University of Minnesota
WebNow 6 QuickStart Guide
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Launching WebNow

The log-in credentials for WebNow are the same as the ones used for ImageNow. Your department’s ImageNow administrative contact may submit a request to OIT Data Security for you if you do not already have them. Page 13 contains the contact information for OIT Data Security.

Follow these steps to log in to WebNow:

1. Open an internet browser and type in the WebNow URL: https://imagenow.umn.edu/webnow.
2. Enter your ImageNow user ID in the User Name field.
3. Enter your password in the Password field.
4. Click Connect to initiate the connection.

NOTE: Visit www.umn.edu/docimage/webnow.html for additional information about the usage of WebNow at the University.
Navigating in WebNow

WebNow Explorer opens in Documents view set to Simple search mode. If you have only workflow privileges, WebNow Explorer will open in Workflow view. You can perform your document searches directly here or navigate to Projects or Workflow view for more options. Navigating from one view to another is done by using the Views pane (on the left hand side) or the WebNow Explorer toolbar (at the top).

Follow these steps to Navigate using the Views pane:

1. Click on a view (Documents, Projects, Workflow) to set the grid to that view. Note that text is not hyperlinked nor does the mouse cursor change to indicate that the text is selectable.

2. Click on the plus sign + next to the name of the view to expand the list and continue doing so until you have expanded the list tree to display the view that you wish to open in the grid.
3. Click on the name of the view you want displayed in the grid.

NOTE: Once a view is chosen from the Views pane, you can navigate directly to its contents, using the view grid toolbar whether these contents are search queries or query views, project names, or workflow queues.
Navigating in WebNow

Resizing Column Width

In WebNow, you are not restricted to a specific window size, column width, or pane width. The view panes and column widths in the viewer grids are resizable. Mousing over the edge of the pane or column lines and dragging—while holding down the left button of the mouse—will allow you to change the width.

Customizing WebNow Viewer

WebNow Viewer panes can be toggled on and off. This is a useful feature for smaller monitors. Additionally, WebNow Viewer pane content can be minimized or expanded to allow full viewing the panes’ tools and features.

Follow these steps to customize the WebNow Viewer:

1. Click on View in the WebNow toolbar.
2. Click on a view pane to toggle it on or off. (Properties, Task, Thumbnails)
3. Click on the expand or minimize button to hide or display the pane content.

Refer to the WebNow online, help documentation for additional information.
Searching for Documents

Depending on your security privileges, WebNow Explorer will open in Documents Simple Search view. From here you can perform a search based on a single criterion (Simple Search) or a search based on one or more criteria (Advanced Search). If your security privileges permit it, you can also save your search query or use queries composed specifically for your department.

Follow these steps to perform a Simple Search:

1. Click on “Documents” in the Views pane or the Documents button in the WebNow Explorer toolbar if WebNow Explorer is not already opened in Documents View.

2. Under the Simple tab, next to “Filter where,” click the down arrow to select the document key on which to filter your results. Your filter options will be “Drawer, Folder, Tab, Field 3, Field 4, Field 5, Document Type” or the labels used by the Applet or LearnMode you have set as your default.

3. Select the condition under which to perform the search. Click the down arrow next to “Starts with” and select from the list.
4. In the third field select or enter your search criterion.

5. Click on the down arrow next to the number of days you wish to further filter your search result.

6. Click the Go button to initiate the search. The results of your search will be displayed in the Documents grid.
By default, the view grid is set to display 500 documents although the maximum number of documents that can be displayed in any view grid is 2,000. Sometimes it is more useful to restrict the number of search results by specific document keys. For those instances, the Advanced Search is used to set the conditions in which to perform the query. In the example below, the search will be set up to find documents based on a person’s name and the applicable date of the document.

Follow these steps to perform an Advanced Search:

1. Click on the Advanced tab.
2. Click on the Add button to add the first search criterion. A dialogue box opens.
3. In the Add Condition dialogue box click the down arrow next to “Field:” and choose a field by which to search.
4. Set Operator to “starts with.” This will allow you to search by just the first few letters of the person’s name.
5. Set Type to “Prompted”.
6. In the Message type in the text you would like to display when the query is run.
7. Click OK.
8. Click ADD to add another condition to the search.
9. Set the condition parameters to:
   a. **Field** = “Date”
   b. **Operator** = “is GT (>)”
   c. **Type** = “Prompted”
   d. **Message** = “Enter the date YYYY-MM-DD.”

10. Click **OK** to add this condition to the search. Your...

11. Set the time period to period to **Any**.

   ![Time period setting](image)

12. Click **Go** to initiate the search. The following user prompt is displayed.

   ![User prompt](image)
13. Fill in the prompted search fields and click **OK**.

14. The search results, if any, will be displayed in the **View** grid.

15. Double-click on an item to open it in WebNow Viewer.
Saving User Queries
You may find it useful to save searches that will be conducted routinely. If you have the security privilege to do so, you may save the searches that you create. Once saved, these searches can be initiated by simply clicking on them in the Views pane or by selecting them from the drop-down list of User Queries.

Follow these steps to save your newly defined searches (User Queries):

1. Click on the down arrow from the <User Queries> located in the WebNow Document Search toolbar.
2. Choose Save Query... from the list.
3. The Save Query prompt box, enter a name for the query and click OK to save it.

The newly created User Query is now displayed in the Views pane and is also available from the drop-down list of user queries.
Although workflow processing in WebNow allows for indexing, it is recommended that indexing be done using the ImageNow client application. WebNow is unable to take advantage of the LearnMode/Applet created for your ImageNow implementation. As an example, predefined lists such as your department document types are not available as drop-down lists in WebNow. Nevertheless, WebNow remains a powerful, platform-independent tool for viewing, routing, marking, and processing your ImageNow documents.

Follow these steps to process a Workflow item in WebNow:

1. Click on the down arrow next to the Workflow button in the WebNow Explorer toolbar and select a queue OR use the navigation tree in the Views pane to open the workflow queue.

2. Right-click on the document to process and choose Open from the pop-up options.
3. In WebNow Viewer – Workflow mode, make any necessary changes or annotations to the document.
4. Route the document using the Workflow tools in the Workflow task pane or in the toolbar at the bottom of the window.
UMN OIT-EAD Imaging Contact Information

On the web: [www.umn.edu/docimage](http://www.umn.edu/docimage)

ImageNow Service Center Support

For General Use

The [EAD-Imaging@lists.umn.edu](mailto:EAD-Imaging@lists.umn.edu) will send your email to the entire EAD Imaging Team-- Dan, Shawn, Jim, Agnes, Brandon and Toufong.

Who to Contact:

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<thead>
<tr>
<th>Item</th>
<th>Contact Name</th>
<th>Contact Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winsock (0) error when attempting to log into ImageNow (ImageNow is down)</td>
<td>Contact the Technology Helpline</td>
<td>612-301-4357 (1-HELP) <a href="mailto:help@umn.edu">help@umn.edu</a></td>
</tr>
<tr>
<td></td>
<td>Dan Wagner - EAD</td>
<td><a href="mailto:Wag025@umn.edu">Wag025@umn.edu</a> Office: (612)-624-2052 Pager: (612)-640-3146</td>
</tr>
<tr>
<td></td>
<td>Shawn Isenhart - EAD</td>
<td><a href="mailto:isen0011@umn.edu">isen0011@umn.edu</a> Office: (612) 624-7739</td>
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<td></td>
<td>James Nolan - EAD</td>
<td><a href="mailto:jbnolan@umn.edu">jbnolan@umn.edu</a> Office: (612) 624-6098</td>
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<td></td>
<td>Agnes Lumenta - EAD</td>
<td><a href="mailto:lumen002@umn.edu">lumen002@umn.edu</a> Office: (612) 624-4238</td>
</tr>
<tr>
<td></td>
<td>Brandon McHugh - EAD</td>
<td><a href="mailto:bmchugh@umn.edu">bmchugh@umn.edu</a> Office: (612) 626-0033</td>
</tr>
<tr>
<td></td>
<td>Toufong Vang - EAD</td>
<td><a href="mailto:vangx005@umn.edu">vangx005@umn.edu</a> Office: (612) 624-0391</td>
</tr>
<tr>
<td>I want to learn about how I can get ImageNow in my department. General info about product for customers not currently using it.</td>
<td>Dan Wagner - EAD</td>
<td><a href="mailto:Wagne025@umn.edu">Wagne025@umn.edu</a> Office: 612-624-2052</td>
</tr>
<tr>
<td>Security questions, requests to add users, design and privilege changes. For large groups, there is a spreadsheet.</td>
<td>OIT Data Security</td>
<td><a href="mailto:x-secur@umn.edu">x-secur@umn.edu</a></td>
</tr>
<tr>
<td>I was just in ImageNow, got an error that shut it down, now I can't log in again.</td>
<td>Contact the Technology Helpline</td>
<td>612-301-4357 (1-HELP) <a href="mailto:help@umn.edu">help@umn.edu</a></td>
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