



**University of Minnesota  
Financial Document Scanning Guide for  
ImageNow 6.2**

<b>INTRODUCTION .....</b>	<b>2</b>
<b>LAUNCHING IMAGENOW AND LOGGING IN.....</b>	<b>2</b>
<b>IMAGENOW TOOLBAR .....</b>	<b>3</b>
<b>SCANNING DOCUMENTS INTO IMAGENOW .....</b>	<b>3</b>
PREPARATION.....	3
SCAN.....	3
DOCUMENT QUALITY ASSURANCE (QA) .....	4
<b>IMAGENOW QA TOOLBAR ICONS.....</b>	<b>5</b>
<b>IMAGENOW SHORTCUT KEYS.....</b>	<b>6</b>
IMAGENOW VIEWER .....	6
BATCH/QA.....	7
<b>DISCONNECTING FROM THE SERVER .....</b>	<b>7</b>

## Introduction

ImageNow is the software used by the University to scan and archive documents that are related to the financial system. This tutorial is intended for imaging staff at who scans documents into ImageNow.

## Launching ImageNow and Logging In

ImageNow can be launched in several ways. You can launch ImageNow:

- By double-clicking the ImageNow icon on the desktop;
- By clicking the ImageNow icon in the Windows System Tray;
- By selecting the ImageNow 6 icon from the Start menu;
- From the Windows Start menu go to Programs > ImageNow 6 > ImageNow 6.



As ImageNow is launched, the splash screen below appears.



### Follow these steps to log into ImageNow:

1. Use the default **UMN 6 Prod** connection profile.
2. In the **Username** field, confirm or enter the user name (x.500).
3. In the **Password** field, enter your ImageNow password.
4. Click **Connect** to initiate the connection to the ImageNow Server. The ImageNow toolbar will display if you are successfully logged in to ImageNow.

**Note:** The default ImageNow Client installation from EAD-Imaging will have pre-configured your **Connection Profile**. If no Connection Profile is indicated then please contact 1-HELP. If you are unable to connect to the server, verify that you have correctly entered the Username and Password. If you continue to be unable to log in please contact 1-HELP.

## ImageNow Toolbar

The ImageNow toolbar provides single-mouse-click access to your frequently used features. Additionally, the dropdown buttons give you a quick path to those features and functions to which you have been granted security privileges by your administrator. The toolbar may look differently for you depending on your security privileges.



**Applications:** Formerly called Applets, they are mini programs that connect the financial system with documents in the imaging system. They also define the Document Keys for scanned documents.

**Batches:** Used by scanner staff to check the quality of scanned documents.

**Documents:** Search for documents that have been linked to a financial transaction in ImageNow by entering search criteria.

**Workflow Icon:** Access scanned documents through a workflow queue for your cluster. This queue is shared with other voucher preparers in your cluster.

**Capture Icon:** Used by scanner staff to initiate document capture or scanning process

**Help Icon:** Contains in depth ImageNow guide.

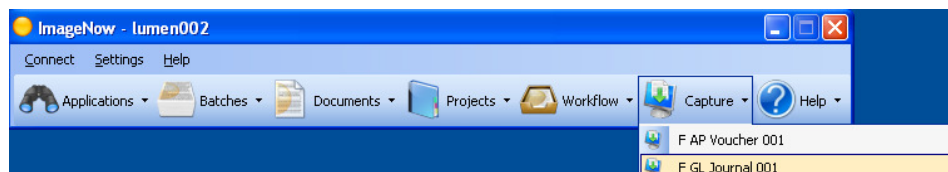
## Scanning Documents into ImageNow

### Preparation

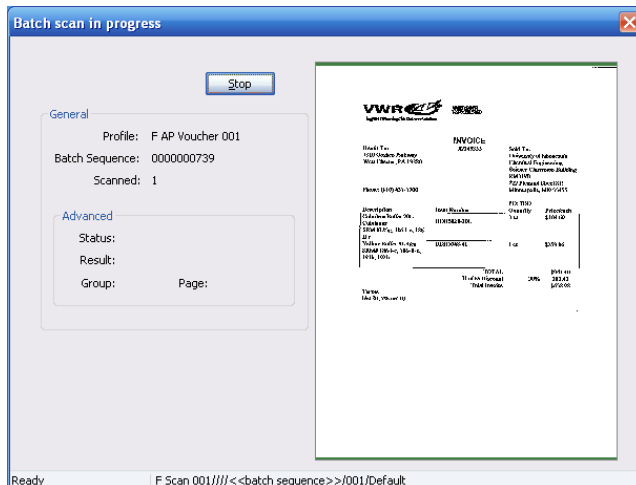
1. Prep documents to make sure there's nothing on them (i.e. sticky note, paper clips, and staples) that can cause problem during scanning. You may also insert the Patch Codes (separator sheets) in between documents during this step.

### Scan

2. Place documents on the scanner tray, click the down arrow on the Capture icon, then choose the correct profile based on the documents to be scanned.

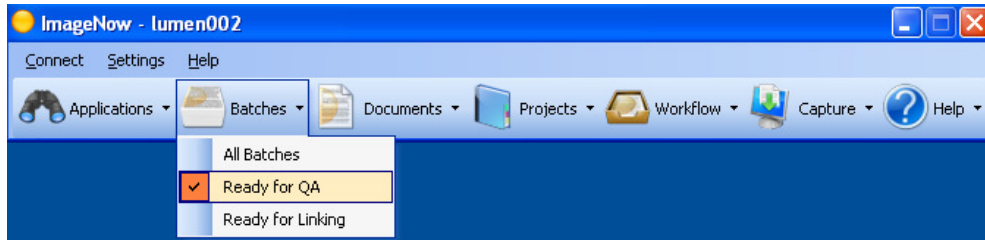


3. Scanner will start and you will be able to see a quick preview of the documents being scanned.

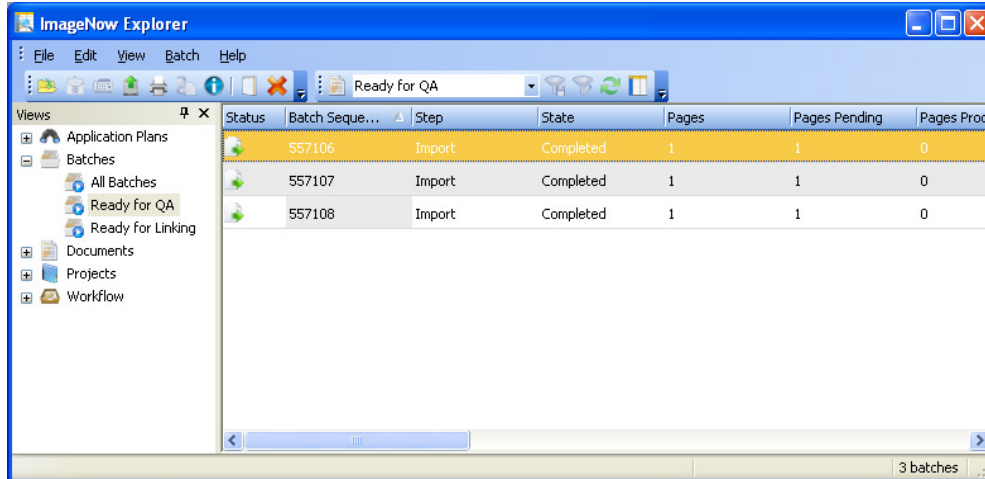


## Document Quality Assurance (QA)

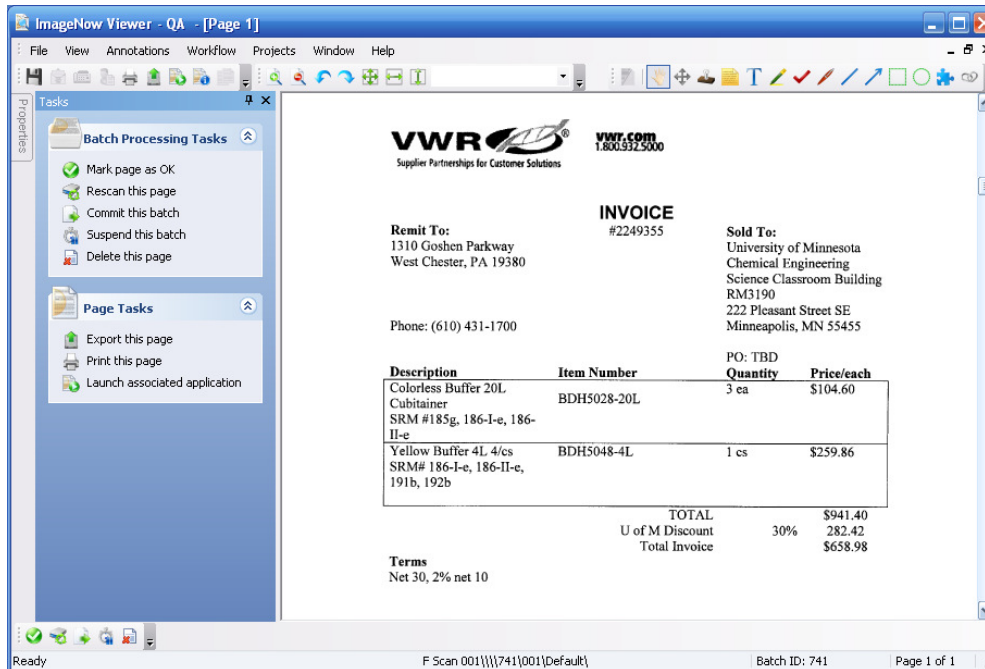
- Once documents are scanned, you will need to check the quality of the scanned images. From the toolbar, click the **Batches** icon.



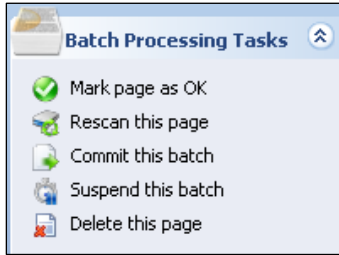
- You are now in the Batch Grid. Scanned documents are identified by the **Batch Sequence** number



- Double click on a document to open it.



7. Quality Assurance step is done to ensure documents are scanned with a sufficient level of quality.












There are different tasks that can be applied to the document. These options are available on the right side and on the bottom left corner of your screen.




<b>Mark page as OK</b>	Image has acceptable quality.
<b>Rescan this page</b>	Image has to be replaced. To do this, place the page on the scanner tray and select this option.
<b>Commit this batch</b>	Approve quality on all pages in the batch.
<b>Suspend this batch</b>	Postpone QA process for the batch.
<b>Delete this page</b>	Delete image.

Once documents are QA'ed, they are automatically placed in the corresponding queue accessible to the cluster staff.

## ImageNow QA Toolbar Icons



	Save.
	Print image.
	Export image to a location on the local computer.
	Launch document in its native format. (PDF, Word, Excel, etc).
	Properties about document.
	Zoom In.
	Zoom Out.
	Rotate 90 degrees to the left.
	Rotate 90 degrees to the right.

	Adjust image to fit the window space.
	Adjust image to fit the width of the window.
	Adjust image to fit the height of the window.

## ImageNow Shortcut Keys

### ImageNow Explorer

<b>Ctrl + O</b>	Open File
<b>Ctrl + M</b>	E-mail File
<b>Ctrl + X</b>	Export File
<b>Ctrl + P</b>	Print file
<b>Ctrl + I</b>	File Properties
<b>Ctrl + D</b>	Duplicate
<b>Ctrl + E</b>	Edit document keys
<b>Ctrl + A</b>	Select all
<b>Del</b>	Delete
<b>F5</b>	Refresh
<b>F11</b>	Views
<b>F1</b>	Help

### ImageNow Viewer

<b>Ctrl + P</b>	Print
<b>Ctrl ++ (number pad)</b>	Zoom in
<b>Ctrl +- (number pad)</b>	Zoom out
<b>F2</b>	Resize fit image
<b>F3</b>	Resize fit width
<b>F4</b>	Resize fit height
<b>Alt + Left Arrow</b>	Rotate left
<b>Alt + Right Arrow</b>	Rotate right
<b>Up Arrow</b>	Pan image up
<b>Down Arrow</b>	Pan image down
<b>Ctrl + Up Arrow; Home</b>	Top of image.
<b>Ctrl + Down Arrow; End</b>	Bottom of image.
<b>Ctrl + Left Arrow</b>	Left margin
<b>Ctrl + Right Arrow</b>	Right margin
<b>Ctrl + G</b>	Go to page
<b>Ctrl + Page Down</b>	Next page
<b>Ctrl + Page Up</b>	Previous page
<b>Ctrl + Home</b>	First page
<b>Ctrl + End</b>	Last page

<b>F6</b>	Scale to Gray
<b>Alt + End</b>	Reset Pointer
<b>Ctrl + Click</b>	Select Annotation
<b>F7</b>	View Properties
<b>F8</b>	Show Keywords
<b>F9</b>	Thumbnails
<b>F11</b>	Invert

#### Batch/QA

<b>Ctrl + Space bar</b>	Page OK
<b>Ctrl + D</b>	Delete page
<b>Esc</b>	Cancel

### Disconnecting from the Server

To disconnect from the ImageNow Server, from the ImageNow toolbar, select **Connect > Disconnect** or **Connect > Exit** from the toolbar or click the **Close** button.

