



Registrar's Office

Quick Reference Guide

For

Scanning & Linking Documents

Using

ImageNow

Note: This Quick Reference Guide is not intended to cover all aspects of the ImageNow system but rather to highlight those functions and features used on a day to day basis within the Registrar's office.

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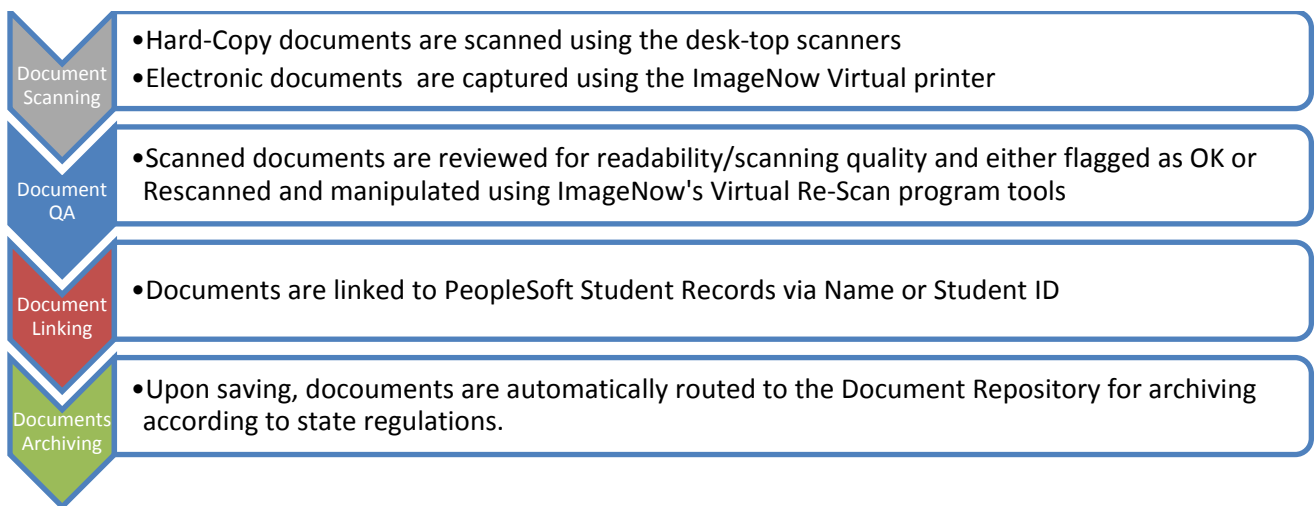
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1. REGISTRAR PROCESS OVERVIEW

ImageNow client software is being implemented in the Registrar’s office for several purposes.

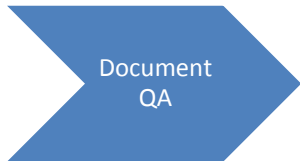
Purpose	Overview
View Graduate Admissions Documents	<ul style="list-style-type: none"> • Provide Registrar office personnel with the ability to view/print graduate program applications and related documents for the term beginning Spring 2011 • Provide Registrar office personnel with the ability to view/print applications and related documents for other departments (e.g. Undergrad Admissions) as they are brought online.
Scan, Link and Archive Documents	<ul style="list-style-type: none"> • Provide Registrar office with the ability to scan student related documents and to store them in a system drawer specific to the Registrar. • Provide ability for documents received electronically (email, etc.) to be virtually “printed” directly into the document repository and linked to the appropriate student record.
Preservation of Registrar Historic Documents	<ol style="list-style-type: none"> 1. Preserve the Registrar’s historic documents by scanning & archiving them in electronic format. 2. Provide easy and simultaneous access to scanned historical documents via ImageNow. 3. Provide automatic deletion of electronic documents that have exceeded the retention period mandated by Massachusetts State regulations

As Registrar office members, you will have access to various directories or queues each of which represents a different point in the document imaging process. The diagram below depicts the four steps for processing documents.





Document Scanning & Capture is the first step in the process. ImageNow will allow you to electronically import documents received electronically (UML email, fax, etc) as well as to scan documents received in hard copy. Once documents are “captured” they may be linked to the applicant’s PeopleSoft record and sent to the document repository for archiving.



Document QA is the second step in the process. Documents that have been manually scanned into the system will be reviewed and using a series of ImageNow tools, tweaked to ensure readability before sending them forward in the process.



Document Linking the third step in the process and the step wherein documents will be associated (linked) to the student’s PeopleSoft record. Student documents are linked via a series of keys or data fields that correspond to the student’s ISIS record. These keys include Student Name and Student ID



Document Archiving is the final step in the scanning process. Once the document has been QA’d and Linked to the appropriate ISIS record, saving the document will forward it to the Document Repository where it will be archived according to state regulations governing the retention of student related documents.

2. LOGGING IN TO IMAGENOW

- DOUBLE-CLICK THE IMAGENOW ICON ON YOUR DESKTOP



The following screen will appear



- ENTER YOUR USER NAME AND PASSWORD:

User Name: Set to be the same as your UML Email User Name. (E.g. Jane_Doe@uml.edu)

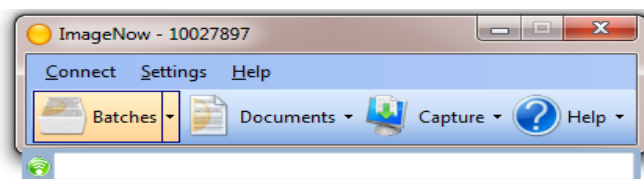
Password: Set to be the same as that for your Email password. (E.g. Chester2)


3. THE ELEMENTS OF IMAGENOW

There are three basic elements with which you should become familiar; The ImageNow Toolbar, the ImageNow Explorer and the ImageNow viewer.

3.1. THE IMAGENOW TOOLBAR

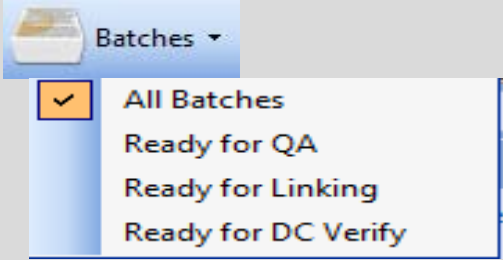
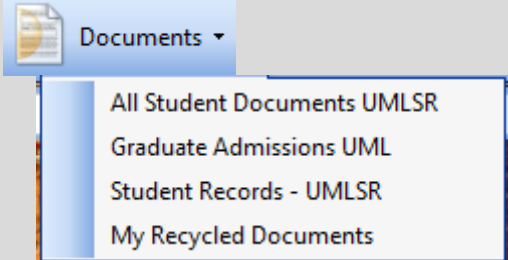
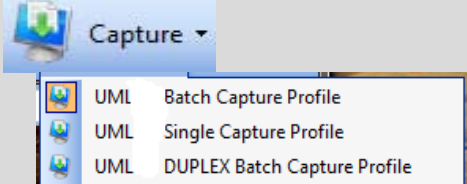
The **ImageNow Toolbar** provide access to all ImageNow functions. The buttons shown below may change depending on your security privileges.



Connect: Click on this command (or press Ctrl C) to disconnect or Exit from the ImageNow application. This method of disconnecting from the application is preferable to using the 

Settings: Click this command (or press Ctrl S) to display a menu of options for the personalization of your dashboard. This guide does not detail this level of setting. Refer to the ImageNow manual for details.

Help: Click this option (or press Ctrl H) to access the ImageNow help screens. Refer to the ImageNow manual for details regarding the Help features.

Tool Name & Menu Options & Definition	Descriptions
 <p>Clicking the Batches button will bring up the ImageNow Explorer.</p> <p>Batches – Refers to the groupings of documents that have previously been scanned/captured and are in various stages of processing.</p>	<p>All Batches: - Selecting All Batches will display all of the groups of documents that have been scanned regardless of their stage in the process.</p> <p>Ready for QA: - Selecting the Ready for QA batches, will display only those groups of documents that have been scanned but not yet reviewed for readability.</p> <p>Ready for Linking: - Selecting the Ready for Linking batches will display those groups of documents that have been scanned and QA'd but have not yet been linked to a student file in PeopleSoft/ISIS</p> <p>Ready for DC Verify: - This is not used by UML Registrar at this time.</p>
 <p>Clicking the Documents button will bring up the ImageNow Explorer where you can search for documents.</p> <p>Documents: - Refers to the pages that have been scanned into ImageNow. The drop down lists the directories in which you can search given your systems security settings.</p> <p>System Drawer: - Refers to the directories in which documents are stored. (i.e. Documents scanned by the Registrar office are stored in the UMLSR drawer, Documents scanned by GA are stored in the grad Admissions drawer, etc.)</p>	<p>All Student Documents UMLSR: This option will allow access to all student documents regardless of in which system drawer (Graduate Admissions, Registrar, Undergraduate Admissions, and/or Financial Aid).they reside.</p> <p>Graduate Admissions UML: - This option will limit your search to only those documents residing in the Graduate Admissions system drawer. Personal Disclosure documents stored in the GA Lockbox are excluded from all searches except those performed by the Registrar. You will note that additional filters further narrowing the search to documents in either the Applied and Processing or Ready for Review queues have been added to the view pane; these will allow you to search for documents that still in process and pending decision.</p> <p>Student Records UMLSR: This option will limit your search to only those documents in the Registrar drawer.</p> <p>My Recycled Documents: - This option will allow you to search for documents that have been sent to your Recycle Bin.</p>
	<p>UML Batch Capture Profile: - This is the default Capture Profile. Use this profile when scanning more than one document or documents for more than a single student. Documents scanned using this profile will be routed to a <i>Ready for QA</i> batch</p>

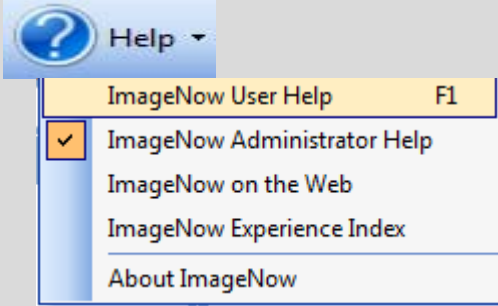
Clicking the **Capture** button will start the ImageNow scanning process.

Capture: - Refers to the act of getting documents into ImageNow.

Profiles are the predefined settings that will be used when scanning documents.

UML Single Capture Profile: - Use this profile when scanning a single document for a single student. This profile will allow you to Link the document to a student as you are scanning rather than doing so in a separate function at a separate time.

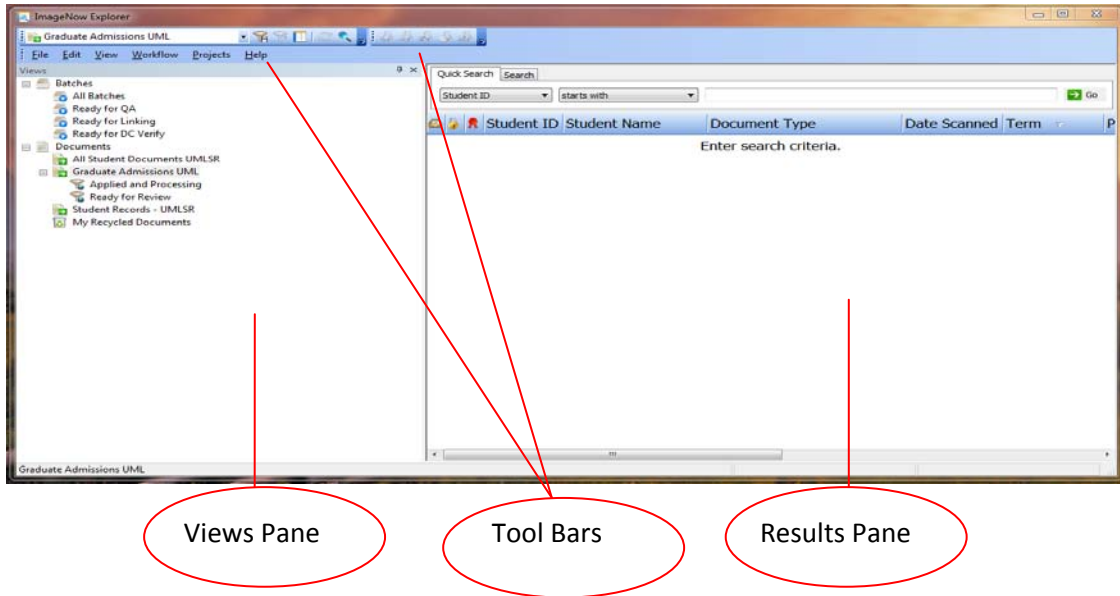
UML DUPLEX Batch Capture Profile: Use this profile when you wish to scan both sides of a document. This is a *Batch* type profile meaning that documents scanned using this profile will be routed to a *Ready for QA* batch.



Clicking the **Help** button will open a web-browser where you can search for help on a variety of ImageNow topics.

3.2. IMAGENOW EXPLORER

The *ImageNow Explorer* is the tool you will use to locate documents in ImageNow. There are several components of the Explorer with which you should become familiar.

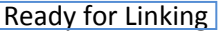





3.2.1. VIEW PANE

Views Pane: The Views Pane provides a listing of the predefined search criteria that will help you to find certain documents. **Note:** See table in section 3.1 for details

3.2.2. TOOLBARS

The ImageNow toolbars display a series of tools that you will use to navigate through the screens of ImageNow. The available tools are as follows

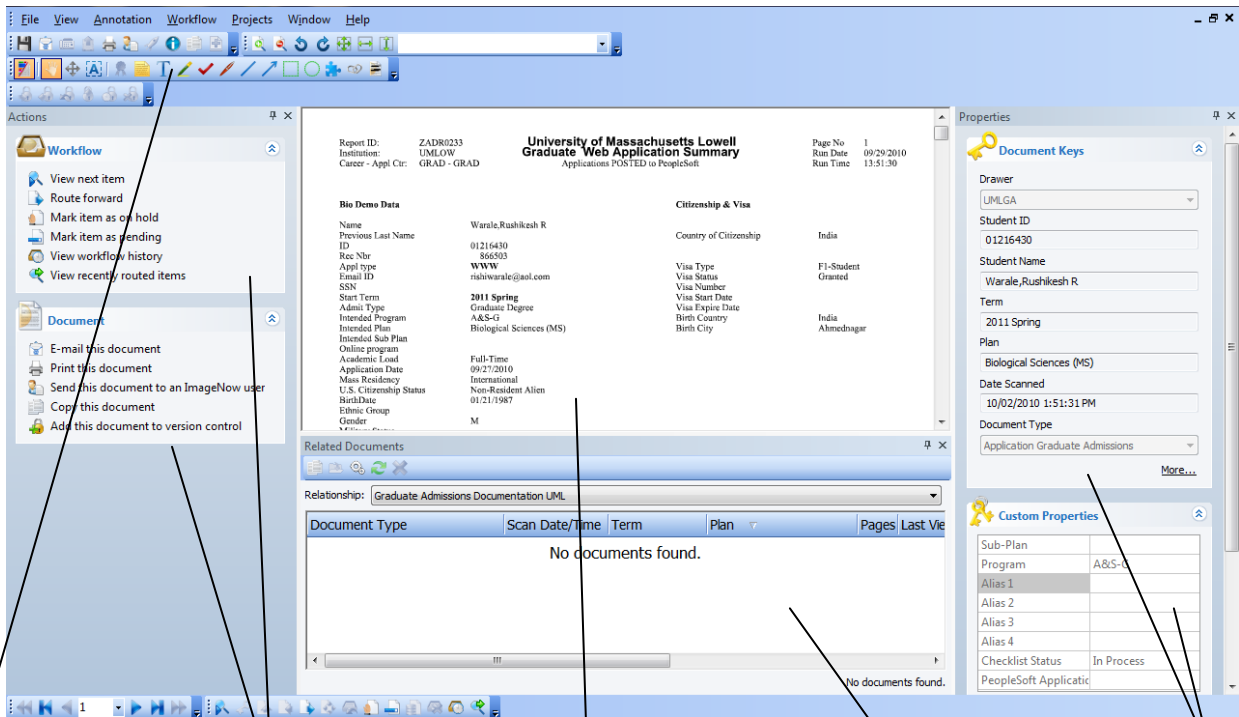
	View Indicator	Indicates the view currently in use. Use the drop down menu to select from the list of available view options
	Columns	Allows you to determine which columns will be included in the Results Pane. Select the columns you want included by checking them off in the list. (E.g. Doc. Type, Student Name, Date Scanned, etc)
	Refresh	This tool will re-run the search and refresh the results.
	Find	This tool will enable the "Find" window at the bottom of the viewer which is used to find specific information from within the list of search results.

3.2.3. IMAGENOW EXPLORER RESULTS PANE

The ImageNow Results Pane is where the documents meeting the Search Criteria will be listed. Each document will be listed in a separate row.

3.3. IMAGENOW VIEWER

The ImageNow Viewer enables you to see the content of your documents. The viewer appears when you select (double-click) a document in the ImageNow Explorer Results Pane. The Page pane displays a resizable view of the document you opened. In addition to displaying the document, the ImageNow Viewers can also display information about the document in the following panes which you can select to appear by checking them off in the View menu:



Annotation
Tools

Action
Pane











Page
Pane

Related
Documents
Pane

Properties
Pane

3.3.1. ACTION PANE

The **Actions Pane** lists the tasks you can perform on the selected document.

Action name	Clicking the Button Lets you
 View next item	Display the next document in the batch replacing that which is currently displayed.
 Route forward	Move the currently displayed document to the next stop (queue) in the in the process flow
 Mark item as on hold	Flag the currently displayed document as “On Hold” and replaces it with the next document in the batch
 Mark item as pending	Flag the currently displayed document as “Pending” and replaces it with the next document in the batch
 View workflow history	Display a window containing the different stops or queues this document has been through listing for each queue the user ID of the person who processed the document thus far.
 View recently routed items	Display a window listing all of the documents routed, to where they were router, and by whom they were routed.
 E-mail this document	Email the currently displayed document. Note that the recipient must have the ImageNow client loaded on his/her system in order to view the document. Emailing of documents is discouraged for security reasons.
 Print this document	Print the currently displayed document to your local printer. Printing of documents is discouraged due to security reasons.
 Send this document to an ImageNow user	Search for and send the currently displayed docment to another ImageNow user.
 Add this document to version control	Start version control allowing more that one person to simultaneously view and annotate documents. When each viewer saves the document, the annotations will be consolodated.

3.3.2. PAGE PANE

The *Page Pane* is where the document you selected will be displayed

3.3.3. RELATED DOCUMENTS PANE

The *Related Documents Pane* will list of all documents linked to the same student ID as that of the displayed document. Double-clicking on any document will open the docum,ent in a new viewer.













3.3.4. PROPERTIES PANE





In the *Properties Pane*, you can display and update the document keys (Student name, ID Term, etc.) and custom properties that describe and define the document. You can also add a note to the document or update an existing note.

3.3.5. ANNOTATION TOOLS

ImageNow allows you to annotate documents in a variety of forms. Remember that once annotations are made and saved, they are viewable by other committee members reviewing the documents. The ToolBar below lists the available Annotation Tools. Those that are Grayed out are tools that have been disabled according to University Policy.



Tool	Name	Clicking the button allows you to
	Save:	Save any annotations you have made to a document. Failure to save before closing a document will result in annotations being lost.
	Print:	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:	View the document's origin, creation date and other information.
	Zoom In & Out:	Enlarge or decrease the view of the displayed document. Each Click will result in an increased/decreased view.
	Rotate Right & Left:	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:	Adjust the width or height of the displayed document equal to that of the window width or height.
	Fit Window:	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	Display any annotations that have been made to the document being displayed. Click this again to hide these annotations.
	Navigate Page:	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.
	Sticky Note:	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:	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:	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:	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:	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:	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:	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:	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.

4. DOCUMENT SCANNING & CAPTURE

Image Now has been configured to allow several methods of capturing documents.

4.1. CAPTURING WEB APPLICATIONS

ImageNow has been interfaced with the UML Web page allowing for Web-Applications to be automatically imported to ImageNow on a daily basis. Each evening, an automated script will pick up the applications from the web-site and place them into the **Ready for Linking** queue.

4.2. MANUALLY SCANNING DOCUMENTS

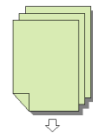
To manually scan a document follow these simple steps.

- ENSURE THAT THE DOCUMENT SCANNER IS TURNED ON.

Inner circle should be lighted green

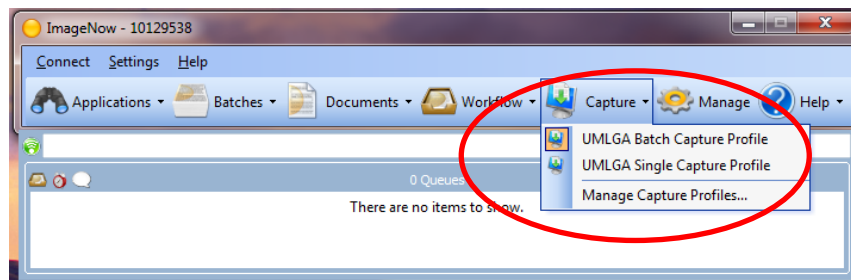


- LOAD THE DOCUMENTS TO BE SCANNED TOP DOWN AND FACE DOWN INTO THE BATCH FEEDER

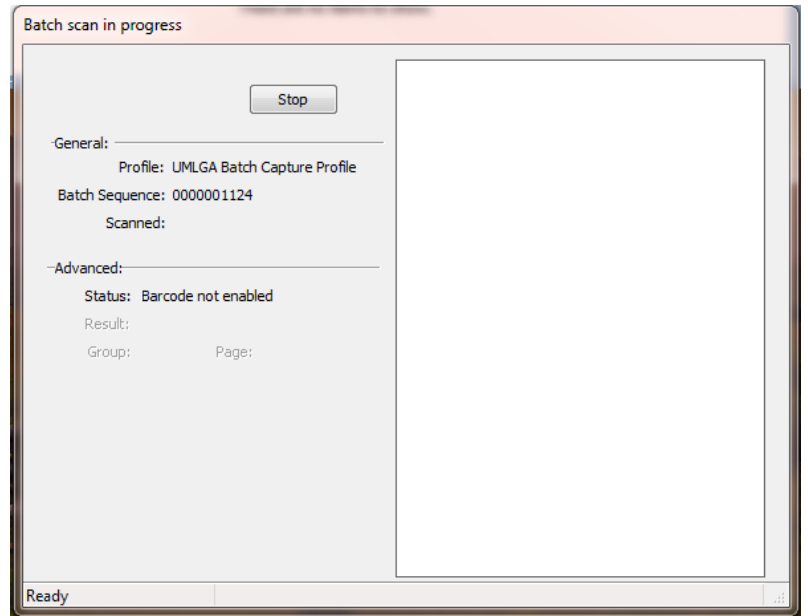
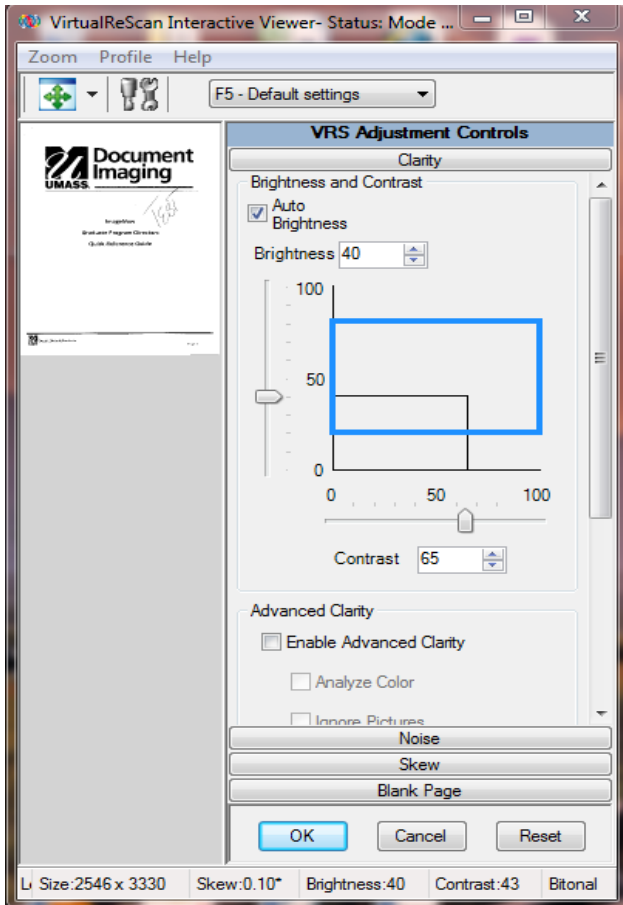


Note: You may also scan single documents using the flat bed of the scanner. To do so, lift the bed cover and place the document face down on the scanning bed.

- SELECT THE UMLGA BATCH CAPTURE PROFILE FROM THE CAPTURE MENU ON THE TOOLBAR



The following Windows will appear.



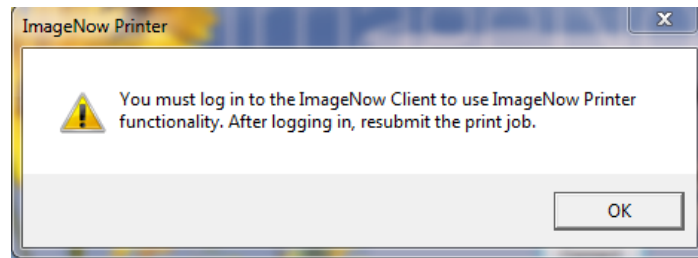
- CLICK CANCEL TO STOP THE SCANNING OR OK TO CONTINUE SCANNING.

4.3. CAPTURING ELECTRONIC DOCUMENTS

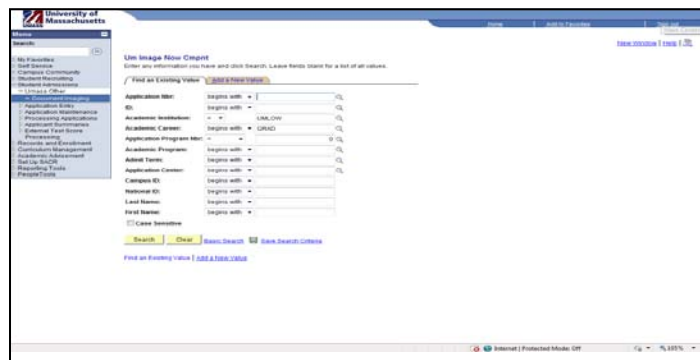
ImageNow allows you to capture electronic documents such as those received via email without printing and manual scanning. It does this by utilizing a Virtual Printer called **ImageNow Printer**. To capture an electronic document, follow the steps below:

- ENSURE THAT YOU ARE LOGGED IN TO IMAGENOW.

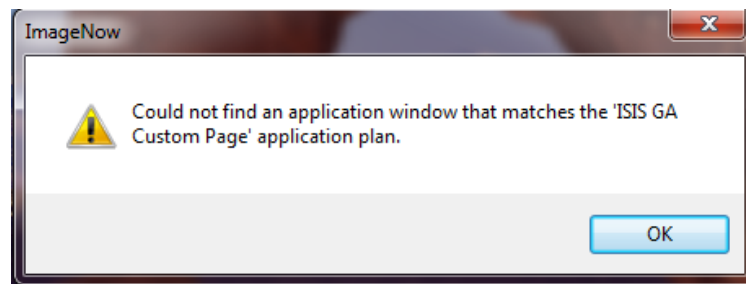
Attempting to print to the ImageNow printer without logging in will result in the following Error message:



- ENSURE THAT YOU HAVE OPENED THE ISIS DOCUMENT IMAGING CUSTOM PAGE



Attempting to print to the ImageNow printer without being logged into the ISIS document Imaging Custom page will result in the following Error message:



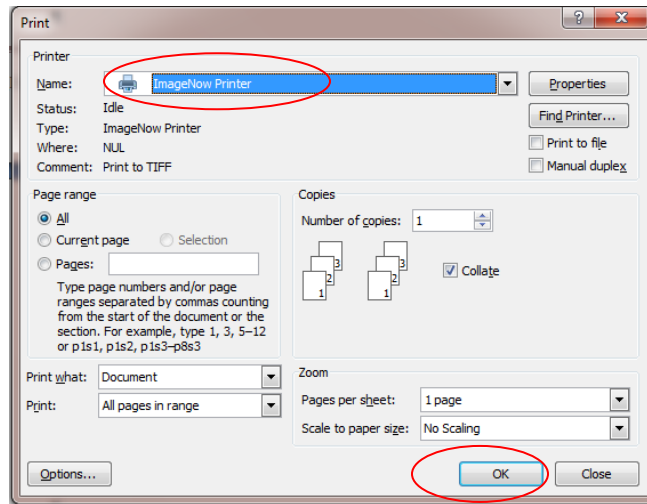
Documents captured via the ImageNow Printer, will be routed to the **Ready for QA queue**

- OPEN THE DOCUMENT TO BE CAPTURED USING WHICHEVER TOOL IS APPROPRIATE

(i.g. MS Word, Excel, Notepad, etc)

- PRINT THE DOCUMENT TO THE IMAGENOW PRINTER

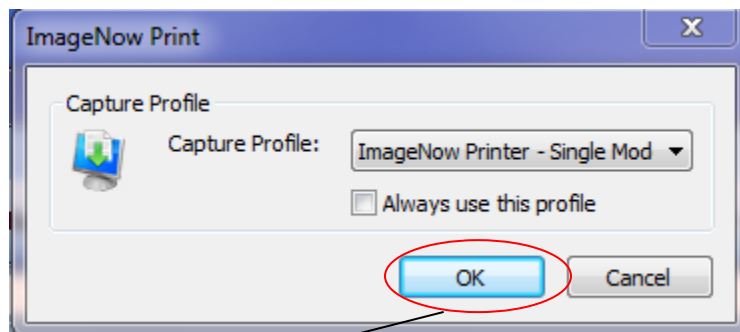
This printer will appear as an option in the application you are using to view the document. Click **OK** to “print” / Capture the document



Note: The Print window pictured here is from MS Word.

Print Windows vary by application

The following Window will appear along with the **Batch Scan in Process** window.



- PRESS OK TO CONTINUE

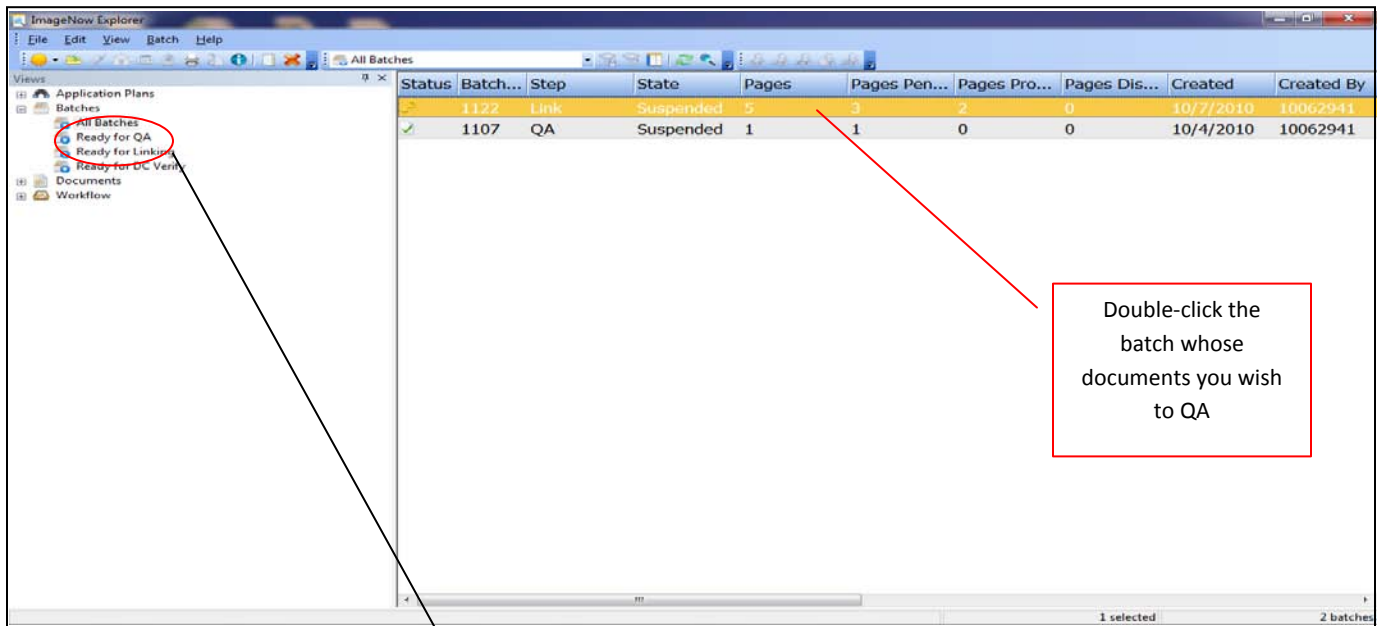
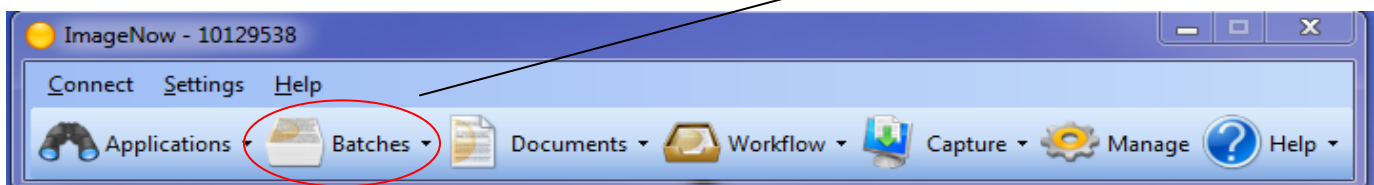
Documents that have been manually scanned will be routed to the **Ready for QA** queue.

4.4. DOCUMENT QA

To ensure the readability of manually scanned documents, ImageNow provides an application which will allow you to clean up many of the issues that contribute to scanned documents being illegible. (e.g. watermarks, security backgrounds, discolorization, skewing etc.)

If you recall, as documents are scanned, the first page triggers the *VirtualReScan* application. It is this application you will use to QA documents.

- OPEN YOUR IMAGENOW EXPLORER BY CLICKING THE BATCHES ICON ON THE IMAGENOW TOOLBAR.



- SELECT THE "READY FOR QA" QUEUE BY CLICKING ON THAT QUEUE IN THE VIEWS PANE.

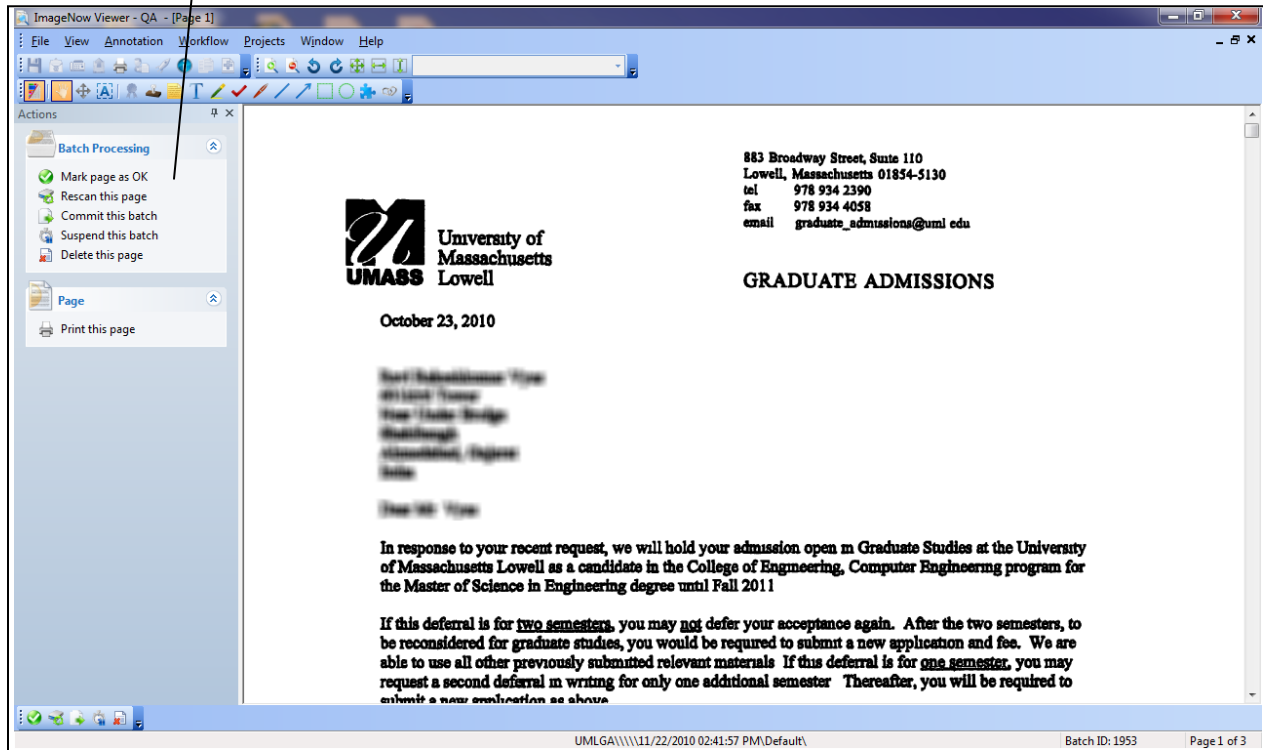
Once selected all of the batches needing to be QA'd will appear in the right pane.

- SELECT THE BATCH OF DOCUMENTS YOU WISH TO QA BY DOUBLE-CLICKING ON THE BATCH.







The ImageNow Viewer will open to display the first of the batch documents.

- SELECT THE APPROPRIATE QA ACTION FROM THE LEFT-HAND PANE.

See description of each available action below.



4.4.1. BATCH PROCESSING ACTIONS

Action Name	Clicking the Button
 Mark page as OK	Signifies that you deem the document to be readable. Clicking this action will forward the document to the Ready for Linking batch and display the next document to be QA'd.
 Rescan this page	Signifies that you deem the document to be unreadable and that it must be rescanned. Reload the document in the scanner and select this action. The document will be rescanned and the Virtual ReScan (VRS) program will be started. See <i>VRS – Cleaning a Document</i> for details.
 Commit this batch	Signifies that you deem all documents within that batch as Readable. Selecting this action will forward all of the documents within this batch to the Ready for Linking queue.
 Suspend this batch	Selecting this action will halt the QA process, mark the batch as Suspended and return you to the ImageNow Explorer. You may return to QAing this batch at any time.
 Delete this page	Selecting this action will send the document to the Recycle Bin.
 Print this page	Selecting this action will send the document to the local printer.

4.4.2. VRS - CLEANING A DOCUMENT

Refer to VRS Help section for details

5. DOCUMENT LINKING

Once Documents are scanned and QA'd for readability, they must be linked to the appropriate student record within PeopleSoft. To link an ImageNow document to a PeopleSoft document, you will utilize a customized PeopleSoft screen which contains all of the information needed to create the link.

Note: Documents received prior to an Application are linked to a special PreApp queue and stored there until the Application is entered into PeopleSoft. See **Linking PreApp Documents** below for details.

➤ ACCESS ISIS / PEOPLESOFT AND SELECT:

Student Admissions>UMass Other>Document Imaging.

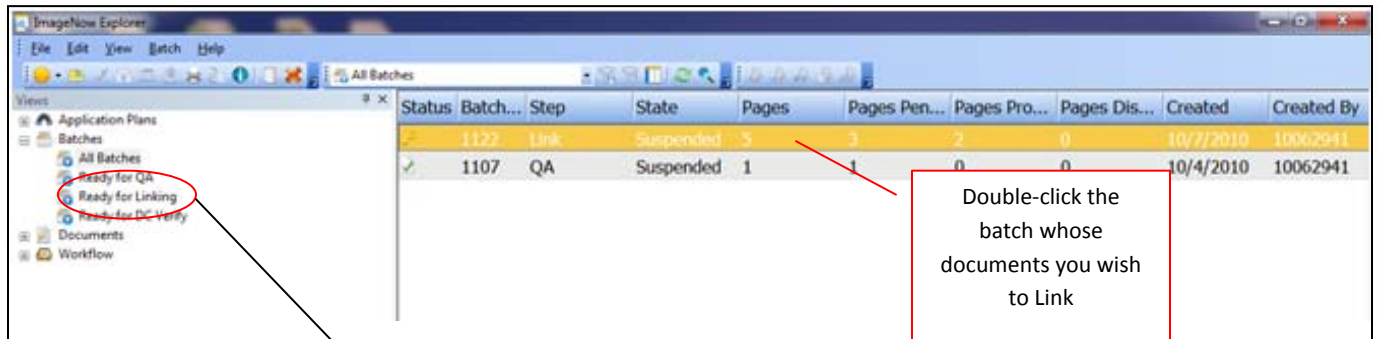
The following screen will display.

The screenshot displays the 'Um Image Now Cmpnt' screen in the PeopleSoft system. On the left, a navigation menu is visible with 'Document Imaging' highlighted under the 'Umass Other' category. The main content area features a search interface with the title 'Um Image Now Cmpnt' and the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. The search criteria include:

- Application Nbr: begins with []
- ID: begins with []
- Academic Institution: = [UMLOW]
- Academic Career: begins with [GRAD]
- Application Program Nbr: = [0]
- Academic Program: begins with []
- Admit Term: begins with []
- Application Center: begins with []
- Campus ID: begins with []
- National ID: begins with []
- Last Name: begins with []
- First Name: begins with []

At the bottom, there is a 'Case Sensitive' checkbox and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A footer at the very bottom of the screen repeats the 'Find an Existing Value | Add a New Value' navigation options.

- OPEN YOUR IMAGENOW EXPLORER BY SELECTING THE BATCHES ICON FROM THE IMAGENOW TOOLBAR.



- SELECT THE READY FOR LINKING QUEUE BY CLICKING ON THAT QUEUE IN THE VIEWS PANE.

Once selected the batches of documents needing to be linked will appear in the right pane.

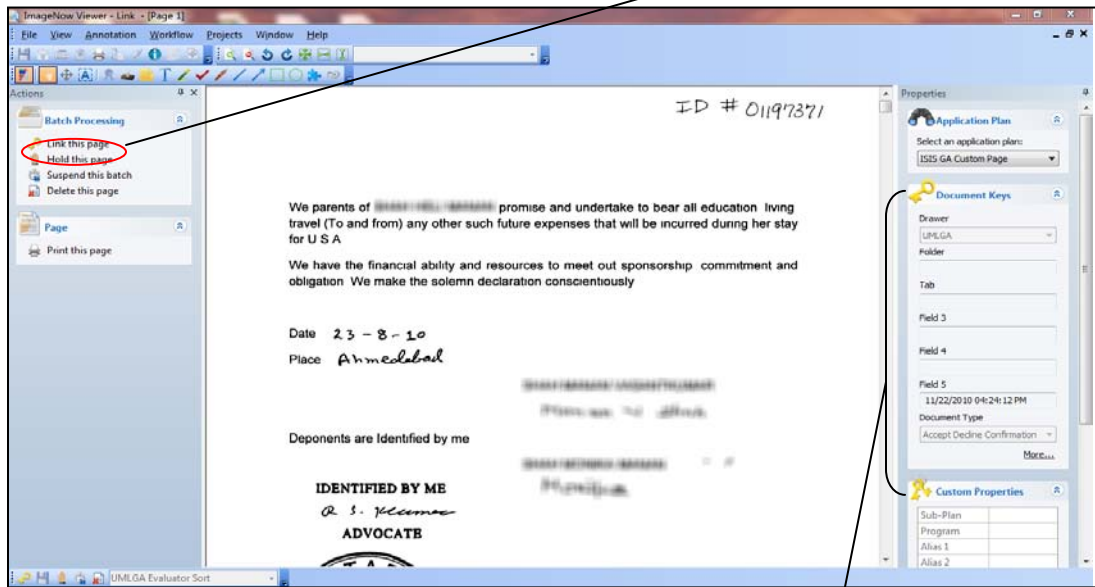
- SELECT THE BATCH OF DOCUMENTS YOU WISH TO LINK BY DOUBLE-CLICKING ON THE BATCH.

The ImageNow Viewer will open to display the first of the documents n that batch.

- GO BACK TO THE PEOPLESOFT CUSTOMIZED PAGE AND USE ANY OF THE SEARCH FIELDS TO FIND THE STUDENT THAT MATCHES THE DOCUMENT YOU ARE LOOKING TO LINK.

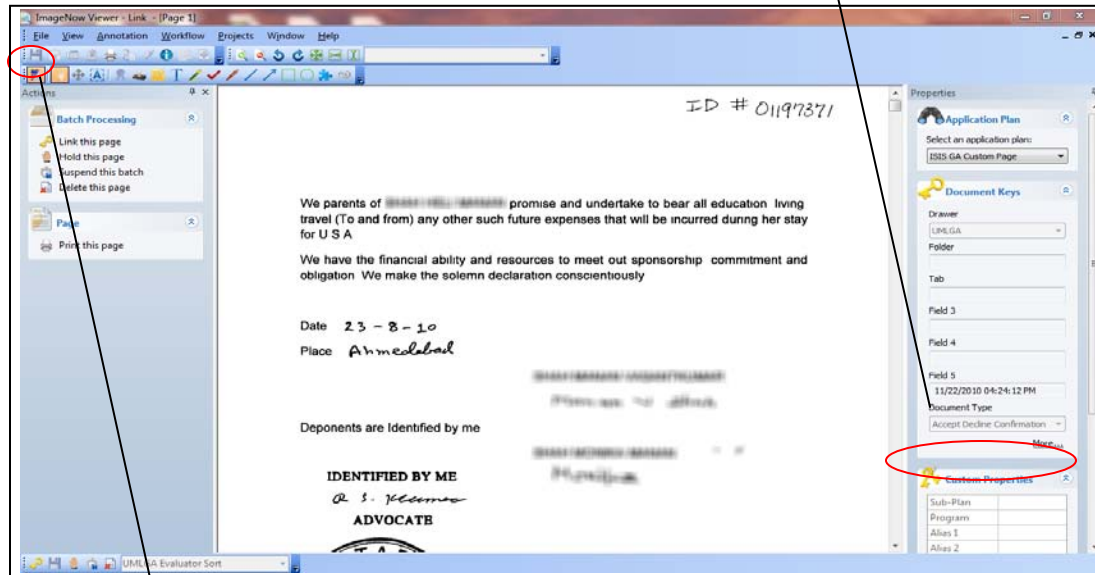
Ensure that the student information displayed in the PeopleSoft Custom page matches the student information on the document you wish to link.


- ONCE YOU ARE CERTIN THAT THE STUDENT RECORD ON THE PEOPLESFT PAGE AND THAT OF THE DOCUMENT TO BE LINKED MATCH, SELECT THE “LINK THIS PAGE” ACTION.



Once linked, the student information will appear in the Document Keys section.

- SELECT THE PROPER DOCUMENT TYPE FROM THE DROP DOWN DOCUMENT TYPE WINDOW.



- ONCE YOU HAVE SELECTED THE APPROPRIATE DOCUMENT TYPE, SAVE THE DOCUMENT BY CLICKING THE SAVE ICON  IN THE UPPER LEFT TOOLBAR.

The document will saved to the Document Repository