# Searching for Documents

This section provides you with information on how to search for a specific document.

*Please refer to the content search section for steps on searching for specific text contained in a document or documents.*

## Searching for a Document (Quick Search)

1. Select a **Documents View** in the **Views** Pane. The view displays in the ImageNow Explorer.
2. Define the search condition on the **Quick Search** tab:
   * In the **Property** list, select the appropriate document key (e.g. Student ID).
   * In the **Operator** list, select an operator, such as "is equal to" or "is greater than," that is used in the comparison.
   * In the **Value** field, select or type a value to be compared to the document's property or field.
3. Click the **Go** button.

## Searching with Multiple Conditions

On the **Search** tab:

1. Click the **Add** button.
2. Click the **Constrain by** list.
3. Select the appropriate constraint.
4. Click the **Type** list.
5. Select the appropriate type.
6. Click the **Field** dropdown list.
7. Select the document field that is the basis of the comparison.
8. Click the **Operator** list
9. Select an operator, such as "is equal to" or "is greater than," that is used in the comparison.
10. In the **Value** field, select or type a value to be compared to the document field, using the selected operator.
11. Click the **OK** button.
12. Click the **Go** button.

## Content Search

### Searching the Content of a Document

4. Select a **Documents View** in the **Views** Pane. The view displays in the ImageNow Explorer.
1. On the Quick Search tab, select **Full Text** in the **Property** list.
2. In the **Value** field (to the right of the Contains operator), type your search criteria. To search for multiple values, separate the text with commas (term1, term2).

   **Note:** When you include mixed case characters, such as "Resume", in your search values, Content Server locates documents that contain the case-sensitive value. For example, "Resume" locates only "Resume", not "resume". If you type the same value using characters in the same case, ImageNow ignores case when searching (e.g. resume, RESUME).

3. Click the **Go** button.
4. Double-click any of the retrieved documents to display them in ImageNow Viewer and see all occurrences of the search strings highlighted.
## Document Imaging System

### ImageNow Quick Reference Card

### Document Linking

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<th>Linking a Document or Batch</th>
<th>Workflow</th>
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<tr>
<td>1. Click the Applications down arrow on the ImageNow toolbar.</td>
<td>Add an annotation</td>
</tr>
<tr>
<td>2. Select the Application Plan for the business application you want to use to link a batch.</td>
<td>1. Open a document in ImageNow Viewer.</td>
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<tr>
<td>3. Click the Batches down arrow on the ImageNow toolbar</td>
<td>2. Right-click the Annotation button on the Annotations Toolbar and select the form of the annotation from the list. <strong>Note:</strong> The Sticky Note and Text buttons only require a left mouse button click.</td>
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<tr>
<td>4. Click Ready for Linking.</td>
<td>3. Click and hold the mouse button on the document image where you want to place the annotation.</td>
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<tr>
<td>5. Select the batch you want to link in ImageNow Explorer grid.</td>
<td>4. Drag the annotation, as necessary, over the target area, and then release the mouse button.</td>
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<tr>
<td>6. Click Open on the File menu.</td>
<td>Route a document in workflow</td>
</tr>
<tr>
<td>7. In ImageNow Viewer - Link, identify the displayed page from its name or other distinguishing information.</td>
<td>1. Click Workflow on the ImageNow toolbar.</td>
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<tr>
<td>8. In the business application, display the corresponding record.</td>
<td>2. In ImageNow Explorer, in the left pane under Workflow, select a Workflow Queue.</td>
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<td>9. Position the ImageNow Viewer - Link window and the corresponding business application record so they are both visible on the screen. In a few cases, the entire business application record may need to be visible for linking to work.</td>
<td>3. In the workflow grid, double-click a document to open it.</td>
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<td>10. Under Properties, select the Document Type from the dropdown menu.</td>
<td>4. Verify the document is the one you want to route to a different queue.</td>
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<td>11. Click the Link page button on the Batch Link toolbar to create a link between ImageNow and your business application. The Properties pane slides in from the right side of the window.</td>
<td>5. Perform one of the following actions on the Workflow toolbar:</td>
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<tr>
<td>12. In the Properties pane, under Document Keys, enter required values, if necessary</td>
<td>• To send the document to the next queue in the workflow process flow, click the Route Forward button and in the Route Forward dialog box, select the route you want. When only a single route is defined for the queue, the Route Forward dialog box does not appear and the item is automatically routed.</td>
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<td>13. Click the Save Batch Page button on the Batch Link toolbar. The next page in the batch is displayed.</td>
<td>• To select a queue in the workflow process to which to send the document, click the Route Anywhere button.</td>
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<tr>
<td>14. Repeat steps 5-9 as necessary until the entire batch is linked. You are then returned to ImageNow Explorer.</td>
<td>• To send the document to another sub queue within a super queue, click Route Forward and in the Route Forward dialog box, under Peer Routes, select the sub queue.</td>
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</table>

### View workflow history

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. Verify that this document is the one you want. |
5. Click the View workflow history button on the Workflow toolbar. |
6. In the Document Properties dialog box, view the workflow item history. |
7. Click the OK button.

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