

# Perceptive Content (ImageNow Client) Instructions

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## Perceptive Content Products used at MCC

<p><b>Perceptive Content Client</b> – allows to scan, link, process workflow, use ImageNow Printer, create and save views and filters, automatically display documents for a record in Colleague using Binoculars function</p>	<p><b>Perceptive Experience for the web</b> – allows to view documents via Views, search for documents, process documents in Workflows, add annotations, modify index keys manually. No linking or scanning is available at this time. <a href="#">Access Perceptive Experience Here</a></p>	<p><b>Perceptive Search</b> – search for documents based on content of the document when you don't know the index keys <a href="#">Access Perceptive Search Here</a></p>
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This document is an overview of how to use a Perceptive Content (ImageNow) client installed on your work computer.

### Log In

If you will be scanning and/or linking, you will need Perceptive Content Client (ImageNow) installed on your PC.

#### Installing ImageNow

If ImageNow is not installed locally on your computer you can contact the Help Desk at [helpdesk@middlesexcc.edu](mailto:helpdesk@middlesexcc.edu) for assistance with installing the application.

Run the Perceptive Content software by selecting the software through searching “Perceptive Content” in the computer search bar. **If you will be only viewing and processing digital documents, you will not need this software installed and can use the web interface to view and process documents accessible here:** <https://edocs.middlesexcc.edu/Experience/#login>. Please save this link to your favorites.

#### Logging in

Once the software displays its login screen, choose the correct platform (“Test” or “Production”) by clicking on Connection Profiles. You can also click on Edit Connection Profiles to choose your default option when opening ImageNow. Enter your user name and password (Middlesex NetId) and click “Connect” to proceed.

Test- Is the environment used for testing code and quality assurance, will not affect Production.

Production- Is the ‘Live’ environment, actual implementation will occur when working in Production.

## Perceptive Content (ImageNow)

**ImageNow:** Computer-installed perceptive software system.

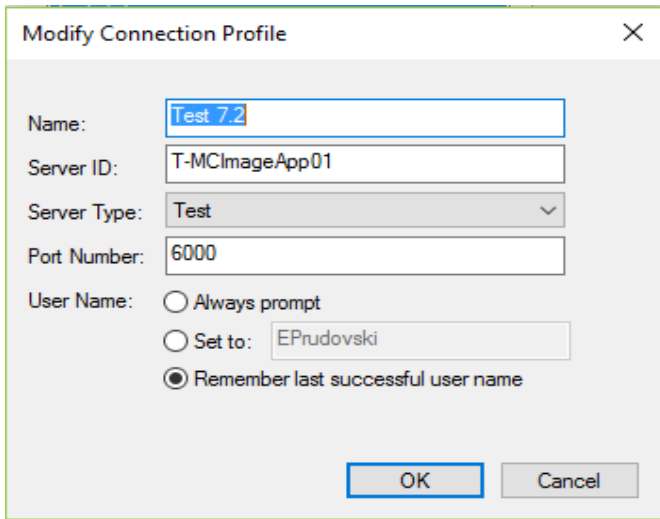


## Alternating Login platform between Production and Test

Select **Connection Profiles** in the top bar section in ImageNow's login screen. Choose the desired platform by clicking on the displayed options.



If the Test platform was unavailable, click on **Edit Connection Profiles** and **Create** the Test platform.



Click **OK** to finish creating the Test platform.

## Using Help Tool

On the **ImageNow** toolbar, select the **Help** menu to locate the **ImageNow User Help** {Shortcut key: F1}



## Resize and Zoom on Documents

Open the document in ImageNow Viewer. Go to View in the menu bar, and select **Zoom In** or **Zoom Out** to modify the document, repeat the process if necessary. {Shortcut key: Ctrl+Num + or Ctrl+Num - | Click on the

Zoom icon}

## Display Message Center

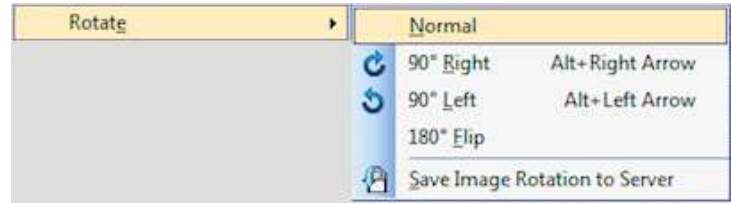
On the **ImageNow** toolbar, select the **Settings** menu to click on **Show Message Center** to display Message Center {Shortcut key: Ctrl + M}

## Always On Top

On the **ImageNow** toolbar, on the **Settings** menu, click **Always on Top** to have ImageNow toolbar to appear at the top of your screen.

## Rotate and save Rotated Documents

In ImageNow Explorer, double-click to open the document in ImageNow Viewer. In ImageNow Viewer, select **View** in the toolbar section, modify the document rotation by clicking on the rotation options desired.



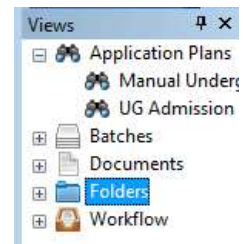
To save the image rotation. Go to **View** in the document menu bar, click **Rotate** and select **Save Image Rotation to Server**.

## Filter

Apply a filter:

You can use this procedure to apply a filter to an existing view in the Views pane of ImageNow Explorer.

1. In ImageNow Explorer, in the **Views** pane, select a document, folder, task, or workflow view to show its filters.
2. Click the filter you want to apply to the view.
3. If the **Select a Search Value** dialog box appears, select or type a value as instructed and then click **OK**.



Create a private filter:

You can use this procedure to save a search you performed as a filter accessible to you in the Views pane of ImageNow Explorer.

1. In ImageNow Explorer, in the **Views** pane, select the view you want to use as a basis for your filter.
2. In the right pane, define your quick search or create conditions for an advanced search.
3. If the search returned the results you want, in the **Current View** toolbar, click the **Save private filter** button. If not, refine your search and then repeat this step.
4. In the **Save Filter** dialog box, type a name and an optional description for the filter and then click **OK**.



Notes:

- To save the search as a private filter, you must have the **Filter** privilege.
- After you save the private filter, it appears below the view you used to create it in the **Views** pane.



## Modifying Column Display in documents/folders/workflow

Select the tab of your choice (Documents, Folders, or Workflow) in the menu bar and wait for the ImageNow Explorer to show up.



Click on **View** at the top of ImageNow Explorer, and choose Columns {Shortcut key: Ctrl + T}. [Image]

Check/Uncheck the option box to the left of your desired field, and select OK to apply changes to your column display.

## Use Annotation

In ImageNow Viewer, open a document. Locate the **Annotation icon** in the document tool bar.



Select/Deselect the icon by clicking on the icon once. [Image showing select/deselect] Selecting the annotation icon allows you to view or edit the existing annotation, deselect the icon to view only the document itself.

**To add annotation**, right click on the icons to the right of the Annotation icon to view and select the desiring form. With a form selected, drag your mouse across the document to create annotation.

**To delete or modify an existing annotation**, turn on the **Annotation** icon in the document toolbar. Right-click on the existing annotation to delete or edit the content/appearance of the annotation.

## Customize Toolbar

**Hide the ImageNow menu bar:**

1. On the **ImageNow** toolbar, on the **Settings** menu, click **Options**.
2. In the **ImageNow Options** dialog box, in the left pane, click **Toolbar**.
3. In the right pane, on the **General** tab, in the **Menu bar** list, select **Off**.

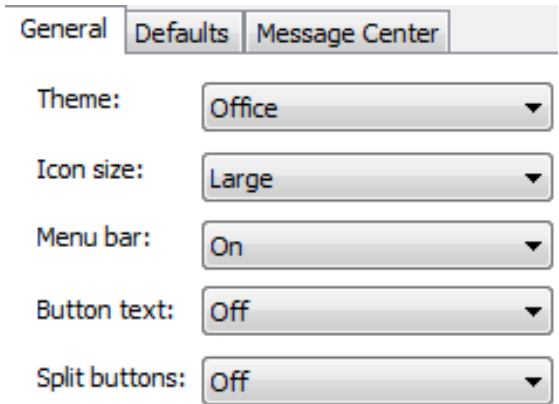
Menu bar:

**Note:** To redisplay the menu bar, select On.

4. Click **OK**.

**Change button appearance:**

1. On the **ImageNow** toolbar, on the **Settings** menu, click **Options**.
2. In the **ImageNow Options** dialog box, in the left pane, click **Toolbar**.
3. In the right pane, on the **General** tab, perform one or both of the following actions:
  - To hide the toolbar button captions, in the **Button text** list, select **Off**. To show the toolbar button captions, select **On**.
  - To hide the command lists next to the buttons, in the **Split buttons** list, select **Off**. To show the command lists next to the buttons, select **On**.
4. Click **OK**.



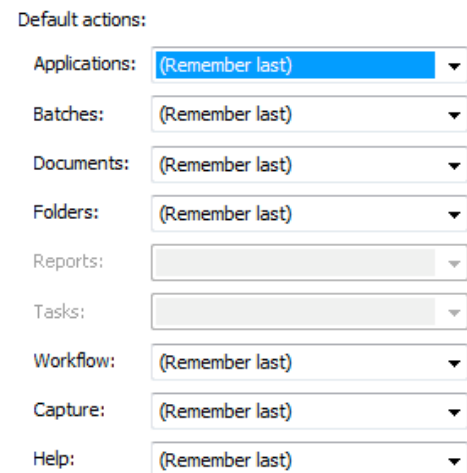
General	Defaults	Message Center
Theme:	Office	
Icon size:	Large	
Menu bar:	On	
Button text:	Off	
Split buttons:	Off	

### Change the icon size

1. On the **ImageNow** toolbar, on the **Settings** menu, click **Options**.
2. In the **ImageNow Options** dialog box, in the left pane, click **Toolbar**.
3. In the right pane, on the **General** tab, in the **Icon size** list, select **Small**, **Medium**, **Large**, or **Extra Large**.
4. Click **OK**.

### Set default ImageNow toolbar selections

1. On the **ImageNow** toolbar, on the **Settings** menu, click **Options**.
2. In the **ImageNow Options** dialog box, in the left pane, click **Toolbar**.
3. In the right pane, on the **Defaults** tab, under **Default Actions**, perform any of the following options:
  - In the **Applications** list, select the default application plan.
  - In the **Batches** list, select the default batch.
  - In the **Documents** list, select the default search query.
  - In the **Folders** list, select the default folder.
  - In the **Reports** list, select the default report.
  - In the **Tasks** list, select the default task.
  - In the **Workflow** list, select the default workflow queue.
  - In the **Capture** list, select the default capture profile.
  - In the **Help** list, select the default Help module.
4. Click **OK**.













Default actions:

Applications:	(Remember last)
Batches:	(Remember last)
Documents:	(Remember last)
Folders:	(Remember last)
Reports:	
Tasks:	
Workflow:	(Remember last)
Capture:	(Remember last)
Help:	(Remember last)

## About the ImageNow toolbar

The ImageNow toolbar lets you change the toolbar size, button size, button text, and much more. All of the functions and documents you need are only one mouse click away. The options below change depending on your security privileges.

Tool	Name	Clicking the button lets you	Clicking the arrow lets you
	Applications	Display ImageNow Explorer with the Find a Document pane for the currently selected application plan.	Select an application plan from the list and display ImageNow Explorer with the Find a Document pane for that application plan.
	Batches	Display ImageNow Explorer for all document batches.	Select all batches, only batches ready for QA or only batches ready for linking.
	Documents	Display ImageNow Explorer, where you can search for documents.	Select a predefined document view.
	Folders	Display ImageNow Explorer, where you can search for folders.	Select a predefined folder view.
	Reports	Display ImageNow Explorer, where you can view reports. <b>Note</b> The Reports button only appears if you have a valid Business Insight license.	Select a report or a report folder.
	Tasks	Display the ImageNow Explorer for any tasks assigned to you.	Select a particular type of task.
	Workflow	Display the ImageNow Explorer for any workflow queues that contain documents.	Select a specific workflow and queue
	Capture	Start the default capture profile.	Start any capture profile in the list.
	Manage	Open Management Console. <b>Note</b> The Manage button only appears if you have management privileges.	No arrow appears.
	Help	Display online help for the ImageNow product you are currently viewing.	Display online help for any ImageNow product in the list.

### Create a custom toolbar

You can create toolbars for any viewer or for ImageNow Explorer. Custom options include creating a user defined toolbar, assigning shortcut keys, and setting toolbar options, such as icon size and ScreenTip display. The options vary depending on the toolbar location.

1. To create a custom toolbar, on the **View** menu, point to **Toolbars** and then select **Customize**.

### Create a custom toolbar

- To create a custom toolbar, perform the following steps:
  1. On the **Toolbars** tab, click **New**.
  2. In the **New Toolbar** dialog box, in the **Toolbar name** box, type a name and then click **OK**.
  3. On the **Commands** tab, in the **Categories** list, select a category. The **Commands** list displays the commands available for the selected category.

**Note:** To create user defined buttons using Visual Basic Scripting (VBScript) or ImageNow Client API, in the **Categories** list, select **User**

4. In the **Commands** list, drag the commands you want to the new toolbar created in step 2.



## Assign a shortcut key

- To assign a shortcut key to a command, perform the following steps:
  1. On the **Keyboard** tab, in the **Category** list, select a category. The **Commands** list displays the commands available for the selected category. The commands vary according to the category selected.

**Note:** Command descriptions are available in the **Description** box.

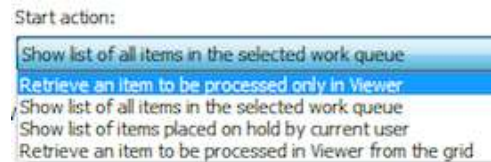
2. In the **Commands** list, select the command for which you want to create a shortcut key. When there is a default shortcut key for a command, it appears in the **Key assignments** list.
3. Click your mouse in the **Press new shortcut key** box.
4. On your keyboard, press the keys you want to use for the selected command and then click **Assign**.

Repeat steps **1 - 4** to assign shortcut keys for any remaining commands.

Click **Close** to finish customization.

## Modify Workflow

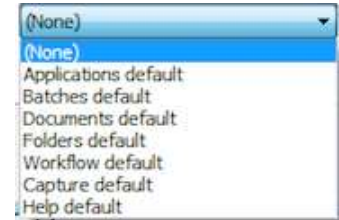
1. On the **ImageNow** toolbar, click the **Settings** menu and then click **Options**.
2. In the left pane, click **Workflow**.
3. In the right pane, on the **General** tab, under **Workflow Startup**, in the **Start action** list, select one of the following options:
  - To open the oldest item in the queue without opening **ImageNow Explorer**, select **Retrieve an item to be processed only in Viewer**.
  - To display a list of all items in the queue in **ImageNow Explorer**, select **Show list of all items in the selected work queue**.
  - To display the current on hold items list in your default queue in **ImageNow Explorer**, select **Show list of all items placed on hold by current user**.
  - To open the default queue in **ImageNow Explorer** and the first workflow item in **ImageNow Viewer**, select **Retrieve an item to be processed in Viewer from the grid**.
4. Click **OK**.



## Define General Display


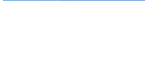
1. On the **ImageNow** toolbar, click the **Settings** menu and then click **Options**.
2. On the left pane, click **Toolbar** and then click the Defaults tab.
3. Under **Initial State**, in the Actions list, select the action for any of the following categories that you want to launch automatically when you log in:

- **Applications default** - After you log in, **Application Plans** opens in the ImageNow Explorer window and the system performs the default action.
- **Batches default** - After you log in, **Batches** automatically opens in the ImageNow Explorer window and the system performs the default action.
- **Documents default** - After you log in, **Documents** automatically opens in the ImageNow Explorer window and the system performs the default action.
- **Folders default** - After you log in, **Folders** automatically opens in the ImageNow Explorer window and the system performs the default action.
- **Reports default** - After you log in, **Reports** automatically opens in the ImageNow Explorer window and selects the default report.
- **Tasks default** - After you log in, **Tasks** automatically opens in the **ImageNow** Explorer window and the system performs the default action. Depending on the specified default action, **ImageNow Viewer** might open as well.
- **Workflow default** - After you log in, **Workflow** automatically opens in the ImageNow Explorer window and the system performs the default action. Depending on the specified default action, **ImageNow Viewer** might open as well.
- **Capture default** - After you log in, the default capture profile automatically opens and the system performs the default action.
- **Help default** - After you log in, **ImageNow User Help** automatically opens.




4. Click **OK**.

## View Workflow History

1. On the **ImageNow** toolbar,  click **Workflow**.
2. In **ImageNow Explorer**, in  the left pane under **Workflow**, select the workflow queue you want.
3. In the workflow grid, double-click a document to open it.
4. In **ImageNow Viewer**, verify that this document is the one you want.
5. On the **Workflow** toolbar, click the **View workflow history** button.
6. In the **Document Properties** dialog box, view the workflow item history, and then click **OK**.

## Search for a Document or Folder in Workflow

1. On the **ImageNow** toolbar, select **Documents** or **Folders** .
2. In **ImageNow Explorer**, in the **Views** pane, select the document or folder view to use as a basis for the search.
3. In the right pane, click the **Search** tab and then click the **Add** button.
4. In the **Add Condition** dialog box, do the following sub-steps:
  1. In the **Constrain by** list, select **Status**.
  2. In the **Type** list, select the type of search to perform.
  3. In the **Field** list, select **Is in workflow**.
  4. In the Operator list, select **is equal to**.

5. In the **Value** list, select **Yes** to search for documents and folders in workflow or **No** for documents and folders not in workflow.

**Note:** If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

6. Click **OK**.
5. Click the **Go** button.

## Notes

- You can also perform a workflow item property search to locate workflow items based on whether they are associated with a document or a folder using the **Workflow item type** field.
- If you know all or part of the workflow item ID for a document or folder, you can also perform a document or folder property search to locate items in workflow using the **Workflow item ID** field. You can also use this search field with the **is blank** or **is not blank** operators to identify documents and folders in or not in workflow.

## View Custom Property Data for a Document

### View custom properties from ImageNow Explorer

1. In **ImageNow Explorer**, select the document, right-click on the document, and then click **Properties**.
2. On the **Document Properties** dialog box, in the right pane, click the Custom tab.
3. On the **Custom** tab, view the custom properties.
4. When you finish viewing data, click **OK** until you return to **ImageNow Explorer**.

### View custom properties from ImageNow Viewer

1. In the documents grid, in the results set, double-click the document to open it in **ImageNow Viewer**.
2. Verify that the **Properties** pane is open.

How? To display the **Properties** pane, in the **ImageNow Viewer**, on the **View** menu, click **Properties**.

3. Verify that the **Custom Properties** section in the **Properties** pane is open.

How? In the **Properties** pane, in the **Custom Properties** section, click the downward arrows to open it.

4. In the **Custom Properties** section of the **Properties** pane, view the custom properties.
5. When you finish viewing data, on the **File** menu, click **Close Viewer**.

## Copy, Move, and Merge Documents

### Copy a Document from Explorer

In **ImageNow Explorer**, in a list of document search results, right-click the document you want to copy and, on the menu, click **Copy Document**. The **Copy Document** dialog box displays.

To assign properties to the document copy, perform one of the following actions:

Assign properties using an application plan

The following steps explain how to assign the location and property values to the document copy using an application plan that maps to a screen in your business application.

Open the record in your business application to which you want to link the new document.

In the **Copy Document** dialog box, under **Application**, perform the following sub-steps:

1. In the **Select an application** list, select the application plan defined for your business application.
2. Click the **Get Keys** button.
3. Optional. To make the selected application plan the default plan when copying a document, select the **Use as default application plan** checkbox.
2. Under **Properties**, modify the values captured from your business application as needed.
3. If custom properties display for the assigned document type, under **Custom Properties**, modify the values captured from your business application as needed.

### Assign properties manually

The following steps explain how to manually assign the location and property values to the document copy.

1. In the **Copy Document** dialog box, under **Location**, perform one of the following actions:
  - To store the document at the drawer level, under **Drawer**, select the name of the drawer where you want to store the document.
  - To store the document in a folder, click **Drawer** and, from the list, select **Path**.
2. If you selected **Path** in the previous step, the **Set Location** dialog box displays, perform the following sub-steps to select a folder:
  1. In the **Drawer** list, select the drawer that contains the folder.
  2. In the **Folder name** box, type part or the entire folder name and click **Search**.
  3. In the **Select path** box, select the path that points to the folder where you want to store the document and click **OK**.

In the **Copy Document** dialog box, perform the following sub-steps:

1. If you selected a path, under **Location**, in the **Name** box, type a document name.
2. Under **Properties**, define values for **Field1** through **Field5**. If you did not select a path, you must define at least one of the fields.
3. In the **Type** list, select a document type.
4. If custom properties display for the document type you selected, under **Custom Properties**, perform the following sub-steps:
  1. To use the default values your administrator defined for the custom properties, select the **Use default values** check box.
  2. Select or type a value for the other custom properties where needed.

Under **Document Options**, select any of the following options:

- **Add to version control.** Places the new document under version control.

**Note:** You can only add a document to version control when a Document Management license exists on your system.

- **Submit to Content Server.** Submits the new document to Content Server to enable full-text search.

**Note:** You can only submit a document to Content Server when a Content Server license exists on your system.

- **Send to workflow queue.** Enables you to select a queue to route the new document for further review or processing.
- **Create shortcut in folder.** Creates a shortcut to the document in another folder, which allows you to reference the document in multiple folders while maintaining the integrity of the document in a single location. In the **Set Location** dialog box, select a path for the shortcut.

**Optional.** Under **Page Options**, select one of the following options:

- **Current Page.** Copies the currently selected page from the original document to the generated document.
- **All Open Pages.** Copies all pages of the original document currently open in View to the generated document.
- **All pages.** Copies all pages to the new document.
- **Page range.** Copies the specified pages to the new document. You must specify the pages to copy.

Optional. In the **Remove from original document** check box, perform one of the following actions:

- To remove all of the pages from the original document and paste them in the new document, select the check box.
- To copy all of the pages from the original document and paste them in the new document, clear the check box.

Click **OK**.

### Merge Documents

The following steps explain how to merge two or more documents into a single document. You must have the Merge privilege for the associated document type or drawer. You can merge using the document or a shortcut to the document.

In **ImageNow Explorer** or **ImageNow Folder Viewer**, locate the documents you want to merge.

1. Select the documents you want to merge.
2. Right-click the document with the properties you want to use for the merged target document and select **Merge**.

**Note:** You cannot merge source documents that are version controlled. If the target document is in version control, the document checks in automatically after the merge.

3. In the **Merge Documents** dialog box, verify the target document properties and click **Yes**.

### Move a Document to a Folder

The following steps explain how to move a document into a folder in the same drawer or in a new drawer. You must have the Move privilege for the source drawer and the Create/Append privilege for the target drawer.

1. In **ImageNow Explorer** or **Folder Viewer**, select the document or documents you want to move.
2. In the **Explorer** toolbar, click the Move button.
3. In the **Set Location** dialog box, do the following sub-steps:
  1. Optional. In the **Drawer** list, select the drawer associated with the folder.
  2. In the **Folder name** box, type the beginning or the entire target folder name.
  3. In the **Select path** list, select the path that points to the folder where you want to store the document.

**Note:** Multiple paths might display because your ImageNow system can contain multiple folders with the same name. Each folder has a unique path, and the path indicates where the folder resides in your ImageNow system.

4. Click **OK**.

## Copy a Page Using Thumbnail

The following steps explain how to copy a page from one document to another. You must have the Create/Append privilege for the associated drawer.

1. Open the document that contains the page you want to copy.
2. In **ImageNow Viewer**, if the **Thumbnails** pane is not visible, on the **View** menu, click **Thumbnails**.
3. In the **Thumbnails** pane, click on the page you want to copy, and then, in the **Thumbnails** pane toolbar, click the **Copy** button.
4. Open the document to which you want to copy. If the document is in version control, check it out.
5. In the **Thumbnails** pane toolbar, click the **Paste** button. You can move the page thumbnail to a different position in the document.
6. If applicable, check in any documents you checked out. **ImageNow Explorer** shows the updated page count for the document following check in.