



Registrar's Office
Quick Reference Guide
for
Viewing and Annotating Student Documents
Using
WebNow

Support Contacts

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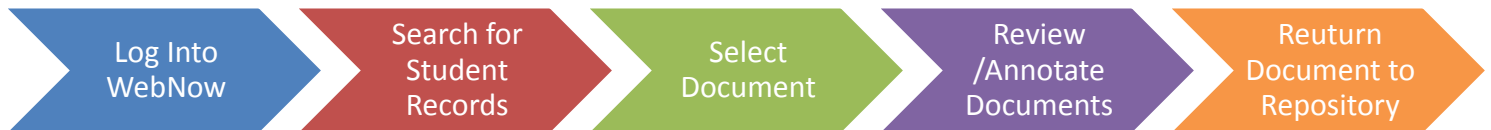
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1 OVERVIEW

ImageNow is a document Imaging application being implemented at UMass Lowell in partnership with the UMass Presidents Office, UMass Boston and UMass Dartmouth. In addition to the many time saving and cost benefits resulting from a mechanized document imaging process, this new approach to the handling of student information will help us to become more compliant with state laws governing the safeguarding of sensitive information. Within UML's Registrar's office, ImageNow will be used for the purposes of scanning and archiving student related and administrative documents. For simple viewing and annotation of student documents, some Registrar personnel will be using the web version of ImageNow (called WebNow). When scanning documents and linking them to ISIS records, Registrar personnel will use ImageNow client.

1.1 VIEWING/ANNOTATING PROCESS SUMMARY

The process steps for searching for and viewing/annotating documents is made up of five simple steps.



[Ctrl+Click the heading to navigate to each section for greater detail and instruction.](#)

[Log into Web Now:](#) Log into WebNow by entering the URL: <https://di-prd.umasscs.net/webnow/> into your web browser and clicking Enter.

[Search for Student Record:](#) Using the various Search Criteria available, locate the student documents you wish to review/annotate.

[Select Document:](#) Select the document you wish to view/annotate by double-clicking on the document name. The Application will open in the WebNow Viewer.

[Review / Annotate Document:](#) Using the various viewing and annotation tools available, review the document as appropriate.

[Return the Document to Repository:](#) Once you have completed your review or annotations, return the document to the Document Repository for archiving.

2 LOG INTO WEB NOW

Access to WebNow is gained through the University's Information Technology web page.

2.1 ENTER THE FOLLOWING URL INTO YOUR WEB BROWSER.

<http://www.uml.edu/it/DI/default.aspx>

The following screen will appear



Note: The Document Imaging Blog will display information relating to the WebNow application. It is here that Application outages due to upgrades, maintenance, etc. will be posted.

2.2 CLICK THE WEBNOW LOGIN BUTTON TO ACCESS WEBNOW

The following screen will appear.

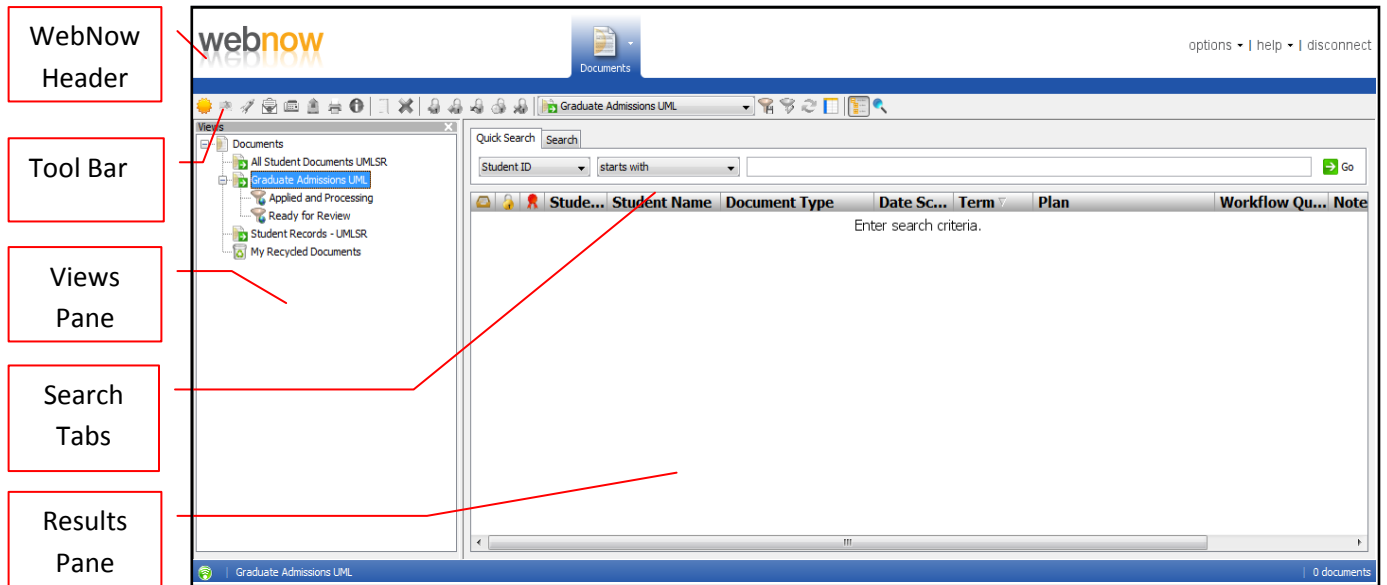


2.3 ENTER YOUR USER NAME AND PASSWORD:

User Names and Passwords have been set to be the same as your UML Email

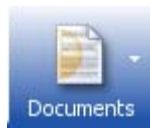
2.3.1 HOME PAGE OF WEBNOW FOR REGISTRAR

When you first log into WebNow, the following screen will be displayed

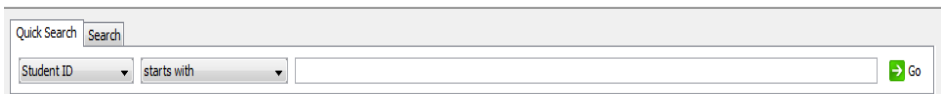


2.3.1.1 WEB NOW HEADER

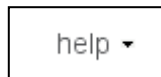
The Header displays top level options as follows



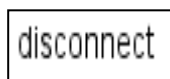
Select this option when you wish to search for a student document(s). When selected, the system will display the Search Criteria screen.



Select this option to customize the screen appearance. Via this option you can change fonts relating to column headings, make headings bold change highlighting colors, etc.



Select this option to access the WebNow on-line help.



Select this option to end your WebNow session. This is the preferred method of disconnecting as simply closing the web browser could result in hung sessions within WebNow.

2.3.1.2 WEB NOW TOOLBAR



The WebNow toolbar displays a series of tools which you will use when accessing scanned document images. Note that only some of the tools are active in this top level view. The inactive tools (those grayed out) have intentionally been disabled for security or policy reasons. The active tools are as follows.

ICON	Name	Description
	New File	Press this button to open the document currently highlighted in the Results Pane. (documents can also be opened by double-clicking the desired document)
	Properties	Press the button to display General Information and Index Keys for the highlighted document
	Views & Filters	This is more of an information icon than a tool. The data displayed in this window reflects the top level Search Constraints.
	Refresh	Press this key to re-run the search and redisplay the search results.
	Columns	This tool allows you to select or deselect the document information that will be displayed in the Results Pane.
	Hide Views Pane	This will determine whether the Views Pane is displayed by default.
	Hide Find Bar	This will determine whether or not the Find Bar is displayed by default. The Find Bar provides drill down search functionality allowing you to search the listing of initial results for certain key words

2.3.1.3 VIEWS PANE

The Views Pane displays the predefined search ‘views’ that have been created. They are as follow:

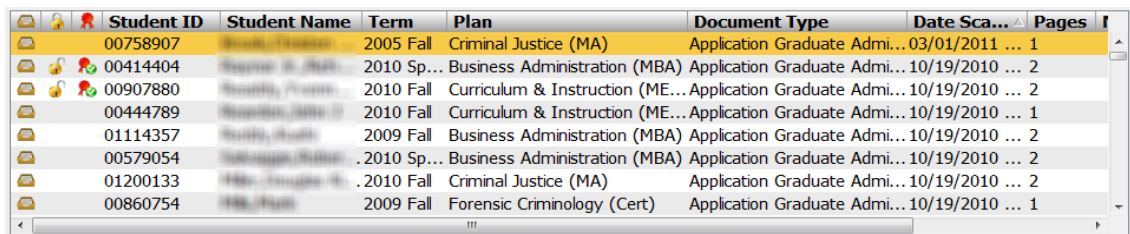
View Name	Description
<i>All Student Document UMLSR</i>	Will search through all documents from all UML departments (E.g. Graduate Admins, Undergraduate Admins, CSCE, etc.)
<i>Graduate Admissions UML</i>	Restricts the search to documents residing in the UML Graduate Admissions drawer (those having originated in Grad Admissions) only. This view may be further restricted to records still within the Graduate Admissions workflow meaning that the student has not provided all of the necessary documents (Applied and Processing) or that the Graduate Coordinator has not yet decided on admittance (Ready for Review)
<i>Student Records UMLSR</i>	This view restricts the search to documents residing in the UML Registrar drawer (those having originated in the Registrar’s office) only
<i>My Recycled Documents</i>	This view restricts the search to documents residing in the UML Registrar Recycling Bin. Documents placed here will be purged by the system after 30 days.

2.3.1.4 SEARCH TABS

Via these tabs, the Registrar's office personnel has the ability to search for documents via two options; **Quick Search** wherein a single search criterion is used and **Search** wherein multiple criteria are stipulated.

2.3.1.5 RESULTS PANE

The Results Pane is where the documents meeting the specified search criteria will be displayed. The columns that are displayed can be customized using the "Options" tool found in the WebNow header.



Student ID	Student Name	Term	Plan	Document Type	Date	Pages
00758907	[blurred]	2005 Fall	Criminal Justice (MA)	Application Graduate Admi...	03/01/2011 ...	1
00414404	[blurred]	2010 Sp...	Business Administration (MBA)	Application Graduate Admi...	10/19/2010 ...	2
00907880	[blurred]	2010 Fall	Curriculum & Instruction (ME...	Application Graduate Admi...	10/19/2010 ...	2
00444789	[blurred]	2010 Fall	Curriculum & Instruction (ME...	Application Graduate Admi...	10/19/2010 ...	1
01114357	[blurred]	2009 Fall	Business Administration (MBA)	Application Graduate Admi...	10/19/2010 ...	2
00579054	[blurred]	2010 Sp...	Business Administration (MBA)	Application Graduate Admi...	10/19/2010 ...	2
01200133	[blurred]	2010 Fall	Criminal Justice (MA)	Application Graduate Admi...	10/19/2010 ...	2
00860754	[blurred]	2009 Fall	Forensic Criminology (Cert)	Application Graduate Admi...	10/19/2010 ...	1

Note: The names have intentionally been blurred for security reasons

3 SEARCH FOR STUDENT RECORDS

Determine whether or not your search will utilize a single criterion or if it will employ multiple criteria to narrow the search. If a single search criterion will suffice, select the **Quick Search** tab. If your search criteria are more complex, select the **Search** tab. In either case, use the criteria listed in section 3.1 to create a search command to locate the document(s) you desire.

3.1 QUICK SEARCH

3.1.1 ENTER THE CRITERION

Use the ▼ beside the **Criterion** filed to select the criteria you will use to locate the document. The following criteria are available

Search Criteria	Notes
<i>Drawer</i>	Limits the search to the specified drawer only. (UMLGA or UMLSR) If Drawer is not specified, both drawers will be included in the search.
<i>Student Name</i>	Limits the search results to documents containing the specified Name
<i>Term</i>	Limits the search results to documents indicating the specified semester (e.g. Spring 2011)
<i>Plan</i>	Limits the search results to documents indicating the specified Plan (e.g. Electrical Engineering)
<i>Date Scanned</i>	Limits search results to documents with the specified scan date
<i>Document Type</i>	Limits the search result to the type of document specified (e.g. transcript, Application, etc)
<i>Custom Property</i>	<ul style="list-style-type: none"> • Alias 1-4: Indexing values automatically populated via ISIS during Linking process. • Check List Status: Index value automatically populated via ISIS during Linking Process; <i>In Progress</i> (Applied and Processing), <i>Ready</i> (Ready for Review). • DOB (date): Indexing value manually populated at time of Scanning/Linking process. This information will NOT be extracted from ISIS. <i>(Applies to historical documents only).</i> • PeopleSoft Application Number: Indexing value automatically populated via ISIS during Linking process. • Program: Indexing value automatically populated via ISIS during Linking process. Refers to the college to which the student belongs (e.g. Education, Management, etc) • Shared: Indexing value automatically populated via ISIS at time of Linking process. Indicates that the document is shared across multiple applications. • SSN#: Indexing value manually populated at time of Scanning/Linking <i>(Applies to historical documents only)</i> • Sub-Plan: Indexing value automatically populated via ISIS during Linking process. Indicates student’s concentration of study.

3.1.2 ENTER THE OPERATOR

Quick Search Search

Student ID starts with

Go

Use the ▼ beside the **Operator** filed to select the operator you will use in conjunction with the criterion to locate the document. The following operators are available

Operator Name	Notes
<i>Equal to</i>	Use this operator when you have a definite criterion such as Student ID or Term. E.g. Student ID Equal to 12345678
<i>Not equal to</i>	Use this operator when you would like to exclude documents with certain criteria. E.g. Term Not equal to Spring 2011
<i>Less than</i>	Use this operator when limited information is known. E.G StudentName is Less than C. This would return all documents where the StudentName starts with the letters A or B
<i>Greater than</i>	Use this operator when limited information is known. E.G StudentName is Greater than C. This would return all documents where the StudentName starts with the letters D – Z
<i>Less than or equal to</i>	Use this operator when limited information is known. E.G StudentName is Less than or equal to C. This would return all documents where the StudentName starts with the letters A-C
<i>Greater than or equal to</i>	Use this operator when limited information is known. E.G StudentName is Greater than or equal to C. This would return all documents where the StudentName starts with the letters C-Z
<i>Starts with</i>	Use this operator when partial information is the only available criteria. E.g. Student name Starts with Smith. (remember that names are stored as LastName,FirstName)
<i>Ends with</i>	Use this operator when partial information is the only available criteria. E.g. Student name Ends with Joeseeph. (remember that names are stored as LastName,FirstName)
<i>Contains</i>	Use this operator when partial information is the only available criteria. E.g. Student name Contains Joeseeph. (remember that names are stored as LastName,FirstName)

3.1.3 ENTER THE VALUE

Quick Search Search

Student ID starts with

Go

Enter the value that completes the search command.

Note: When selecting Drawer and Document Type as the criteria, the **Value Field** will be restricted to a listing of preset values. In such cases, the value field will display a ▼. Press this arrow to display a drop-down list of available options

Quick Search Search

Drawer is not equal to

LME.GA

LME SR Student Related

Go

3.1.4 PRESS THE Go BUTTON TO RUN THE SEARCH

The system will display a listing of all documents matching the criteria in the Results pane. (See section 2.3.15)

SEARCH NOTES

- **Current Documents:** Only those documents originating in departments already on-line with ImageNow will be available. As of this publication, only Graduate Admissions documents for Spring 2011 term and beyond are available.
- **Historical Documents:** Historical Documents being scanned as part of the Outsourced Scanning project will be loaded into ImageNow and made available as they are scanned.

4 SEARCH FOR STUDENT RECORDS

Once you have completed your search command and the system has displayed the results in the Results Pane. Double click the document you wish to view. It will open in a new Viewer window.

Stude...	Student Name	Document Type	Date Sc...	Term	Plan	Workflow Qu...	Notes	P...
01033142	Burns, Jennifer A	Profile Sheet	10/26/20...	2014 Fall	Community Social Psych (...)	Evaluator 1 (U...		2
00323891	Bigelow, Thoma...	Profile Sheet	10/26/20...	2011 Spring	Electrical Engineering (MSE)	Evaluator 1 (U...		3
00790642	Baker, Harley D	Profile Sheet	10/26/20...	2011 Spring	Beh Intervention Autism (...)	Evaluator 1 (U...		2
01215719	Banks, Lornie Lynn	Profile Sheet	10/26/20...	2011 Spring	Beh Intervention Autism (...)	Evaluator 1 (U...		2

If there are no documents that fit the search Criteria, the system will display the message “No Documents Found” in the Results pane.

Stude...	Student Name	Document Type	Date Sc...	Term	Plan	Workflow Qu...	Notes	P...
No documents found.								

5 REVIEW / ANNOTATE DOCUMENTS

Once you have selected the document to be processed, it will appear in the ImageNow Viewer where you can review it and add annotations as needed.

5.1 IMAGENOW VIEWER

The screenshot shows the ImageNow Viewer interface. The main window displays a document titled "University of Massachusetts Lowell Graduate Web Application Summary". The document content is organized into sections: "Bio Demo Data", "Citizenship & Visa", and "Address & Phone". The "Bio Demo Data" section includes fields like Name, Rec Nbr, Appl type, Email ID, SSN, Start Term, Admit Type, Intended Program, Intended Sub Plan, Online program, Academic Load, Application Date, Mass Residency, U.S. Citizenship Status, BirthDate, Ethnic Group, Gender, and Military Status. The "Citizenship & Visa" section includes fields like Country of Citizenship, Visa Type, Visa Status, Visa Number, Visa Start Date, Visa Expire Date, Birth Country, and Birth City. The "Address & Phone" section is partially visible at the bottom.

On the right side of the viewer, there is a "Properties" sidebar with several sections: "Document Keys" (listing fields like UMLow, Student ID, Student Name, Term, Plan, Date Scanned, Document Type), "Custom Properties" (listing fields like Program, Sub-Plan, Alias 1, Alias 2, Alias 3, Alias 4, Check, In Proc, People), and "Notes" (a text area for adding notes). A "Tool Bar" is located at the top left of the viewer window.

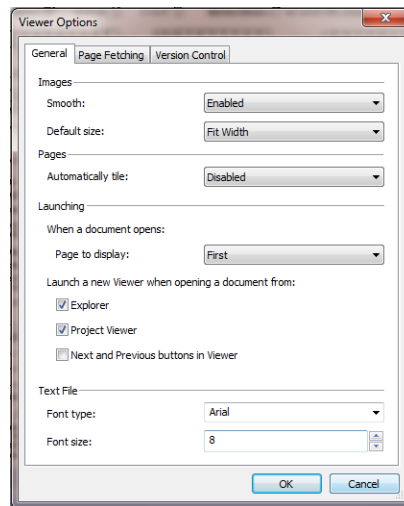
Red boxes and arrows point to the following components:

- Tool Bar:** Located at the top left of the viewer window.
- Document Pane:** The main area displaying the document content.
- Document Keys:** The top section of the Properties sidebar.
- Custom Properties:** The middle section of the Properties sidebar.
- Document Notes:** The bottom section of the Properties sidebar.

- **Tool Bar:** Displays the available Annotation Tools. Those grayed out are not available for security purposes. See Annotating Documents section for details
- **Document Pane:** Area where the document image is displayed
- **Document Keys:** Displays the keys that link the document image to the Student's ISIS record
- **Custom Properties:** Displays the index fields given to the document at time of Scanning/Linking
- **Document Notes:** Displays any notes that were entered into the Property>Notes section of the document.

5.2 SETTING VIEWER DEFAULTS

WebNow allows you to personalize the default viewing settings to suit your preferences. To do this, open the viewer (as per above) and select **File>Options** and the following screen will appear.



Viewer Options

General Tab	
Images Section	
Smooth	<p>Enabled: (<i>Suggested</i>) Smooths out the edges of the text characters within a document.</p> <p>Disabled: Presents the text as is when the document is displayed.</p>
Default Size	<p>Fit Window: Scales the view such that the entire document (width and height) fits within the Viewer pane.</p> <p>Fit Width: (<i>Suggested</i>) Scales the document such that width of the document fits within the Viewer window. This setting will require scrolling up and down to view the entire document.</p> <p>Fit Height: Scales the document such that Height of the document fits within the Viewer window. This setting will require scrolling right and left to view the entire document.</p>
Pages Section	
Automatically Title	This feature has been disabled
Launching Section	
Page to Display when launching	<p>First: Opens a document to the first page when viewing.</p> <p>Last: Opens to the Last page for the document when viewing</p>
Launch New Viewer when Opening a document from:	Checking the boxes beside each option will result in documents opened from that source being opened in a new window rather than replacing the document displayed in the current window.
Text File Section	
Font Type	This option has been disabled as the images being viewed are

	scanned and therefore have a set font.
Font Size:	This option has been disabled as the images being viewed are scanned and therefore have a set size.
Page Fetching Tab	These options are disabled.
Version Control Tab	
If a document is checked out when a viewer closes:	<p>Prompt: displays a message indicating that the document is currently checked out asking if the viewer would like to save changes.</p> <p>Check In: checks the document being closed back into the system storing any changes to be added to the changes being made by the other viewer.</p> <p>Leave Checked out: Leaves the document checked out to be closed once the first viewer has closed his copy.</p>











Note: When closing the Viewer Options Window, you will be prompted that any changes will only take effect once the Viewer is re-opened.



5.3 ADDING ANNOTATIONS

ImageNow allows you to add annotations in a variety of forms. Remember that once annotations are made and saved, they are viewable by other committee members reviewing the documents as well as being permanently stored as part of that document.

The ToolBar below lists the available Annotation Tools. Those that are Grayed out are tools that have been disabled according to University Policy.



Icon	Function	Description
	Save:	Click this to save any annotations you have made to a document. Failure to save before closing a document will result in annotations being lost.
	Print:	Click this to print the displayed document to your local printer. In order to safeguard applicant privacy, please be certain to properly dispose of all printed documents after review.
	Properties:	Click this to view the document's origin, creation date and other information.
	Zoom In & Out:	Click this to enlarge or decrease the view of the displayed document. Each Click will result in an increased/decreased view.
	Rotate Right & Left:	Click these to rotate the document view 90° in a clockwise or counterclockwise direction. As a rule, the Graduate Admissions team will properly orient documents during their QA process.
	Fit Width & Height:	Use these to adjust the width or height of the displayed document equal to that of the window width or height.
	Fit Window:	Click this to adjust the document size to that of the window in which it is being displayed. In some instances documents may appear in a reduced size when first opened.
	Show/Hide	Annotations: Click this to display any annotations that have been made to the document being displayed. Click this again to hide these annotations.
	Navigate Page:	Click this to switch your cursor/pointer to a hand which can be used to grab the sheet and move it up or down. In general this performs the same function as the Up and Down arrows alongside the document window.
	Digital Signature:	Click this to apply your electronic signature to the document. There are 4 options associated with a digital signature: Approved, Denied, No Decision at this Time and Approved with Conditions . Once you click this button you must then click on the document in the location you want the signature to appear. Note that you will be required to enter a password each time you attempt to apply a signature. (See "Digital Signature – Creating a Password and Changing Designation" below for directions on how to create a Signature password & to change the designation). Digital Signatures are available to GPDs (Coordinators) only.

Icon	Function	Description
	Stamp:	Click this and then click on the document to apply a stamp to the document. Right click this button to view the various stamp options available to you. GPDs have access to apply the “Deferred Consideration”, “Previously Accepted”, and “Waitlisted” stamps. Committee members have access to apply the reviewer “Approved” and Reviewer “Denied” stamps.
	Sticky Note:	Click this and then click on the document to apply an electronic sticky note. A text window will appear allowing you to add notations. In cases where previous reviewers have added sticky note notations, you can add to the same sticky note by double clicking on the note located on the document and the system will keep a history of the different notations made.
	Text:	Click this and then click the document to add text comments directly to the document. Though a text window will appear allowing you to type notes, the note will appear directly on the document when OK is clicked.
	Highlight:	Click this to change your cursor to a highlighter. Once the highlighter is visible, move it to the text you wish highlighted, press and hold the left mouse key and drag the highlighter across the text to be highlighted. When you release the mouse button, your cursor will revert to a pointer and the highlight will be in place along with sizing tabs. Use your mouse pointer to grab the sizing handle and drag it till the desired size is reached. Right clicking the Highlight button will display a list of available highlighting colors.
	Check:	Click this to change your cursor to a check mark, move the check mark to the location desired and press the left mouse button to apply the check. The check will appear with sizing tabs. Right clicking the Check button displays a list of the check colors available.
	Pen:	Click this to convert your cursor to a pen which will allow you to add free form annotations to the document. Move the pen to the area desired, hold down the left mouse button and annotate as desired. Right clicking the Pen button displays a list of the pen colors available.
	Line:	Pen: Click this to convert your cursor to a line which will allow you to draw straight lines on the document. Move the line cursor to the area desired, hold down the left mouse button and annotate as desired. Right clicking the Line button displays a list of the line colors available.
	Arrow:	Click this to convert your cursor to an arrow which will allow you to draw straight arrows on the document. Move the arrow cursor to the area desired, hold down the left mouse button and annotate as desired. Right clicking the Arrow button displays a list of the arrow colors available.
	Box & Circle:	Click either of these to change your cursor to a box/circle which will allow you to draw boxes/circles around selected text. Move the box cursor to the anchor point desired, press and hold the left mouse button and drag the cursor to the desired end point. Release the mouse button and a box/circle will appear. Right clicking the Box/Circle button to see the list of the box colors available.


5.4 ADDITIONAL COMMANDS

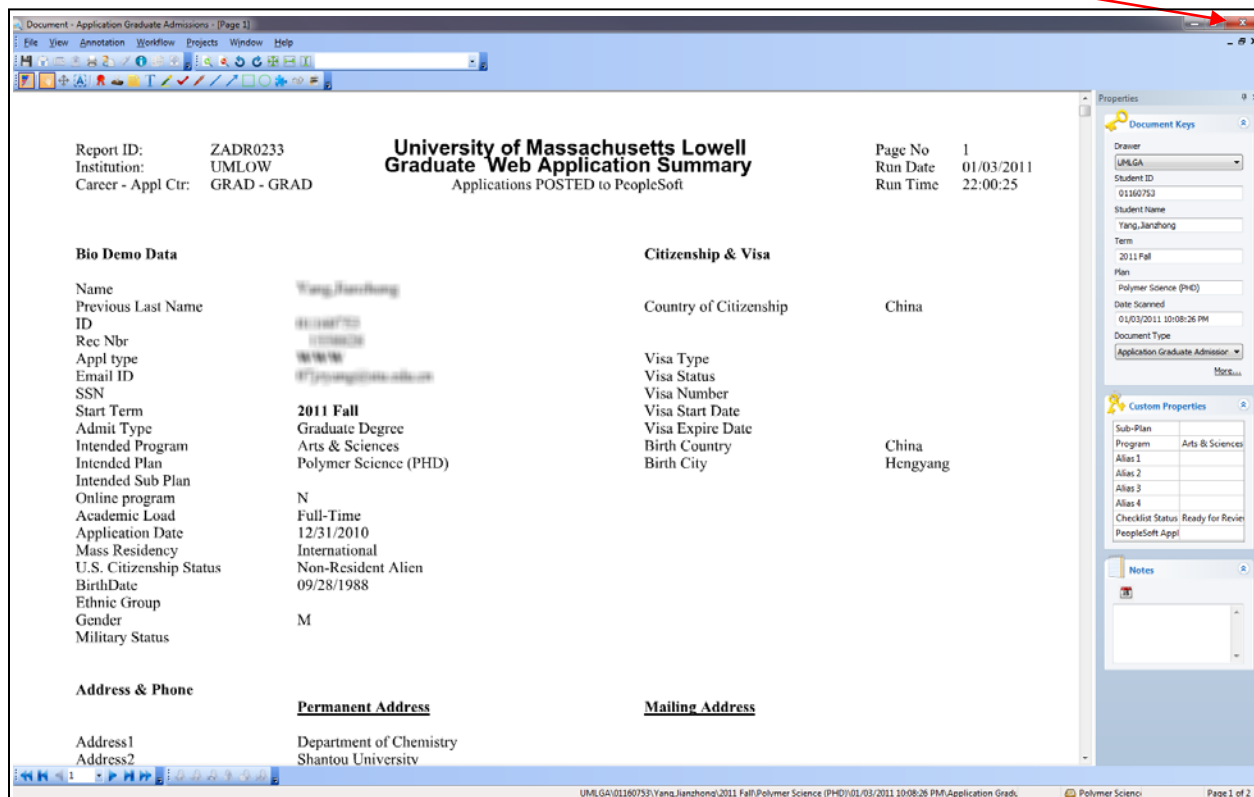
In addition to the functions above which are located at the top of the editing screen, there is a command toolbar located at the bottom of the editing screen. These commands are used to move from one page to the next or from one document to the next. It is with this toolbar that you will route the Applications back to the graduate Admissions office.



Icon	Function	Description
	Previous & Next Item:	Use these commands to navigate away from the Application currently being displayed to either the previous or next application. When either of these commands is used, a prompt will appear asking what should be done with the Application currently being displayed. You may place the application on hold or route it back to the queue for future action. Cancel will remove the prompt cancelling the command.
	Previous & Next Page:	Use these commands to navigate between pages of the Application currently being displayed. Documents containing only one page will result in these command buttons being grayed out.
	First & last Page:	Use these commands to navigate to the first and last pages of the currently displayed Application.
	Route Forward:	Use this key to move the Application back to the graduate Admissions office once you have reviewed the pertinent documents and digitally signed the Profile Sheet.
	Recall Last Workflow Item:	Use this command to recall the last item processed.
	On Hold:	Use this command to flag the Application as On Hold. When clicked. A window will appear in which you can note the reasons for placing the document on hold.
	View Workflow History:	This command will display a window detailing the actions that have been applied to that particular Application. Through this history, you can see who have viewed and processed the application to date.
	View Recently Routed Items:	This command will display a window listing all of the items that have been routed forward during this log-on session.

6 RETURN DOCUMENT TO REPOSITORY

Once you have completed your review or annotations, you must return the document to the system's document repository by clicking on the  in the upper right-hand corner of the viewer.



Report ID: ZADR0233
Institution: UMLLOW
Career - Appl Ctr: GRAD - GRAD

**University of Massachusetts Lowell
Graduate Web Application Summary**
Applications POSTED to PeopleSoft

Page No 1
Run Date 01/03/2011
Run Time 22:00:25

Bio Demo Data

Name	Yang, Jianzhong
Previous Last Name	
ID	01160753
Rec Nbr	11098026
Appl type	96/96/96
Email ID	07jyoung@umass.edu.cn
SSN	
Start Term	2011 Fall
Admit Type	Graduate Degree
Intended Program	Arts & Sciences
Intended Plan	Polymer Science (PHD)
Intended Sub Plan	
Online program	N
Academic Load	Full-Time
Application Date	12/31/2010
Mass Residency	International
U.S. Citizenship Status	Non-Resident Alien
BirthDate	09/28/1988
Ethnic Group	
Gender	M
Military Status	

Citizenship & Visa

Country of Citizenship	China
Visa Type	
Visa Status	
Visa Number	
Visa Start Date	
Visa Expire Date	
Birth Country	China
Birth City	Hengyang

Address & Phone

	<u>Permanent Address</u>	<u>Mailing Address</u>
Address1	Department of Chemistry	
Address2	Shantou University	

Properties

Document Keys

Drawer	UMLGA
Student ID	01160753
Student Name	Yang, Jianzhong
Term	2011 Fall
Plan	Polymer Science (PHD)
Date Scanned	01/03/2011 10:08:26 PM
Document Type	Application Graduate Admissor

Custom Properties

Sub-Plan	
Program	Arts & Sciences
Alias 1	
Alias 2	
Alias 3	
Alias 4	
Checklist Status	Ready for Review
PeopleSoft Appl	

Notes

UMLGA/01160753/Yang,Jianzhong/2011 Fall/Polymer Science (PHD)/01/03/2011 10:08:26 PM/Application Gradu... Polymer Scienc... Page 1 of 2