

Imagine Document Handling and Access

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Capturing Documents

- **Using INow Printer.pdf**
- **FinAid - Using the new INow Printer.pdf**
- **SIS FinAid BusOps New Capturing Process.pdf**

Linking Documents

How do I link a newly scanned or captured document and relate it to an already existing document?

Follow the steps below:

1. Open the recently captured document in the corresponding queue. Leave it open
2. Go to documents and search for the previously captured document which data matches the new document
3. Make sure the Document Keys (Properties) section on the previously captured document is on the left side
4. Once you have both documents open, go to the recently captured document and click on the Select an Application Plan drop down box - choose the corresponding application plan (usually includes in its name the word "Relating")
5. This should bring the values previously set from the old document to the new one
6. Save the changes in the new document

Missing Documents

Where is my document?

If a document can't be found in the system after it has been captured, please check the following areas:

1. Has the document been successfully scanned and QA'd? It might still be waiting to be captured or QA'd.
2. Was the document captured along with other documents? If this is the case, the document might be part of a completely different item and thus it might still need to be split from the original one.
3. Has the document been sent to the appropriate queue or drawer? It might have been routed to a queue or drawer with restricted access.
4. Has the document been properly indexed? It might not have the adequate index values, thus making it difficult to find.
5. Has the document been assigned the appropriate document type? If it has been assigned a document type with restricted access, only a certain group might be able to see it.
6. If the document has been properly captured, QA'd, indexed and routed, make sure:
 - a. There are no typos in the search term.
 - b. To narrow down the search by entering a creation date range.
 - c. To use the appropriate view and or filter when searching for it.

"No records found" message appears when searching for document.

Verify that the document was actually captured (scanned, emailed, imported, etc.). This is a common error message that appears when the document does not exist in the system.

Where is my fax?

There could be several reasons your fax was not processed:

1. The fax was corrupted during transmission.
2. A bad connection was used.
3. The source fax machine is old, dirty, or transmitting at a very low resolution -- the recommended resolution for faxing is **Fine**.

Please go to [Recommended Fax Specifications](#) for more details.

Copying and Moving Documents

How can I copy a document while logged into the Client?

Sometimes it is necessary to copy a whole item, including all its pages or documents. To copy an item, follow the steps below:

1. In Perceptive Content Explorer, run a search to return the document you want to copy. Highlight the document and go to File/Copy Document, or click Ctl-Y.
2. The Copy Document dialog box opens.
3. If applicable, choose the appropriate Application Plan – if no Application Plan is available or used in the current process, proceed to modify or enter the newly required index values manually (including **Drawer** and **Type**, formerly known as “Document Type”).
 - a. **Note:** If no index values are entered or modified, the system will display the message “Attempt to copy document to itself” and the document won’t be copied.
 - b. **VERY IMPORTANT:** Do not enter any values on the NAME field. Doing so will trigger a Content Modeling process, which is not used at this time.
4. Make sure to check the **Send to workflow** queue checkbox and select the appropriate queue.
 - a. **Note:** If no workflow queue is selected, the document will be created in the system per se, but it won’t appear in any workflow queue making it difficult to find.
5. Click OK.

Note:

- If you need to copy only specific pages from the source document make sure to check the **Page Range** radio button and enter the selected pages from current document .
- if you need to remove specific pages from the source document make sure to enter a **Page Range** and to check the **Remove** selected pages from current document checkbox.

Is there an easy way to move a document that was scanned into the wrong queue into the appropriate one?

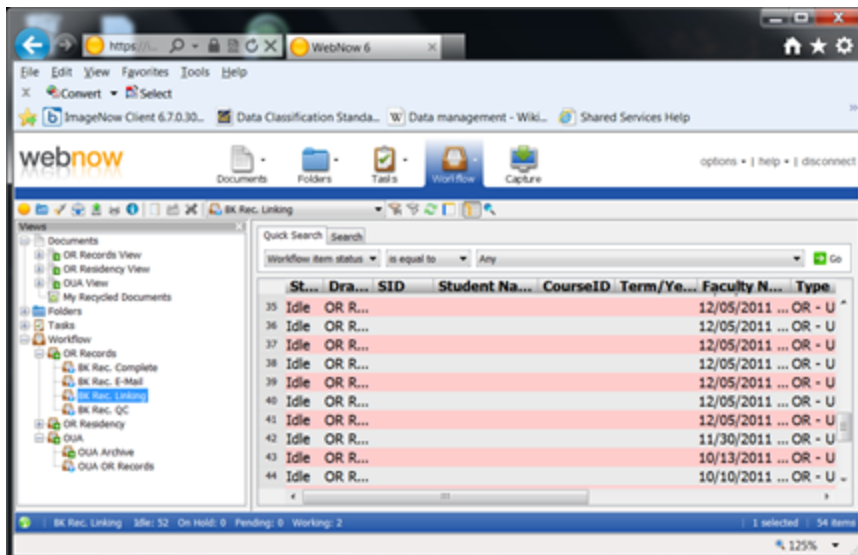
Yes, provided the user has been granted the appropriate privileges, use the **Route Anywhere** command. First, check to verify that you have the required permission for your document. If the document is open, either click **Workflow** in the menu bar and then **Route Anywhere** OR click the **Route Anywhere** icon (a graphic with 4 arrows) at the bottom of the Perceptive Content Viewer page. From the **Route Anywhere** window, you can select the destination queue, and then click the **Route** button. If the document isn’t open but the Perceptive Content Explorer is open, you may right-click on the document and select **Workflow** and then the **Route Anywhere** option, select a destination queue, then click the **Route** button.

If the Route Anywhere option is not available in the document, please contact your Imagine Implementation Admin (usually, the user with the privileges to route the document accordingly).

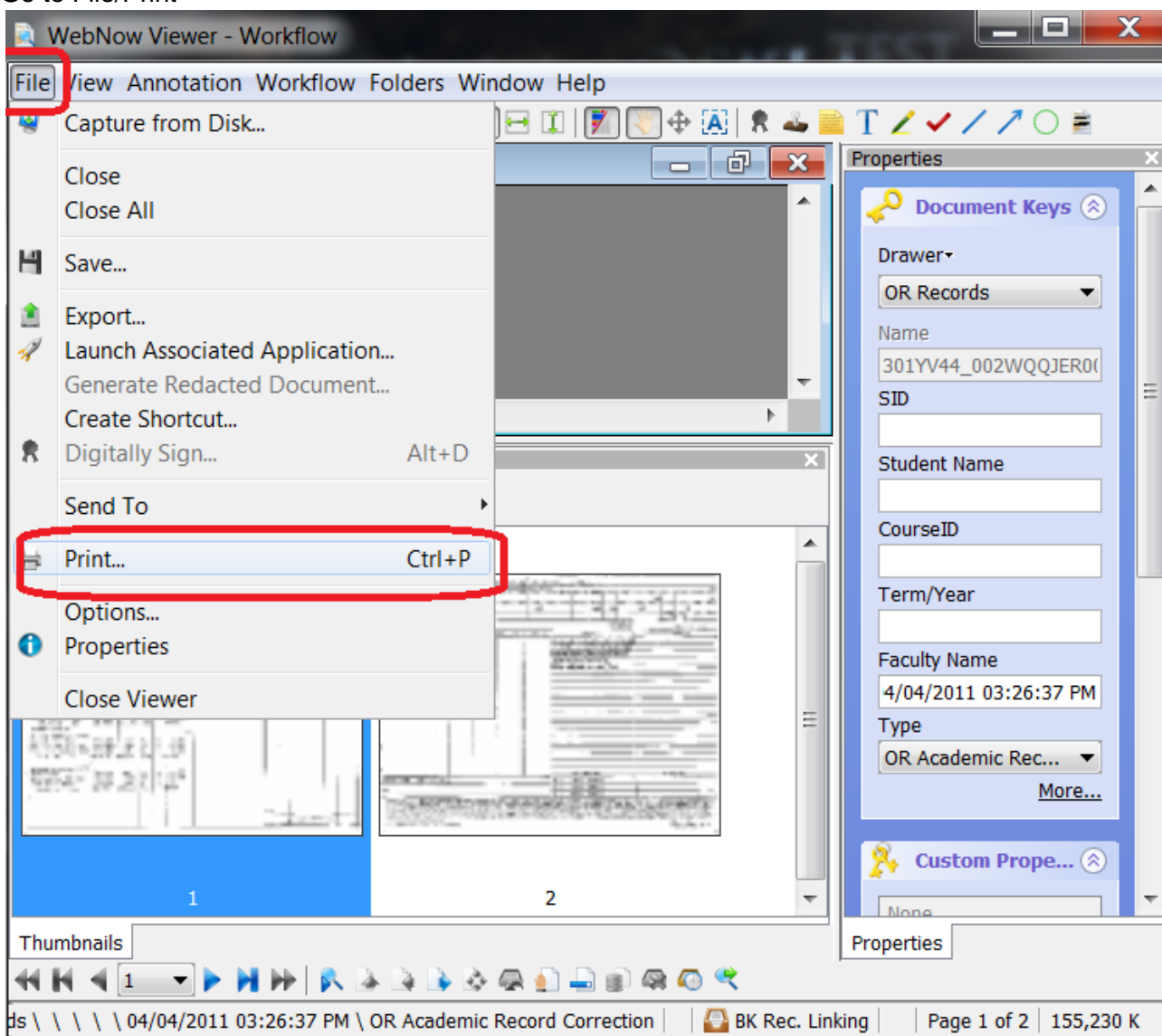
Printing Documents

How do i print single pages in WebNow?

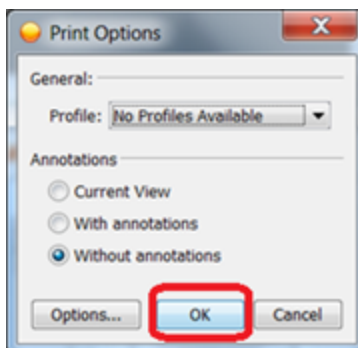
1. Log in to WebNow



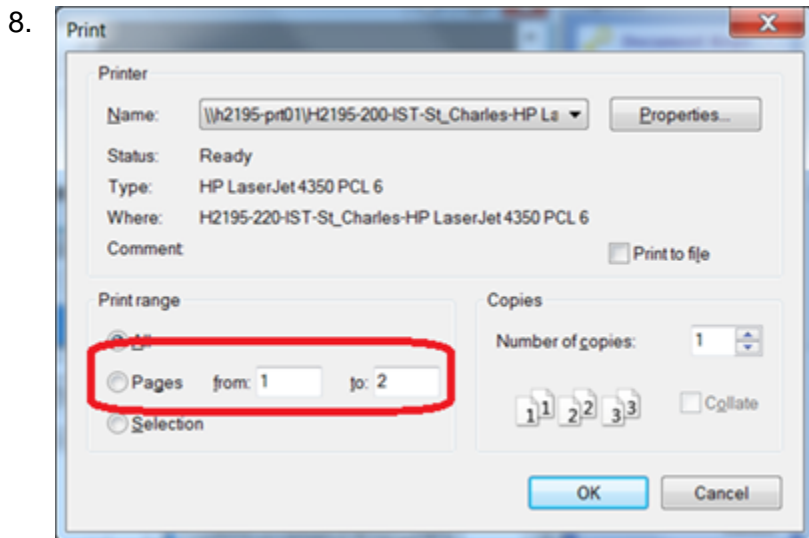
- 2.
3. Go to File/Print
- 4.



5. On the Print Options dialog box click OK
- 6.



7. Once the print options appear, go to the Pages section and choose the pages that are actually needed



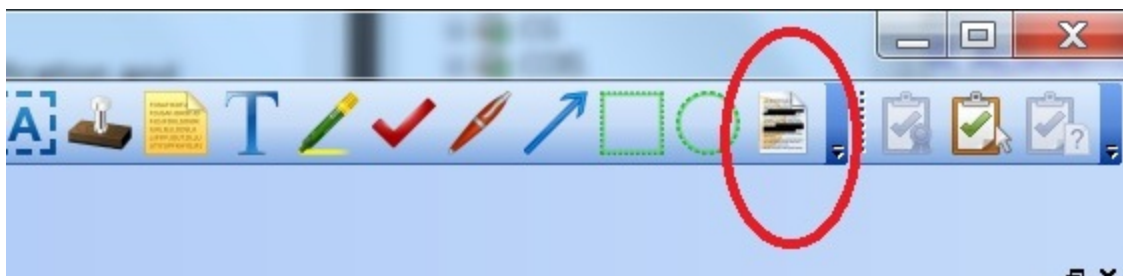
Redacting Documents

Scanned documents should not include sensitive data (please see <https://security.berkeley.edu/data-classification> for Data Classification and protection levels). Documents with sensitive data **should be redacted prior to be scanned**. However, if you suspect previously scanned documents include sensitive data they should be redacted within the system, then the original should be deleted.

How can I redact a scanned document that contains sensitive data?

Please apply the steps below to redact each one of the pages with this issue:

1. Open the document
2. Open the page with the issue
3. Click on the **Redaction** icon
- 4.



5. With the **Redaction icon on** select the data to be redacted
6. Go to File/Generate Redacted Document
7. On the **Generate Redacted Document** dialog box, make sure to type a unique identifier in one of the index values, ie, "REDACTED" in the Student Name field (**after** the actual student name)
8. Make sure the **appropriate workflow queue** is selected and that the Send to Workflow queue check box is checked
9. Make sure the "All pages" radio button is checked or select the appropriate page range
10. Click OK

Generate Redacted Document

Application
Select an application
(None) [refresh]
 Use as default application plan

Location
Drawer: [v]
OR Records [v]
Name: [text box]

Properties
SID: 24132091
Student Name: EVANS, WILLIAM - REDACTED
CourseID: N/A
Term/Year: Fall 2013
Faculty Name: Hamilton, R
Type: OR Change of Name [v]

Custom Properties
[text box]
 Use default values

Document Options
 Submit to Content Server
 Send to workflow queue
BK Res. Linking [v]

Page Options
 Current page
 All open pages
 All pages
 Page range
[text box]
Example: 1,3,5-12

OK Cancel

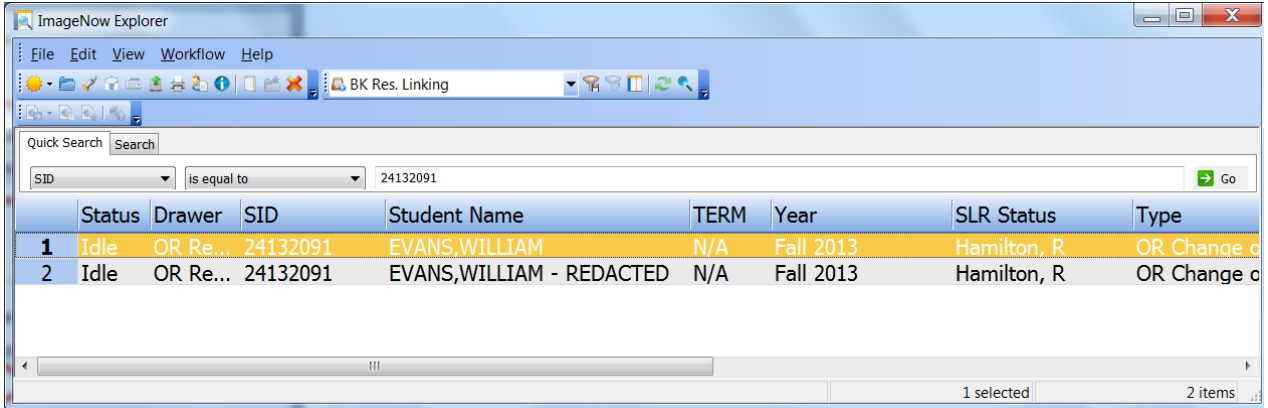
How can I delete a scanned document that contains sensitive data after i have created a newly

redacted document?

After newly redacted documents have been created the originally scanned documents that include sensitive data should be deleted. Please apply the steps below to find and delete the document.

In our previous example, we added the word "REDACTED" to the student name.

1. Go to the queue chosen in step 8 above. In this case, the queue is BK Res Linking
2. Do a quick search for any of the Index Values in the original document, i.e. in this case, let's use the student id **24132091**:

3. 

- a. Note that two items with almost same index values appear.
4. Proceed to delete the original document by right-clicking on it and by selecting the delete option.
 5. Once the original document has been deleted open the newly generated document and proceed to remove the "REDACTED" word from the index value, in this case Student Name.
 - a. **Note** that deleting the whole original item deletes also its document history.

Rotating Documents

How do I rotate a document?

You can rotate any image document (for example, .jpg, .bmp, .png, .gif, and .tif), **however**, you can **only** save image rotations for TIFF documents.

1. Perform the following action, depending on your viewer:
 - a. In ImageNow Explorer, double-click the document you want to rotate.
 - b. In ImageNow Viewer, on the View menu, point to Rotate and then select the option you want.
2. Saving the document. For a **TIFF** document type, save the rotation change on the ImageNow Server:
 - a. On the View menu, point to Rotate, and then click Save Image Rotation to Server.

Date and Time in Documents

- **Date and time when document was linked**
- **Date and time when document was routed**
- **Date and time when document was scanned**
- **Displaying time in columns**

- **Displaying Routed and Routed by in views**

Downloading and Uploading Documents to the system

- **Downloading and Uploading Documents to the old FASO system**
- **Downloading and Uploading Documents to the system**

Exporting documents from the system

- **Job Aid. Exporting Documents from the Perceptive Content Explorer**