

GETTING TO KNOW IMAGENOW POWERVIEW QUICK START GUIDE

by Perceptive Software, Inc.


Table of Contents

Log in and start the ImageNow client	1
ControlBar toolbar	2
View a document.....	2
Search grid.....	4
Search grid toolbar	4
Open a document.....	5
PowerView	5
PowerView View Mode.....	7
File toolbar.....	8
View toolbar.....	8
Annotation toolbar	9
Page toolbar	9
Pager window	9
DocKeys window	10
Keywords window.....	11
PowerView title bar.....	11
PowerView status bar.....	11
Automatically tile open documents	13
View document properties	14

ImageNow 5.4 Viewer Quick Start Guide

This document contains information on how to view and search for linked documents within ImageNow. The various viewer toolbars available to you within ImageNow are also explained.

Log in and start the ImageNow client

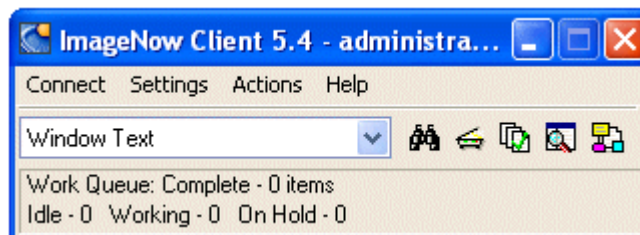
ImageNow can be started in several ways. You can start ImageNow by double-clicking the ImageNow icon on the desktop, or by clicking **Start**, pointing to **Programs**, and then clicking **ImageNow**; you can also start ImageNow by clicking the **Tray** icon .

As you start ImageNow, you will see the following splash screen:



Important If the **Profile** list box is blank, then a Login Profile has not been configured. Please contact your system administrator to configure the following profile fields: **Server ID**, **Protocol**, **Port Number**, and **User ID**.

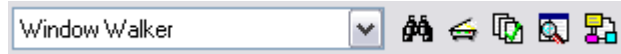
1. In the **Profile** list box, select the profile you want to use.
2. In the **User ID** box, confirm or enter the user name.
3. In the **Password** box, enter your password.
4. Click **Connect** to initiate the connection to the ImageNow Server. The ImageNow ControlBar will display if you are successfully logged into ImageNow:



Note If you are unable to connect to the server, verify that you entered the user ID and password correctly.

ControlBar toolbar

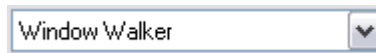
The ControlBar toolbar contains several icons that enable you to perform many essential ImageNow Actions. The icons correspond to the options in the **Actions** menu.



The following options are available:

Icon	Option	Description
	View	Performs Enabled View based on selected applet.
	Capture	Initiates capture process.
	Batch	Opens Batch View grid.
	Search	Opens Document Search grid.
	Workflow	Opens Workflow grid.

Note Some of the options may appear grayed out. If an option is grayed out, you do not have access to that option. Workflow options may appear grayed out if workflow has not been configured on the system or you do not have workflow permissions assigned.



Applet menu

When using Enabled View within ImageNow, you must be aware of the currently selected applet. The Applet menu on the ControlBar shows the currently selected applet.

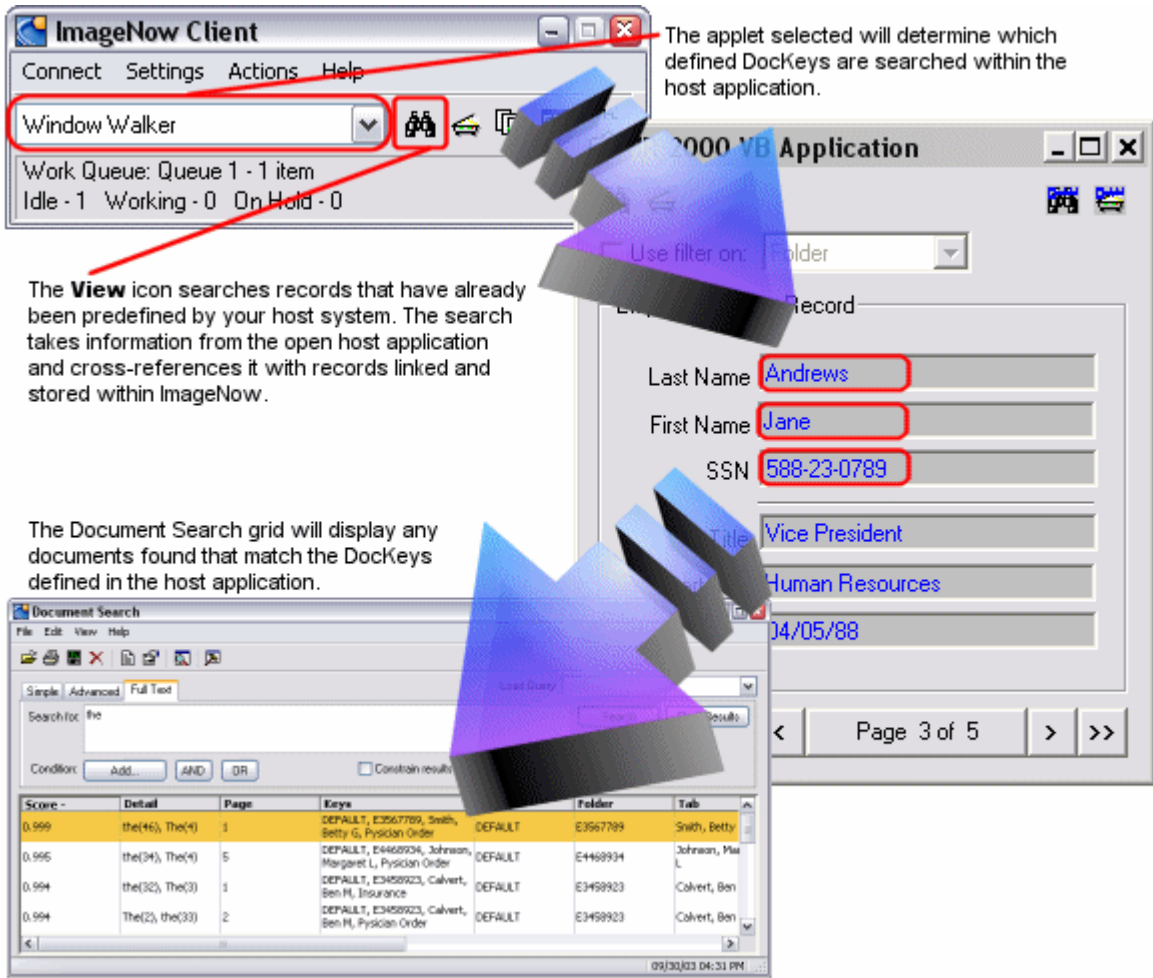
An applet is a container that holds all of the information that ImageNow needs to communicate with and gather data from your host application. In most cases, a single applet is used to communicate with the host application. If you have integrated ImageNow with more than one host application, you may see multiple applets in the Applet menu.

View a document

ImageNow enables you to quickly search for and view linked documents. Every object or image that is stored within ImageNow is linked with individual data index keys, or DocKeys. These DocKeys make document retrieval fast, efficient, and accurate. You can view a document using the **View** icon located on the ImageNow ControlBar.

Using the View Icon

The **View** icon initiates a search of records that have already been view-enabled (linked) by your host system. The search takes information from the open host application and cross-references it with records linked and stored within ImageNow. The Document Search grid will display any documents found that match the DocKeys defined in the host application.



Follow these steps to search for a document with the **View** icon:


Important ImageNow can only view records in your application that have been previously linked, or predefined, during set-up. In addition, your host application must have been previously 'learned' for ImageNow to gather data from it.

1. While logged into ImageNow, open your host application.

Note The host application must be open for the **View** icon  to search correctly (unless manual entry is used in the applet).


2. Open a record within the host application that has been View Enabled.
3. Select the appropriate applet from the ControlBar Applet menu.

Note The applet selected will determine which defined DocKeys are searched within the host application.

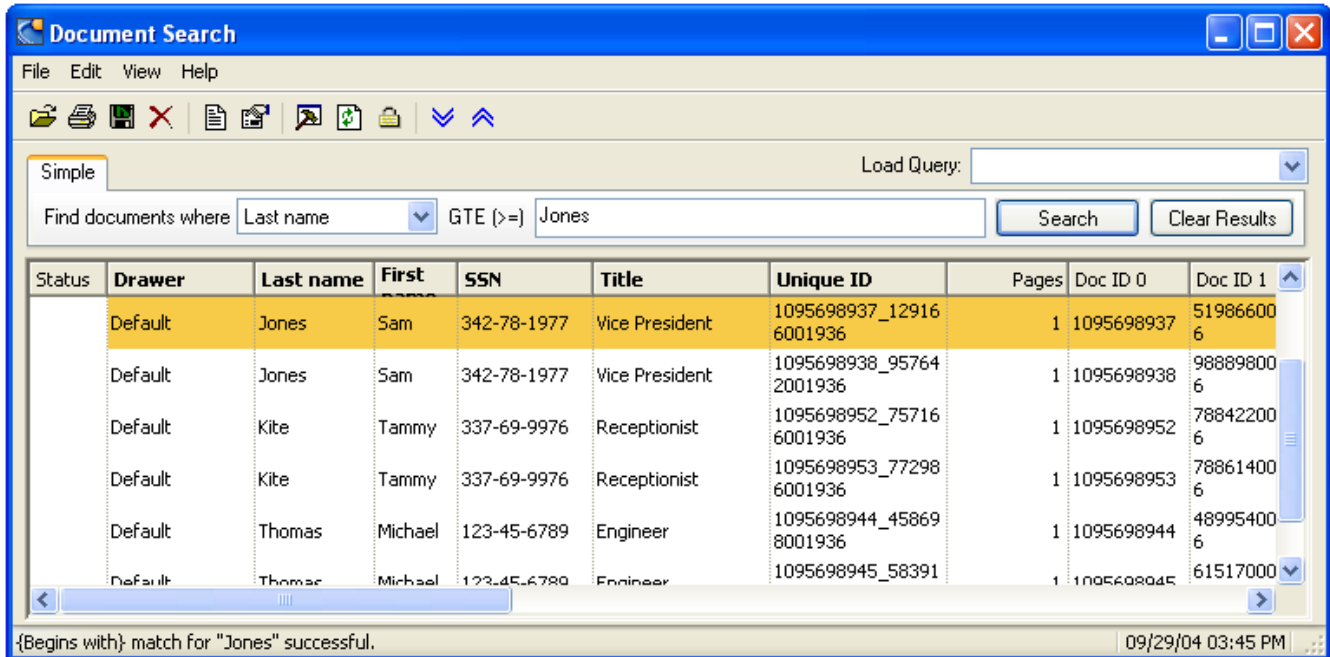
4. Click the **View** icon  on the ControlBar. ImageNow gathers data from the host application record and passes it to the ImageNow Server. The server then looks for matches in the gathered data. If a single match is found, a copy of the document is opened and displayed in PowerView View Mode (skip step 6, you are finished).
5. If multiple matching documents are found (i.e., different document types for the same record), the matches will be displayed in a list in the Document Search grid. Double-click the selected (highlighted) document that you want to view. A copy of the document is opened and displayed inside PowerView View Mode.

Note You do not need to save the document; when you are finished viewing it, simply close PowerView (the document will not be deleted or misplaced).

Search grid

The Search grid is accessed by clicking the **Search Grid** icon  from the ControlBar.

The Search grid enables you to quickly search for and locate stored documents. Each object or image that is stored in ImageNow has individual data index keys, or DocKeys. These DocKeys make document retrieval fast, efficient, and accurate.



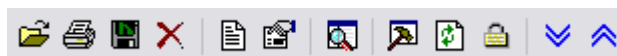
The Search grid shows documents with their DocKeys and additional index fields. Some of the fields are indexed and some are non-indexed. Indexed fields display in the Search grid with bold column headers. Indexed fields can be searched and sorted; non-indexed fields cannot.

Indexed Fields	Non-Indexed Fields
Drawer	Document Status
Folder*	Pages
Tab*	Doc ID 0 & Doc ID 1
Field 3*	Scan User
Field 4*	Modification User
Field 5*	Last View User & Date
Scan Date – Creation date and time	Keywords
Modification Date	Workflow Queue & State & User
* Label may display differently in Search grid	Workflow Item ID




Once you have located a document in the Search grid, you can view it by double-clicking it; the document will open in PowerView Search Mode.










Search grid toolbar

The Search grid toolbar enables you to find, annotate, and manage documents.




The following options are available:

Icon	Option	Description
	File Open	Opens the selected document.
	Print	Opens the Print dialog box. This enables you to print a screen capture of the Search grid dialog box.
	Export	Opens the Export dialog box. This enables you to export the selected document to a remote location.

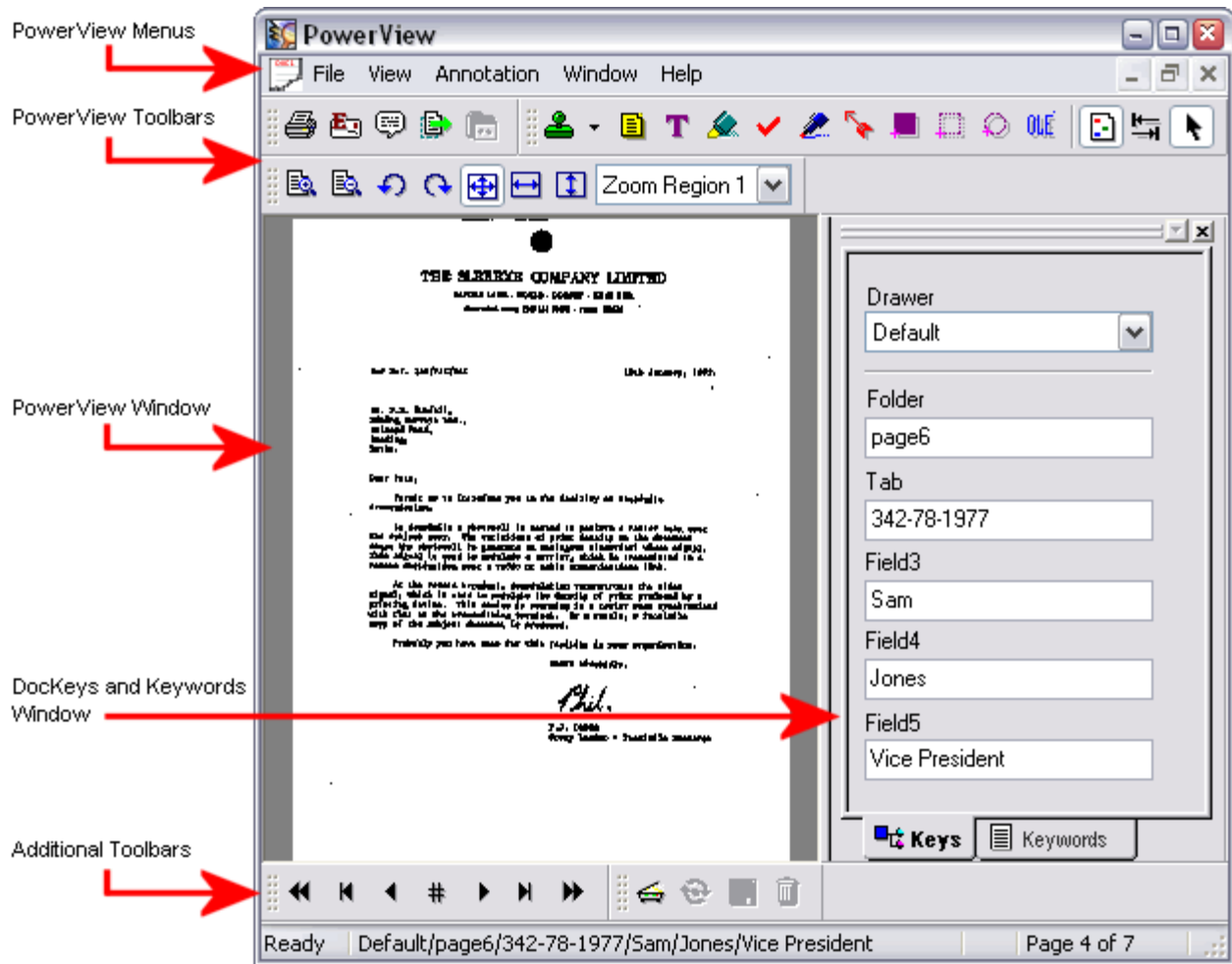
	Delete	Deletes the selected document.
	Notes	Opens the Document Keywords window. This enables you to enter notes about the selected document.
	Properties	Opens a detailed listing of information about the selected document.
	Find	Opens the Quick Search dialog box. This enables you to quickly search individual columns.
(C-Tree Simple Search only)		
	Table Control	Opens the Table Control dialog box. This enables you to customize the Search grid.
	Refresh	Re-displays document list including additions, changes, or deletions made since the last time the Search grid was opened.
	Toggle Lock	Toggles locking of Search grid data for local sorts and searches.
	Page Down	Loads the next set of documents to the on-screen view.
	Page Up	Loads the next set of documents to the on-screen view.

Open a document

- In the grid, select (highlight) the document you want to open.
- Open the document by doing one of the following:
 - Double-click on the document.
 - Press **Enter**.
 - From the ControlBar menu bar, select **File, Open**.
 - From the Grid toolbar, select the **Open** icon .
- The selected document will display in ImageNow PowerView.

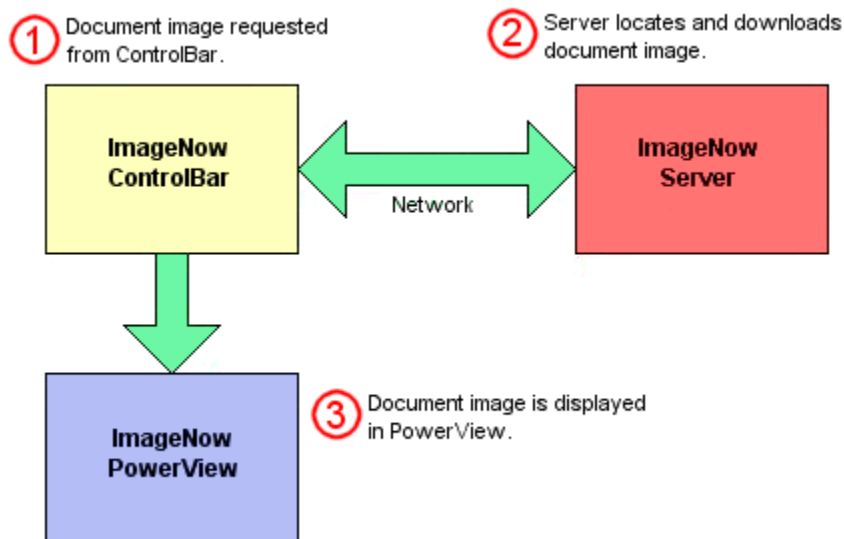
PowerView

When you open a document in ImageNow, the document is launched in PowerView, ImageNow's tool for viewing images. PowerView is the primary user interface within ImageNow; it is where most of the document processing will take place. PowerView has several toolbars, modes, and components that display during the various stages of document processing.




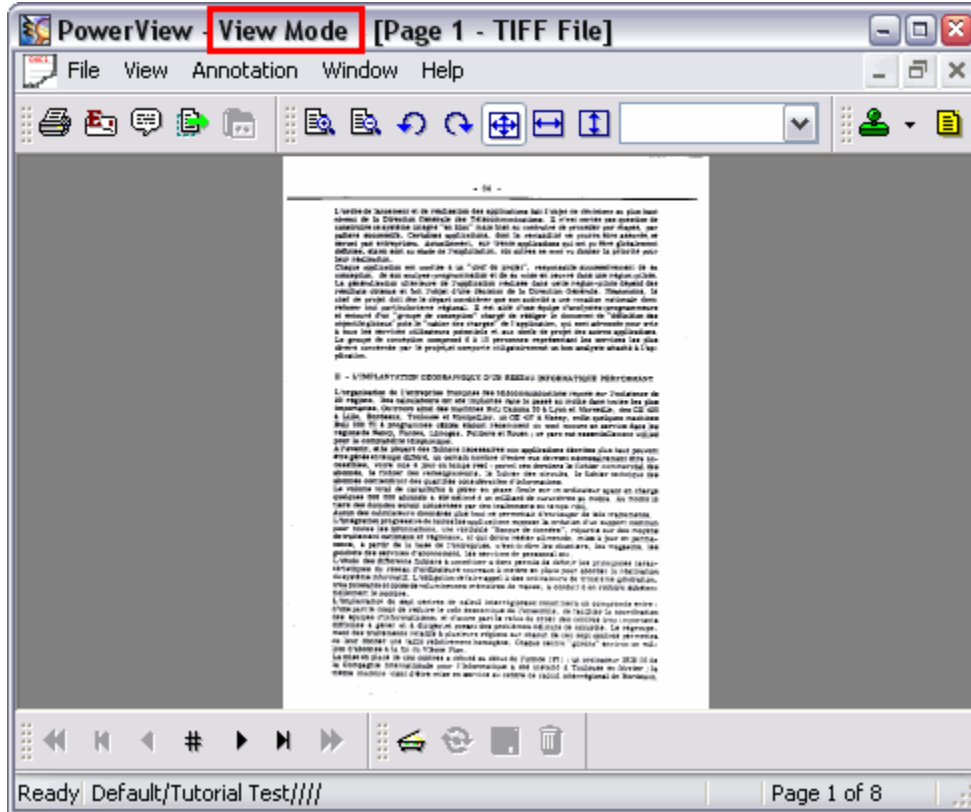
How does PowerView work?

As each document image is scanned or imported, it is uploaded to the ImageNow Server. You can then use the ImageNow ControlBar to locate and retrieve documents for processing. Once a document is requested from the ImageNow ControlBar, the document is downloaded via the network and displayed within ImageNow PowerView.



PowerView View Mode

Click the **View** icon  to display a document in PowerView View Mode. In addition to viewing documents in View Mode, you can also annotate documents.



View Mode components

There are no special properties or toolbars that display inside View Mode. By default, the following toolbars are displayed:

- File toolbar
- View toolbar
- Annotation toolbar
- Page toolbar
- Scan toolbar


The following PowerView components can also be used:

- Pager Window
- DocKeys Window
- Keywords Window

Opening PowerView View Mode

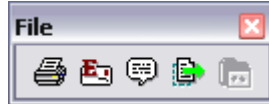
Important ImageNow can only view data from records in your application that have been previously linked, or pre-defined, during set-up. Contact your system administrator for clarification on which application records are available for viewing.

1. While logged into ImageNow, open your host application.
2. Open a record within the host application that has been View Enabled.






3. Select the appropriate applet from the ControlBar Applet menu.
4. Click the **View** icon  on the ControlBar. ImageNow gathers data from the host application record and passes it to the ImageNow Server. The ImageNow Server then looks for matches in the gathered data. If a match is found, a copy of the document is opened and displayed in PowerView View Mode.
5. If multiple matching documents are found (different document types for the same record), the matches will be displayed in a list in the Document Search grid. Double-click the selected (highlighted) document that you want to view. The document will open and display inside PowerView View Mode.

File toolbar

The PowerView File toolbar contains icons that enable you to perform several application-level controls. These icons coincide with several of the options contained in the PowerView **File** menu.



The following options are available:









Icon	Option	Description
	Print	Prints the selected document.
	Email	Attaches copy of the selected document in an email message (requires appropriate email configuration).
	Image Info	Opens properties dialog box on the selected document.
	Save As	Exports the selected document to be saved under a different name.
	Launch Associated Application	Launches associated application of selected document, such as Word, Excel, and Access (if the programs are installed).

View toolbar

The PowerView View toolbar contains several icons that enable you to alter the way the document is displayed in PowerView. The icons coincide with several of the options contained in the View menu.



The following options are available:

Icon	Option	Description
	Zoom In	Increases the magnification of the selected page by 2x.
	Zoom Out	Decreases the magnification of the selected page by 1/2x.
	Rotate Left	Rotates the selected page counterclockwise 90°.
	Rotate Right	Rotates the selected page clockwise 90°.
	Fit Window	Resizes the selected page to fit in the window.
	Fit Width	Resizes the selected page to fit the entire width in the window.
	Fit Height	Resizes the selected page to fit the entire height in the window.
	Zoom Regions	Selects zoom regions, or saves new zoom regions.

Annotation toolbar

The PowerView Annotation toolbar contains several tools that enable you to annotate document images.



Note Presently, only TIFF (.tif), Bitmap (.bmp), and JPEG (.jpg) document images support annotations.

The following options are available:

Icon	Option	Description
	Stamp	Stamps various messages (Approved, Confidential, etc.) on the document image. Can be used to create customized stamps.
	Sticky Note	Places a "note" (text box) on the document image to which comments can be added.
	Text	Enters text on the document image.
	Highlight	Highlights selected areas of the document image.
	Check	Places a checkmark on the document image.
	Redline	Draws a line on the document image.
	Arrow	Draws an arrow on the document image.
	Solid Mask	Blocks out selected areas of the document image.
	Hollow Mask	Highlights selected areas of the document image with a rectangular outline.
	Hollow Circle Mask	Highlights selected areas of the document image with a circular outline.
	OLE Item	Embeds sounds, pictures, or any other object supported by your system into the document image.
	Toggle Show Annotations	Shows or hides annotations made on the document image.
	Move/Resize	Moves or resizes annotations placed on the document image.
	Annotation Off	De-selects the currently selected annotation.

Page toolbar

The PowerView Page toolbar enables you to navigate through pages and documents.

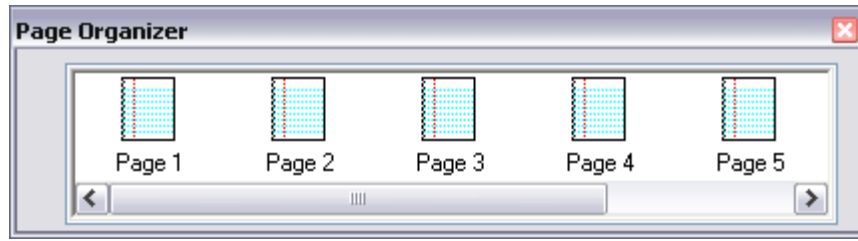



The following options are available:

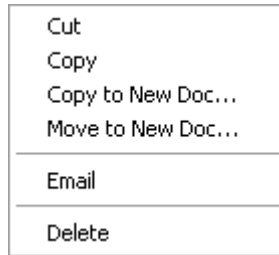
Icon	Option	Description
	Previous Document	Opens previous document.
	First Page	Opens first page of document.
	Previous Page	Opens previous page of document.
	GoTo Page	Opens a specified page.
	Next Page	Opens next page of document.
	Last Page	Opens last page of document.
	Next Document	Opens next document.

Pager window

The PowerView Pager enables you to organize the various pages of a multi-page document. To access the Pager, from the PowerView menu bar, click **View**, and then click **Pager**. By default, the Pager will display under the document window.



Each page icon  represents each page of the document. Each page icon contains a menu that has several options available for the individual page. Right-click the page icon of the individual page you want to modify. The following menu will display:



The following options are available:

Option	Description
Cut	Cuts selected page.
Copy	Copies selected page.
Copy to New Doc...	Copies selected page to a new document.
Move to New Doc...	Moves selected page to a new document.
E-mail	Attaches copy of selected page as an e-mail attachment.
Delete	Deletes or removes selected page.

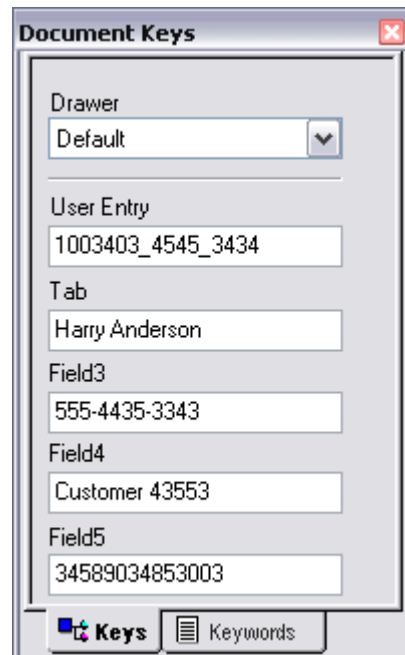
DocKeys window

The PowerView DocKeys Window contains information used to index and retrieve captured objects. To access the DocKeys Window, select **View, Document Keys** from the PowerView menu bar, or press **F7**. By default, the DocKeys Window will display to the right of the document window.

As data is gathered into ImageNow, it is stored in one or more of the Document Keys, or DocKeys. The DocKeys are ImageNow's index fields. The data in these fields is used by ImageNow to index and retrieve captured objects.

There are as many as six DocKeys available within ImageNow. The first field, **Drawer**, is used to separate large groups of captured objects. Security can be applied to a drawer to allow access only to certain users.


In addition to the Drawer field, there are five DocKey fields available to store information on captured objects. The DocKey fields are customizable to fit any business model. The most important part of a DocKeys structure is that each individual object is uniquely defined.

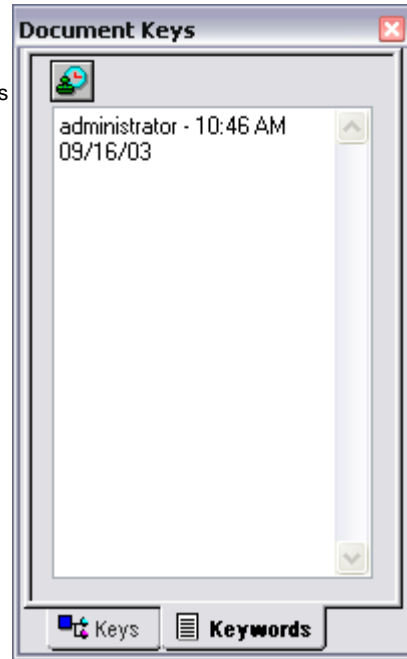


Keywords window

The PowerView Keywords window contains information used to index and retrieve captured objects. To access the Keywords window, select **View, Keywords** from the PowerView menu bar, or press **F8**. By default, the Keywords window will display to the right of the document window.

The Keywords window can be used to enter and view notes or other relevant information about the object.

You can also automatically add the time and date you reviewed the object to the Keywords window. To add a date stamp, click the **Date Stamp** icon  in the top left corner of the Keywords window.







Once notes are entered, the information can be viewed in the Search grid. The **Keywords** column displays the information entered into the Keywords window.

PowerView title bar

The PowerView title bar is located along the top of the PowerView window. It contains standard Microsoft® Windows® features that control how it appears on the screen.

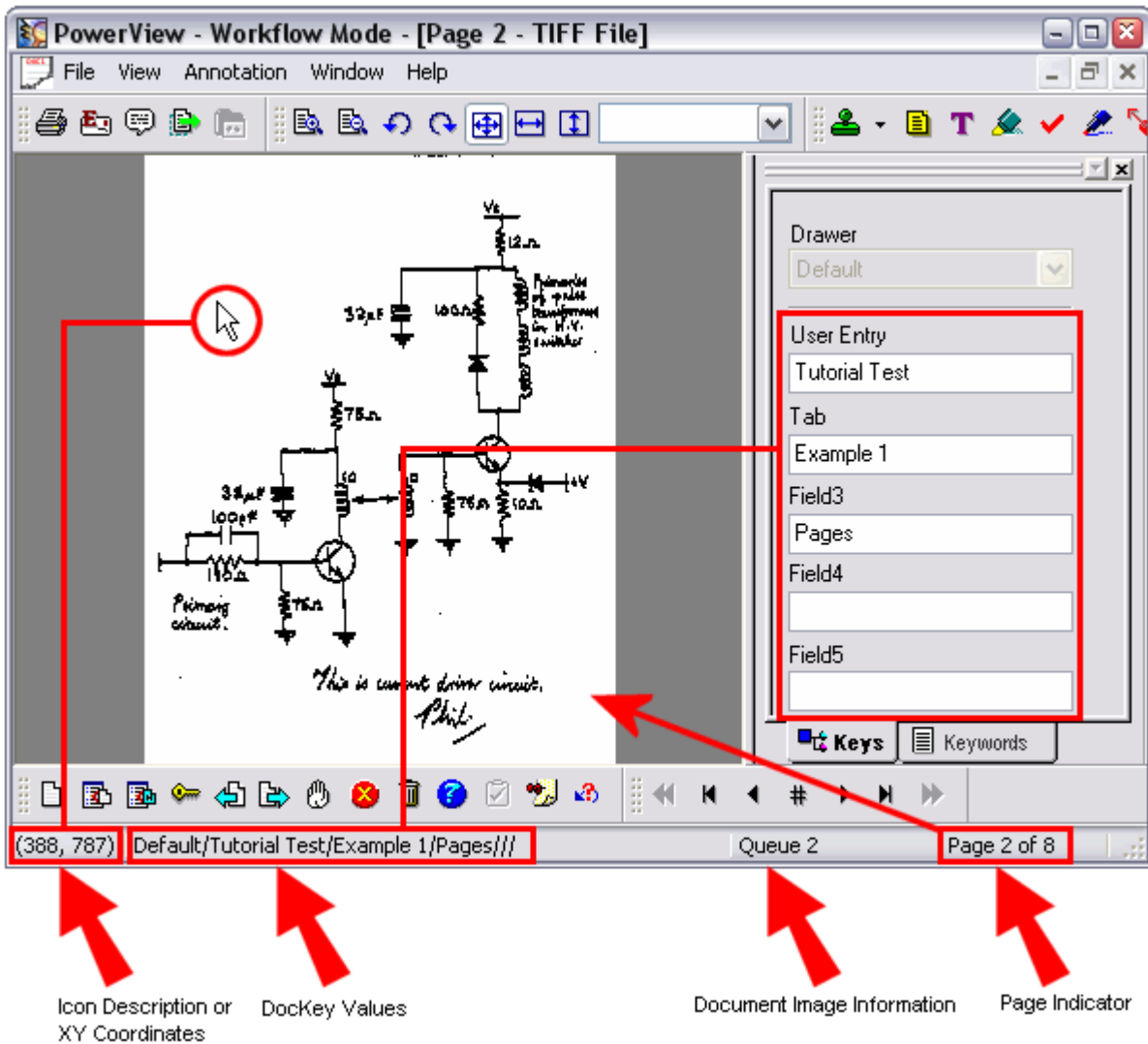


The PowerView title bar contains standard Microsoft Windows controls for minimizing, maximizing, restoring, and closing PowerView.


Button	Option	Description
	Minimize	Minimizes the PowerView window.
	Maximize	Maximizes the PowerView window.
	Restore	Restores the PowerView window to its original size.
	Close	Closes the PowerView window.

PowerView status bar

The PowerView status bar is located at the bottom of the PowerView window. The PowerView status bar contains information about the status of documents being viewed and processed in PowerView. In Workflow, the status bar can also be used to alert users when an item has been sitting in a workflow queue for too long.



As shown above, there are four sections within the PowerView status bar. The following table describes each section:

Section	Description
Icon Description or XY Coordinates	Displays toolbar icon descriptions when the cursor rolls over an icon. If XY Coordinate positioning is enabled (View > Show XY Coords), the XY coordinates of the cursor position on the document image will display.
DocKey Values	Displays the DocKeys of the displayed image.
Document Image Information	Information will vary depending on which grid you are using: In Workflow Mode: Displays the current workflow queue. In Batch Mode: Displays the Batch ID number.
Page Indicator	In Search Mode: Displays Workflow icon  if document has been sent to Workflow. Displays the page number of the displayed image and the total number of pages in the document.

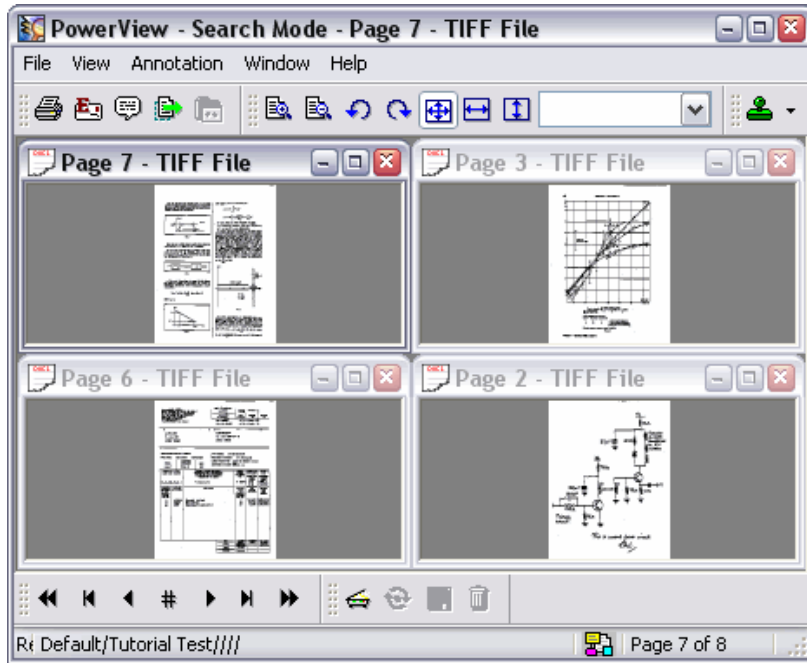
Showing x-coordinates and y-coordinates

1. Open a document image in PowerView.
2. In the PowerView menu bar, select **View, Show XY Coords**.
3. Roll the cursor over the image. The XY Coordinates will display in the bottom left corner of the PowerView status bar.

Note To hide the XY Coordinates, select **View** and uncheck **Show XY Coords**.

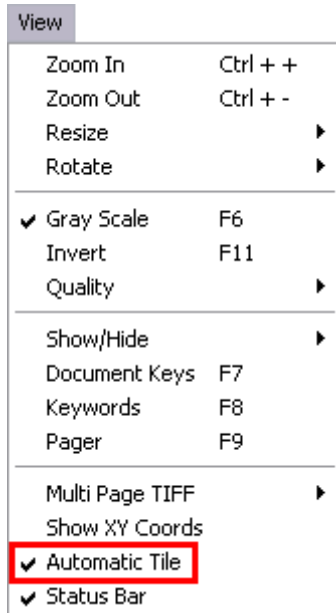
Automatically tile open documents

Automatic Tile enables you to simultaneously view all the pages of a multiple-page document in the PowerView window. By default, PowerView automatically tiles the pages in the document as they are opened, allowing you to see all of the opened pages side by side. Each page is opened within its own sub-window that can be resized, minimized, maximized, or repositioned.

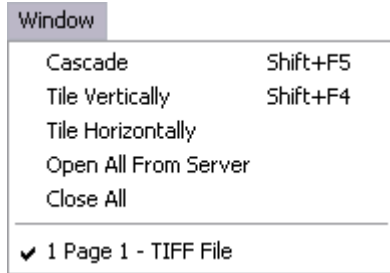


Disabling Automatic Tile

In the PowerView **View** menu, a checkmark appears next to **Automatic Tile** when the feature is enabled. To disable Automatic Tile, click the checkmark to clear it.



Additionally, with multiple sub-windows opened, you can use the **Window** menu to control how the pages of the document are displayed.



The following options are available:

Option	Description
Cascade	Cascades open pages in the PowerView window (Shift+F5).
Tile Vertically	Vertically tiles open pages in the PowerView window (Shift+F4).
Tile Horizontally	Horizontally tiles open pages in the PowerView window.
Open All From Server	Opens all pages of the document in PowerView.
Close All	Closes all open pages of the document (does not close PowerView).

Opening all pages from the server

ImageNow PowerView allows you to view several different documents at once. Each document opened is placed in a separate PowerView window. To retrieve and automatically tile all of the pages in a document, click **View**, and then click **Open All From Server**. All of the pages in the selected document will display in separate PowerView windows.

Note ImageNow is capable of supporting up to 99 simultaneous PowerView windows.

View document properties

This option is only available in ImageNow 5.4.

In Search grid, right-click on a document, and then click **Properties**, or in PowerView, click **File**, and then click **Page Properties** to view details including DOC ID, Created and Modified information, Index Keys, File type and other properties.

Properties ✖

Batch

- Page 1
- Page 2
- Page 3
- Page 4
- Page 5
- Page 6
- Page 7
- Page 8

Properties **Notes & Logging**

General

Batch ID: 1089920488_672602000508

Sequence: 0000000002

Type: IMPORTED

Step:

State:

Pages

Captured: 8

Discarded: 0

Total: 8

Field	Value
Created	07/15/2004 02:41:28 PM
Created By	administrator
QA Start	07/15/2004 02:41:44 PM
QA Complete	07/15/2004 02:41:53 PM
QA'd By	administrator
Link Start	07/15/2004 02:42:09 PM
Linked By	administrator
Modified	07/15/2004 02:45:59 PM
Modified By	administrator