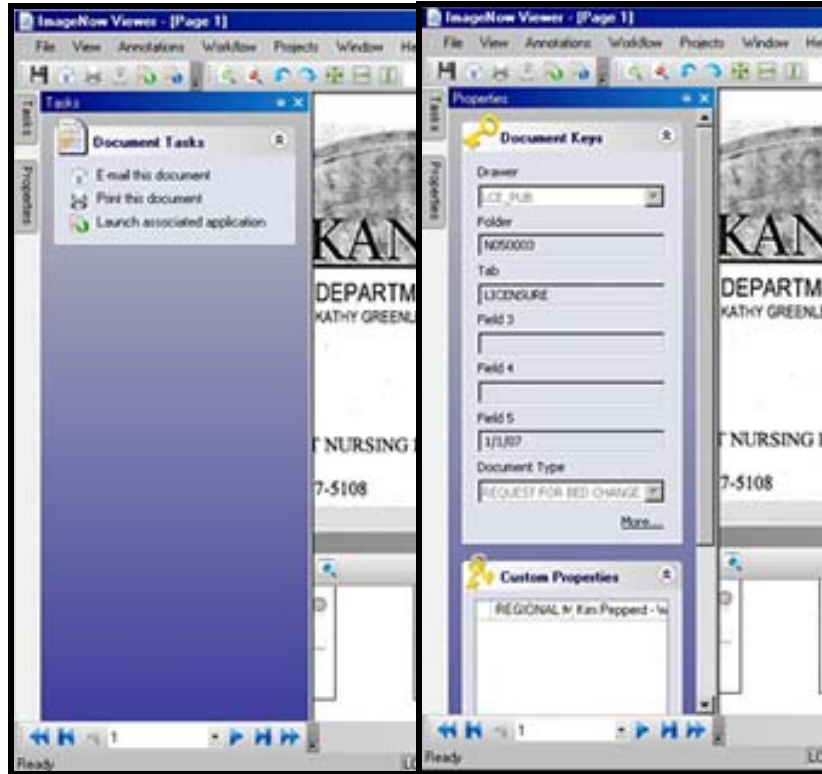
Both the Tasks and Properties panes are accessed by clicking on the tab. The pane will slide out and over the document image.

- 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.

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About the ImageNow Viewer Window, Continued

Panes

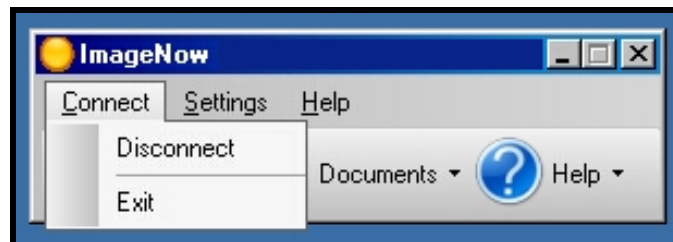


Note

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

About the ImageNow Viewer Window, Continued

Help

Displays the generic on-line help for ImageNow.



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 reviewing 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								
1.	Opened the appropriate ASPEN program to a specific record.									
2.	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									

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Viewing Documents – Through Aspen, Continued

How to (continued)

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

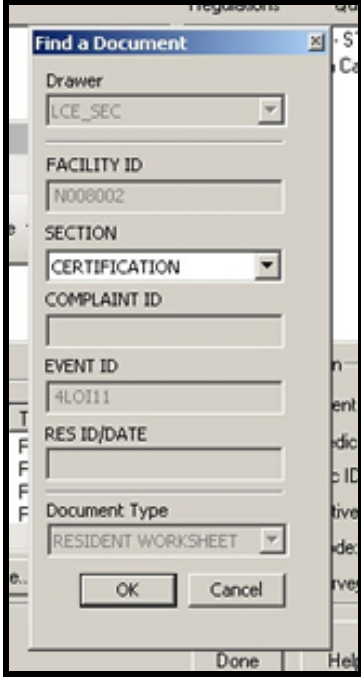
The screenshot shows the Citation Manager application window for the period 01/08/2007 - 01/11/2007. The interface is divided into several sections:

- Citations:** A tree view on the left showing folders for 'Long Term Care Facilities - 09.00' and its sub-items: '0000 - Initial Comments -', '0225 - Staff Treatment Of Residents - D', '0280 - Comprehensive Care Plans - E', '0281 - Comprehensive Care Plans - E', '0315 - Urinary Incontinence - D', '0324 - Accidents - D', and '0368 - Frequency Of Meals - E'.
- Regulations:** A list on the right showing 'ACH KAR - ST - K - 99' and 'Long Term Care Facilities - FED - F - 09.00'.
- ImageNow Applet:** A floating window titled 'ImageNow' with a menu bar containing 'Connect', 'Settings', and 'Help'. The 'Applets' dropdown menu is open, showing 'ACO - CERTIFICATION' (selected) and 'RESIDENT WORKSHEET'.
- Team Roster:** A table at the bottom left with columns 'ID', 'Name', and 'Title'. It lists four staff members: Evelyn Lacey, Nancy F. Miller, Nancy Franz, and Marnie Thomas, all with the title 'Registered Nu'. Below the table are 'Roster...' and 'Activate...' buttons.
- Survey Info:** A panel at the bottom right displaying details for 'RESIDENT WORKSHEET', including Event ID (4L011), Medicare ID (175124), Fac ID (N008002), Active Surveyor (Zimmerman, Debra (77777)), Mode (Supervisor), and Survey Dates (01/08/2007-01/11/2007).
- Toolbar:** A row of icons at the bottom for 'Find...', 'Forms...', 'Letters...', and 'Attach'. 'Done' and 'Help' buttons are also present.

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Viewing Documents – Through Aspen, Continued

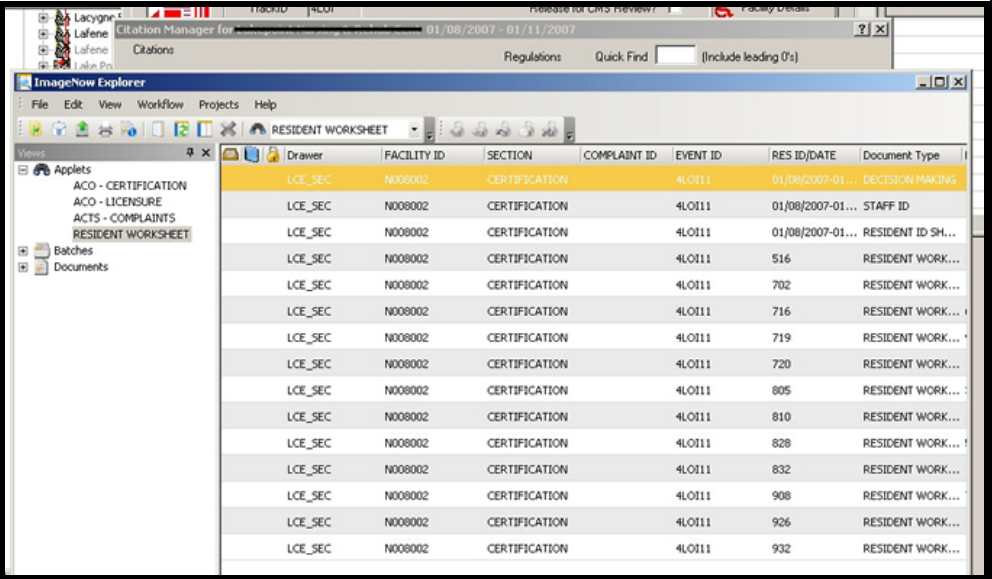
How to (continued)

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

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Viewing Documents – Through Aspen, Continued

How to (continued)

Step	Action	Result
5.	Click on OK	A grid of any linked documents appears in ImageNow Explorer.
 <p>The screenshot shows the ImageNow Explorer application window. The title bar reads 'ImageNow Explorer'. The menu bar includes 'File', 'Edit', 'View', 'Workflow', 'Projects', and 'Help'. The toolbar contains various icons for file operations. On the left, there is a 'Views' pane with a tree structure showing 'Applets' (ACO - CERTIFICATION, ACO - LICENSURE, ACTS - COMPLAINTS, RESIDENT WORKSHEET), 'Batches', and 'Documents'. The main area displays a table with the following columns: 'Drawer', 'FACILITY ID', 'SECTION', 'COMPLAINT ID', 'EVENT ID', 'RES ID/DATE', and 'Document Type'. The table contains 14 rows of data, with the first row highlighted in yellow. The first row's data is: LCE_SEC, N008002, CERTIFICATION, 4L0111, 01/08/2007-01..., DECISION MAKING. The other rows follow a similar pattern with varying 'RES ID/DATE' and 'Document Type' values.</p>		
6.	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
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:

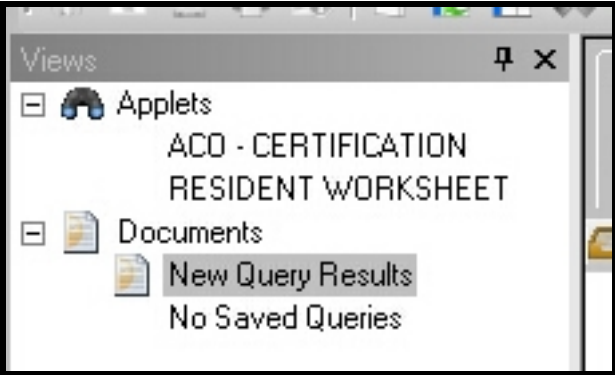
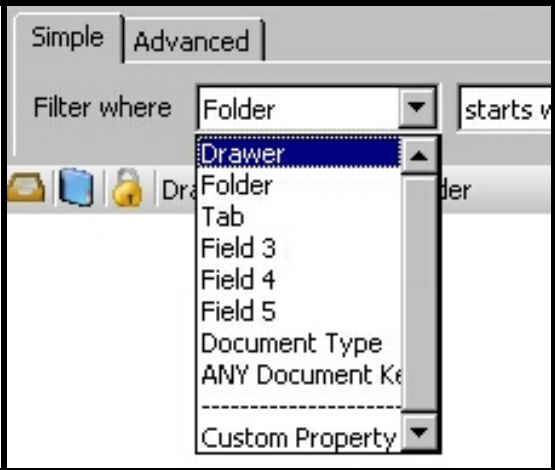
- is equal to
- is not equal to
- is greater than
- is less than
- is greater than or equal to
- is less than or equal to

Continued on next page

Simple Search, Continued

How to

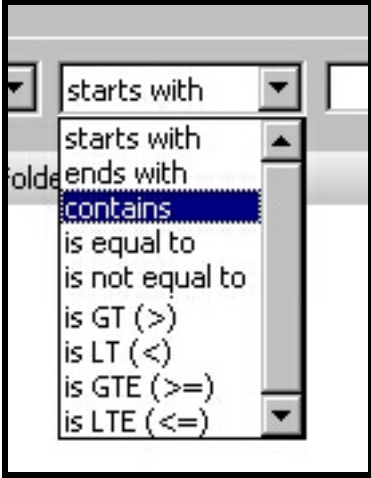

To create a simple search, follow the steps in the below table.

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.
		

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Simple Search, Continued

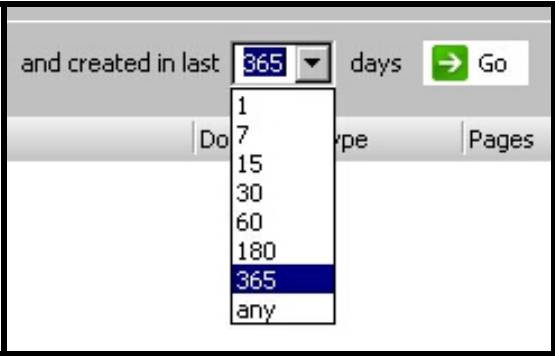
How to (continued)

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

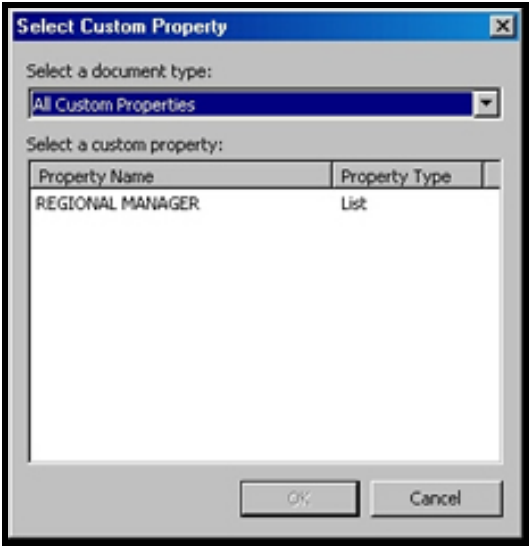

A custom property is a pre-defined system query. To use the custom property option, follow the steps in the below table.

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

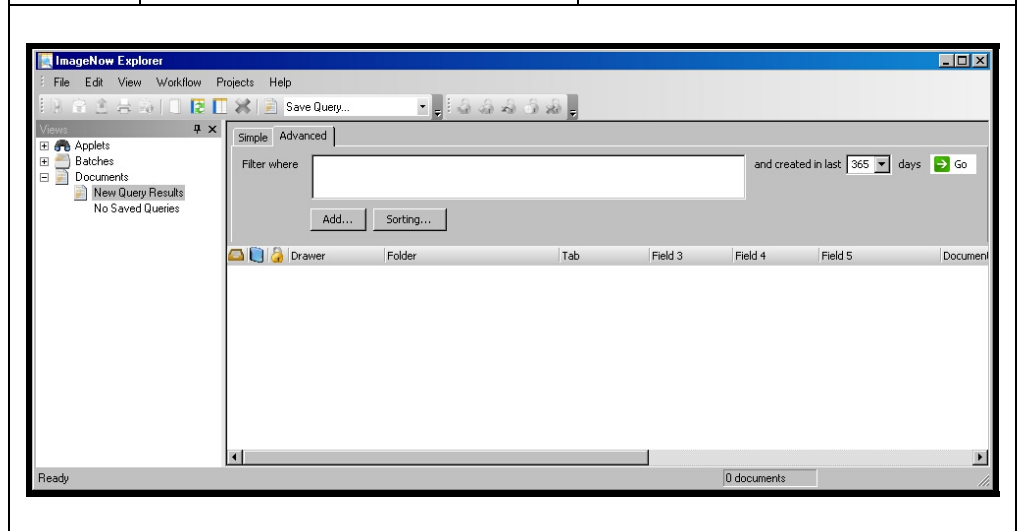
In an advanced search, a search can be done for documents that meet several different criteria with additional operators. In addition to searching for DocKey comparisons, in advanced search, can search for specific document properties, a specified user who created, modified, or was the last to view the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

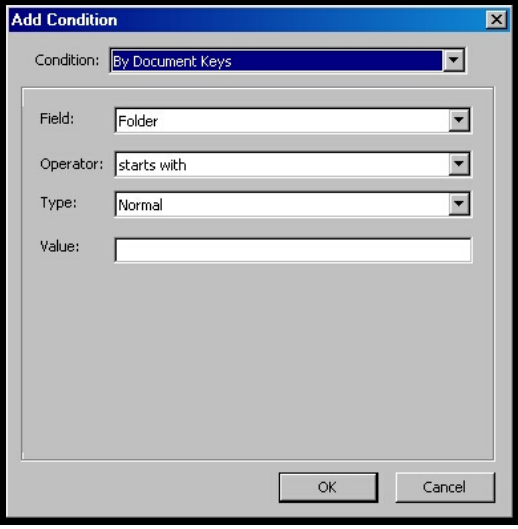
Step	Action	Result
1.	In the ImageNow Explorer , verify that the Views pane is displayed.	
2.	In the Views pane, select Documents .	



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		

Continued on next page

Advanced Search, Continued

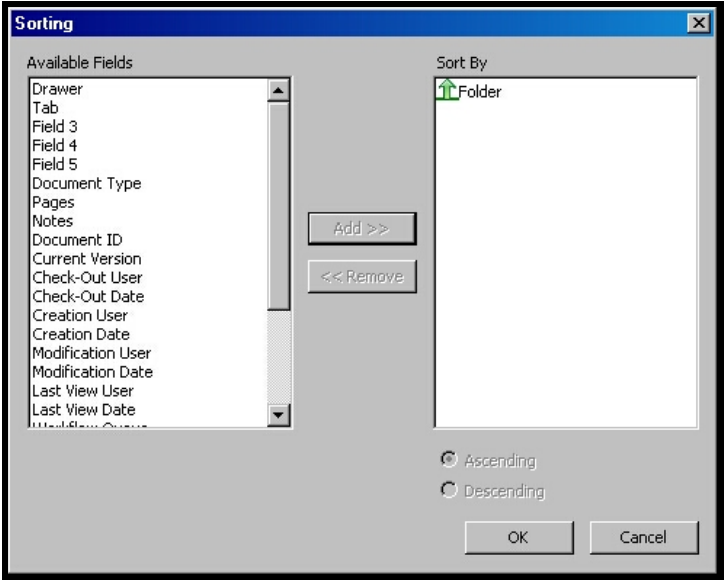
How to (continued)

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 be 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

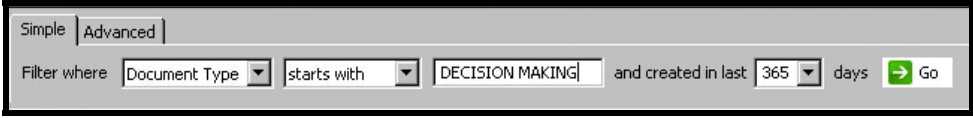
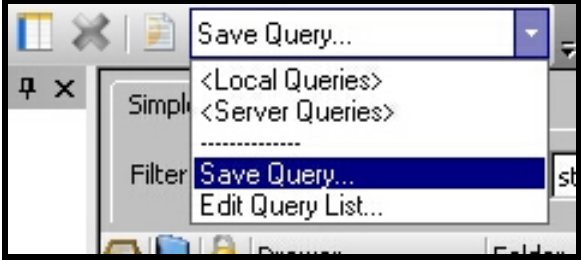
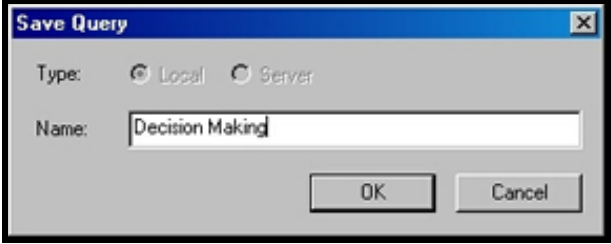
To create a sort on the advance search, follow the steps in the below table. This is optional.

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.
		

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

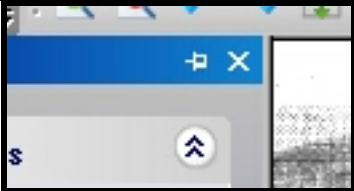

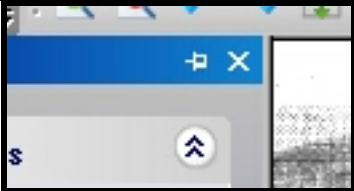

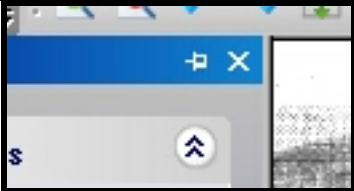

To run a previously saved search, follow the steps in the below table.

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.

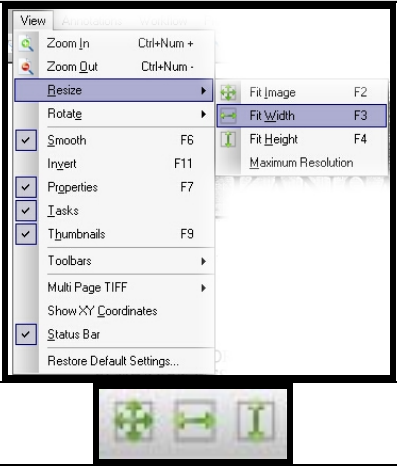
Step	Action	Result														
1.	In ImageNow Explorer , double-click any document.															
2.	In the ImageNow Viewer , arrange the panes(such as Tasks, Properties, Thumbnails) as follows:															
	<table border="1"> <thead> <tr> <th>Pane</th> <th>Action</th> </tr> </thead> <tbody> <tr> <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.															
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.															
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

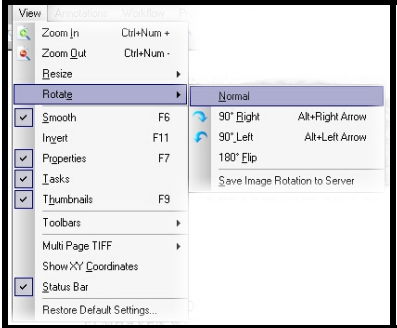

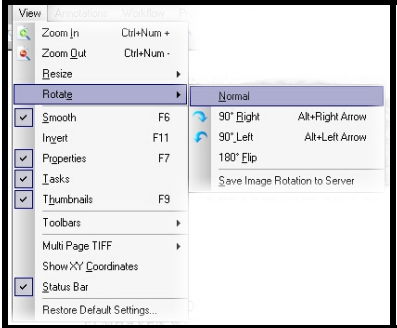

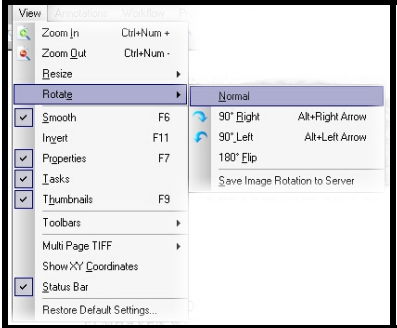

To resize a document in the view pane, follow the steps in the below table.

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" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="565 726 976 764" style="text-align: center;">Option</th> </tr> </thead> <tbody> <tr> <td data-bbox="565 764 976 1142"> <p>On the Menu bar. Select View then Resize</p> </td> </tr> <tr> <td data-bbox="565 1142 976 1226"> <p>Button on the Toolbar</p> </td> </tr> </tbody> </table>	Option	<p>On the Menu bar. Select View then Resize</p>	<p>Button on the Toolbar</p>	
Option					
<p>On the Menu bar. Select View then Resize</p>					
<p>Button on the Toolbar</p>					
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

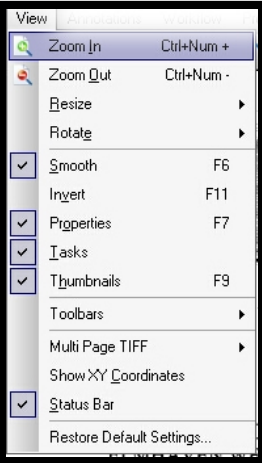

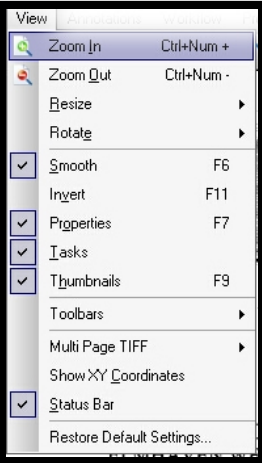

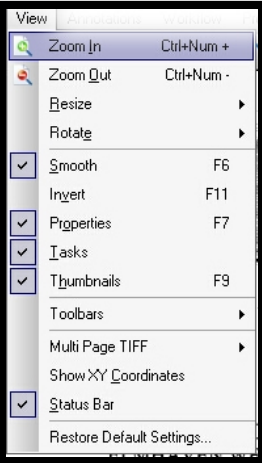

To rotate a document in the view pane, follow the steps in the below table.

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"> <thead> <tr> <th>Option</th> <th></th> </tr> </thead> <tbody> <tr> <td>On the Menu bar. Select View then Rotate</td> <td>  </td> </tr> <tr> <td>Button on the Toolbar</td> <td>  </td> </tr> </tbody> </table>	Option		On the Menu bar . Select View then Rotate		Button on the Toolbar		
Option								
On the Menu bar . Select View then Rotate								
Button on the Toolbar								
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 data-bbox="566 726 976 764" style="text-align: center;">Option</th> <th data-bbox="976 726 1385 764"></th> </tr> </thead> <tbody> <tr> <td data-bbox="566 764 976 1224"> <p>On the Menu bar. Select View then Resize</p> </td> <td data-bbox="976 764 1385 1224">  </td> </tr> <tr> <td data-bbox="566 1224 976 1310"> <p>Button on the Toolbar</p> </td> <td data-bbox="976 1224 1385 1310">  </td> </tr> </tbody> </table>			Option		<p>On the Menu bar. Select View then Resize</p>		<p>Button on the Toolbar</p>	
Option								
<p>On the Menu bar. Select View then Resize</p>								
<p>Button on the Toolbar</p>								
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.							