



# ImageNow Administrator

## Getting Started Guide

ImageNow Version: 6.7.x



**perceptive**software

Written by: Product Documentation, R&D  
Date: June 2012

© 2012 Perceptive Software. All rights reserved

CaptureNow, ImageNow, Interact, and WebNow are trademarks of Lexmark International Technology SA, registered in the U.S. and other countries. Perceptive Software is a stand-alone business unit within Lexmark International Technology SA. All other brands and product names mentioned in this document are trademarks or registered trademarks of their respective owners. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or any other media embodiments now known or hereafter to become known, without the prior written permission of Perceptive Software.

# Table of Contents

- Overview..... 7**
  - About the administrator..... 8
- Install and License ImageNow..... 8**
  - About server and client installation..... 8
    - inserver6 directories installed..... 8*
  - What is demonstration mode? ..... 10
  - About license types..... 10
  - About the licensing process..... 11
- About Administering the ImageNow Server ..... 11**
  - About server administration in Management Console..... 11
    - About ImageNow Client performance reporting ..... 12*
    - About ImageNow Server technical information..... 12*
    - About monitoring user and agent connection..... 12*
    - About monitoring licenses..... 12*
  - About Monitor Agent..... 13
    - Configure Monitor Agent..... 13*
  - About storing document objects..... 14
    - About OSM Sets..... 14*
    - About OSM filters ..... 15*
    - About OSM trees..... 15*
  - About agents and extensions..... 16
  - Accessing the administrative portion of ImageNow ..... 16
    - Create a connection profile ..... 17*
    - Log in and start Management Console ..... 17*
- Configuring the Document Filing System..... 18**
  - Custom properties..... 18
    - Define a date custom property..... 18*
    - Define a flag custom property..... 19*
    - Define a list custom property..... 19*
    - Define a number custom property..... 20*
    - Define a string custom property..... 20*
    - Define a user custom property..... 21*
  - Document Types ..... 22

<i>Define a document type</i> .....	23
Document type lists.....	24
<i>Define a document type list</i> .....	25
Drawers .....	25
<i>Define a drawer</i> .....	25
<b>About Assigning Privileges</b> .....	<b>26</b>
About the privilege hierarchy.....	26
Assign privileges to a user or group.....	27
<b>About Managing Users and Groups</b> .....	<b>28</b>
Add a user .....	28
Modify or delete a user.....	29
Assign management privileges .....	29
Add a group.....	30
Modify or delete a group .....	30
Add a user to a group.....	31
<b>Integrating with your Business Application</b> .....	<b>32</b>
About application plans.....	32
About LearnMode.....	32
<i>Create a LearnMode application plan</i> .....	33
<i>Create an agent application plan</i> .....	35
<i>Create an Interact application plan</i> .....	35
<i>Create a manual application plan</i> .....	36
<b>Configuring your Business Processes</b> .....	<b>36</b>
What is Workflow Designer? .....	36
<i>About security privileges in Workflow Designer</i> .....	37
Create a workflow process .....	37
About queues .....	37
<i>Create a work queue</i> .....	38
<i>Create a super queue</i> .....	38
<i>Create sub queues for a super queue</i> .....	39
<i>Create a system queue</i> .....	39
<i>Create a transfer queue</i> .....	40
About workflow alarms.....	40
<i>Create an alarm</i> .....	41

- About routes ..... 43
  - Create a route* ..... 44
- Add a user to a queue ..... 44
- About rules and scripts ..... 44
- About Tasks ..... 45**
  - Grant task template manager privileges ..... 45
  - Create a task template ..... 46
    - Define the template properties* ..... 46
    - Define the template components* ..... 46
    - Define the template action*..... 47
    - Define the template assignment list* ..... 47
    - Define the template reason lists* ..... 48
    - Define the template due date method*..... 49
    - Define the template security*..... 49
- About CaptureNow ..... 51**
  - About scanner configuration ..... 51
    - Install a scanner*..... 51
    - Create a scanning profile*..... 54
  - About barcodes ..... 55
    - Configure ImageNow to recognize barcodes*..... 56
    - About patchcodes* ..... 56
    - Scan using a patchcode*..... 57
  - What is the ImageNow Printer? ..... 57
  - About capture profiles ..... 57
    - Create a capture profile*..... 57
  - About Package mode..... 58
- About Template Types ..... 59**
  - About addendums..... 59
    - Create an addendum template*..... 59
  - About annotation templates ..... 60
    - Create an annotation template*..... 60
- About Administering Views..... 61**
  - Types of views..... 61
  - Create a view definition ..... 64

Modify column and row display ..... 64

About administering related views ..... 64

*Create a related document view*..... 65

**Index ..... 66**

## Overview

ImageNow is a content management software system that adapts to your business process. It uploads, organizes, and stores documents and content. This guide describes the role of the administrator in ImageNow and WebNow. It also explains step-by-step procedures of common functions an administrator may need to perform. This document assumes that to complete the tasks you are the manager or owner user or have the appropriate management privileges.

This guide contains the following sections:

- **“Overview”** introduces and defines the administrator user in ImageNow.
- **“Install and License ImageNow”** defines the licensing options available for implementation and gives step-by-step instructions for installing the ImageNow client.
- **“About Administering the ImageNow Server”** introduces the tools available to administer the ImageNow server and gives some step-by-step instructions on basic administration tasks. Identifies and defines the Server directories and document objects.
- **“Configuring the Document Filing System”** defines the concepts of the document filing organization and gives instructions for creating the filing system.
- **“About Assigning Privileges”** describes a high-level introduction to privileges and gives instructions on granting or denying privileges.
- **“About Managing Users and Groups”** describes groups and users and provides instructions for adding, modifying, deleting, and granting security privileges.
- **“Integrating with your Business Application”** gives information for creating application plans that map document keys when a user imports a document into ImageNow.
- **“Configuring your Business Process”** provides basic information on creating a detailed workflow that matches your business process using Workflow Designer.
- **“About Tasks”** defines tasks and gives the procedures for creating task templates.
- **“About CaptureNow”** describes some of the most common uses of CaptureNow and gives step-by-step instructions on configuring CaptureNow, installing a scanner, creating a scanning profile, creating scanning profiles, and configuring barcodes.
- **“About template types”** defines ImageNow templates and gives detailed directions for creating optional addendum, and annotation templates.
- **“About Administering Views”** defines views, provides a table that gives available types of views, and defines the procedures to create views.

This document provides a high level overview of administration in ImageNow. For additional details, information about functionality that requires additional licensing (such as Business Insight and Retention Policy Manager), and topics about specific designers (such as View Designer and Workflow Designer), refer to the Perceptive Software website, in the Customer Portal, under Product Documentation. For information about purchasing additional functionality, contact your Perceptive Software representative.



## About the administrator

Before beginning administrative tasks in ImageNow, designate who will be the ImageNow administrator. The ImageNow administrator must have a solid understanding of how to manage network systems and TCP/IP architecture. ImageNow Server provides application services, database services for document metadata, and document file storage services.

ImageNow administrators plan and set up the filing system for documents. The administrator arranges the drawers, folders, and document keys to subdivide the filing system into a logical hierarchical structure. An organized data hierarchy is important for managing large document databases because it allows quick and easy access to images when using ImageNow views and filters. The ImageNow administrator's ongoing duties include monitoring the use and growth of the filing system, as well as, moving and re-filing images for the ImageNow users.

ImageNow administrators design the security model and are responsible for configuring users and groups, and establishing roles and privileges for security. The administrator can assign the privilege to give other users the ability to manage users and groups. While designing the security, the administrator can assign access and management privileges to views, drawers, document types, and workflow queues, thereby controlling which users have access to departmental documents and workflow processes. ImageNow administrators also set up and maintain the workflow environment, which consists of work queues, system queues, and super queues, which include sub queues. These queues are then connected with automatic or manual links that simulate the path a document follows in an office environment.

## Install and License ImageNow

### About server and client installation

Running ImageNow on your network requires that you install the ImageNow Server on a server computer and install at least one ImageNow Client on a computer that can access the server computer. You install the client on all computers on which a user performs ImageNow tasks. ImageNow uses encrypted communication through TCP/IP to pass data between the server and clients. Each user accesses ImageNow from the client using a login ID and password. User authentication takes place on the ImageNow Server, but you set it up in the ImageNow Client.

For step-by-step instructions on installing ImageNow, refer to the ImageNow Server Installation and Setup Guide for your environment and database on [www.perceptivesoftware.com](http://www.perceptivesoftware.com).

### inserver6 directories installed

The following table lists the default directories the system creates after you install ImageNow Server. It provides a description of the contents within these directories.

Directory	Description
audit	Location for audit log files when the audit.format setting in the inow.ini file is set to 1 or 3, and auditing is enabled. Auditing logs are stored in an XML format and ImageNow exports a file for each 24-hour period during which a user member logged onto the system.
bin	Storage location for all ImageNow agent executable (EXE) files, DLLs, and the product readme PDF.



Directory	Description
db	Location for database tables for ImageNow Server using Embedded ImageNow SQL. If you install the ImageNow Server for an external DBMS, such as SQL Server or Oracle, this directory does not appear.
envoy	Storage location for Envoy libraries.
etc	Location for the configuration (INI) files for all locally installed agents. This directory also stores the hardware fingerprint license file, in_hwfp, required to license the ImageNow Server.
fax	Temporary storage location for image files received by the Fax Agent. By default, the system creates a subdirectory for each channel enabled on the fax board.
help	Location for Administrator Help (CHM) files.
install_temp	Storage location for files, such as default task and out of office reasons, used during the initial installation of ImageNow Server.
job	Location for pending jobs on the ImageNow Server for specific agents, such as Recognition Agent.
learnmode	Storage location for font files used for HyperLearn application plans. The ImageNow Server can store up to 50 font files in this directory.
log	Location for all upgrade, error, performance, and agent log files.
osm_01.00001	Storage location for all document objects. The system stores each document page as a separate Object Storage Manager (OSM) file.
osm_02.00001	Location for subobjects, such as annotations, applied to document objects.
osm_03.00001	Storage location for all documents that currently appear in the All Batches view in ImageNow Explorer. After a document is indexed, the system removes that document from this directory and relocates the document, by default, to osm_01.00001.
script	Location that stores all scripts used in the ImageNow system.
temp	Temporary storage location used as a working directory by the Import and Output agents.
update	Location that stores the update packages used by the Automatic-Update service to deliver new updates to ImageNow Client.
user	Temporary storage location for all users when an operation, such as capture, requires that ImageNow Client send a file to ImageNow Server.
workflow	No files are currently stored in this directory.

## What is demonstration mode?

When you install ImageNow the first time, the product is in demonstration mode until you install an ImageNow Server and 5 ImageNow Client licenses. The system gives the first client that logs into the server and does not see any licenses in ImageNow a choice of two demonstration modes.

The first choice is 30 days with 5 concurrent users. A combined total of 5 ImageNow and WebNow users can log into ImageNow an unlimited number of times for 30 days. These users have unlimited access to all core ImageNow functionality. After the 30 days expires, users cannot log into ImageNow until you purchase licenses. The second choice is 5,000 documents with 5 concurrent users. This allows a total of 5 users to log in and add up to 5,000 documents to ImageNow. Once 5,000 documents are added to ImageNow, users cannot log into ImageNow until you purchase licenses.

Once you purchase a license and add it to your ImageNow Server, you cannot use demonstration mode anymore. Perceptive Software issues licenses when you purchase ImageNow. If you do not have a license or you need to have your license re-issued, contact your Perceptive Software representative.

## About license types

**Concurrent use** is a software license that is based on the number of simultaneous users accessing the program. For example, in a five-user concurrent license, after five users log in to the program, the program prevents a sixth user from logging in. After any of the first five users log off, the next user can log in. Concurrent licensing limits the number of users running the program from a centralized location, such as the ImageNow Server, based on the current license agreement. The licenses in concurrent licensing are a pool of available licenses which a user can utilize from any client computer. These licenses are not node-locked to a specific client computer. The following products use concurrent licensing: ImageNow Client, WebNow Client, ImageNow/WebNow, Office Plug-In, and Retention Policy Manager. The Business Insight Author license is also a concurrent use license.

**Per seat** is a node-locked license that is based on the number of computers on which you install the software. A node-locked license is locked to a computer by specific information about the computer. For example, an ImageNow Client per-seat license is node locked by placing a token on the client computer the first time that client runs. For per-seat clients and some ImageNow Agents, the system generates this token in the background and stores it locally on the client computer. The token is a file that contains specific information about the license type. The token also contains the encoded hardware information consisting of 5-10 unique properties of the client computer, such as MAC address, disk drive serial number, disk drive size, and processor serial number. The license works as long as 60 percent of the hardware comprising the original encoded hardware information remains the same. Products that use per seat licensing are ImageNow Server, CaptureNow - Kofax, Fax Agent, Output Agent, ImageNow Client, Content Server, Import Agent, Recognition Agent (OCR), ERM Server (Processing), ERM Server (Retrieval), Mail Agent, User Replication Agent, CaptureNow - File IP, CaptureNow - ISIS Levels 1 to 3, and Message Agent Server.

**Transaction package** licensing limits volume for a specified period. Transaction package licensing is controlled from a centralized location. Transactions licenses are based on counting the number of transactions within ImageNow and decrementing this number over a period of time. The transactions are usually server calls or object retrievals. Once you use all of the transactions in a specified period, you cannot use any more transactions until the period expires. Products that use transaction package licensing are Message Agent Client and Message Agent External Viewer.

**Feature** licensing makes functionality available in ImageNow. Feature licenses are set at the server level and are either available or not available for all users. Products that use feature licensing are Document Management, ImageNow iScript, Output Agent - DICOM, ERM Server (APA), ERM Server (PCL), Fax Agent (Image Processing), MA HL7 Add-On, MA HL7 TCP/IP Connections, Recognition Agent (ICR), Recognition Agent (OMP), Retention Agent, and Business Insight (Reports).

## About the licensing process

To obtain the hardware information for the ImageNow Server, you must be the admin user on Windows.

1. Generate a system fingerprint using the following substeps.
  1. Click **Start**, point to **All Programs**, point to **ImageNow 6**, and then click **ImageNow Management Console**.
  2. In the Login page, click **License Manager**.
  3. In the **License Management** dialog box, select **Save system fingerprint** and click **OK**.
  4. In the **Save As** dialog box, enter a name for the file and then navigate to the location where you want to save the report. Click **Save**.
2. Contact your Perceptive Software representative for instructions on where to send the system fingerprint file to obtain your license. The system fingerprint file has a SYSFP extension.
3. When you receive the license files, store the license files in a temporary directory on the ImageNow Server computer.

## About Administering the ImageNow Server

Perceptive Software offers two powerful command line tools available to all ImageNow administrators: INTTool and INUpgradeUtil. These command line tools provide you with the ability to administer aspects your server and database, and upgrade specific functionality without requiring a graphical interface.

Using INTTool, you can administer your server by adding or deleting users, obtaining or changing owner information, or sending messages to connected ImageNow users. You can also add digital signature reasons, add annotation templates, assign audit templates, and unlock a workflow process. INTTool provides commands for you to manage licenses and OSM data. You can also run iScript commands through INTTool.

Using INTTool, you can access areas of the ImageNow database. These tasks include exporting a table to a file and importing a file to a table, obtaining table structure information and the number of records in a table. You can add, update, or delete records using INTTool. By default, the system installs INTTool during the ImageNow Server installation.

Using INUpgradeUtil, you can migrate privileges and saved server queries to your version of ImageNow, as well as convert applets to application plans. In most cases, the upgrade utility runs these upgrade commands. Do not run these commands manually unless you are instructed to do so by Product Support.

## About server administration in Management Console

In previous versions of ImageNow, you could access administrator information using ImageNow Server Administrator (ISA), or by using INTTool and INUpgradeUtil commands. Now, instead of opening ISA to access the administrator information, you access the Diagnostics tab in Management Console.

## About ImageNow Client performance reporting

ImageNow Client performance reporting lets you track performance of the following key operations in ImageNow Client from the end-user perspective:

- **ImageNow Viewer.** How long it takes to open a document.
- **ImageNow Workflow.** How long it takes to route an item forward.
- **ImageNow Form.** How long it takes to open a form
- **ImageNow Capture.** How long it takes to capture either a single document in Single Mode or a set of documents in Package Mode.

This feature is located in the Diagnostics tab of Management Console. ImageNow Client stores the recorded information in the content database. After you export the report, you can view the report data. When you delete detailed performance data, you can optionally store an averaged, condensed snapshot of the data. Over time, you can compare and contrast the performance shown by the condensed data.

## About ImageNow Server technical information

The technical information you can view and export about your ImageNow Server is grouped into the following categories: server information, database information, and ImageNow information. The server information contains such details as your operating system version, service packs, server resources, and total RAM. The database information includes such details as the database server name, the ODBC driver name, and ODBC driver version. The ImageNow information section contains such details as your ImageNow version, agents that are installed and running on your ImageNow Server machine, and lists any remoted agents. This feature is located in the Diagnostics tab of Management Console.

## About monitoring user and agent connection

ImageNow allows you to monitor any users and agents that have open sessions in your network. If a user is connected either directly or remotely to your network, ImageNow Management Console tracks the user's name, license type, time spent online for this session, network address, server instance, and server host. It also displays whether the user is currently online.

You can also track agent sessions. Unlike the user sessions, which only trace remote or active users, agents connected to ImageNow appear in Management Console. You can track the same information for agents as you can for users, including the state of the session's connection.

Using Management Console, you can monitor an unlimited number of users and agents. To select individuals out of the potentially large amount of sessions, you can search for them by supplying all or part of the user or agent name.

This feature is located in the Diagnostics tab of Management Console.

## About monitoring licenses

The Licenses feature of the Management Console allows you to monitor license usage by product and licensing scheme. In the first column, the percent of available licenses used is shown by color: yellow indicates more than 70 percent used, while red indicates more than 90 percent used.

If the Current Users value is the same number as the Licensed Users, and you do not have overdraft licensing protection, the next user that attempts to log in receives an error message saying that the number of available licenses has been exceeded.

This feature is located in the Diagnostics tab of Management Console.

## About Monitor Agent

Monitor Agent functionality is supported in Windows and Unix environments except where noted. Monitor Agent enables you to track the status of any ImageNow agent and perform actions based on an event that occurred. For example, you can use Monitor Agent to send an email when a threshold is passed, such as when an agent is non-responsive. When an event occurs, you can perform other tasks, such as restarting an agent, sending an email, or archiving log reports.

You can use Monitor Agent to help you track the status of agents and perform tasks. By customizing the Monitor Agent configuration file (inserverMonitor.ini), you can use Monitor Agent to automate certain administrative actions of ImageNow agents when any of the following events occur:

- A certain amount of time passed since an agent restarted. (Windows only)
- An agent is non-responsive. (Windows only)
- Excessive memory leaks, thread leaks, GDI leaks, or handle leaks. (Windows only)
- An agent terminates abnormally.
- Dump files are created by crashing agents.

An action is an automated process initiated by Monitor Agent in response to an event. When an event occurs, Monitor Agent can perform the following actions in response:

- Restart the process.
- Run an external program.
- Notify administrators through email when an event occurs.
- Archive log reports on a schedule or in response to an event.

Additionally, Monitor Agent can perform an action on a defined schedule regardless of any events that may or may not have occurred.

## Configure Monitor Agent

The Monitor Agent configuration file (inserverMonitor.ini) contains several sections of settings that enable you to define the basic functionality of Monitor Agent. Each setting in inserverMonitor.ini is defined in detail in product help located on [www.perceptivesoftware.com](http://www.perceptivesoftware.com).

1. Navigate to the **\Program Files\inserver6\etc** folder, and then in a text editor, open the **inserverMonitor.ini** file.
2. Modify the .ini file to configure the settings in the following groups:
  - **Polling.** Set **polling.interval** to a positive integer to represent the time in seconds you want Monitor Agent to wait between instances of polling the system, initiation of processes, and checking for actions and events.
  - **Event Log.** Generates log files for events and actions managed by Monitor Agent.
  - **Logging.** Enables you to troubleshoot Monitor Agent if an issue arises.
  - **Defaults.** The Defaults section defines general settings.
  - **Email.** Specifies the server and port Monitor Agent uses to route emails.
  - **Defines.** Identifies the processes you want Monitor Agent to monitor.



## About storing document objects

ImageNow stores all document objects in the Object Storage Manager (OSM). The OSM stores objects in the original format, for example, TIFF, PDF, or Microsoft Word. Because each page of a document is stored as a separate object in the OSM, a scanned multi-page document is stored as multiple objects. The Object Storage Manager is organized in sections called sets, trees, and optional filters. A storage set contains one or more storage trees.

Using INTTool, a command line tool, you can manage your OSM storage.

The OSM provides the following features:

- **Multiple OSMs.** You can create separate object storage structures that you can subdivide by virtually any logical construct. This enables you to create a separate OSM structure for each drawer in your ImageNow system. This feature is useful when you want to separate information, such as Human Resource information, from other information.
- **OSM spanning.** You can represent several physical drives as one logical drive, which allows a single OSM to expand beyond the bounds of a single physical drive.
- **OSM mirroring.** You can enable mirroring to distribute duplicate object storage structures to multiple sites. This feature enables you to create a real-time duplicate OSM to support mission-critical functions, disaster recovery, and real-time backup.
- **Data set management.** You can easily move, copy, or delete OSM structures based on a wide variety of business rules.
- **OSM caching.** You can cache files that are read or written to the main OSM storage device on a faster device, such as a SAN, to improve performance and reduce bottlenecks.
- **OSM cache lifecycle management.** You can adjust the cache lifecycle from the default of 1,440 minutes to a shorter or longer value.

## About OSM Sets

When you install ImageNow, several OSM sets are created automatically to contain different categories of data used in different phases of document capture and storage. For example, one OSM set contains temporary data for documents in batch processing, and another contains supporting data for annotations and forms. In addition to these standard OSM sets, you can create additional sets for special purposes, for example, to contain documents filtered on either of two document keys: Drawer and Document Type.

### Add an OSM set

After creating the OSM set, you must create a corresponding OSM tree before you can store objects in the OSM set.

1. On the ImageNow Server computer, do one of the following actions:
  - In Windows, open a **Command Prompt** window, and change to the `[drive]\inserver6\bin` directory.
  - In Unix, change to the `$IMAGENOWDIR6/bin` directory.
2. Enter the following command:
 

```
intool --cmd add-osm-set
```
3. The INTTool command prompts you for the required properties.

- Optional. You can provide information for the following parameters.

```
intool --cmd add-osm-set [--record <record>] [--delim <delim>]]
```

- *<record>* is the information that describes the OSM set record.
- *<delim>* is the delimiter that separates the values between the record fields. The default delimiter is ^.

## About OSM filters

An OSM filter enables you to store newly captured documents in separate OSM sets, which function as filter sets. When adding the filter, you specify a single condition: either a drawer name and value or a document type and value. As a result, you create a drawer filter or a document key filter.

For example, you could create an OSM filter to store all documents with a drawer value of AP in a separate OSM set. You could also create an OSM filter to store all documents with a document type value of Invoice in a separate OSM set. In the situation where a newly captured document has drawer value (for example, AP) that satisfies one filter's condition and also a document key value (for example, Invoice) that satisfies another filter's condition, the drawer filter is used instead of the document key filter.

You can update an existing filter by changing the OSM set in which filtered documents are stored. If you delete an OSM filter, the filtered documents remain in the filter set and can still be searched and processed in ImageNow or WebNow like unfiltered documents.

**Note** OSM filters affect only newly captured documents. They do not move documents captured before the filter was added. However, a filter does move a document out of the filter set to a different OSM set if you edit the document keys of the document and change the drawer or document type to a value that no longer satisfies the filter's condition.

## Add an OSM filter

- On the ImageNow Server computer, do one of the following actions:
  - In Windows, open a **Command Prompt** window and change to the `[drive:]\inserver6\bin` directory.
  - In Unix, change to the `$IMAGENOWDIR6/bin` directory.

- Enter the following command:

```
intool --cmd add-osm-filter --osm-set <OSM Set ID> --type <type> --value<value>
```

- Provide information for the following parameters:
  - *<OSM Set ID>* is the ID of the OSM set in which the filter documents are stored.
  - *<type>* is either DRAWER or DOCTYPE, depending on which document key you want to filter on. It is case sensitive.
  - *<value>* is the name of the drawer or document type corresponding to the DRAWER or DOCTYPE selection.

## About OSM trees

Each OSM set must contain at least one OSM tree, which defines the structure of directories and subdirectories where captured documents are stored. There is no need for more than one OSM tree per OSM set unless the size and number of stored documents requires the OSM set to span additional drives. To set up an OSM set that you expect to become very large, you can create a separate OSM tree



for each additional drive that may be needed. When the original OSM tree uses up its available disk space, ImageNow Server automatically moves to the next OSM tree with no interruption in service.

OSM sets and OSM trees use two integration types: FSS (File System Storage), which is supported by all platforms, and CAS (Content Addressed Storage), which is used only with Centera servers. You can add FSS trees only to FSS sets and add CAS trees only to CAS sets.

### Add an OSM tree

1. On the ImageNow Server computer, do one of the following actions:
  - In Windows, open a **Command Prompt** window and change to the `[drive:]\inserver6\bin` directory.
  - In Unix, change to the `$IMAGENOWDIR6/bin` directory.

2. Enter the following command:

```
intool --cmd add-osm-tree --type <integration type>
```

3. Provide information for the following parameter:

- `<integration type>` is the storage device type. Valid values are FSS and CAS.

4. The INTool command prompts you for the required properties.

5. Optional. Provide information for the following parameters.

```
intool --cmd add-osm-tree --type <integration type> [--record <record>] [--delim <delim>]]
```

- `<record>` is the information that describes the OSM tree record.
- `<delim>` is the delimiter that separates the values between the record fields. The default delimiter is ^.

## About agents and extensions

The ImageNow Server contains internal agents that process jobs and provide messaging to the ImageNow clients. In general, the ImageNow Server causes the internal agents to perform as needed without any manual steps. However, you can manually configure the ImageNow Import Agent, which is the internal agent that is responsible for handling all automated import routines on the server. You can set this internal agent to poll for information and a specific directory for specific files to import.

You can also purchase external agents to extend search, fax, mail, output, OSR, and user replication functionality. For more information about the ImageNow Content Server, ImageNow Fax Agent, ImageNow Mail Agent, ImageNow Output Agent, ImageNow Recognition Agent, or ImageNow User Replication Agent, refer to your online Help at [www.perceptivesoftware.com](http://www.perceptivesoftware.com).

Additionally, you can extend ImageNow functionality with add-on components like ImageNow DataCapture. DataCapture is a solution that automates forms processing, and it allows you to capture a form and then verify the collected data.

## Accessing the administrative portion of ImageNow

The Management Console is the administrator area in ImageNow. It enables you to configure ImageNow privileges, workflow, and so on. You must have the proper security privileges to access these areas of functionality.


## Create a connection profile

The connection profile gives you the ability to preconfigure a connection to a server, server type, port number, and other information. Each build of ImageNow on a computer can contain multiple connection profiles. The user can select to connect to this connection profile when logging in to the system.

1. To open Management Console, click **Start**, point to **All Programs**, point to **ImageNow 6**, and then click **ImageNow Management Console**.
2. Click Connection Profiles.
3. Click Edit connection profiles.
4. In the **Connection Profiles** dialog box, click **Create**.
5. In the **New Connection Profile** dialog box, do the following steps:
  - In **Name**, type a name for the ImageNow Server.
  - In **ServerID**, type the name of the computer on which ImageNow Server resides.
  - In **Server Type**, select **Development**, **Personal**, **Production**, or **Test** to represent the type of server you are using.
  - In **Port Number**, type the port number for the ImageNow Server computer, which is 6000 by default.
  - In **Username**, select one of the following: **Always prompt**, **Set to** and type a default user name, or **Remember last successful user name**.
6. To use domain authentication with your connection profiles, select the **Use domain authentication** check box. To stop using domain authentication, leave the check box unselected. This is only available when using SYSTEM authentication.
7. Click **OK**.

## Log in and start Management Console

To access the administrator area in ImageNow, complete the following steps:

1. To start the Management Console, do one of the following steps:
  - On the **ImageNow** toolbar, click **Manage**.
  - To start a separate instance of Management Console, click **Start**, point to **All Programs**, point to **ImageNow 6**, and then click **ImageNow Management Console**.
  - Right-click the **ImageNow**  icon in the Windows System Tray, and then click **Launch ImageNow Management Console**. This appears when you enable the Windows System Tray icon for ImageNow during setup.
2. If you are already logged in to ImageNow, the **Management Console** displays. If you are not logged in, complete the following steps:
  1. In the **User name** box, confirm or enter the user name and in the **Password** box, enter your password.

2. Click **Connect** to initiate the connection to the ImageNow Server. The **Management Console** displays if you are successfully logged in.

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

## Configuring the Document Filing System

Your Perceptive Software Professional Services team typically assists with determining the best filing structure for your ImageNow system during the design phase of your implementation. ImageNow offers two filing system structures: one in which you organize documents at the drawer level using document keys, and one in which you store documents in a content model that includes folders and shortcuts. The following subsections provide steps to create the necessary components to store documents at the drawer level using document keys. For details about defining a content model, refer to the *Content Modeling for Administrators Getting Started Guide* available on the Customer Portal. If you are upgrading from an earlier version of ImageNow, also refer to the *Content Modeling Upgrade Guide* available on the Customer Portal.

### Custom properties

Custom properties provide optional property fields that enable you to store additional data to describe a document. They offer another method to categorize documents for easy sorting. Custom properties let you store unlimited data beyond the standard document keys. You make custom properties available to documents by assigning them to document types. ImageNow provides the following custom property data types: Date, Flag, List, Number, String, and User.

Suppose, for example, that a clerk in the Human Resources Department adds a document to ImageNow and assigns the "Medical Enrollment Form" document type for each new employee. The clerk also assigns string and date custom properties as shown in the following table:

Document Type	Custom Property Data Type	Custom Property	Custom Property Value
Medical Enrollment Form	String	Plan Year	2012
	Date	Coverage Start Date	01/01/12

### Define a date custom property

The following steps explain how to define a custom property that stores a date as a string value.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **Date**.
3. In the **New Date Property** dialog box, in the **Name** box, type the name of the custom property.

4. For **Default value**, perform one of the following actions:
  - To always use the current date as the default value, verify that the **Default to the current date** check box is selected.
  - To select a date for the default value, clear the **Default to the current date** check box, click the **Default value** arrow, and then on the Calendar control, select the default date for this custom property.
  - To use no default date, leave the **Default value** empty and clear the **Default to current date** check box.
5. In the **Display Format** section, select the **Month**, **Day**, **Year**, and **Weekday** check boxes to show the respective portion of the date.
6. Click **OK**.

## Define a flag custom property

The following steps explain how to define a custom property that stores a Boolean field where a user can select from two options.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and then select **Flag**.
3. In the **New Flag Property** dialog box, in the **Name** box, type a name for the custom property.
4. Optional. In the **Default value** list, select **True** or **False** for the default value for this custom property. If you leave this setting empty, no default value appears in the custom property.
5. In the **Positive Label** box, type the value to display when the condition is true.
6. In the **Negative Label** box, type the value to display when the condition is false.

**Note** The Flag property stores values of 0 or 1 based on the value that is selected by the user. The Positive Label and Negative Label boxes allow you to adjust the labels that represent the stored values.

7. Click **OK**.

## Define a list custom property

The following steps explain how to define a custom property that stores a predefined list of values from which a user can select a value.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and then point to **List**.
3. In the **New List Property** dialog box, in the **Name** box, type a name for the custom property.
4. To add values to the list, do the following substeps:
  1. Under **Display Format**, in the **Values** list, click **Add**.
  2. Type the value you want to add to the list and press ENTER.
  3. Repeat the previous substeps for each value you want to display in the list.
5. Optional. After you add all list values, use the **Move Up** and **Move Down** buttons to reorder the listed items.

6. Optional. In the **Default value** list, select the default list value for this custom property.
7. Click **OK**.

## Define a number custom property

The following steps explain how to define a custom property that stores a number value such as currency.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and then select **Number**.
3. In the **New Number Property** dialog box, in the **Name** box, type a name for this custom property.
4. Optional. In the **Default value** box, type the number to use for the default value for this custom property.
5. Under **Display Format**, perform one of the following actions:
  - To define a number custom property based on currency, perform the following substeps:
    1. In the **Format** list, select **Currency** and select **USD**, **GBP**, or **EUR** as the currency type.
    2. In the **Decimal Places** box, type or select the number of decimal places.
    3. Optional. To remove the thousands separator from numbers greater than 999, clear the **Punctuated at thousands** check box.
  - To define a number custom property based on any numeric value, perform the following substeps:
    1. In the **Format** list, select **Decimal**.
    2. In the **Decimal Places** box, type or select the number of decimal places.
    3. Select **Fixed** or **Varying**. If you select **Varying**, the **Decimal Places** box is dimmed and unavailable.
    4. Optional. To remove the thousands separator from numbers greater than 999, clear the **Punctuated at thousands** check box.
6. Click **OK**.

## Define a string custom property

The following steps explain how to define a custom property that stores a text value.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **String**.
3. In the **New String Property** dialog box, in the **Name** box, type a name for the custom property.
4. Optional. In the **Default value** box, type the default string value for this custom property.
5. Click **OK**.

## Define a user custom property

The following steps explain how to define a custom property that stores an ImageNow user's name.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **User**.
3. In the **New User Property** dialog box, in the **Name** box, type a name for the custom property, and perform one of the following actions:
  - To use an ImageNow group for user list values, in the **Source** list, select **Group** and, in the **Group** list, select the group you want.
  - To create individual user list values, in the **Source** list, select **Predefined list** and to add members to the list of user values, click **Add**.
4. In the **Default value** list, choose one of the following options:
  - Select **(Current user)** to display the logged in user as the default.
  - Select the blank line to show the empty line as the default.
  - Select a user name to display as the default.
5. Under **Display Format**, in the **Format** list, select a display format.
6. Optional. If you selected a display format other than **User name**, to use a display prefix, such as Mr., when displaying this custom property, select the **Display prefix** check box.
7. Optional. If you selected a display format other than **User name**, to use a display suffix, such as Jr., when displaying this custom property, select the **Display suffix** check box.
8. Click **OK**.



## Document Types

You must define document types for your ImageNow system. You can use document types to define:

- A value that categorizes a document so that your users can easily identify its purpose.
- The document types you want to allow in a drawer.
- The custom properties a user can or must assign to a document.
- Access to a document.

Suppose, for example, that an HR clerk assigns the “Medical Enrollment Form” document type to a document regardless of which drawer the document resides. In Management Console, you define a document type for the HR clerk in the Document Type dialog box to include the “Plan Year” and “Coverage Start Date” custom properties.

**Document Type**

General Custom Properties Digital Signatures

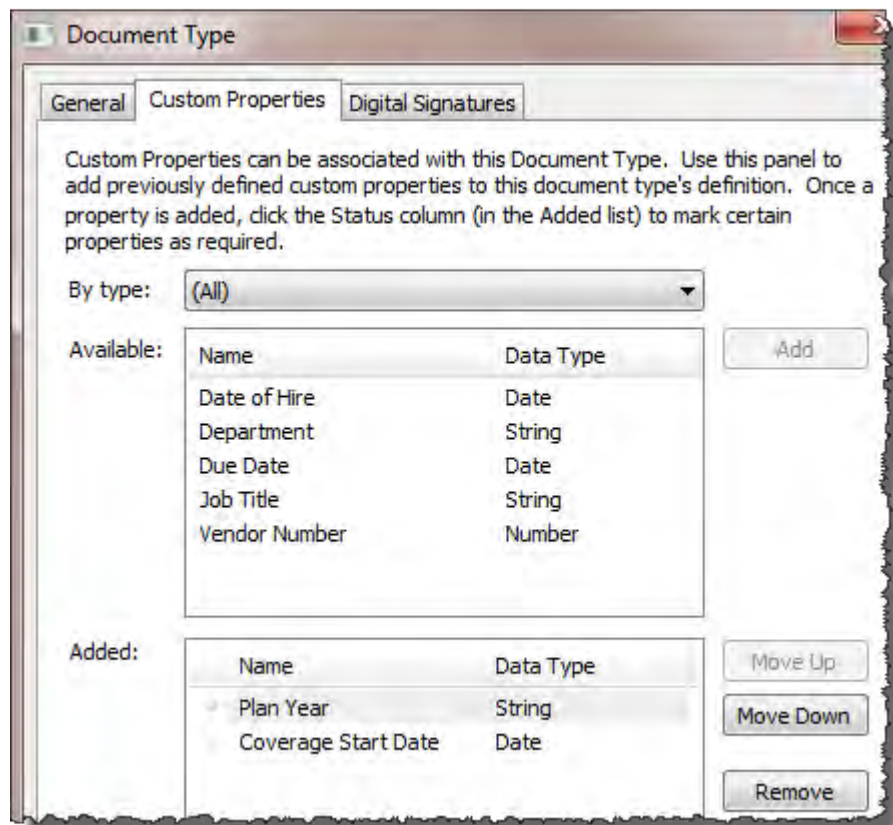
Use this panel to assign a document name and description for the new document type. The description is optional, however, it is recommended that you enter a value that describes the document type and how it is used.

Name: Medical Enrollment Form

Description:


☒ Is active





## Define a document type

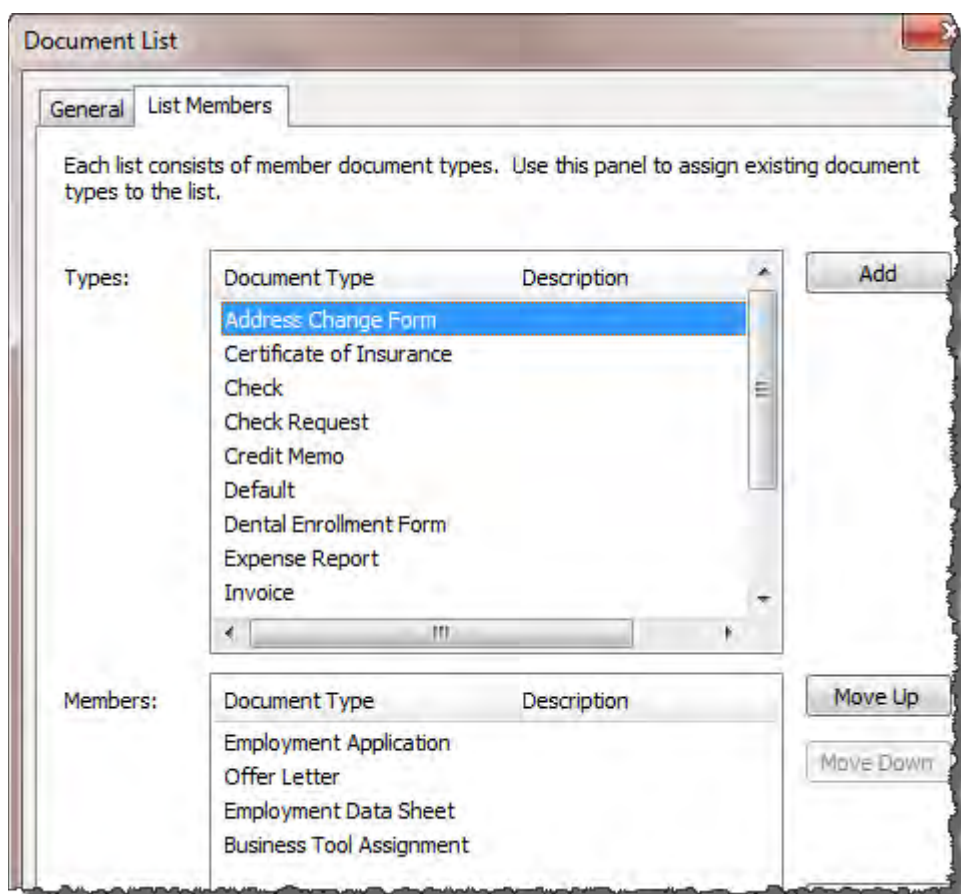
The following steps explain how to define a document type and assign custom properties to it.

1. In **Management Console**, in the left pane, click **Document Types**.
2. In the right pane, on the **Document Types** tab, click **New**.
3. In the selected row under **Document Type**, type a name for the document type and press ENTER.
4. Select the new document type and click **Modify**.
5. In the **Document Type** dialog box, on the **General** tab, perform the following substeps:
  1. Optional. In the **Description** box, type a description of the document type.
  2. Verify the **Is Active** check box is selected.
6. Optional. To assign a custom property to this document type, click the **Custom Properties** tab and add custom properties to the document type as follows:
  1. To filter the custom property rows displayed in the **Available** list to a single data type, in **By type**, select the type you want.
  2. In the **Available** list, select a custom property and click **Add**.
7. To make the custom property required for this document type, in the **Added** list, click in the column in front of the custom property type. The **Required**  icon appears.

8. Optional. To reorder the custom properties, in the **Added** list, click **Move Up** or **Move Down**. For example, you can move the most commonly used document types to the top of the list.
9. If you want ImageNow to verify signatures for this document type, click the **Digital Signatures** tab, select the **Automatically verify signatures for this document** type check box and, to specify how often the signatures are verified, in the **Verification interval** boxes, select the number and time unit and then click **OK**.
10. Click **OK**.

## Document type lists

A document type list is a method you can use to group sets of document types based on a relationship. Although document type lists are an optional component of your ImageNow system, you can use a document type list to quickly locate a document type when you need to change its settings or when a user needs to select a document type for a document. Suppose, for example, that a document type list named “HR – Onboarding” includes the following document types: Employment Application, Offer Letter, Employment Data Sheet, and Business Tool Assignment. In Management Console, you define a document type list in the Document List dialog box.



## Define a document type list

The following steps explain how to define a document type list.

1. In **Management Console**, in the left pane, click **Document Types**.
2. In the right pane, on the **Document Types Lists** tab, click **New**.
3. In the selected row under **Document Type List**, type a name for the list.
4. Select the new document type list and click **Modify**.
5. On the **General** tab, perform the following substeps:
  1. In the **Name** box, modify the name as needed.
  2. Optional. In the Description box, describe the document type list.
6. To add document types to the list, on the **List Members** tab, perform the following substeps:
  1. In the **Types** list, select a document type and click **Add**.
  2. Optional. To reorder the document types in the list, in the **Members** box, select a document type and click **Move Up** or **Move Down**.
7. Click **OK** and, in the confirmation box, click **Yes**.

## Drawers

You must define drawers for your ImageNow system. They contain the documents that are stored in ImageNow and are often defined as a department or function, such as Human Resources. Additionally, you can use a drawer to define:

- The document types you want to allow in a drawer.
- Access to a document.

## Define a drawer

The following steps explain how to define a drawer.

1. In **Management Console**, in the left pane, click **Drawers**.
2. In the right pane, click **New**.
3. In the **Add Drawer** dialog box, on the **General** tab, type the drawer name and an optional description.
4. To restrict the drawer to allow only specified document types, on the **Document Types** tab, perform the following substeps:
  1. Select the **Allow only selected document types** check box.
  2. Optional. To filter the document types according to the list in which they were assigned, in the **By list**, select a document type list.
  3. Under **Available**, select a document type and click **Add**. Continue to add document types that you want to allow at the drawer level.
  4. To change the order in which the document types display in the drawer, in the **Selected** list, click **Move Up** or **Move Down**. For example, you can move the most commonly used document types to the top of the list.

5. To delete a document type from the list, in the **Selected list**, select the document type you want to remove and click **Remove**.
5. Click **OK**.

## About Assigning Privileges

A user with management privileges, a manager, or the owner can assign privileges to users and groups. You can assign a privilege using one of three actions: grant a privilege by allowing it, revoke a privilege by denying it, or choose not to set a privilege assignment at all. The system evaluates and displays a user's effective privileges at the user level, not at the group level. To determine the effective privileges, ImageNow evaluates all of the privilege assignments given to a user and all of the privilege assignments (if any) the user inherits from groups to which the user is a member and then determines which privilege assignments get priority over other privilege assignments.


In most cases, you grant privileges to groups of users who need similar privileges. However, certain users may need specific privileges. For example, you can grant a user access to delete documents in a particular drawer regardless of the privileges set for groups in which the user is a member. To do this, you would grant that user the privilege to delete documents in a specific drawer. Because this is a privilege granted to a user, it overrides any privileges assigned at the group level.

If you assign or manage privileges, consider adding groups using the following procedure. As an example, this procedure uses a departmental method of grouping.

- Add groups with names that describe a particular department or job, such as Finance, HR, and Marketing.
- Add drawers with names that correspond to the departments as well. However, the system does not require you match group names to drawer names and this approach may not always be the best implementation for a particular department.
- Assign allow and deny privileges within each new group that meet the needs for that department. For example, grant the Financial group complete allow privileges for the Financial drawer. Then, grant the HR access to the HR drawer, and so forth.
- Add the relevant users to each of the new groups.
- Add groups to allow for access to another group's drawers. For example, you can create a subgroup in the Financial group that has limited access to the HR drawer.

## About the privilege hierarchy

ImageNow evaluates all privilege assignments at the user level. When user privileges and group privileges are different or when a user belongs to several groups in which the privilege assignments differ, ImageNow applies privilege hierarchy rules to resolve the privilege. The following table shows the privilege hierarchy, where user privileges are higher priority than group privileges, and that deny privileges are higher priority than allow privileges.

<div style="text-align: center;"> Highest Priority    Lowest Priority </div>	Privilege	User	Deny
			Allow
		Group	Deny
			Allow

The following examples show how the privilege hierarchy works:

**User privilege opposes privilege inherited from a group.** In this example, you grant a user the privilege to delete documents. Additionally, the HR group, to which the user belongs, is denied the ability to delete documents. As a member of the HR group, this user inherits the deny privilege. While the user can delete documents; at the group level, the user cannot delete documents. ImageNow uses privilege hierarchy rules to determine whether the user can delete a document. Since user level privileges override group level privileges, the user can delete documents.

**Group privilege opposes a privilege from another group.** Another area where privilege assignment evaluations occur is at the group level. In this case, the user belongs to two groups. In the HR group, the user is denied the ability to delete documents. In the HR\_Records group, the user inherits the ability to delete documents at the group level. So, one group allows the privilege and another group denies the privilege. Because the deny privilege overrides the allow privilege within the same group level, the user is denied the ability to delete documents.



**Additional resolutions.** When a user is a member of multiple groups where a privilege is allowed or denied in one group and not assigned in any other group, the user's effective privilege is the allowed or denied privilege. In addition, if a privilege is not specifically assigned, the user cannot perform the function.

## Assign privileges to a user or group

To allow or deny users the ability to perform actions in ImageNow, complete the following steps:

1. In the **Management Console**, in the left pane, select either **Users** or **Groups**.
2. In the right pane, on the **Security** tab, perform one of the following actions:
  - In the **Select a user** list, select a user, and then click **Modify**.
  - In the **Search for users** box, type all or some of a user name, first or last name, and then click **Search**. In the **Select a user** list, select a user, and then click **Modify**.
3. In the **Security Settings** dialog box, assign the privileges you need:
  - **Batch privileges** – Add users who can create batches.
  - **Document type privileges** – For each document type you create, grant privileges to allow or deny users the ability to perform actions.
  - **Category privileges** – For each category you create, grant privileges to allow or deny users the ability to perform actions.
  - **Drawer privileges** – For each drawer you create, grant privileges to allow or deny users the ability to perform actions.



- **Global privileges** – Select the privileges that users can perform globally.
  - **Process privileges** – Select a workflow process that users can access.
  - **Folder privileges** – Select a folder type and grant privileges to users in order to use or manage folders.
4. Optional. To grant the privilege, click the column in front of the user until  appears.
  5. Optional. To deny the privilege, click the column in front of the user until  appears.
  6. Click **OK**.

## About Managing Users and Groups

As a manager or administrator, you can manage the privileges for each user and group in ImageNow. You can assign privileges to users or you can use groups to streamline the task of assigning standard sets of privileges to large numbers of users.

You can create different groups for different types of users. There may be a group of users who perform all of the scanning tasks and require privileges to scan documents in a drawer but not to copy or move them. You can assign another group the privileges to create and process batches. You can assign both global privileges and drawer privileges at the group level or at the user level.

Using groups for the majority of work in assigning privileges cuts down on system administration work and reduces privilege confusion. You can always make exceptions for a particular user by denying a privilege at the user level because the user level privilege overrides the group level privilege within the same level (Drawer privileges or Global privileges). For example, you may have a manager who wants to restrict a particular user in a group from deleting documents in a certain drawer. Denying the Delete privilege at the user level allows the user to continue to perform all the other functions in the software that are assigned as privileges at the group level, while preventing just that user from deleting documents.

### Add a user

When adding a user, you provide personal and contact information about the user. You can optionally set an out of office event, and set up logging and auditing for the user. If using the System authentication method with multiple ImageNow Server instances, Perceptive Software recommends that all users are associated with the users in the network domain or Active Directory (Windows), or in the network (UNIX).

To add a user, complete the following steps:

1. In the **Management Console**, in the left pane, click **Users**.
2. In the right pane, on the **User Profiles** tab, click **New**, type the name you want and then press ENTER.
3. Select the user and then click **Modify**.
4. In the **Modify User Profile** dialog box, in the left pane, click each of following panes and add information as needed:
  - **Personal Information** – In the **Identity** section, type user information in the following fields: **First Name**, **Last Name**, **Prefix**, **Suffix**, and **External ID** (if you require HL7 compliance). In the **Miscellaneous** section, type additional information such as **Title**, **Organization** and, **Organization Unit**. Leave the **Is Active** check box selected.

- **Contact Information** – Type additional user information, such as **Phone, Mobile, Fax, Pager, Email, and Location**.
- **Out of Office** – This pane has no events in the right side for new users. For more information, refer to the *Management Console - Out of Office* section in the Table of Contents.
- **Logging** – Set up logging for the user you are creating.
- **Auditing** – Assign existing audit templates to the user you are creating.
- **Digital ID** – A new user won't have a Digital ID when being created, so no action is necessary in this pane.

5. Click **OK**.

## Modify or delete a user

To change information or remove a user, complete the following steps:

1. In the **Management Console**, in the left pane, click **Users**.
2. In the right pane, on the **User Profiles** tab, perform one of the following actions:
  - To remove a user, in the **Select a user** list, select a user and then click **Delete**.
  - To change user information, in the **Select a user** list, select a user and then click **Modify**.
3. In the **Modify User Profile** dialog box, perform the following actions in each section of the left pane:
  - **Personal Information** - In the **Identity** section, change information describing the new user's identity in the following fields: **First Name, Last Name, Prefix, Suffix, and External ID** (for HL7 compliance). In the **Miscellaneous** section, change additional information such as **Title, Organization, and Organization Unit**. Select or clear the **Is Active** check box according to whether you want the user be active or inactive.
  - **Contact Information** - Change additional user information, such as **Phone, Mobile, Fax, Pager, Email, and Location**.
  - **Out of Office** - You can create, modify, view, or disable a user's out of office event.
  - **Logging** - Set up or modify logging for the user.
  - **Auditing** - Assign or unassign audit templates to this user.
  - **Digital ID** - Expire or void the user's existing Digital ID.
4. Click **OK**.



## Assign management privileges

To give the user management privileges, complete the following steps:

1. In the **Management Console**, in the left pane, click **Users**.
2. In the right pane, on the **Security** tab, perform one of the following actions:
  - In the **Select a user** list, select a user and then click **Modify**.
  - In the **Search for users** box, type all or some of a user name, first or last name and then click **Search**. In the **Select a user** list, select a user and then click **Modify**.



**Note** To sort the **Select a user** list in ascending or descending order, click the **Name**, **Last Name**, **First Name**, or **Status** column headers.

3. In the **Security Settings** dialog box, in the left pane, click **Global Privileges**.
4. In the **Privileges** list, perform one of the following actions:
  - To grant all management privileges, click the column in front of the **Manage** privilege group until  appears in front of the group.
  - To grant specific management privileges, click the column in front of each privilege in the **Manage** group until  appears.
5. Click **OK**.

## Add a group

To create a group, complete the following steps:

1. In the **Management Console**, in the left pane, click **Groups**.
2. In the right pane, on the **Group Information** tab, click **New**.
3. Type a group name and then press ENTER.
4. Optional. To add a group description, select the group and then click **Modify**. In the **Group Properties** dialog box, in the **Description** box, type a description for the group, and then click **OK**.
5. Optional. To add users to the group, on the **Security** tab, select the group and then click **Modify**.
6. In the **Security Settings** dialog box, in the left pane, click **Group Members**.
7. To add users to the group, under **Group Members**, perform the following substeps:
  1. Click **Add**.
  2. In the **Select users** dialog box, perform one or both of the following actions:
    - In the **Search results** list, select one or more users and then click **Add**.
    - In the **Search for users** box, type all or some of a user name, first or last name and then click **Search**. In the **Search results** list, select one or more users and then click **Add**.
- Note** To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, or **First Name** column headers.
8. Click **OK**.
9. Optional. You can assign auditing templates and security privileges by clicking the corresponding pane on the left.
10. Click **OK**.

## Modify or delete a group

To remove or change a group, complete the following steps:

1. In the **Management Console**, in the left pane, click **Groups**, and then perform one of the following actions in the right pane, on the **Group Information** tab:
  - To remove a group, in the **Select a group** list, select a group and then click **Delete**.

- To change group information, in the **Select a group** list, select a group and then click **Modify**.
  - In the **Search for groups** box, type all or some of a group name and then click **Search**. In the **Select a group** list, select a group and then click **Modify**.
2. Optional. In the **Group Properties** dialog box, in the **Description** box, you can modify the description of the group, and then click **OK**.
  3. To change the security settings and membership for the group, on the **Security** tab, select the group and then click **Modify**.
  4. In the **Security Settings** dialog box, in the left pane click on any of the privilege panes, and change the security settings as needed in the right pane.
  5. In the left pane, click **Group Members** and then, in the right pane, perform any of the following actions:
    - Click **Add** to add additional users to this group
    - In the **Select Users** dialog box, perform one of the following actions:
      - In the **Search results** list, select one or more users and then click **Add**.
      - In the **Search for users** box, type all or some of a user name, first or last name and then click **Search**. In the **Search results** list, select one or more users and then click **Add**.
      - Click **Remove** to remove a user from this group. In the confirmation dialog box, click **Yes**.
  6. Optional. You can assign auditing templates and security privileges by clicking the corresponding pane on the left.
  7. Click **OK**.

## Add a user to a group

To add a user to an existing group, complete the following steps:

1. In the **Management Console**, in the left pane, click **Groups**.
2. In the right pane, on the **Security** tab, perform one of the following actions:
  - In the **Select a group** list, select the group you want and then click **Modify**.
  - In the **Search for groups** box, type all or some of a group name and then click **Search**. In the **Select a group** list, select a group and then click **Modify**.
3. In the **Security Settings** dialog box, in the left pane click **Group Members**, and then in the right pane under **Group Members**, perform the following substeps:
  1. Click **Add**.
  2. In the **Select Users** dialog box, perform one of the following actions:
    - In the **Search results** list, select one or more users and then click **Add**.
    - In the **Search for users** box, type all or some of a user name, first or last name and then click **Search**. In the **Search results** list, select one or more users and then click **Add**.
4. Click **OK** twice.

## Integrating with your Business Application

ImageNow can learn to identify information from your business application and associate that information with the document.

### About application plans

An application plan maps document keys and fields that the system populates when a user imports a document or folder into ImageNow using that application plan. There are multiple types of application plans in ImageNow that employ different methods of mapping and populating. For example, you can click specified fields from your business application or you can import the document and select the fields manually.

You can create the following types of application plans:

- **Agent application plan.** Use this method with ImageNow agents, both internal and external, that process jobs and provide messaging to the ImageNow clients.
- **Interact application plan.** Use this method with the Interact line of products that integrate with ImageNow. These products consist primarily of software that works within a third party's environment to expose ImageNow functionality.
- **LearnMode application plan.** Use this method for GUI-based, DOS-based, and terminal emulation applications. LearnMode can also learn applications that can communicate using OLE, DDE, and COM objects.
- **Manual application plan.** Use this method to create a stand-alone application plan. In special situations, ImageNow can be set to run as a stand-alone imaging system. In this case, images can be indexed and retrieved without the use of a business application.

### About LearnMode

LearnMode is a client-side, non-programmatic method of integrating your business application with ImageNow and learning screens or windows within that application. After the system learns a window, you can scan images and link them directly to records in your application. Thereafter, when you want to access an image that is linked to a particular record in your application, it is only one mouse click away.

LearnMode offers eight different methods to learn your business application, and the best method to use depends on the type of application you are using. For example, knowing whether your application is GUI-based, web-based, DOS-based, a terminal emulator, or other type of application will assist in determining the LearnMode type to use. Typically, each application ImageNow learns is stored in a container called an application plan. Each application plan can be a different LearnMode type. An application plan is comprised of screens: one screen for each screen or window in your business application you want to link images to. For example, a General Banking System business application may have a Main screen, a Summary screen, and a Loan screen.

To learn a screen in your business application, you must create a screen in an application plan. To create a screen, you capture the data from your business application screen, and create document index keys to link the image to the record in your application. Once you have created and tested the screen, you can scan images into ImageNow and link them to a particular record in your business application from that screen. Thereafter, you can view these images from your application anytime by opening the record in your business application and clicking one button on the ImageNow Client control bar.

The first task in learning your business application is to determine the appropriate LearnMode type. After you have determined the LearnMode type, you can create screens for each business application screen

to which you need to link documents. After you create an application plan for your business application, scanning and viewing images is seamless and automatic.

## Create a LearnMode application plan

1. Start your business application and open the window that you want ImageNow to learn.
2. Navigate to an active record.
3. On the **ImageNow** toolbar, click **Manage**.
4. In the **Management Console**, in the left pane, expand the **Application Plans** tree, and then click **LearnMode**.
5. In the right pane, on the **Applications** tab, click **New**.
6. In the **Plan Settings** dialog box, click the **General** tab.
7. Under **Information**, do the following actions:
  - In **Name**, type a unique name for your application plan.
  - In **Description**, type a description for your application plan.
  - Select **Is active** if you want this application plan to be active and available to users.
8. To configure ImageNow to identify the application or screen, under **Application**, choose one of the following types and complete the associated steps:
  - **Window Title**. To identify the business application based on the name that appears in the title of the applications window, complete the following steps:
    1. From the **Method** list, select **Window Title**.
    2. Click **Identify**.
    3. In the **Window Selector Starter** dialog box, click **Start**.
    4. Point to the title bar of the business application window and click the mouse button. The data captured from the business application window appears in the **Value** box.
  - **Class ID**. To identify the business application based on the class ID designated for the application, complete the following steps:
    1. From the **Method** list, select **Class ID**.
    2. Click **Identify**.
    3. In the **Window Selector Starter** dialog box, click **Start**.
    4. Point to the title bar of the business application window and click the mouse button. The data captured from the business application window appears in the **Value** box.
  - **Application Name**. To identify the application based on the name of the running executable, complete the following steps:
    1. From the **Method** list, select **Application Name**.
    2. Click **Identify**.
    3. In the **Window Selector Starter** dialog box, click **Start**.
    4. Click the title bar of the business application window . The data captured from the business application window appears in the **Value** box.

9. To configure ImageNow to identify the application or screen based on a value you enter, choose one of the following types and complete the associated steps:
  - **Window Title.** To identify the business application based on the name that appears in the title of the applications window, complete the following steps:
    1. From the **Method** list, select **Window Title**.
    2. In **Value**, type the name of the application.
    3. Click **Test**. The system attempts to find the business application window or screen with the given string in the **Value** box.
  - **Class ID** – To identify the business application based on the class ID designated for the application, complete the following steps:
    1. From the **Method** list, select **Class ID**.
    2. In **Value**, type the class ID that is designated for the application.
    3. Click **Test**. The system attempts to find the business application window or screen with the given string in the **Value** box.
  - **Application Name.** To identify the business application based on the name of the running executable
    1. From the **Method** list, select **Application Name**.
    2. In **Value**, type the name of the application's executable.  
**Note** The application name is the same name listed on the **Processes** tab in the Windows Task Manager.
    3. Click **Test**. The system attempts to find the business application window or screen with the given string in the **Value** box.
10. Depending on the results, the system displays one of the following messages in the **Status** box:
  - **Application found.** ImageNow has successfully connected to your business application. You can continue to the next step.
  - **Could not find application.** Start your business application and open the window that you want ImageNow to learn and repeat the learning process.
  - **More than one application found.** Close all applications, except the business application you want ImageNow to learn and repeat the learning process.
11. Click **OK**. ImageNow captures a screen shot of the business application window and displays it in **LearnMode Application Plan Designer**.
12. In **LearnMode Application Plan Designer**, make the necessary changes to the application plan, such as modifying or adding new screens or dictionary data elements, and mapping documents and folders. For more information, refer to the appropriate topics in ImageNow Application Plan Designer Help.



## Create an agent application plan

Use this method with ImageNow agents, both internal and external, that process jobs and provide messaging to the ImageNow clients.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, expand the **Application Plans** tree and then click **Agents**.
3. In the right pane, on the **Applications** tab, click **New**.
4. In the **Plan Settings** dialog box, click the **General** tab.
5. Under **Information**, do the following actions:
  - In the **Name** box, type a unique name for your application plan.
  - In the **Description** box, type a description for your application plan.
  - Select **Is active** if you want this application plan to be active.
6. Click **OK**.
7. In **Agent Application Plan Designer**, modify your agent application plan as you normally would by mapping keys and configuring view actions for documents and folders. For more information, refer to the appropriate topics in ImageNow Application Plan Designer Help.

## Create an Interact application plan

Use this method with the Interact line of products that integrate with ImageNow. These products consist primarily of software that works within a third party's environment to expose ImageNow functionality.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, expand the **Application Plans** tree and then click **Interact**.
3. In the right pane, on the **Applications** tab, click **New**.
4. In the **Plan Settings** dialog box, click the **General** tab.
5. Under **Information**, do the following actions:
  - In the **Name** box, type a unique name for your application plan.
  - In the **Description** box, type a description for your application plan.
  - Select **Is active** if you want this application plan to be active.
6. Click **OK**.
7. In **Agent Application Plan Designer**, modify your Interact application plan as you normally would by mapping keys and configuring view actions for documents and folders. For more information, refer to the appropriate topics in ImageNow Application Plan Designer Help.

## Create a manual application plan

This method creates a stand-alone application plan. In special situations, ImageNow can run as a stand-alone imaging system. In this case, the system can index and retrieve images without a business application.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console**, in the left pane, expand the **Application Plans** tree and then click **Manual**.
3. In the right pane, on the **Applications** tab, click **New**.
4. In the **Plan Settings** dialog box, click the **General** tab.
5. Under **Information**, do the following actions:
  - In the **Name** box, type a unique name for your application plan.
  - In the **Description** box, type a description for your application plan.
  - Select **Is active** if you want this application plan to be active.
6. Under **Application**, select **None** from the **Type** list, and then click **OK**. ImageNow opens **LearnMode Designer**.
7. In **Manual Application Plan Designer**, modify your manual application plan as you normally would by mapping keys and configuring view actions for documents and folders. For more information, refer to the appropriate topics in ImageNow Application Plan Designer Help.

## Configuring your Business Processes

ImageNow workflow lets you automate business processes and create review checkpoints. After you save a document in ImageNow, the system can route the document through any number of queues, which might represent different departments or different desks within a department.

In Management Console, you can create, modify, or delete a workflow process, and assign workflow privileges. You can also create reason lists to use in workflow for users to select from when placing items on hold in a queue. When you create or modify a workflow process, you enter the ImageNow Workflow Designer. For detailed information about workflow administration, click the Help menu in the ImageNow Workflow Designer window.

## What is Workflow Designer?

Workflow Designer for ImageNow provides administrators with the ability to graphically create queues and routes for their workflow processes from start to sign-off. Working in Workflow Designer is efficient. You can quickly manage workflow processes and user privileges without downtime.

There are three major types of workflow models and Perceptive Software supports each of them including variations where an organization may build multiple workflow models or combine them into a single process:

- **Ad-hoc workflow.** Used by dynamic workgroups that run individual processes for each document, which typically relies heavily on email and the use of alerts.



- **Transaction-based workflow.** This is a task-based workflow that usually involves lengthy and complicated processes, such as loan or claims processing, that involves multiple document types and a high level of customization.
- **Document-centric workflow.** Focus is on the document as the unifying object in the workflow process. Documents are associated with owners, applications, rules, and routes.

## About security privileges in Workflow Designer

In Workflow Designer, you have the ability to set workflow-specific privileges including the ability to add, process, archive, delete, or remove workflow items. You also create routes, queues, alarms and rules in Workflow Designer. See the sub-sections in this Help file for more information about how each of these features work.

## Create a workflow process

To create a new workflow, complete the following steps.

1. In the **Management Console**, in the left pane, click **Workflow**.
2. In the right pane, on the **Workflow** tab, click **New**.
3. In the **Add Process** dialog box, in the **Name** box, type a name, and then in the **Description** box, type the description of the process that will appear in the ToolTip for the process.
4. Click **OK**, select the process, and then click **Modify**.

The **ImageNow Workflow Designer** opens to create queues, routes, and workflow rules.

## About queues

Workflow is comprised of queues and routes that move items through your business processes. A workflow item is the base component for workflow, and it references a specific document or folder in ImageNow. A workflow item is routed from queue to queue until it reaches its destination. These queues are linked by routes.

- **Automated system queues.** An Automated system queue (ASQ) is a predefined queue that performs a specific action. For example, a Content ASQ automatically submits items to Content Server. A Transfer ASQ sends items in the queue to the Object Storage Manager set that you specify when creating the queue. To learn about the Object Storage Manager, refer to ImageNow Administrator Help.
- **Super queues.** A Super queue redistributes workflow items to a collection of distinct queues that perform the same workflow function. These sub queues reduce the number of alarms, routes, and rules needed.
- **System queues.** A System queue performs an action that does not require user intervention. For example, a queue that automatically prints documents or faxes. You usually perform this action with a rule or script.
- **Work queues.** A Work queue is a queue that you assign to one or more users who are performing the same action upon the same workflow items within the queue.
- **Complete queue property.** This queue property sets the queue as the final queue in a process. Any work, system, or super queue can be a Complete queue.
- **Join queue property.** This queue property rejoins workflow items that have been routed in parallel. Any work, system or super queue is allowed to be a Join queue.

## Create a work queue

This procedure outlines the minimal steps required to create the different queue types. For setting some of the more advanced queue properties, refer to the online Help at [www.perceptivesoftware.com](http://www.perceptivesoftware.com).

1. In the **Workflow Designer** window, in the left pane, under **Queues**, select the **Work** queue and then drag it to the right in your process diagram.
2. Double-click the queue to modify its properties.
3. In the **Queue Properties** dialog box, in the left pane, select **General**.
4. In the right pane, in the **Name** box, enter the name for your work queue.
5. If you want to define a Join queue, select the **Join queue** check box. A **Join Queue** is one that rejoins a workflow item that you route in parallel by creating two or more copies (siblings) of the original item. When they arrive in the Join queue, the items are rejoined as the one workflow item that existed prior to the split.
6. To define this queue as the last queue in the process, select the **Complete queue** check box. As an item is routed into a Complete queue, its status is then changed to "completed."
7. Click **OK**.

## Create a super queue

This procedure outlines the minimal steps required to create the different queue types. For setting some of the more advanced queue properties, refer to the topics in the "Queue Properties" section.

1. In the **Workflow Designer** window, in the left pane, under **Queues**, select the **Super** queue and then drag it to the right in your process diagram.
2. Double-click the queue to modify its properties.
3. In the **Super Queue Properties** dialog box, in the left pane, click **General**.
4. In the right pane, in the **Name** box, enter the name for your super queue.
5. In the left pane, click **Sub Queues**.
6. In the right pane, click **New**.
7. In the **New Sub Queues** dialog box, perform one of the following actions:
  - To create manual queues, complete the following actions.
    1. On the **General** tab, click **Manual queue creation** and type a name in the **Name** box.
    2. On the **Users and Groups** tab, click **Add**.
    3. In the **Select Users and Groups** dialog box, on the **Users** tab, select each user you want to assign to this queue, click **Add**, and then click **OK**.
    4. In the **Select Users and Groups** dialog box, on the **Groups** tab, select each group you want to assign to this queue, click **Add**, and then click **OK**.
    5. For each sub queue you want to use in your process, in the left pane, click **Sub Queue** and in the right pane, click **New**.
  - To create automatic queues, complete the following actions.
    1. On the **General** tab, click **Automatic queue creation** so that the queue is named for you by the Workflow Designer.

2. On the **Users and Groups** tab, click **Add**.
3. In the **Select Users and Groups** dialog box, on the **Users** tab, select each user you want to assign to this queue, and then click **Add**.
4. In the **Select Users and Groups** dialog box, on the **Groups** tab, select each group you want to assign to this queue, click **Add**, and then click **OK**.

**Note** If automatic is selected, a separate queue is created for each user and group using their user and group names for the sub queue name.

8. Click **OK**.

## Create sub queues for a super queue

1. In the process containing the super queue you want, double-click the super queue.
2. In the **Super Queue Properties** dialog box, in the left pane, click **Sub Queues**.
3. In the right pane, click **New**.
4. In the **New Sub Queues** dialog box, on the **General** tab, select either **Manual queue creation** or **Automatic queue creation**. If you select **Manual queue creation**, type a name for your sub queue in the **Name** box. With **Automatic queue creation**, ImageNow creates the queue name for you that is based on the selected users and groups.

**Note** The name of the sub queue always includes the name of the corresponding super queue in parentheses. This allows you to re-use sub queue names in different super queues without encountering a conflict of duplicate sub queue names.

5. On the **Users and Groups** tab, click **Add**.
6. On the **Users** tab, search for and select the users you want to have access to this sub queue, click **Add**, and then click **OK**.
7. On the **Groups** tab, search for and select the groups you want to have access to this sub queue, click **Add**, and then click **OK**.
8. In the **New Sub Queues** dialog box, click **OK**.


## Create a system queue

This procedure outlines the minimal steps required to create the different queue types. For setting some of the more advanced queue properties, refer to the topics in the Queue Properties section.

1. In the **Workflow Designer** window, in the left pane, under **Queues**, select the **System** queue and then drag it to the right in your process diagram.
2. Double-click the queue to modify its properties.
3. In the **Queue Properties** dialog box, in the left pane, select **General**.
4. In the right pane, in the **Name** box, enter the name for your system queue.
5. In the left pane, click **Actions**.
6. In the right pane, on the **Inbound**, **Within Queue**, or **Outbound** tab, in the **Action** list, select the script or rule you want to use.
7. Click **OK**.

## Create a transfer queue

Use this procedure to create a queue that saves items in the OSM set you select. Before performing this procedure, you must create two queues: one queue for successful transfers to the OSM set and another queue for processing unsuccessful transfers.

1. In the **Workflow Designer** window, in the left pane, under **Queues**, select the **Transfer**  automated system queue and then drag it to the right in your process diagram.
2. Double-click the queue to modify its properties.
3. In the **Queue Properties** dialog box, in the right pane, under **Details**, in the **Name** box, enter the name of the queue.
4. Under **Automated Action**, perform the following substeps:
  1. To designate the process and queue for items successfully processed in this queue, in the **Successful Action** list, select a process in the **Process** list and then select a queue in the **Queue** list.
  2. To designate the process and queue for items that are not successfully processed in this queue, in the **Failure Action** list, select a process in the **Process** list and then select a queue in the **Queue** list.
  3. In the **OSM** list, select the OSM set in which ImageNow saves the documents.

**Note** The transfer queue references the OSM set by name. Ensure the target OSM set and the original OSM set names are identical.

5. Click **OK**.

### Notes

- If you do not have a Content Server license, the Content ASQ does not appear in the **Queues** pane in **Workflow Designer**.
- You cannot manually create outgoing routes for a Content ASQ. To create outgoing routes, set the options in the **Automated Action** section for this queue.
- You are not able to designate sub queues as success or failure queues, therefore, they do not appear in the **Queue** list.

## About workflow alarms

ImageNow provides queue alarms that can alert users of a critical task that he or she needs to perform. For example, you can send an email alarm to the AP manager if the document key value = Reject. You can create another kind of alert that shows the AP manager that an item was routed from Legal Review to the current queue. Alarms relieve the user from repeatedly inspecting the status of multiple queues to determine whether critical tasks have been performed within a certain time frame.

You can add the following kinds of alarms to a queue:

- An **Email alarm** causes an email message to be sent to a person or group through an SMTP server.
- An **ImageNow Icon alarm** causes the ImageNow icon, in the upper left corner of the toolbar, to flash until the user has taken appropriate action with the affected queue. It also causes the ImageNow icon in the System tray to flash.
- A **Message Center alarm** scrolls across the marquee below the **ImageNow** toolbar and also is listed in the Message Center window.

- An **Audible alarm** plays a .WAV sound file on the user's computer when a specified condition in a queue has been satisfied.

You must be logged in as a workflow Administrator to be permitted to create alarms, rules, queues, and other elements comprising workflow from the Workflow Designer utility.

All of the users with the process privilege for the queue where the alarm was triggered receive the alarms, except for the owner, managers, and users with the global manage workflow processes privilege. That is because these user roles automatically have the process privilege for *every* queue in the system. These users can receive email alarms since email addresses can be added manually. Since Message Center, Icon, and Audible alarms are not activated for users with owner, manager, or user with management privileges roles, to test these three kinds of alarms, you must log in as a user who is not any of these three roles.

## Create an alarm

The following procedures explain how to define an email alarm rule and assign that rule to your email alarm.

### Name your alarm

1. In **Workflow Designer**, double-click the queue where you want to add an alarm.
2. In the **Queue Properties** dialog box, in the left pane, click **Alarms**.
3. In the right pane, click **Add**.
4. In the **Select Alarms** dialog box, click **Create**.
5. In the **Alarm Settings** dialog box, perform the following steps:
  1. In the **Name** box, type a name such as **Email Alarm**.
  2. Optional. In the **Timeout Period**, type or select a time such as five minutes.


**Note** Before you change this setting, consult Perceptive Software Product Support. This timeout applies only if the client loses communication with Alarm Agent.

3. Verify that the **Status** is set to **Active**.
4. In the **Alarm Rule** list, select **Edit Rules**.

### Build a rule


1. In the **Rules** dialog box, click **Create**.
2. In the **Rules Editor**, perform the following steps:
  1. In the **Rule name** field, type the name you want.
  2. In the **Rule type** list, select **Alarm rule**.

### Add conditional statements and define your alarm

1. To create a statement for your rule, under **Statements**, click **New**.
2. In the **Statement Editor** dialog box, in the **Statement name** box, type a name.
3. Under **Conditions**, perform one or both of the following options:
  - To modify the existing condition, click the blue underlined text.
  - To add a new condition, click the **Add**  button.



4. In the **Add Condition** dialog box, perform the following substeps:
  1. In the **Constrain by** list, click the kind of constraint to set up the lists you need in the **Type**, **Field**, and **Operator** boxes.
  2. In the **Type** list, verify that **Normal** is selected.
  3. In the **Field** list, click the field for the comparison.
  4. In the **Operator** list, select the operator to use in the comparison.
  5. In the **Value** box, enter or select a value to use with the operator when comparing against the field.
  6. Click **OK**.
  7. Optional. Repeat these substeps for any additional condition rows.

**Note** If you add multiple conditions, you can toggle the Boolean operator between **AND** and **OR** by clicking it. If you need to delete a condition, select the condition and then click the **Delete**  button.
5. To create an alarm for items that meet the conditional statements you just defined, perform the following substeps:
  1. Under **Actions**, click **Add** and then select the type of alarm you would like to create.
  2. Complete the appropriate information for the type of alarm you select.

#### Activate your rule

1. In the **Rules Editor**, click **Active** and then click **OK**.
2. To close the **Rules** dialog box, click **OK**.
3. In the **Alarm Settings** dialog box, in the **Alarm Rule** list, select the alarm rule you just created and then click **OK**.
4. In the **Select Alarm** dialog box, select the alarm you just created, and then click **Add**.
5. In the **Queue Properties** dialog box, verify that your email alarm is in the list, with a Queue Status of **Enabled** and an Alarm Status of **Active**.
6. If you don't have the **Alarm Status** column, click **Columns**. In the **Columns** dialog box, select the **Alarm Status** check box, and then click **OK**.
7. In the **Queue Properties** dialog box, click **OK**.
8. Close Workflow Designer.



## About routes

Routes connect workflow queues. They can be inbound or outbound or both. You can also route to a queue contained in the same process or to a queue in a different process.

Route type	Description
Conditional routes	A conditional route is a route that is determined by rules that occur dynamically in the process. The next queue in the process is determined by information received by the workflow process. For example, in an approval process where an invoice over \$5,000 must go to the Finance Director, the process automatically routes invoices greater than that amount to the Finance Director.
Inter-process routes	An inter-process route allows you to route items from a queue in one workflow process to a queue in another workflow process.
Load Balance routes	A load balance route is designed for high volume processing, such as ten thousand or more items per day, and allows you to route items using distribution. The distribution option you select determines how your items are routed. You can choose to route an equal number of items among a set of destination queues. As an example, when you define four destination queues and there are twenty thousand items, this distribution option routes approximately five thousand items to each queue. With this option, users process approximately the same number of items, however, a variance exists. This variance decreases as the number of items increases. Alternatively, you can choose to route items to the destination queue with the fewest number of items. This option means that the faster a user processes items, the more items he or she receives. By default, this option distributes items equally among the set of destination queues.
Parallel routes	A parallel route allows multiple actions to take place at the same time. Multiple processing of the same document can occur and be brought together at a specified queue. When all processes are completed, the next action is initiated. With a parallel route, a workflow item is routed to more than one queue at the same time and when all actions on the item (sibling) are complete, the sibling items are routed forward and rejoined in a join queue. Items you route into a queue in parallel cannot be routed to another parallel route because they are already split.
Parallel Conditional routes	A parallel conditional route is a route that allows multiple actions to take place at the same time and also allows you to place conditions on the route.
Peer routes	A peer route allows you to route items between sub queues within a super queue.
Sequential routes	A sequential route is a clearly defined route with little variation. One action must be completed before the workflow item is routed to the next queue. Manual routes are used when there is more than one queue an item might be routed to next. This route requires the user to select the destination queue from the available routes list.
Sequential Auto routes	A sequential auto route is a clearly defined route with no variation. One action must be completed before the workflow item is routed to the next queue. Automatic routes require no additional user interaction after the Route button is clicked. There is only one queue the item can route to next, so it is automatically sent to that queue.

## Create a route

You can only create load balance, sequential, sequential auto, and parallel routes using the Task Pane. To create conditional or parallel conditional routes, refer to those topics.

1. In **Workflow Designer**, in the **Task Pane**, click **Routes**.
2. On the **Grid** toolbar, verify that the **Normal Routes** button is selected.
3. On the top of the left pane, click a route type.
4. Point to the queue you want to connect to until the pointer changes shape to a cross-hair, and then click this queue and drag to draw it to the other queue.
5. Repeat these steps to create all routes within your workflow process.

## Add a user to a queue

Adding a user to a queue also involves assigning privileges for that user about what actions they can take in the queue.

1. Open the process containing the queue to which you want to add a user.
2. Double-click the queue you want.
3. In the **Queue Properties** dialog box, in the left pane, select **Users** and then click **New**.
4. Perform one of the following actions:
  - On the **Users** tab, under **Available Users**, select a user and then click **Add**.
  - On the **Groups** tab, under **Available Groups**, select a group and then click **Add**.
5. Click **OK**, and then back in the **Queue Properties** dialog box, click under the column for the privilege you want to assign to the user or group.
6. Click **OK**.

## About rules and scripts

Rules and scripts help you manage items as you move them through workflow queues. In Workflow Designer, rules let you create conditional alarms and routes. Typically, you would use workflow rules to set up alarms and to route items through your work queues. Scripts are typically used when you want to automate actions such as to print, fax or email. You might also use a script to strip elements from a numeric string such as slashes from a telephone number or hyphens from a social security number. See *ImageNow iScript Help* in the ImageNow iScript Editor for programmability documentation.

In the Actions area of your Queue Properties, you can create, modify, and remove scripts and rules. To create rules and specify conditions in order to trigger an event on a queue, you use the ImageNow Rules Editor. You set up these conditional routes similarly to the way you would set up email rules in Microsoft Outlook. There are two types of rules: Routing and Alarm. Once you have created your rules, you set the order in which you want to apply them, and then you activate them.

## About Tasks

A task is work that you assign to one or more users for documents and folders. ImageNow provides the following task types:


- **Document deficiency.** Create this task type to indicate when a document is missing or is incomplete.
- **Pointer.** Use this task type to draw attention to a specific document or folder location for further action.
- **Signature required.** Assign this task type when a user needs to digitally sign a document.

**Note** You must have the Document Management Suite license installed on your ImageNow system to use the signature required task type.

To administer tasks, in Management Console, you create task templates for your users. In a task template, specify the task type, set locations (folder, document, and page), actions (iScripts), an assignment list, a completion method (automatic with valid digital signature, manual and complete pending review), reasons (action and return), a due date method, and security options. Task template security allows you to determine the roles your users have when working with tasks. You can also manage reasons and reason lists for the task templates.

## Grant task template manager privileges

This privilege is necessary to create and manage task templates. You manage only the task templates you create. To manage another user's template, you must have the Manage privilege for that template.

1. In the **Management Console**, in the left pane, perform one of the following options:
  - To grant a privilege to a user, click **Users** and then in the right pane, on the **Security** tab, perform one of the following actions:
    - In the **Select a user** list, select a user, and then click **Modify**.
    - In the **Search for users** box, type all or some of a user name, first or last name, and then click **Search**. In the **Select a user** list, select a user, and then click **Modify**.
  - To grant a privilege to a group, click **Groups** and then in the right pane, on the **Security** tab, perform one of the following actions:
    - On the **Groups** tab, in the **Select a group** list, select a group and then click **Modify**.
    - On the **Groups** tab, in the **Search for groups** box, type all or part of a group name and then click **Search**. In the **Select a group** list, select a group and then click **Modify**.
2. In the **Security Settings** dialog box, click the **Global Privileges** pane.
3. In the **Privileges** list, under **Manage**, select the **Task Templates** privilege.
4. Click the column to the left of the privilege so that  displays to grant the privilege.
5. Click **OK** until you return to the **Management Console**.

## Create a task template

To define the task type and the behavior of the task, complete the following steps.

1. In the **Management Console**, in the left pane, click **Tasks**.
2. In the right pane, on the **Templates** tab, in the **Select a task type** box, select an option:
  - **Document deficiency**
  - **Pointer**
  - **Signature required on document**
3. Under **Templates**, click **New**.

### Define the template properties

1. In the **Task** dialog box, in the left pane, select **Properties**.
2. In the right pane, under **General**, in the **Name** box, type a name for your task template.
3. In the **Description** box, type a template description.
4. Under **Options**, verify that the **Is active** check box is selected to make the task template available to task creators assigning tasks from the **Tasks** toolbar.
5. Optional. Select the **Delete completed task** check box to automatically and permanently delete a task and its related history after the task is completed.

**Note** If a task creator assigns a task series and the **Delete completed task** check box is selected, ImageNow does not delete the tasks in that series until the series is complete. After a series is complete, the system removes that entire series.

### Define the template components

In the **Task** dialog box, in the left pane, select **Components** and perform the following steps:

1. In the right pane, under **General**, in the **Task instructions** box, type the instructions you want your task assignees to see.
2. Optional. Select the **Modifiable during task creation** check box to allow a task creator to modify the instructions on the **Options** tab in the **New Task** dialog box.
3. In the **Task location** section, select one or more of the following locations to determine where tasks created with this template can be assigned:
  - **Folder**. Create a task for a folder.
  - **Document**. Create a task for a document.
  - **Page without a visual representation**. Create a task for a page in a document with no visual representation.
  - **Page with a visual representation**. Create a task, along with a visual representation, for a page in a document.

**Note** You must select at least one task location.

4. In the **Completion method** box, select one of the following methods:
  - **Manual.** After task assignees complete a task, the task status is Complete.
  - **Complete pending review.** After task assignees complete a task, the task status is Complete Pending Review. Tasks with this status go to a reviewer.
5. Optional. Under **Workflow Assignment**, select one or both of the following workflow options:
  - **Send to queue** - Select the destination queue option you want. The default option is **(None)**, in which case documents or folders are not sent to any queue. If you want to prompt the task creator for a workflow queue, select **(Prompt)**. All other options are the queues to which the current user has the Add privilege.
  - **Send the folder to the workflow queue if the task location is a document in a folder** - If the task location is a document in a folder, select this option to send the folder to workflow.

**Note** To enable the **Send the folder to the workflow queue if the task location is a document in a folder** option, in the **Send to queue** box, select a queue or (Prompt).

## Define the template action

1. In the **Task** dialog box, in the left pane, click **Actions**.
2. In the right pane, under **Scripting**, perform one or more of the following actions to apply an iScript to:
  - Assigned tasks, in the **Assigned** list, select a script.
  - Returned tasks, in the **Returned** list, select a script.
  - Pending review tasks, in the **Pending review** list, select a script.
  - Complete tasks, in the **Complete** list, select a script.
  - Canceled tasks, in the **Canceled** list, select a script.
  - Invalid tasks, in the **Invalid** list, select a script.
3. Optional. To send an email notification to task assignees when a task is created with this template, under **Creation Notification**, select the **Send email notification when task is created** check box.
 

**Note** A task assignee must have an email address configured in his or her user profile in order to receive an email notification.
4. Optional. To include a link in the email notification, perform one or both of the following actions:
  - To include an ImageNow link, select the **Include ImageNow link** check box.
  - To include a WebNow URL link, select the **Include WebNow URL link** check box.
5. Click **OK**.

## Define the template assignment list

1. In the **Task** dialog box, in the left pane, click **Assignment**.
2. In the right pane, click **Add**.



3. In the **Select Users and Groups** dialog box, to add users or groups so they are available for task assignment, select one of the following options:
  - To add users to your assignment list, on the **Users** tab, select one of the following options:
    - In the **Search results** list, select one or more users, click **Add** and then click **OK**.
    - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want, and then click **Search**. In the **Search results** list, select one or more users, click **Add** and then click **OK**.
  - To add groups to your assignment list, on the **Groups** tab, select one of the following options:
    - In the **Search results** list, select one or more groups, click **Add** and then click **OK**.
    - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add** and then click **OK**.

**Note** To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, **First Name**, or **Group Name** column headings. The **Assignment list** must contain at least one user or group.
4. Optional. Select the **Automatically assign the task to the task creator** check box.

## Define the template reason lists


1. In the **Task** dialog box, in the left pane, click **Reasons** and perform the following steps:
2. Optional. Under **Action Reasons**, in the **Action** list, select the action list you want.
3. Optional. To create a new reason list, click **New** and then perform the following steps:
  1. In the **Reason List** dialog box, on the **General** tab, in the **Name** box, type a reason list name.
  2. In the **Description** box, type a short description.
  3. Verify that the **Is active** check box is selected.
  4. On the **List Members** tab, under **Available**, select one or more reasons and then click **Add**.
  5. Optional. To create new reasons, click **New** and in the text box, type a reason.
  6. Click **OK** to close the **Reason List** dialog box.
4. Optional. Select the **Assignee must specify a reason during task completion** check box to require the task assignee to indicate why he or she is completing a task.
5. Under **Return Reasons**, in the **Return** list, click a return list.

## Define the template due date method

1. In the **Task** dialog box, in the left pane, select **Due Date**.
2. In the right pane, under **Due Date Calculation**, in the **Method** list, select one of the following methods:
  - No due date
    - In the **Method** list, click **No due date**.
  - Based on assignment date
    1. In the **Method** list, click **Based on assignment date**.
    2. In the **Days** box, set the number of days you want.
  - Based on start date
    1. In the **Method** list, click **Based on start date**.
    2. In the **Days** box, set the number of days you want.
  - Prompt task creator for date
    - In the **Method** list, click **Prompt task creator for date**.

## Define the template security

1. In the **Task** dialog box, in the left pane, click **Security**.
2. In the right pane, under **Users and Groups**, click **Add**.
3. In the **Select Users and Groups** dialog box, to add users or groups for privilege assignment, select one of the following options :
  - To add users, on the **Users** tab, select one of the following options:
    - In the **Search results** list, select one or more users, click **Add** and then click **OK**.
    - In the **Search for users** box, type all or part of a first name, last name, or user name of the user you want and then click **Search**. In the **Search results** list, select one or more users, click **Add** and then click **OK**.
  - To add groups, on the **Groups** tab, select one of the following options:
    - In the **Search** results list, select one or more groups, click **Add** and then click **OK**.
    - In the **Search for groups** box, type all or part of the group name you want and then click **Search**. In the **Search results** list, select one or more groups, click **Add** and then click **OK**.

**Note** To sort the **Search results** list in ascending or descending order, click the **User Name**, **Last Name**, **First Name** or **Group Name** column headings.
4. Under **Users and Groups**, select a user or group.
5. To grant the user or group the following privileges, click the column in front of each privilege until  appears. You can grant or deny privileges to create, delete, modify, review, and view tasks created with this template. Additionally, grant or deny the manage privilege for the template itself.
  - **Create**. To allow the user or group to create tasks with this template, grant the **Create** privilege.

- **Delete.** To allow the user or group to delete tasks created with this template, grant the **Delete** privilege.
- **Manage.** To allow the user or group to manage this template, grant the **Manage** privilege.  
**Note** In order for the user or group to access task templates in the Management Console, the user or group must have the **Manage Task Templates** privilege on the **Global Privileges** tab.
- **Modify.** To allow the user or group to modify tasks created with this template, grant the **Modify** privilege.
- **Review.** To allow the user or group to review tasks created with this template, grant the **Review** privilege. Reviewers look at tasks after they have been completed by a task assignee.
- **View.** To allow the user or group to view tasks created with this template, grant the **View** privilege. The user or group with this privilege can view tasks but cannot process or modify them.  
**Note** The View privilege is not required for task assignees. The user or group assigned to a task automatically has the ability to view that task. Additionally, by default, task creators and reviewers are automatically able to view tasks they created or are reviewers for. However, because tasks are associated with documents and folders, the user or group must have the necessary document or folder privileges.
- **Manage Returned.** To allow the user or group to view and modify returned tasks created with this template, grant the **Manage Returned** privilege. Granting this privilege also allows the user to manage returned tasks for tasks created using an iScript.  
**Note** Alternatively, you can click **Allow All**, **Deny All**, or **Deselect All** to allow, deny or deselect all privileges for the selected user or group.
- Verify that the **Automatically grant task creators the Review privilege for the tasks they create** check box is selected. If you don't want task creators to review the tasks they create, then clear this option.
- Click **OK**.

**Note** The **Incomplete Template** dialog box appears if you did not add at least one user or group to the assignment list, if you did not select a return list, or if you selected the **Send the folder to the workflow queue if the task location is a document in a folder** check box, but did not select a queue in the **Send to queue** list. To save this template, click **OK**. The template is set to inactive. To return to the template to complete it, click **Cancel**.

## About CaptureNow

CaptureNow is a central ImageNow feature that lets users scan and import documents from multiple sources into ImageNow. In the capture profiles, you define your organization's scanning technology, and you set up and store all the options you need to obtain precise images and other documents in ImageNow. The following list defines some key terms used in CaptureNow.

- **Capture profiles.** ImageNow can capture hard-copy documents, files in a directory, or files from your computer. From a given source (File, Scanner, or ImageNow Printer), you build your capture profile and set the options you want for document indexing, workflow, image processing, and mode. Each new capture profile appears on the Capture menu on the ImageNow toolbar.
- **Single mode.** This profile copies the properties defined in an application plan to capture and index documents in ImageNow. Suitable for situations where you want to capture and link documents at the same time you scan them.
- **Batch mode.** This profile captures documents and stores them in a group (or batch) on your local computer, where the system eventually uploads to ImageNow Server and processes based on settings specified in the capture profile. Batch mode can import documents into ImageNow using index keys you specify or none at all.
- **Package mode.** This profile captures documents and allows you to index related data into a set of predefined baskets. Related data refers to documents that share at least one common index value such as Patient ID or Patient Name. Package mode is ideal for use in point-of-registration or walk-up environments, where document collectors are required to collect highly structured data in real time and need to verify and organize the data based on logical groups and other settings. Package Mode gives you the option of setting up document rules which, in conjunction with prompted scanning, assist the user in determining which documents are to be included in package mode capture.
- **File.** This source type lets you retrieve documents from a file system.
- **Scanner.** This source type lets you load paper (or other items) into the appropriate scanning device. The device will capture the items and load them into ImageNow.
- **ImageNow Printer.** This source type lets you import a document, such as an email, into ImageNow without having to scan it first. You import the document using the Print button within the software program that is displaying it.

## About scanner configuration

You can configure a scanner for any ImageNow Client computer in your enterprise. Scanning profiles and capture profiles define the behavior of the scanner in connection with the ImageNow Client. You can create up to ten capture profiles and distribute them according to user names, groups, or computer names.

### Install a scanner

You must log on to Windows using an account in the Windows Administrator Group to successfully install a scanner on your ImageNow system. The installation procedure varies depending on the type of scanner and drivers you install.

## Install the SCSI card

If using a USB scanner, you do not need to install a SCSI card. Mini-desktops do not have enough space for 650i SCSI cards. Follow your manufacturer's instructions to install the card.

1. Verify the SCSI card is an Adrenaline 650i, which includes a hardware license to use AIPE.
2. Insert the SCSI card in the desired PCI slot on the scanning workstation.
 

**Note** Do not connect the scanner to the SCSI port of the workstation yet. Connect the scanner only after you install all of the drivers.
3. Turn on the computer and log in as a user with administrative privileges on the computer where the SCSI is installed.
 

**Note** During startup, the SCSI cards name should appear. If it does not appear, you must shut down the computer and reinsert the card.
4. If the Windows **Found new hardware** wizard appears, follow the instructions and install the drivers. The next three steps verify that the installation was successful.
5. On the desktop, right-click **My Computer** and then click **Properties**.
6. In the **System Properties** dialog box, on the **Hardware** tab, click **Device Manager**.
7. Click the plus sign next to **SCSI and RAID controllers** and verify the name of your SCSI card appears in the device list.
  - If it appears, continue the installation procedure.
  - If it does not appear, shut down the computer and verify the SCSI card is inserted correctly. If the card does not appear in the device list after you restart the computer, install the card in a different PCI slot and repeat this procedure.

## Install the drivers

We recommend that you obtain the latest version of the scanning drivers directly from the manufacturer and that you manually install them on the scanning computer, even if the Found New Hardware wizard installed the drivers during SCSI installation.

1. Download the necessary scanner ISIS software driver you need.
  - For a Fujitsu scanner, use the following URL to download the drivers: <http://www.fujitsu.com/us/services/computing/peripherals/scanners/support/downloads/isis.html>
  - For Canon scanners, use the following URL to download the drivers and the necessary .inf file: <http://www.usa.canon.com/cusa/support>
  - If the ISIS software driver is unavailable and you do not have the original manufacturer's installer CD, refer to the scanner's manufacture's website or documentation.
2. Install the driver according to manufacturer's instructions.
  1. Note the path to which the files are extracted. This path is typically C:\<scanner name>.
  2. Navigate to the path in the previous step and run the **setup.exe**, accepting the default settings.
3. Connect the scanner into the workstation by doing one of the following:
  - For USB scanners, plug the USB cable into any available port.



- For SCSI scanners, with the scanner and computer turned off, plug the scanner into an available SCSI port, turn on the scanner, and then turn on the computer.
4. If the **Found new hardware** wizard appears, follow the instructions on the wizard pages.
 

**Note** For Canon and some other scanners, you need to enter the location of the .inf file that you downloaded in step 1. Other models may require you to insert the manufacturers CD.
  5. Use the Windows Device Manager to verify that the scanner name appears in the device list under imaging devices.
    - If it does not appear, make sure the scanner is turned on and check the SCSI card or USB port connections. If necessary, repeat this procedure.
    - If a yellow question mark appears next to the name of your scanners, the .inf file associated with the scanner is missing. This error may appear for the Kofax DS2500 and other older scanners. For more information, refer to the Troubleshoot scanner configuration topic on the Perceptive Software website, in the Customer Portal, under Product Documentation.

### Install Kofax Adrenaline

If you use Pixel scanning drivers, you do not have to complete this step. You typically install both Kofax Adrenaline Software products except when your business case precludes either AIPE or VRS. For complete instructions for installing Kofax Adrenaline, refer to the following Kofax document: [ftp://ftp.kofax.com/pub/support/vrs\\_scanning\\_apps/vrs/4.2/product\\_documentation/user\\_guides/english/VRS\\_Installation\\_Guide.pdf](ftp://ftp.kofax.com/pub/support/vrs_scanning_apps/vrs/4.2/product_documentation/user_guides/english/VRS_Installation_Guide.pdf)

1. To verify scanner compatibility and recommended configuration with Kofax product versions and controller type, access the Scanner Configurator tool from the following URL: <http://www.kofax.com/configurator>
2. Log in to the scanning computer as a user with administrative privileges.
3. Insert the Kofax CD into the CD ROM drive.
  1. If the program does not run automatically after a few seconds, access the CD/DVD-ROM drive using Windows Explorer.
  2. Double-click **setup.exe**.
4. On the **Welcome** dialog box, select **Install VRS and an Adrenaline SCSI controller** and click **Next**.
5. Enter your Kofax license information and click **Next**.
6. Accept the default values for the remaining dialog boxes of the wizard.

**Note** Refer to the Troubleshoot scanner configuration topic on the Perceptive Software website, in the Customer Portal, under Product Documentation to research any messages that appear during this part of the installation.

### Test the scanner

If you use Pixel scanning drivers, do not complete this step. Kofax installs a program to test the scanner and the Kofax driver. You can trace any problem that appears both in ImageNow and in this program to either the Kofax driver or the scanner.

1. On the **Start** menu, point to **Programs**, then point to **Kofax VRS**, and then click **VCDemo**.
2. In **VCDemo**, point to **Source**, click **Scanner**, select the correct source that you want to use, and then click **OK**. When the scanner is ready, the scanner icon appears.
3. Insert one or more documents in the scanner.

4. Point to **Source** and then click **Process Batch**. The result determines your next step:
  - If configured properly, the scanner scans and displays the documents. You installed the scanner successfully.
  - If an error appears, the SCSI card, ISIS driver, or Kofax driver is not configured properly.

## Create a scanning profile

Scanning profiles store information about the type of scanner you are using, along with scanner-specific features such as paper size, color mode, and image processing filters. Before you can create a scanning profile, you must install and license the scanner and then configure it to work with CaptureNow using the Device Manager dialog box.

To create a profile that contains information about your scanning hardware, complete the following steps.

1. On the **ImageNow** toolbar, on the **Settings** menu, click **Options**.
2. In the **ImageNow Options** dialog box, in the left pane, click **Capture**.
3. In the right pane, under **Scanning Profiles**, click **Manage Profile List**.
4. In the **Scanning Profile Manager** dialog box, click **Create**.
5. In the **Scanning Profile** dialog box, on the **General** tab, perform the following steps to create a new scanning profile:
  1. In the **Name** box, type a unique profile name.
  2. **Description** box, type a short description.
  3. In the **Device** box, select the device name you want.

**Note** Depending on the type of driver you are using, the **Scanning Profile** dialog box will display different tabs. Pixel drivers use the **General**, **Properties**, and **ImageNow Processing** tabs. Kofax drivers use **General**, **Properties**, **Advanced**, and **Options** tabs. TWAIN drivers use **General** and **Properties** tabs.
6. On the **Properties** tab, under **Properties**, choose the options you want.
7. Optional. If you are working with a flatbed scanner, under **Flatbed Settings**, choose the options you want. If your scanner does not support flatbed scanning, then the **Flatbed Settings** options are dimmed and unavailable.
8. When using Kofax drivers, on the **Advanced** tab, under **Options**, choose one or more of the following options:
  - In the **Prescan** box, specify the number of pages to be cached by the Kofax Accelerator.
  - In the **Timeout** box, specify the time in seconds before the scanning process will stop after the last page is scanned.
  - To delete blank pages from the scanning process by using a more advanced comparison, select the **Calculate Blank Page Deletion** check box.
  - Click **Advanced**, and then choose the options you want. These vary based on the device you have installed.
  - Click **Units**, and then specify what units of measurement you want for the current profile.

9. When using Kofax drivers, on the **Options** tab, choose the options you want in order to scan part of a document, not all of it. If your scanning device supports duplex scanning, then you can specify a picking rectangle for both front and back pages.
10. When using Pixel drivers, on the **ImageNow Processing** tab, select the filter you want and then add, remove, configure or move it up or down in the list. Before you configure a filter, first move it to the **Selected Filters** list.
11. Click **OK** three times.

#### Notes

- To create a scanning profile, the user logged in to the local machine must have the Write permission for the [drive]:\Documents and Settings\All Users\Application Data\ImageNow\etc folder.
- When using Pixel driver, to add filters quickly to the **Selected Filters** list, you can double-click on the one you want to add it, or select multiple filters at once by using the CTRL or SHIFT keys, and then click **Add** (or **Remove**).
- When you remove a filter from the **Selected Filters** list, that filter is not removed completely. It is returned to the **Available Filters** list.
- You can apply image processing filters to black and white, grayscale, and color images. The filters available to you depend on the driver type and scanning color.

## About barcodes

You can use barcode recognition to detect barcodes on an image and convert them to their ASCII equivalents. The detection recognizes a barcode oriented on a page in any direction. During a barcode recognition operation, ImageNow searches the image for possible barcodes. If a potential barcode is found, ImageNow examines it for specific characteristics, such as the type of the barcode, the height of the barcode, the width of the narrowest barcode element, the length of the barcode (number of characters encoded), the size ratio of the narrowest element compared to the largest element, the font size (18 point is recommended), and the text format (for example, for text "ABC123" you have to type "\*ABC123\*" when produced from a Windows application). If ImageNow determines that the code has these characteristics, the code is deemed recognizable.

You use barcode triggers within a Capture Profile for the following three scenarios: to separate documents, to separate groups, or to use as an index key value. For example, you can use barcodes to separate large batches of documents, similar to using patchcodes. Using a barcode as a separator sheet trigger further simplifies the task of scanning and organizing documents. Each time the scanner detects a barcode, the system creates a new batch. The system places all newly scanned documents in the new batch until scanning finishes or the scanner detects another barcode.

A barcode grouping trigger categorizes documents based on one or more barcodes. You can specify a barcode filter that a barcode must match before a new batch is started. Enabling barcode grouping requires that you set one or more index keys for each barcode.

You can also use barcodes to automatically index your documents. You can use parts of barcodes as keys of a document. For example, you can break a barcode that contains the value 1650498029802011 into three pieces, and each piece can be a key. You can designate the first five digits as a key, the middle ten digits as a key, and the last digit as a key.

## Configure ImageNow to recognize barcodes

The following steps outline the high-level procedures that you need to perform to configure ImageNow to recognize barcodes.

1. Complete the following steps to access your scanning profile:
  1. On the **ImageNow** toolbar, click the **Capture** arrow and then click **Manage Capture Profiles**.
  2. Click **Create**.
  3. In the **New Capture Profile**, on the **General** tab, in the **Type** section, in the **Source** list, select **Scanner**.
  4. Click the **Scanner** tab.
2. Within your scanning profile, set the **DPI** to **300**. 300 DPI (Dots Per Inch) is the recommended setting for optimal barcode recognition.
3. Enable barcode detection by selecting the **Barcode Detection** option within your scanning profile.
4. Set the **Barcode Detection Properties** that you want, for example, bar size, search directions, type, and number of barcodes to be recognized on a page, and the quality condition of the barcode.
5. Set your capture profile for either **Batch Separation** or **Auto Indexing**.
6. For **Batch Separation**, select the **Barcode Separator Sheet** and **Remove Separator Sheet** options within your capture profile.
7. For auto indexing, set the following options within your capture profile:
  - Select the **Barcode Grouping** option to index any remaining pages behind the barcode page.
  - Set the **Page Limit** option to a value between 0 and 999 to set the maximum number of pages a barcode can link together. This limit serves as a safeguard should a barcode go undetected.
  - Set the barcode grouping trigger to specify which barcode to use for grouping if more than one barcode is detected.
  - Assign the barcode values to index keys. You can assign a barcode for one index key or all five.
  - If a single barcode contains multiple pieces of data, you can parse the barcode into multiple index keys using a pipe character (|).

## About patchcodes

You can use a patchcode to create a new batch when it is detected by the scanner. Patchcodes are similar to barcodes in that they further simplify the task of scanning and organizing documents. Kofax scanning hardware and software can detect and recognize six separate patchcode patterns, while Pixel enabled devices recognize three patterns. If a potential patchcode is found, it is examined for specific characteristics to determine if it is recognizable.

Some of the patchcode characteristics examined are:

- The narrow bars must be 0.08 inch in height.
- The wide bars must be 0.20 inch in height.
- The entire patchcode must be 0.80 inch in height.
- The entire patchcode should be at least 2.0 inches in width.

Each time a patchcode is detected, a new batch is created for the documents that are scanned after it. All newly scanned documents are placed in the new batch until scanning finishes or another patchcode is detected.

## Scan using a patchcode

Verify that the patchcode is located on the leading edge of the page being inserted into the scanner (if inserted backwards, some patchcodes may accidentally scan as other patchcodes). Also, make sure that the patchcode is positioned horizontally on the page, that it is at least 0.20 inches from the leading edge of the page, and that it does not extend 3.75 inches from the leading edge of the page. Patchcodes are only detected on the front side of a page.

1. Download the patchcodes from the Perceptive Software website and print them.
2. Enable patchcode detection for the capture profile you want to use.
3. Insert the patchcode printouts to divide the documents you are going to scan into individual batches. Insert the patchcode printout on top of the documents you want to designate as a new batch.
4. Position the patchcode printout toward the scanner feed with the patchcode on the leading edge of the paper.  
**Note** This could vary based on the type of scanner you have.
5. Scan your documents.

## What is the ImageNow Printer?

The ImageNow Printer allows you to import a document, such as a Microsoft Office document or an email, into ImageNow without having to print and scan it first. You can use the ImageNow Printer from any software program that has a print option. The options you set in an ImageNow Printer capture profile determine how the system processes your ImageNow Printer documents. Because ImageNow Printer stores documents as TIFF files, you can annotate them. You can also set the page orientation, color, and watermark options for the ImageNow Printer.

When you want the ability to highlight a Word document or add a sticky note to an email, consider importing your documents using the ImageNow Printer. When you don't need to annotate, you can use the import from disk or drag object options. With these methods, the system stores the files you import in the original file format. For example, when you import a Word document using the import from disk option, ImageNow stores the document as a DOC file. While you can view the Word document, you cannot annotate it.

## About capture profiles

A capture profile is a reusable collection of settings that makes capturing a single-click task. The profile stores all the options you need to capture and conduct related processing tasks with ImageNow Client. The scanning options in a capture profile include a source that designates where you are capturing documents from (File, Scanner, and Printer) and other options for document indexing, routing a captured document to a workflow queue, and image processing.

## Create a capture profile

To create a capture profile, complete the following steps.

1. On the **ImageNow** toolbar, click the **Capture** arrow and then click **Manage Capture Profiles**.



2. In the **Capture Profiles** dialog box, click **Create**.
3. In the **New Capture Profile** dialog box, perform the following steps:
  1. On the **General** tab, under **General**, perform the following steps:
    1. In the **Name** box, type a unique name for the profile.
    2. In the **Description** box, type a short description of your profile.
  2. Under **Type**, perform the following steps:
    1. In the **Source** list, click **ImageNow Printer**, **File**, or **Scanner** as appropriate.
    2. In the **Mode** list, click **Single**, **Batch**, or **Package** as appropriate.
    3. Optional. If you have installed Content Server, select the **Submit documents to Content Server** check box if you want the captured objects to be submitted to Content Server for full text indexing.
  3. Optional. Under **Workflow**, in the **Send To** box, click the destination queue option you want. The default option is **<None>**, in which case the documents are not sent to any queue. If you want to prompt the user for a workflow queue, click **<Prompt User>**. All other options are the queues to which the current user has Add access.
  4. Depending on your selections on the **General** tab, complete the information on the **File**, **Scanner**, **Single**, **Package**, or **Batch** tabs as appropriate.
  5. Optional. On the **Index Keys** tab, select the options you want, including the **Document Type**. Double-click a key to make any changes. If a key is set to **Empty**, this is a default setting and no key is set up for that field.
4. In the **<name of capture profile>** dialog box, click **OK**.
5. In the **Capture Profiles** dialog box, click **Close**.

**Note** To quickly create a new capture profile, you can base it on an existing profile by clicking **Copy** in the **Capture Profiles** dialog box. Next, click **Modify** and make the changes you want to create the new profile.

## About Package mode

Unlike Single or Batch mode, Package mode uses a set of pre-defined Basket Groups, Document Rules, and Capture Profile options to allow you to capture, organize, and verify that you have the documents you need. Package mode lets you collect and index documents with different physical attributes and from multiple sources. Package mode allows you to gather index keys at the point of scanning, much like Single mode, but also allows you to deal with varying sets of data, which is an advantage over Batch mode.

In ImageNow Viewer - Package, you can drag and drop your captured images between the Basket Groups you set up. With Package mode, you can gather the pages in groups or one at a time, and there is no limit to the number of objects you can collect.

## About Template Types

You can create many types of templates in ImageNow. A template defines the behavior of aspects of ImageNow such as the security and appearance. You can define a wide range of things including task properties, annotation appearances, addendum behaviors, and groups or users associated with template types.


### About addendums


A user creates an addendum page to correct or augment the content of a signed document without editing the document itself. Addendum pages differ from other document pages in two ways: the user can only add addendum pages to signed documents, and the user normally creates the content of the addendum using an addendum template. You define addendum templates in Management Console. The user must save and sign the addendum before other users can view it.

You create addendum templates either by typing and formatting the content of the template yourself or by importing an RTF or TXT file into ImageNow and modifying it as necessary. The default template selection is Blank page, which contains no text or formatting.

### Create an addendum template





To use document management functionality, which includes the version control feature described in this topic, a Document Management license is required.

Use the following procedure to add a template to the list that appears when the user clicks the **Add an addendum**  button in the Viewer. The default template selection is Blank page, which contains no text or formatting.

1. In the **Management Console**, in the left pane, click **Addendum Templates**.
2. In the right pane, click **New**.
3. In the **New Addendum Template** dialog box, under **General**, type a name and optional description for the template and then, if you want to keep the template hidden from your users, clear the **Is active** check box.
4. Under **Appearance**, do one of the following actions:
  - To import an RTF or TXT file, click the **Import**  button and then, in the **Select Addendum Template File** dialog box, browse to the file, select it, and click **Open**.
 

**Note** Tables in the RTF file are included in the template, but in WebNow, they don't appear as tables.
  - To compose your own template, begin typing in the space below the toolbar. You can use the toolbar buttons to apply the following styles or actions:

Button	Style
<b>B</b>	Bold
<i><b>I</b></i>	Italic
<u><b>U</b></u>	Underline

Button	Style
	Font family, font size, color
	Undo
	Redo
	Set alignment

**Note** If you are creating templates for WebNow users, do not include the double strikethrough style or tables in the template.

- When you are finished editing the template, click **OK**.

## About annotation templates

You provide templates for the annotations that a user can utilize to mark up and comment on a document. Users can annotate a document without affecting the original image. Each ImageNow annotation requires an annotation template.

You specify the security options based on the template. In the annotation template, you can grant users or groups the privilege to create, delete, hide, modify, and view specific annotation templates. For example, you can create a Stamp template with the following text: Received by Accounts Payable. You can set the template security so that only users in the Accounts Payable group can use, modify, or delete annotations created using that Stamp template. If you do not grant ImageNow users in the Human Resources access to view stamps created using that stamp template, those users cannot view, modify, or delete this annotation.

You can remove an annotation template from the list that appears to users without deleting the template completely. You can also remove (without deleting) an annotation type such as check, stamp, or line from the Annotation toolbar.

## Create an annotation template

To define a template that a user can utilize to mark up and comment on a document, complete the following steps.

- In the **Management Console**, in the left pane, click **Annotations**.
- In the right pane, perform the following steps:
  - In the **Select an Annotation Type** box, select an option from the list and then click **New**.
  - In the selected row under **Template Name**, type a name for the template and then press **ENTER**.
  - Select the template and then click **Modify**.
- In the **Annotation** dialog box for whichever annotation type you selected, perform the following steps:
  - Define the template properties.
    - In the left pane, select **Properties**.
    - Optional. Supply a **Description** for the annotation template.

3. Under **Options**, verify that **Is Active** is selected so that it appears on the **Annotations** toolbar.
5. For some template types, you can modify the content.
6. Depending on the Annotation type, in the left pane, **Content** appears. If it is available, in the left pane, click **Content**.
7. Modify the options.

## About Administering Views

As an ImageNow administrator, you create views that display only the documents and folders your users need to work with. By tailoring your user's view to only the items they need to see, you simplify their user experience. While ImageNow may contain hundreds or thousands of documents, your users see only the subset of items that you enable in their view.

Views enable you to add another layer of protection to documents on ImageNow Server. In addition to the access privileges set for drawers and document types, your users can see the documents and folders within a particular drawer or document type that satisfy the view definition.

Using views, you can customize the columns that the user sees in ImageNow Explorer. In the View Designer, you can modify the way columns appear to the users, predefine the sort order and grouping of items, or include a summary of statistical data about the columns. If a view includes statistics, they appear below the search grid.

After you create a view, you can assign view privileges to specific users or groups, or both. When your users open ImageNow Explorer, they see only the documents and folders to which you have granted them access via a view. You can also use a document or folder view to create a report if you have Business Insight installed in your environment.

In Management Console, you can create, modify, and delete views. You can also create relationships between documents and folders, which display as views. To learn the details of creating views, defining column display, and granting user access to views, first create a new view or modify an existing one. When you do so, ImageNow View Designer opens.

If you want to designate a view to use when a user accesses ImageNow from a link that does not specify which view to use, you can set one of the defined document or folder views as the system default in View Designer. When you set a view to the system default, the view results appear when the user accesses ImageNow from a link. In the Management Console, you can also set the default view on a user-by-user basis. User default views override system default views.

## Types of views

The following table summarizes the kinds of views available in ImageNow, including views created by you, your view manager, and views created automatically by the ImageNow system.

View	Defined By	Description	Modifiable Components
Application Plan	Users with application plan management privileges	An application plan view returns a set of documents captured using a specific application plan. Users with application management privileges can configure view actions and components in Application Plan Designer. Application plans that do not have a defined view action do not display results in ImageNow or WebNow	View privileges View conditions Column layout View statistics Sorting and grouping

View	Defined By	Description	Modifiable Components
		<p>Explorer.</p> <p>Users with the View privilege for the application plan can run the view. For the active business application plan screen, the view returns the associated results. For more information about defining view actions, refer to the “What is a view action?” topic in Application Plan Designer help.</p>	
Batches	System	A batch view returns the batches in your ImageNow system. By default, batch users can view all batches, batches that are ready for QA, and batches that ready for linking.	<p>Column layout</p> <p>Sorting and grouping</p>
Document	User with document view management privileges	A document view returns a set of documents. Users with view access and search privileges for the document drawer can run a document view. Document views appear in the Views pane under Documents in ImageNow or WebNow Explorer.	<p>View name</p> <p>View privileges</p> <p>View conditions</p> <p>Public filters</p> <p>Private filters</p> <p>Column layout</p> <p>View statistics</p> <p>Sorting and grouping</p>
Folder	Users with folder view management privileges	A folder view returns a set of folders. Users with view access, folder viewing privileges, and search privileges for the folder's drawer can run a folder view. Folder views appear in the Views pane under Folders in ImageNow or WebNow Explorer.	<p>View name</p> <p>View privileges</p> <p>View conditions</p> <p>Public filters</p> <p>Private filters</p> <p>Column layout</p> <p>View statistics</p> <p>Sorting and grouping</p>
Related	Users with document or folder view management privileges	<p>Related views appear in the Related Documents pane of the document viewer and in the Related Folders pane of the folder viewer. A related view applies the relationship selected in the list to the current document or folder. The view displays a list of all documents or folders that satisfy the conditions of the relationship.</p> <p>Users with document view management privileges can create and modify document relationships in Management Console. Users with folder view management privileges can create and modify folder relationships in Management Console.</p>	<p>Relationship name</p> <p>View privileges</p> <p>View conditions</p> <p>Public filters</p> <p>Private filters</p> <p>Column filters</p> <p>View statistics</p> <p>Sorting and grouping</p>



View	Defined By	Description	Modifiable Components
Folder Content	Users with folder type management privileges	<p>When the user opens a folder, ImageNow Folder Viewer displays a secondary grid that lists the folder contents. This secondary grid is called a folder content view. User with folder type management privileges can modify components of the folder content view in Management Console.</p> <p>Because document and folder shortcuts can belong to any number of folders, the same document or folder might appear as a representation in Folder Viewer with different grid layouts, depending on the type of folder the user opens.</p>	<p>Column layout</p> <p>View statistics</p> <p>Sorting and grouping</p>
Recycled documents and folders	System	<p>When the user deletes a document or folder, if you have enabled recycled item views, ImageNow moves the item to a system view called My Recycled Documents or My Recycled Folders.</p> <p>If the user is the owner or a manager, two additional views appear. These views, All Recycled Documents and All Recycled Folders, display all items deleted by all users. As long as the user can see a recycled document or folder, the user can restore it to its previous view, at which time the document or folder keeps the attributes it had before deletion, if possible.</p> <p><b>Note</b> Items remain in the recycled view for the number of days that you specify in the inserverFS.ini file.</p>	Private filters
Recently received documents	System	<p>Recently received documents appear in a temporary view that appears when one ImageNow user transfers documents to another user with the Send to User feature. This transfer must occur while both users are connected to the same ImageNow Server. The view sorts the received documents according to the name of the sending user and the time they were sent.</p>	
Workflow Process	Users with workflow process management privileges	<p>A workflow view returns a list of items (representing documents or folders) when the user accesses a workflow process, which appears in the Views pane under Workflow in ImageNow or WebNow Explorer.</p>	Private filters

View	Defined By	Description	Modifiable Components
Workflow Queue	Users with workflow process management privileges	<p>A workflow queue view returns a list of items (representing documents or folders) when the user accesses a workflow queue, which appears in the Views pane under Workflow in ImageNow or WebNow Explorer.</p> <p>Workflow queue views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.</p>	<p>Column layout</p> <p>View statistics</p> <p>Private filters</p> <p>Grouping and sorting</p>
Task	Set as default	A task view returns a list of tasks assigned to the user according to type of task, such as My Assigned or To Review. Task views appear in the Views pane under Tasks in ImageNow or WebNow Explorer.	<p>Public filters</p> <p>Private filters</p> <p>View statistics</p> <p>Column layout</p> <p>Sorting and grouping</p>

## Create a view definition

To use the View Designer to create a view definition, complete the following steps:

1. In the **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the **Documents** or **Folders** tab, click **New**.
3. In the **New View** dialog box, in the **Name** box, type a name, and then in the **Description** box, type the description of the view that will appear in the ToolTip for the view.
4. Click **OK**, select the view, and then click **Modify**.
5. In the **View Designer** window, on the **Help** menu, click **ImageNow View Designer Help** to review the steps for adding or changing conditions, adding or modifying public filters, modifying column layout, previewing the view, and assigning view privileges to users and groups.

## Modify column and row display

You can specify how columns are named, arranged, and sized as well as define sort and grouping of rows in the search grid. All of these procedures appear in the Help topics for ImageNow View Designer.

1. In the **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the **Document** or **Folder** tab, click the view you want to modify, and then click **Modify**.
3. In the **View Designer**, on the **Help** menu, click **ImageNow View Designer Help**.

## About administering related views

A user can display one or more related views from ImageNow Viewer or WebNow Viewer. When the user selects a related view to apply to the active document, the Related Documents pane displays documents that match the document with respect to the conditions you define for the related view.

With owner or manager privileges, you can create, rename, and delete related views in ImageNow. When you modify a related view, you automatically enter ImageNow View Designer, where you can create or modify relationship conditions, activate the view, and assign security settings to it.

## Create a related document view

To perform these procedures, you must be a user with management privileges, a manager, or the owner.

1. In the **Management Console**, in the left pane, click **Relationships**.
2. In the right pane, on the **Related Documents** or **Related Folders** tab, click **New**.
3. In the **New Relationship** dialog box, in the **Name** box, type a name, and then in the **Description** box, type the description of the view that will appear in the ToolTip for the view.
4. Click **OK**, select the view, and then click **Modify**.
5. In the **View Designer** window, on the **Help** menu, click **ImageNow View Designer Help** to review the steps for adding or changing relationship conditions and assigning view privileges to users and groups.

## Index

addendums	
overview .....	59
templates, creating .....	59
administrator	
area, accessing .....	17
role, overview .....	8
Adrenaline 650i .....	52
AIPE .....	52
annotation templates	
creating .....	60
overview .....	60
application plans	
overview .....	32
types .....	32
barcodes	
configuring ImageNow to recognize .....	56
recognition, overview .....	55
Basket Groups, Package mode .....	58
Batch mode capture profile .....	51
Business Insight Author license .....	10
Calculate Blank Page Deletion check box .....	54
Canon scanners .....	52
capture profiles	
creating .....	57
overview .....	57
CaptureNow, overview .....	51
changing	
groups .....	30
users .....	29
concurrent use license .....	10
configuring scanners .....	51
connection profiles	
creating .....	17
creating	
scanning profiles .....	54
task templates .....	46
custom property data types	
date .....	18
flag .....	19
list .....	19
number .....	20
string .....	20
user .....	21
deleting	
groups .....	30
users .....	29
demonstration mode .....	10
directories, default, inserver6 .....	8
Document deficiency, task type .....	45
document organization, administrator role .....	8
Document Rules, Package mode .....	58
feature license .....	11
filters .....	55
flatbed scanner options .....	54
folders, containing server files .....	8
Fujitsu scanners .....	52
groups	
adding .....	30
adding users to .....	31
assigning privileges to .....	27
deleting .....	30
managing security for .....	28
modifying .....	30
ImageNow Printer	
and capture profiles .....	51
overview .....	57
ImageNow Processing tab .....	55
inserver6, default directories .....	8
ISIS software driver .....	52

Kofax Adrenaline, installing.....	53	installing .....	52
license		SCSI .....	53
Business Insight Author .....	10	testing.....	53
concurrent use .....	10	USB .....	52
feature.....	10	scanning drivers, installing .....	52
per seat.....	10	scanning profiles, creating.....	54
transaction package .....	10	SCSI	
Management Console		card .....	52
overview .....	16	scanners.....	53
starting.....	17	security tasks	
management privileges, granting.....	29	administrator role .....	8
optional objects		Signature required, task type .....	45
custom property .....	18	Single mode capture profile .....	51
document type list.....	24	task templates	
OSM (Object Storage Manager)		actions.....	47
folder locations .....	9	assignment lists .....	47
Package mode		components .....	46
capture profile .....	51	creating .....	46
overview .....	58	due date methods.....	49
per seat license .....	10	management privileges.....	45
Pointer, task type .....	45	properties .....	46
Prescan box .....	54	reason lists .....	48
privileges		security.....	49
assigning to users or groups.....	27	tasks, overview .....	45
assigning, overview .....	26	templates	
hierarchy of.....	26	overview .....	59
task template manager.....	45	testing scanners .....	53
related views		transaction package license .....	10
creating.....	65	USB scanners .....	52
related views, administering .....	64	users	
required objects		adding .....	28
document type .....	22	adding to a group.....	31
drawer.....	25	assigning privileges to.....	27
scanners		deleting.....	29
Canon .....	52	managing security for .....	28
configuring.....	51	modifying.....	29
Fujitsu .....	52	view definitions, creating .....	64



views		Word document, importing with ImageNow	
columns, modifying display.....	64	Printer.....	57
rows, modifying display.....	64	workflow management, administrator role.....	8
types .....	61	workflow processes	
views, related		administering.....	36
administering.....	64	creating .....	37