

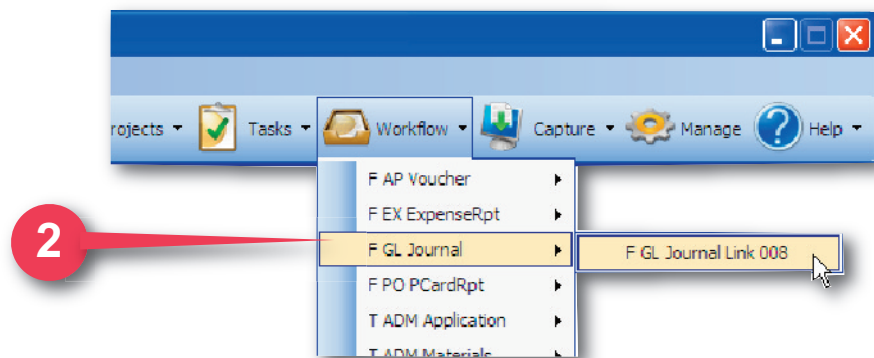
Processing a Workflow Item: Opening the Item

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.

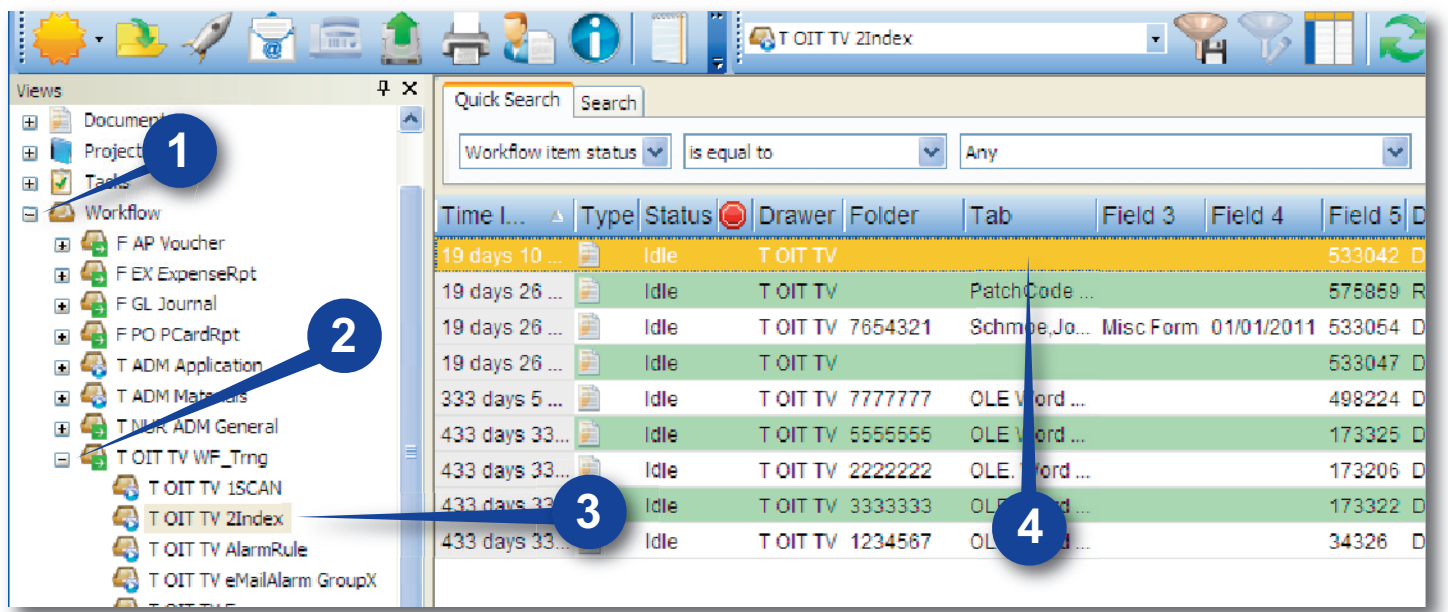
Here are two quick methods for opening a Workflow queue.

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.



Processing a Workflow Item: Routing

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.

The screenshot displays the ImageNow Viewer Workflow interface. The top window, labeled 'Host Application', shows the University of Minnesota HEPCOM system with a search for 'Ashley McDaniel' (ID: 3374156). Below this, the 'Leave Response/Notification' form is visible, containing fields for Employee Name (Ashley M. McDaniel), Signature of Supervisor or Responsible Administrator (Barb Jones), and Notification/Timing of Leave. The 'Workflow Tasks' panel on the left lists actions such as 'View next item', 'Route forward', 'Recall workflow item', 'Mark item as on hold', 'Mark item as pending', 'View workflow history', 'View recently routed items', 'E-mail this document', 'Save a copy of this document', 'Print this document', 'Send this document to an ImageNow user', 'Copy this document', 'Edit this document's properties', 'Launch associated application', and 'Delete this page'. Red callouts highlight specific actions: 2 points to the 'Relink' button, 4 points to the 'Save' button, and 5 points to the 'Route Forward' button.

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 (**DockKeys**), it is possible to do this within Workflow. In Workflow Mode, the **Relink** icon is used to relink 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:** down arrow and then select the appropriate application plan.
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 DockKeys have been enabled for relinking.

The screenshot displays the ImageNow Workflow application interface. A red circle with the number '1' points to the 'Host Application' dropdown menu in the top right corner. A red circle with the number '4' points to the 'Application Plan' dropdown menu in the right sidebar. A red circle with the number '5' points to the 'Relink' icon in the bottom toolbar. The main window shows a document titled 'SAMPLE SCAN. OK TO DELETE.' with a 'Document Keys' sidebar on the right. The 'Document Keys' sidebar includes fields for 'Drawer', 'StudentID', 'Name', 'Date of Birth', 'Academic Program', 'BatchID', and 'Document Type'. The 'Host Application' dropdown is currently set to 'University of Minnesota'. The 'Application Plan' dropdown is set to 'T NUR ADM StuFiles Manual'. The 'Document Keys' sidebar is currently empty. The 'Relink' icon is located in the bottom toolbar, between the 'Route Forward' and 'Route Back' icons.