ImageNow QuickStart is designed to introduce and familiarize you with ImageNow's basic functions. Each function is outlined with a brief description and a basic walk-through.

**ImageNow ControlBar**
The ImageNow ControlBar provides single-mouse-click access to your frequently used features. Additionally, the drop-down buttons give you a quick path to those features and functions to which you have been granted security privileges by your administrator. The ControlBar may look differently for you depending on your security privileges.

Clicking on Applets, Batches, Documents, Projects, and Workflow will launch ImageNow Explorer.

**Applications** Displays documents such as a student record from the ImageNow system based on the last applet you used and the current record on display in the **Host Application**.

**Batches** Launches ImageNow Explorer in batch grid allowing you to quality assure and link batches of scanned files thus creating ImageNow documents.

**Documents** Is used to search for ImageNow documents.

**Projects** Provides an option for organizing similar documents and setting customized properties on those documents.

**Tasks** Displays work that is assigned to you.

**Workflow** Access and process workflow items in your workflow.

**Capture** Set up and manage scanners and capture profiles through this button. Clicking this button will launch the most recently run capture profile.

**Manage** Used by administrators to manage security and privileges across ImageNow.

**Help** Launches the online ImageNow help documentation.

The buttons available on the toolbar will depend on your security privileges.
The ImageNow Viewer is your primary interface with ImageNow. The Viewer is a comprehensive tool that controls all aspects of viewing ImageNow documents. It has eight modes for viewing and processing ImageNow objects, and each is designed for specific tasks. Each viewer mode has its own toolbar. Although the modes look similar, the toolbars and options will change with each different mode and your security privileges.

You are not required to select a specific mode. The correct Viewer mode will automatically open based upon the task you are performing.

Below is a list of the ImageNow Viewer modes and their functions.

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<tr>
<td>Viewer - Project Mode</td>
<td>Opening a project from the Project View.</td>
<td>Review and re-link documents. Annotation possible.</td>
</tr>
</tbody>
</table>

Source: Perceptive Software, Inc.
Launching ImageNow and Logging In

ImageNow can be launched in several ways. You can launch ImageNow:

- By double-clicking the ImageNow icon on the desktop;
- By clicking the ImageNow icon in the Windows System Tray;
- By selecting the ImageNow 6 icon from the Start menu;
- From the Windows Start menu go to Programs > ImageNow 6 > ImageNow 6.

As ImageNow is launched, the splash screen similar to the one below appears.

![ImageNow Splash Screen]

**Note:** The default ImageNow Client installation from the Imaging Team will have pre-configured your *Connection Profile*. If no Connection Profile is indicated then please contact your ImageNow specialist to have a connection profile configured for your workstation.

Follow these steps to log into ImageNow:

1. In the **Connection Profiles** expanded list, select the profile you want to use.
2. In the **Username** field, confirm or enter the user name.
3. In the **Password** field, enter your password.
4. Click **Connect** to initiate the connection to the ImageNow Server. The ImageNow Control Bar will display if you are successfully logged in to ImageNow. (The Control Bar may look differently for you.)

![ImageNow Control Bar]

**Note:** If you are unable to connect to the server, verify that you have correctly entered the Username and Password. If you continue to be unable to log in, please 1-HELP.
Capturing an Object

ImageNow uses various methods to capture different data types or objects. The term "object" is used in place of "image," because ImageNow is capable of handling many different file types, not just images.

Objects can be captured in both single and batch mode from either a scanner or a disk. As a result, there are four ways to capture objects with ImageNow:

- Batch scan from a scanner.
- Batch import from a disk.
- Single scan from a scanner.
- Single import from a disk.

The majority of scanning in ImageNow is done in Batch Mode. Batch Mode allows you to scan multiple pages at one time. Depending on the type of scanner you have, you will load a stack of paper documents into an Auto Document Feeder (ADF) for rapid scanning and processing. When you perform a scan in Batch Mode, ImageNow treats each page as an individual file (or document) that is stored together in a group called a “batch”. The batch will then be available to you for further processing and indexing/linking.

Follow these steps to scan a batch of documents:

1. Click on the down arrow next to the Capture icon from the ImageNow toolbar.
2. Properly load the documents into the scanner.
3. Left-click on the profile you wish to use. Documents will automatically begin scanning and a preview image will display on the Batch Scan in progress dialog box.
   
   *A check mark next to the capture profile indicates that the marked profile executes when the Capture button is clicked.*

4. Upon conclusion of the batch scan process, a dialog box will display. Click Yes to reload more documents and continue scanning, or click No to stop. If you select Yes, the documents you load into the scanner will be scanned into the current batch. If you select No, the batch is uploaded to the server.

Having the ability to import files stored on a disk, ImageNow supports a wide variety of file formats including .txt, .jpg, .gif, .bmp, etc. The procedure for batch importing is similar to that of batch scanning. The major difference is that the source of the files is a disk instead of a scanner.

**Note:** Your computer must be configured specifically to be used as a scanning workstation. In addition to having a scanner connected to your computer, there is special driver software that must be installed.
Processing a Batch: Open for Viewing

Whenever batches are imported or scanned, they enter the Batch View grid (except those batches that are sent directly to workflow queues—they do not display in Batch View). The Batch View grid is then used to open and view the batch pages for quality assurance and linking.

Follow these steps to open a batch:

1. Click on the Batch icon from the ImageNow ControlBar. This action opens ImageNow Explorer with the Batch grid displayed.
2. Double-click on the desired batch for processing, or select (highlight) it and Right-Click > Open from the pop-up menu.

The selected batch will display in ImageNow Viewer in QA mode.

Quality Assurance

Q/A simply means looking through each page in the batch and deciding which ones to keep, which ones to discard, and which ones to rescan. When a batch is chosen for Q/A, the first page of the batch appears in the ImageNow Viewer, and the Q/A process begins.

Linking

Linking is the process of assigning DocKeys to the pages of a batch. The DocKeys are what enable a page to be found with a search query. If the pages are not linked, they will not be indexed into the database structure and will not be found with a search query.

Once the pages are quality assured and linked, they are moved from the Batch View grid to the Document Search grid. Batch View closes once all of the batches are quality assured and linked.

Note: One or more batches must be previously scanned or imported to display in the Batch View grid.
Processing a Batch: QA

Quality assuring documents takes place in ImageNow Viewer QA Mode. ImageNow Viewer QA Mode has its own toolbar that appears in the bottom left corner of the ImageNow Viewer window. The same set of tools will also appear in a Task pane within the Viewer window. Depending on your security privileges, additional toolbars and icons may be available.

Using this toolbar, you will be able to quality assure each of the pages in the batch.

Follow these steps to Q/A a batch:

1. In ImageNow Explorer, select the document you want to QA and select File > Open, or click the Open icon 📂 (The batch must be eligible for Q/A.)

2. In ImageNow Viewer QA, look at the displayed page and determine whether it is acceptable or if it needs to be discarded. A page is acceptable when it meets most or all of the following standards:
   - The scanned or imported image resembles the original document.
   - The entire page is visible; no portion has been cut-off due to a scanner misfeed.
   - All critical elements of the document (e.g. signatures, account numbers, totals amounts, etc.) are readable.
   - The document is properly oriented and aligned.

3. Click one of the following options on the Q/A Toolbar:
   
   A. ✔️ Mark Page OK

   If the page satisfies the Q/A standards, click the Mark Page OK icon. The page has now completed the Q/A process. If the batch was a single page document, the Batch Q/A Completed dialog box will display. If you are linking a multi-page document, the next page of the document will display in the ImageNow Viewer window.

   Note: Though it is important to check each page in a batch, you can Q/A the batch without looking at all of the pages individually. Click on the Commit Batch icon to approve all of the pages in the batch as Q/A complete.

   B. 🗑️ Delete or 🔄 Rescan

   If the page does not meet the Q/A standards, you will need to discard or rescan the page (you do not need to discard a page before you rescan it). To discard the page, click the Discard icon; the page will be deleted from the system. To rescan the page, locate the original document and place it back into the scanner feed (if you imported the document, locate the original file). Click the Rescan icon.

4. Repeat steps 2 and 3 until the entire document is quality assured and the Batch Q/A Completed dialog box appears.
Processing a Batch: Linking

Linking documents takes place in ImageNow Viewer Link Mode. Link Mode has its own toolbar that appears in the bottom left corner of the Viewer window and similar tools in the Tasks pane.

Using this toolbar or the set of tools in the task pane you will be able to link documents to your host system.

Follow these steps to link a document:

1. In the Batch View grid, select (highlight) the document you want to link and select File > Open, or click the Open icon (the document must be eligible for linking).

2. Launch the host application and retrieve the correct host record information that will be used to match the image to be displayed in the ImageNow Viewer-Link window.

3. In the Applet Menu on the ImageNow toolbar, select the applet that matches your host system (the one that contains the record you want to link the document to).

4. Click the Link icon to create a link between the two systems (ImageNow and your host application). If the link is successful, the document keys will contain the updated information from the host application.

5. Click Save Batch Page. The next image to be linked will appear automatically.

Repeat steps 3, 4, and 5 until the entire batch is linked.
Searching for a Document: via Applet

You can search for documents using an Applet and the corresponding Host Application or using Search Queries.

Follow these steps to retrieve a document using an Applet:

1. Launch the host application and retrieve the correct host record information that will be used to match the image to be displayed in the ImageNow Viewer-Link window.
2. Click Applications on the ImageNow toolbar.
   If more than one Application Plan is available, then select from the drop down arrow, the Applet you wish to use to integrate with the Host application.
3. ImageNow Explorer launches and the documents corresponding to the record in the Host Application appear in the Documents grid. If there is only one corresponding document, it will open in an ImageNow Viewer window.

Repeat these steps to view documents for another record (person).
Searching for a Document: via Simple Query

Follow these steps to retrieve a document using a Search Query.

   This launches the ImageNow Explorer.
2. Under the Simple tab, next to “Filter where”, click the down arrow to select the document key on which to filter your search results.
   Your options are Drawer, Folder, Tab, and the various fields.
3. Click the Operator down arrow and make a selection (is equal to, GTE, etc.).
4. In the search field, type in the search criteria (or select one from the drop-down list).
5. Click Go.
6. Double click on a document to open it for viewing in ImageNow Viewer.
Viewing a Document

Documents can be viewed from within ImageNow Explorer via the following modes/ grids:

- Applications
- Batches
- Documents
- Projects
- Workflow

To view a document listed in any of these ImageNow Viewer modes, select or highlight the document and then perform one of the following actions:

1. Double click on the highlighted document.
2. Click the Open icon .
3. Select File > Open.

Opening a document from a View mode will enable the processing in that mode for which you have been given security privileges. For example, opening a document from the Workflow grid will enable you to process that document as a workflow item if you have the necessary security privileges.
Processing a Workflow Item: Opening the Item

ImageNow Workflow allows administrators to create a workflow plan comprised of start and work queues. These queues are connected with either automatic or manual links that simulate the path a document follows as it moves through a business.

Follow these steps to select a Workflow queue and then open an item within it.

Here are two quick methods for opening a Workflow queue.

1. From the ImageNow ControlBar, click the down arrow next to the Workflow button.
2. Select a Workflow queue to open.

   ImageNow Explorer opens and the documents contained in the selected queue are listed in the Workflow grid.
3. Double click on an item to open it for viewing and processing.

Alternatively, you can:

1. From the ImageNow Explorer Views pane, click the “+” next to Workflow to view the expanded list of workflows.
2. Click the “+” next to a workflow to view the expanded list of queues in that workflow.
3. Click on a Workflow queue to list the documents contained within that queue.
4. Double click on a item to open it for viewing and processing.
Follow these steps to route a workflow item:

1. Open an item in ImageNow Viewer Workflow mode (see page 15).
2. Validate the document keys against the appropriate record from the Host application. Relink or make any changes as necessary.
3. Additionally, make any necessary annotations.
4. Click Save if any changes were made to the document.
5. Click Route Forward.
6. A window appears with the queue choices, if any. Select the appropriate destination queue and then Route.
7. Repeat these steps until all items are linked and the queue is empty.
8. The ImageNow Explorer window remains opened.
Processing a Workflow Item: Relinking

Typically, linking a document occurs in the **Batch View** grid. Once a document has been linked in the Batch View grid, it is sent to the **Search** grid, where it can then be sent to **Workflow**. However, if you want to change or add document keys (**DocKeys**), it is possible to do this within Workflow. In **Workflow Mode**, the **Relink** icon is used to re-link an item to a different host application record.

Follow these steps to link a document in **Workflow**:

1. Launch the host application and retrieve the correct host record information that will be used to match the image to be displayed in the ImageNow Viewer-Link window.
2. Open an item in ImageNow Viewer Workflow mode (see page 11).
3. In the Workflow window, click the **Properties** tab to display the Applet sidebar (if it’s not already visible).
4. Click the **Select an application plan** tab to display the Applet sidebar (if it’s not already visible).
5. Verify that the data in the **Host** application matches the information in the image then click **Relink**.
6. **Route Forward** or **Save** the document.

**Note:** The **Relink** icon will only be accessible if the queue and DocKeys have been enabled for relinking.
Disconnecting from the Server

To disconnect from the ImageNow Server, from the ImageNow toolbar, select **Connect > Disconnect**.

The ControlBar disappears. After a brief moment, the ImageNow splash screen appears allowing you to log back in.

Closing the ImageNow Client will also disconnect your session. To close the current session and exit ImageNow, select **Connect > Exit** from the toolbar or click the **Close** button.

**Note:** It is not necessary to disconnect from the server prior to exiting ImageNow.