



ImageNow Training

Client users



Table of Contents

| | |
|--|----|
| Launching ImageNow & Logging In | 1 |
| Your ImageNow Password | 2 |
| Password rules | 2 |
| Changing your ImageNow password | 2 |
| Password support | 2 |
| ImageNow Client Menus | 3 |
| Connect menu | 3 |
| Settings menu | 3 |
| Help menu | 4 |
| Selecting the application | 4 |
| Document searching | 6 |
| Three ways to search for documents | 7 |
| 1. Quick search | 7 |
| 2. Advanced search | 8 |
| 3. Binocular search | 10 |
| ImageNow Viewer/Looking at the document | 11 |
| ImageNow Viewer - File toolbar | 13 |
| ImageNow Viewer - View toolbar | 13 |
| ImageNow Viewer - Annotations toolbar | 14 |
| ImageNow Viewer - Thumbnail toolbar | 14 |
| ImageNow Viewer - Navigator toolbar | 15 |
| Search Filters | 15 |
| Public filters | 15 |
| Private filters | 16 |

Launching ImageNow & Logging in

Depending on how your ImageNow client was installed you can launch the client via:

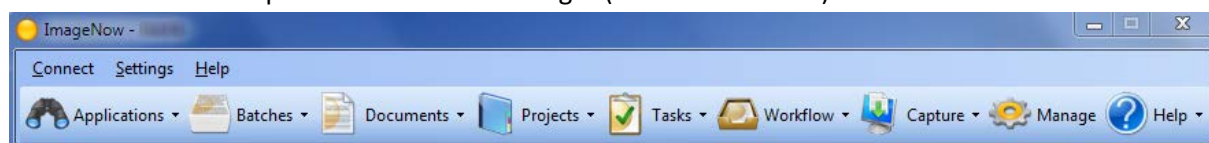
- Desktop icon
- Click the Start button/All Programs/ImageNow 6/ImageNow
- System Tray icon

- enter your ImageNow username and password and press the Connect button

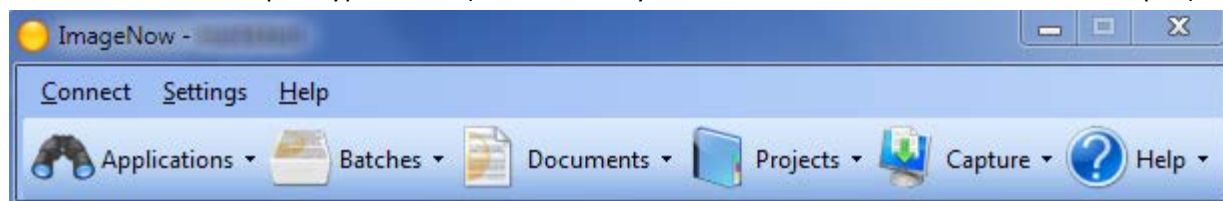


ImageNow will display a window with the icons that have been assigned to you.

Example: Power user or Manager (all available icons)



Example: Typical user (Note: You may have more or fewer icons than this example.)



Your ImageNow password

- your password will have to be changed once every 180 days
- you will be notified via email prior to the expiration date informing you to change your password

** Best Practice: Change your ImageNow password at the start of every new semester.*

- Password rules:

- passwords must be at least 8 characters long
- passwords must include a combination of 3 character types such as numbers, special characters, lower case letters or upper case letters
- passwords must not be reused

- Changing your ImageNow password: [this doesn't apply to Minnesota State Mankato users]

- go to the web site: <https://secure.mnsu.edu/imagenow>



Imagenow Password Change Form

| | |
|-----------------|--------------------------|
| Username | <input type="text"/> |
| Old Password | <input type="password"/> |
| New Password | <input type="password"/> |
| Verify Password | <input type="password"/> |

Submit Password Change

Reset Password reset form

[E-mail MSU ITS Staff](#)

- enter your username, old (current) password, your new password, verify the new password and then click the Submit Password Change button

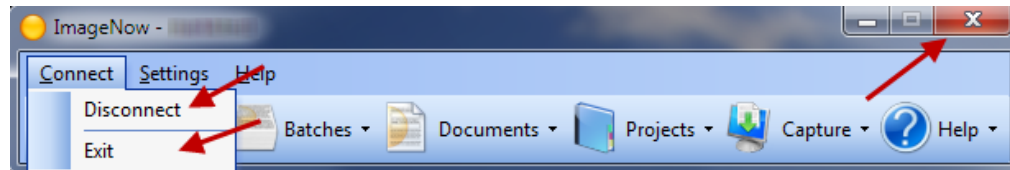
- the system will notify you if the password change was successful

- Password support:

- if your password has expired or you encounter a problem changing your password send an email to imagenowsupport@mnsu.edu or call the MSU Help Desk at (507) 389-6654
- provide your name, campus, ImageNow username, your issue and contact information

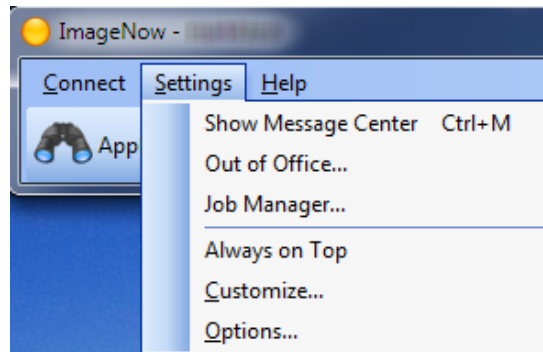
ImageNow Client Menus

- Connect menu



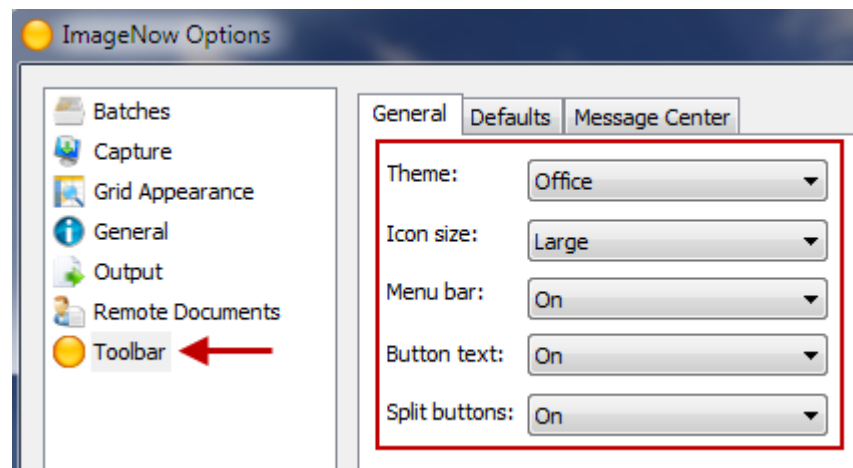
- three ways to exit the program: select "Disconnect," select "Exit" or click the red "X" to close the window

- Settings menu

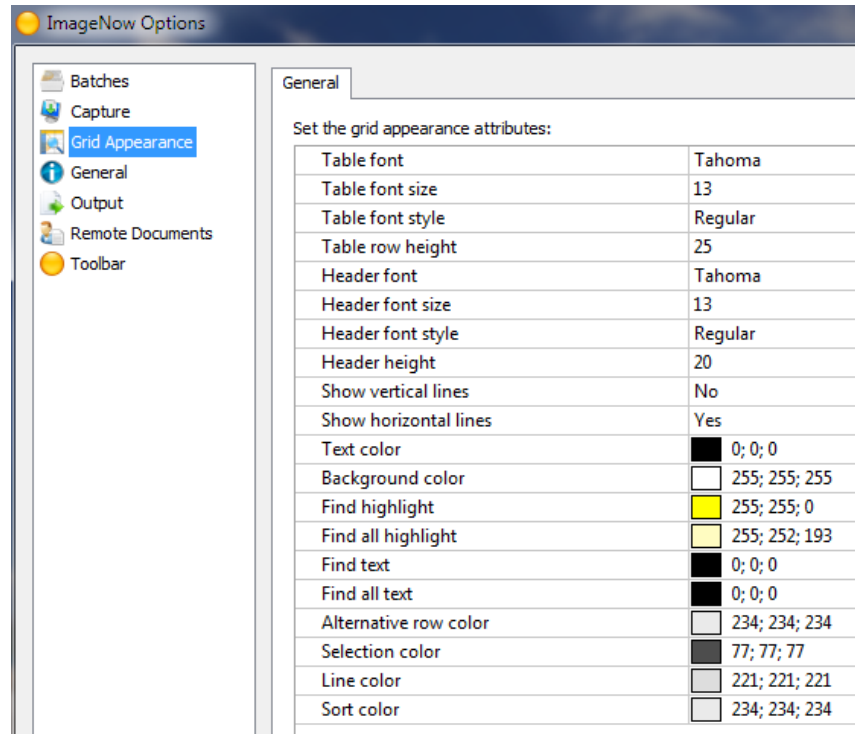


- the most commonly used item is "Options..." which is used to change the clients default settings

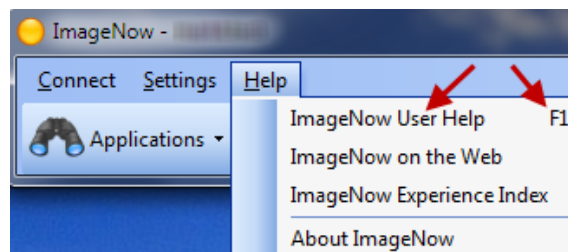
- the "Options" window (below) the Toolbar appearance can be changed by selecting an item in the red box



- under "Grid Appearance" you can change the font, font size, and colors on the "ImageNow Explorer" window (see below)



- Help menu



- ImageNow Help is available through the menu or by pressing F1

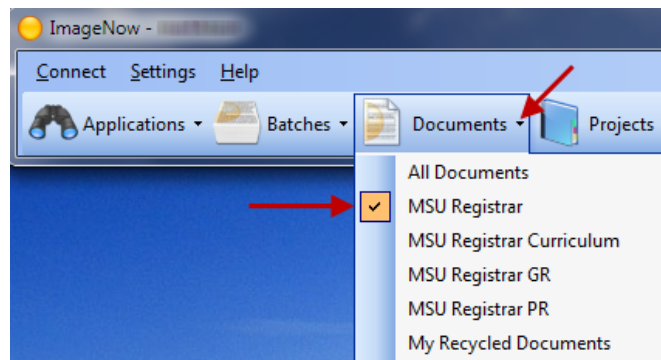
Selecting the application

- you will have access to one or more applications depending on the department and the privileges that have been granted to you
- one of the first things you should do is to select the application that matches the types of documents that you are searching for

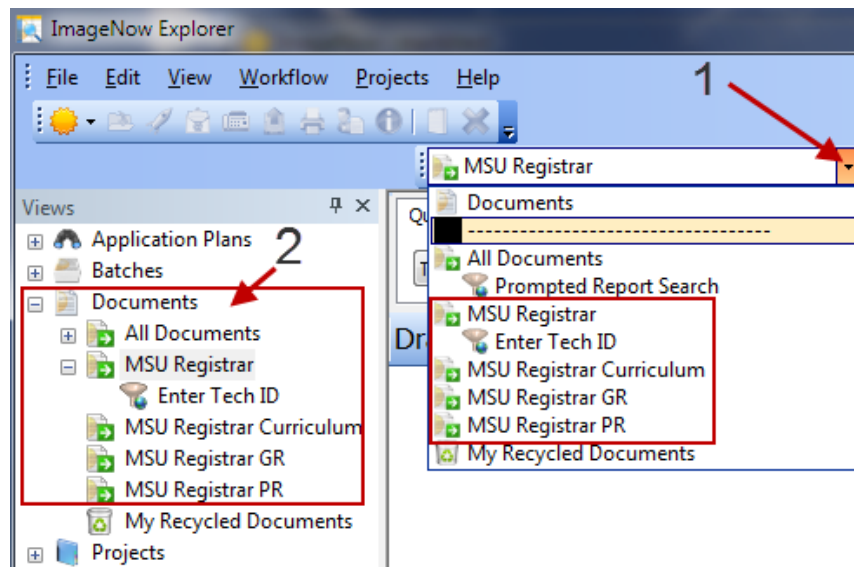
Note: Each application has unique column headings based on the index fields.

- the quickest way to select an application is to click the small down arrow next to "Documents" and then selecting the application from the list (see below)

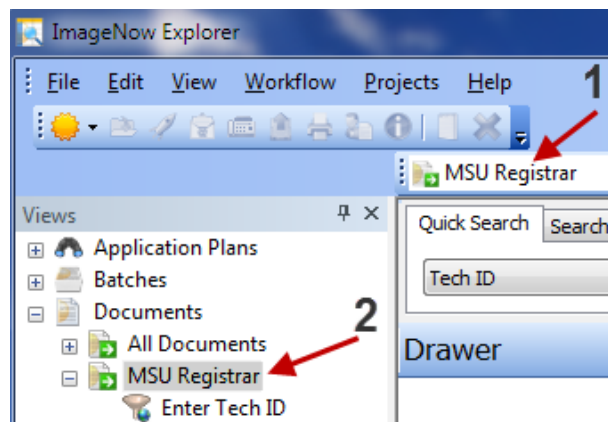
(in this example, the selected or default application has been set to "MSU Registrar" and is shown with a checkmark)



- or you can click the “Documents” icon and then from the “ImageNow Explorer” window select the application from section 1 or section 2 (see below)

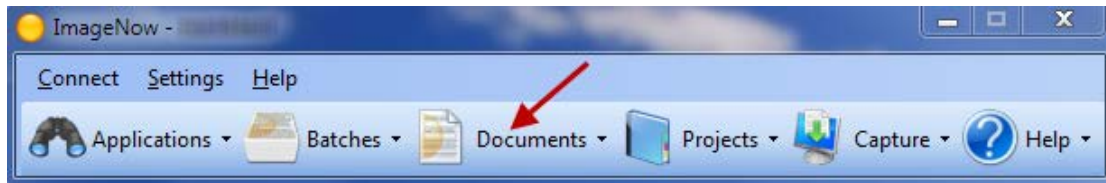


- your default or selected application will be displayed in the small Explorer window (#1) or as the highlighted item (#2) (see below)

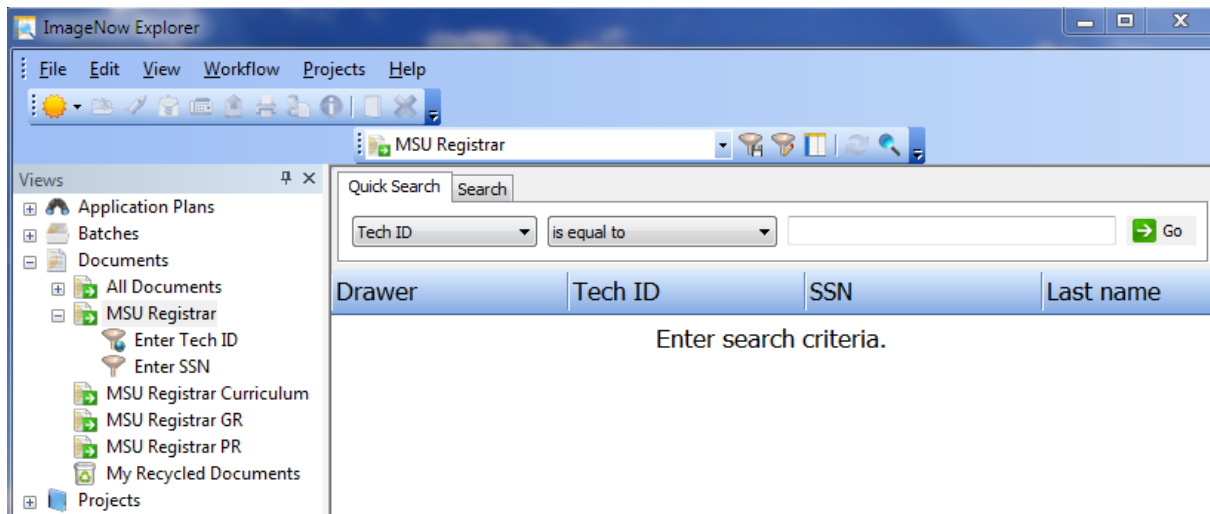


Document Searching

- to search for a document(s) in ImageNow click the “Documents” icon or name



- this opens the “ImageNow Explorer” window (see below)
 - this is the window that you will use for document searches
 - the “Views” pane on the left shows the applications that you have the privilege to see (in this example the user works in the Registrar’s office and has access to four different applications)
 - the selected application is currently set to “MSU Registrar” (the window in center above the Search tabs)



- the search pane on the right (above) is where the documents are displayed
- in the example below, documents are displayed with the index fields as column headings and the individual documents are displayed as a row

The screenshot shows the ImageNow Explorer window with search results displayed in a table. The table has columns: 'Drawer', 'Tech ID', 'SSN', 'Last name', 'First name', 'Document type', and 'Pages'. The search criteria 'Tech ID is equal to 00179092' is entered in the search box. The results show five rows of document information.

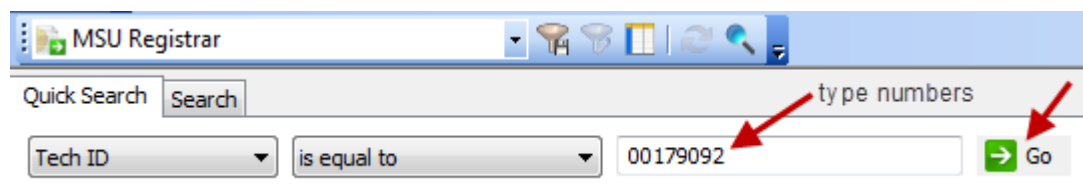
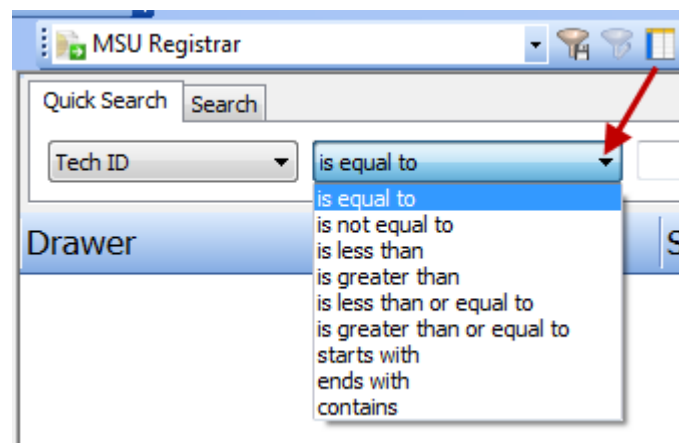
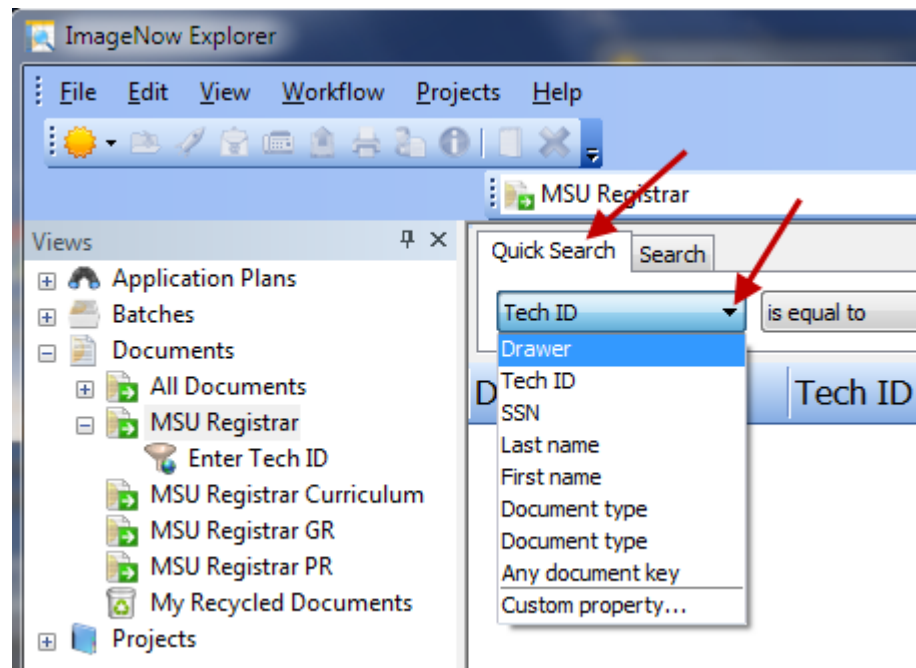
| Drawer | Tech ID | SSN | Last name | First name | Document type | Pages |
|-----------------|----------|-----|-----------|------------|----------------------|-------|
| MSU RegistrarAd | 00179092 | | Smith | Justin | App-Domestic | 1 |
| MSU Registrar 2 | 00179092 | | Smith | Justin | Graduation documents | 4 |
| MSU Registrar 1 | 00179092 | | Smith | Justin | Transcripts | 4 |
| MSU Registrar 1 | 00179092 | | Smith | Justin | Substitution forms | 2 |
| MSU Registrar 1 | 00179092 | | Smith | Justin | Evaluation forms | 2 |

Three ways to search for documents:

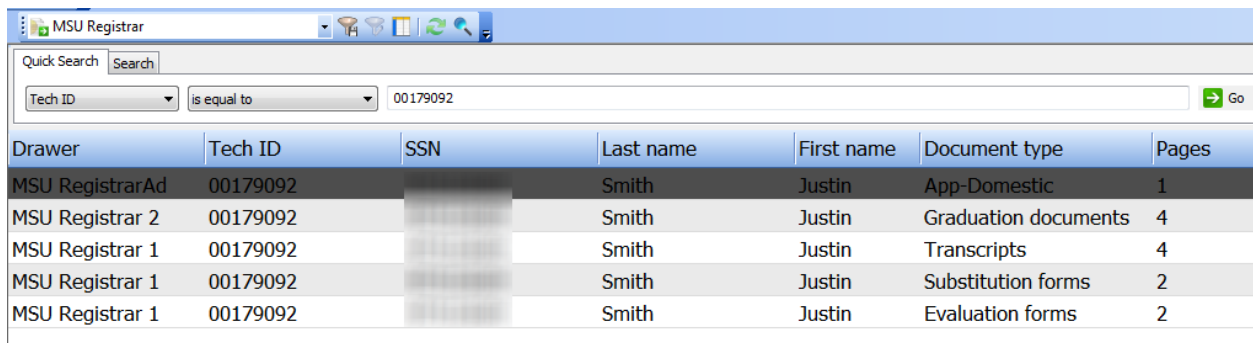
1. Quick Search

- with this method you select a single criteria (e.g. Tech ID) from the drop down list, then select the operator, and then type the value or select again from a list

Note: The criteria that you can search for is dependent on the index fields in your selected application.



- results of a Quick Search based on a Tech ID



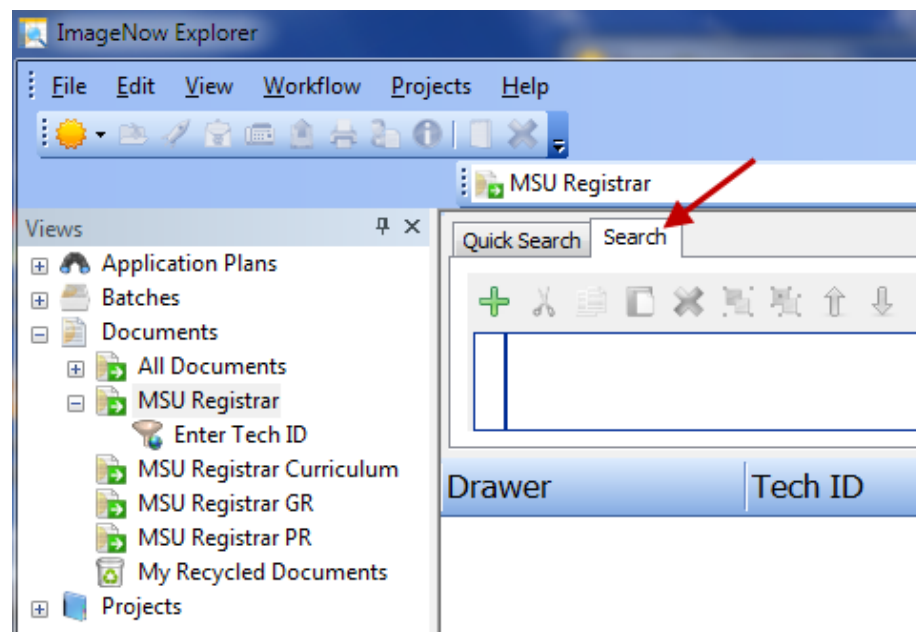
The screenshot shows the MSU Registrar application window. At the top, there is a 'Quick Search' section with a dropdown menu set to 'Tech ID', a radio button selected for 'is equal to', and a text input field containing '00179092'. A green 'Go' button is to the right. Below this is a table with the following columns: Drawer, Tech ID, SSN, Last name, First name, Document type, and Pages. The table contains five rows of data.

| Drawer | Tech ID | SSN | Last name | First name | Document type | Pages |
|-----------------|----------|-----|-----------|------------|----------------------|-------|
| MSU RegistrarAd | 00179092 | | Smith | Justin | App-Domestic | 1 |
| MSU Registrar 2 | 00179092 | | Smith | Justin | Graduation documents | 4 |
| MSU Registrar 1 | 00179092 | | Smith | Justin | Transcripts | 4 |
| MSU Registrar 1 | 00179092 | | Smith | Justin | Substitution forms | 2 |
| MSU Registrar 1 | 00179092 | | Smith | Justin | Evaluation forms | 2 |

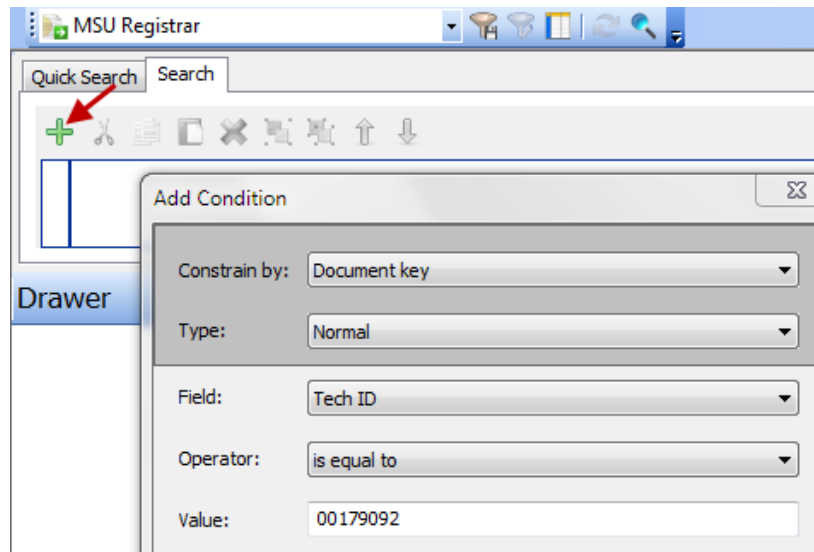
In the example above, a quick search will return all of the documents that meet the search criteria. If you want to refine your search and to retrieve only Justin's "Transcripts" then you could use the advanced search feature (see below).

2. Advanced Search

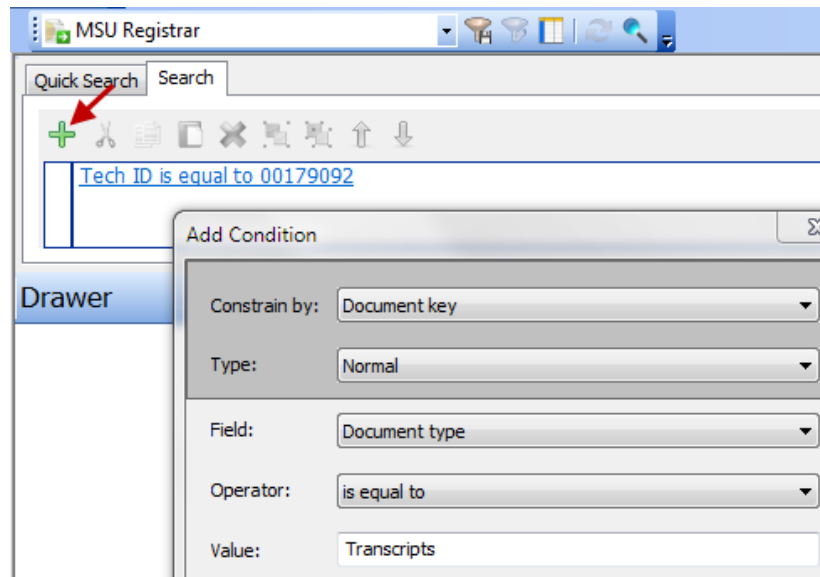
- select the tab "Search"



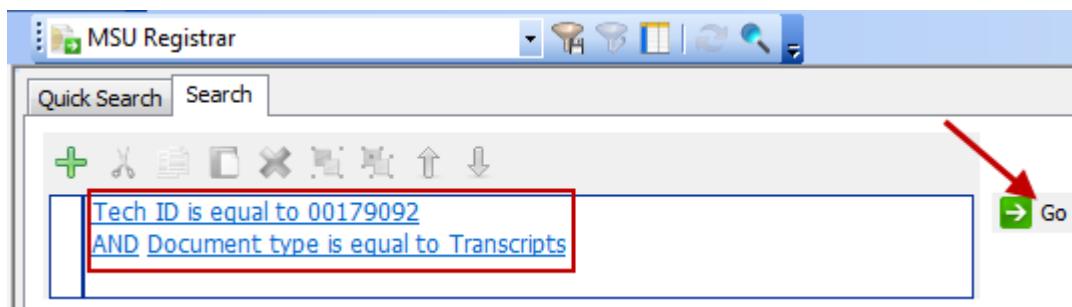
- with an advanced search you can add multiple conditions to refine your searches
- conditions are added by clicking the green plus (+) icon
- in the first example below, the condition of "Tech ID" + "is equal to" + [value] is being created



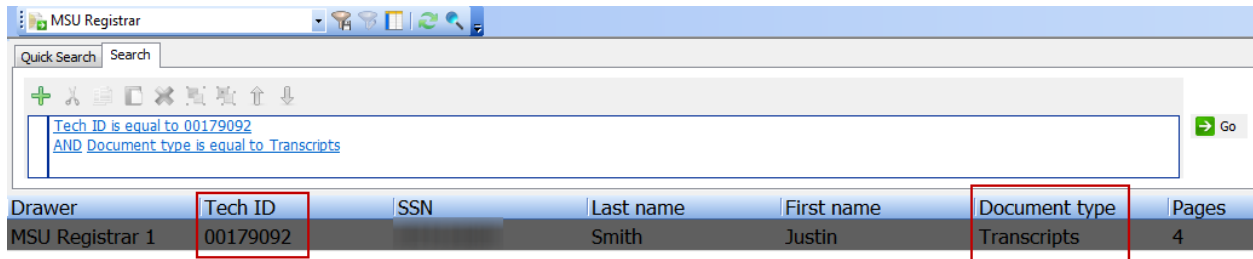
- in the second condition below, the condition of “Document type” + “is equal to” + value of “Transcripts” is being created



- the screen below shows the two search conditions in the red box
- click the Go button to start the search



- the result of the advanced search (below) shows the single document that our search conditions were looking for

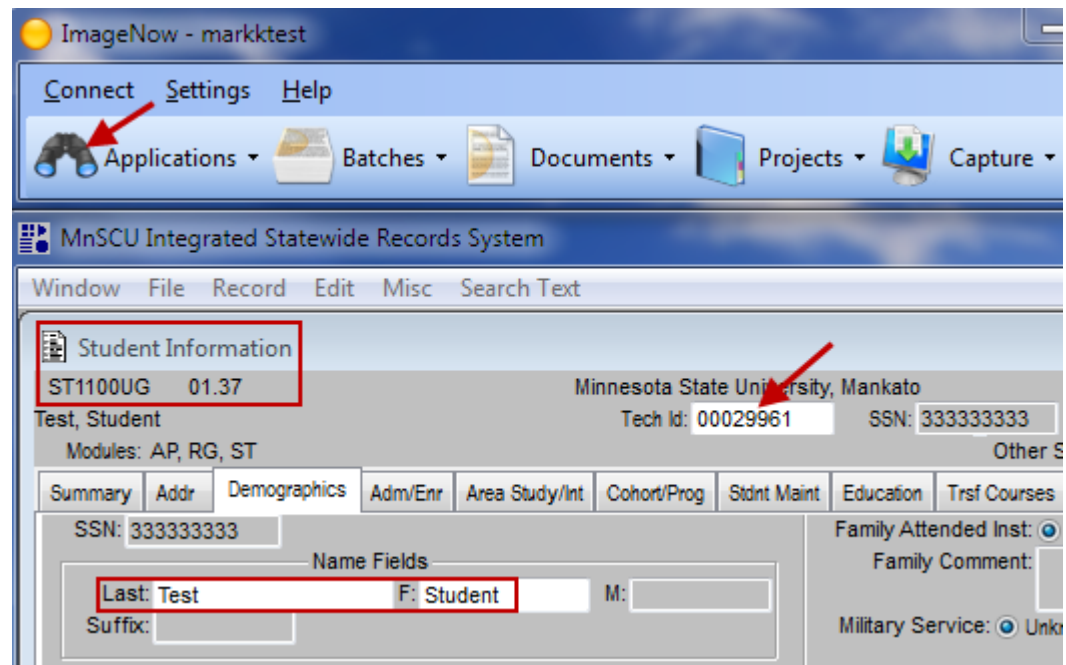


The screenshot shows the MSU Registrar search interface. At the top, there is a search bar with the criteria: "Tech ID is equal to 00179092 AND Document type is equal to Transcripts". Below the search bar is a table with the following columns: Drawer, Tech ID, SSN, Last name, First name, Document type, and Pages. The table contains one row of data.

| Drawer | Tech ID | SSN | Last name | First name | Document type | Pages |
|-----------------|----------|-----|-----------|------------|---------------|-------|
| MSU Registrar 1 | 00179092 | | Smith | Justin | Transcripts | 4 |

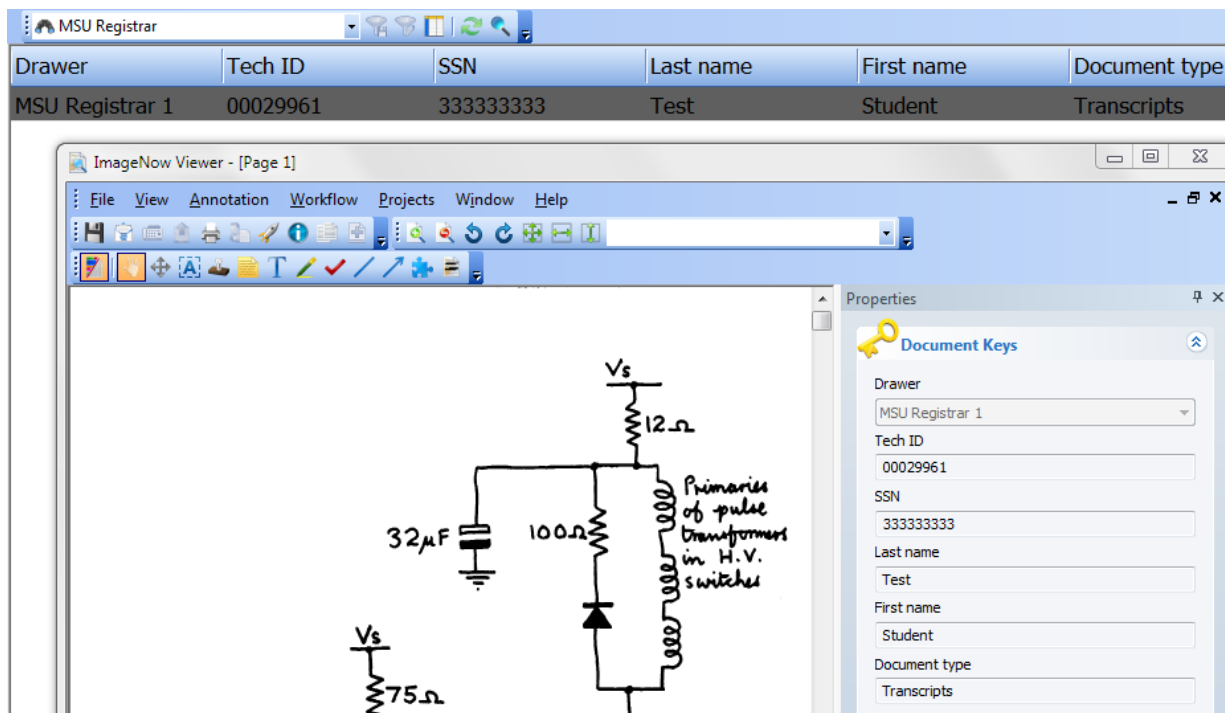
3. Binocular Search

- allows for a quick search based on the information currently displayed on an ISRS screen
 - in the example below, the ISRS screen "ST1100UG - Student Information" is showing the information for "Student Test," by simply clicking the binocular icon on the left ImageNow will search for the documents for "Student Test"
- Important: A binocular search only works with ISRS screens that have been associated with your currently selected application.



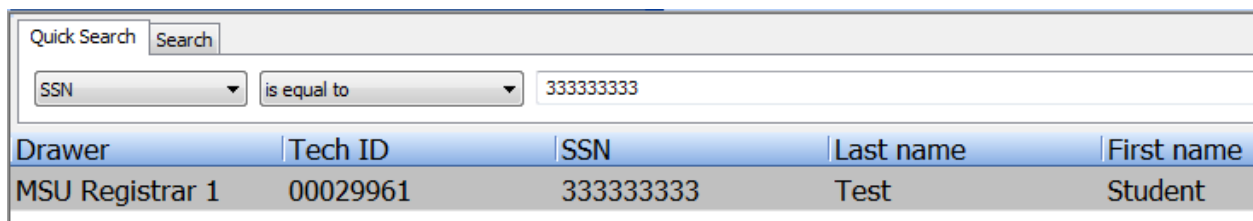
The screenshot shows the ImageNow - markktest interface. The top menu bar includes "Connect", "Settings", and "Help". Below the menu bar is a toolbar with icons for "Applications", "Batches", "Documents", "Projects", and "Capture". The main window displays the "MnSCU Integrated Statewide Records System" with a menu bar including "Window", "File", "Record", "Edit", "Misc", and "Search Text". The main content area shows the "Student Information" screen for "ST1100UG 01.37". The student's name is "Test, Student" and the institution is "Minnesota State University, Mankato". The "Tech Id" is "00029961" and the "SSN" is "333333333". The "Modules" are "AP, RG, ST". The "Name Fields" section shows "Last: Test" and "F: Student". The "Family Attended Inst:" is "Unk".

- in the example below, the binocular search returned one document and since there was only one document it automatically opens the "ImageNow Viewer" window and displays the document

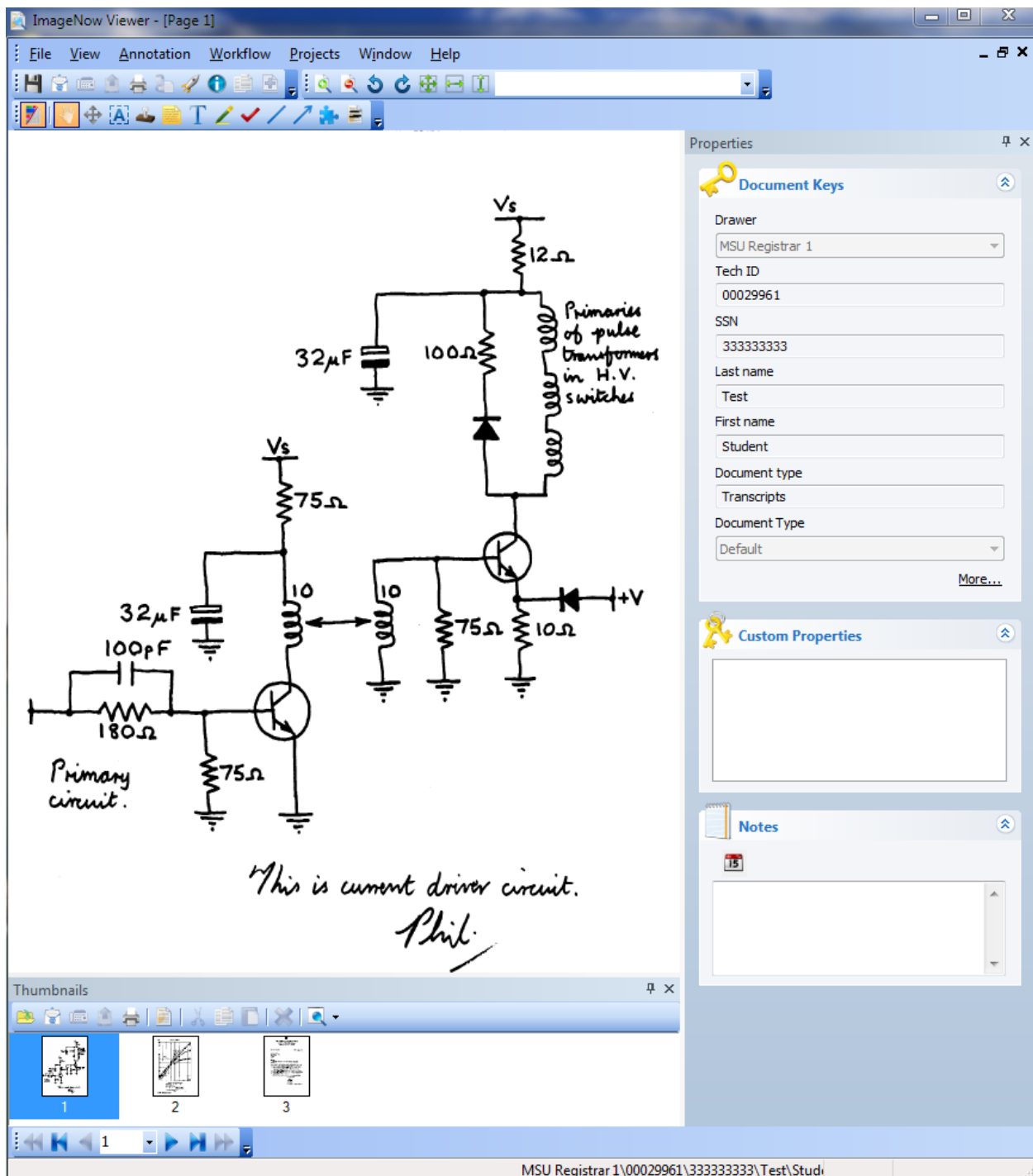


ImageNow Viewer / Looking at the document

- the documents are displayed in the "ImageNow Viewer" window
- in the example below a quick search has returned a document, to view the document select and double-click it or highlight the document and then from the menu select "File" and then select "Open"



- the "ImageNow Viewer" window will open and display the first page of the document (see below)



- the ImageNow Viewer window has a number of toolbars that you should become familiar with (see below for more information on the toolbars)

Note: Not all toolbar icons will be visible to you and will vary based on your assigned privileges.

- you can control which toolbars are visible by selecting from the menu “View” and then “Toolbars”

ImageNow Viewer - File toolbar



| Tool | Name | Description |
|------|-------------------------------|---|
| | Save | Save the selected item. |
| | E-mail | Display the E-mail Format dialog box, which lets you select the way you want to send items to email recipients. |
| | Fax | Display the Fax dialog box, which lets you select the way you want to fax items. |
| | Export | Display the Save As dialog box, which lets you select the destination folder of the items you are exporting. |
| | Print | Display the Print dialog box, which lets you send the items to your printer. |
| | User | Send the selected document to another user who is connected to the same ImageNow Server. |
| | Launch Associated Application | Open the item in the application in which it was created. |
| | Properties | Display the Document Properties dialog box for the selected item. |
| | Copy Document | Make a copy of the selected document. |
| | Add an Addendum | Add information to a signed document and create a new signed version. |
| | Process Approval Requests | Approve one or more disposition actions on a document under a retention policy. |

ImageNow Viewer - View toolbar



| Tool | Name | Description |
|------|-----------------|--|
| | Zoom In | Magnify the view one level each time you click it. |
| | Zoom Out | Reduce the magnification of the view one level each time you click it. |
| | Rotate 90 Left | Rotate the image 90 degrees to the left. |
| | Rotate 90 Right | Rotate the image 90 degrees to the right. |
| | Fit Window | Adjust the image to fit the space available in the window. |
| | Fit Width | Adjust the image to fit the width of the window. |
| | Fit Height | Adjust the image to fit the height of the window. |

ImageNow Viewer - Annotations toolbar



| Tool | Name | Description |
|------|--------------------------|--|
| | Show or Hide Annotations | Show or hide the annotation layer of the active document. |
| | Navigate Page | Use the mouse pointer to move the document in the window. |
| | Select Annotation | Select an annotation to modify it. |
| | Select Content | Copy content to the clipboard. |
| | Digital Signature | Place a visual representation of a digital signature on a document image. |
| | Stamp | Add a stamp image with whatever text and style you define. |
| | Sticky Note | Add a sticky note. The user must double-click the resulting note to display its content. |
| | Text | Add a text box that can be read without double-clicking. |
| | Highlight | Highlight a rectangle in the document. |
| | Check | Add a check mark anywhere on the document. |
| | Pen | Draw a free-form shape. |
| | Line | Draw a straight line. |
| | Arrow | Draw an arrow. |
| | Rectangle | Draw a square or rectangle. |
| | Oval | Draw a circle or oval. |
| | OLE | Insert objects as annotations using the Microsoft OLE (Object Linking Embedding) technology. |
| | URL | Insert a URL link to a web page. |
| | Redaction | Insert an opaque rectangle that covers a portion of the document so that the covered information is no longer visible to the viewer. |







ImageNow Viewer - Thumbnail toolbar



| Tool | Name | Description |
|------|--------------|---|
| | Open | Display the selected item in ImageNow Viewer. |
| | E-mail | Display the E-mail dialog box, which lets you select the way you want to send items to e-mail recipients. |
| | Fax | Display the Fax dialog box, which lets you enter a fax number and other related information. |
| | Export | Display the Export dialog box, which lets you select the destination, format, and pages of the item you are exporting. |
| | Print | Display the Print dialog box, which lets you send the items to your printer. |
| | New Document | Display the Copy Document dialog box, which lets you make a copy of the selected document by changing the value of one or more of the index keys in the copy. |
| | Cut | Enabled when you select a thumbnail. Place the page on the clipboard and remove the page when you paste it in another location. |
| | Copy | Enabled when you select a thumbnail. Place a page on the clipboard. |
| | Paste | Enabled if you have pages on the clipboard. Insert the page. |
| | Delete | Enabled when you select a thumbnail. Delete the selected page. |
| | Views | Select the thumbnail size. |

ImageNow Viewer - Navigate toolbar

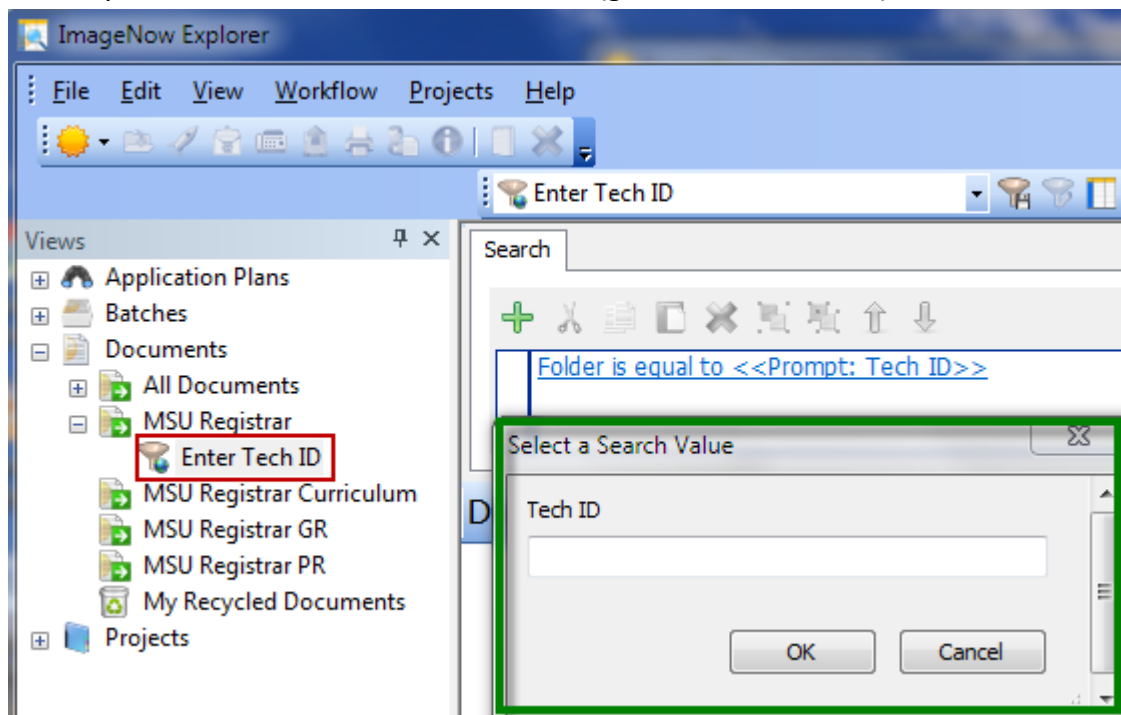


| Tool | Name | Description |
|---|-------------------|---|
|  | Previous Document | View the previous document. |
|  | First Page | View the first page of the current document. |
|  | Previous Page | View the previous page of the current document. |
|  | Next Page | View the next page of the current document. |
|  | Last Page | View the last page of the current document. |
|  | Next Document | View the next document. |

Search Filters

Public filters

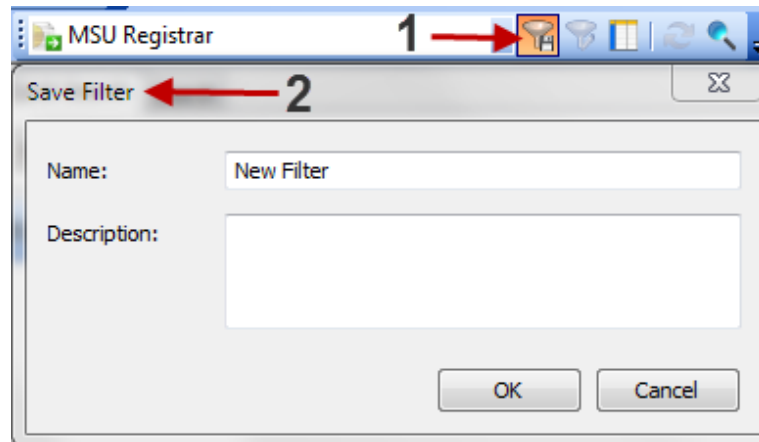
- have been pre-defined for you (note: not all applications have public filters)
- in the example below the application “MSU Registrar” has one public filter called “Enter Tech ID” (red box below)
- by clicking the public filter “Enter Tech ID” a small window opens and prompts you to enter the Tech ID to search for (green window below)



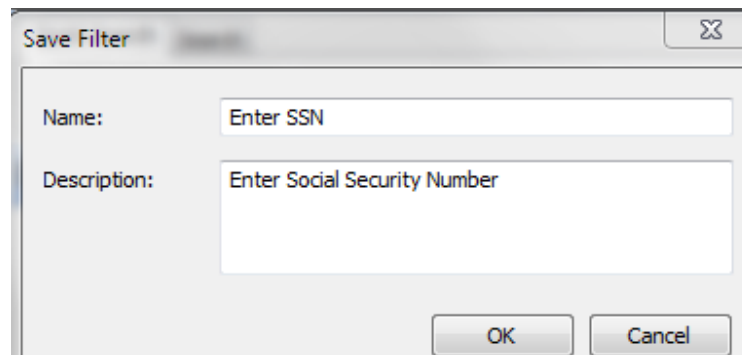
- simply enter the Tech ID that you are search for and click the OK button, the document(s) matching the Tech ID will be displayed

Private filters

- are search filters that you can create to simplify your searches
- these filters are stored on your local computer and are unique to you
- add a private filter by clicking the icon of a funnel with a floppy disk (#1) and this opens the “Save Filter” window (#2)

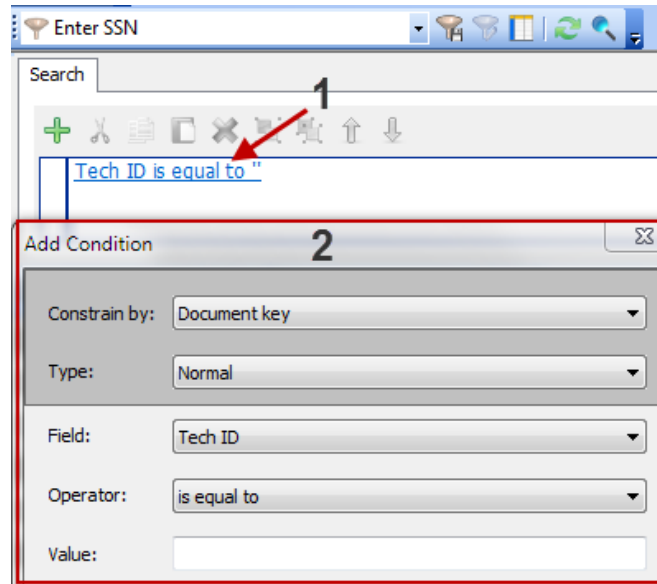


- in this example we are going to create a private filter to search for documents based on a social security number (SSN)
- enter the name of the new filter and optional description

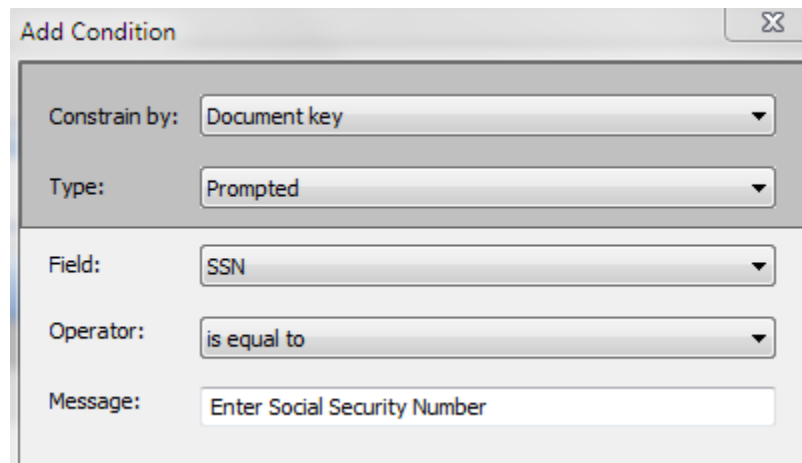


- next on the “Search” tab click the “Tech ID is equal to” (#1 below) and this will open the “Add Condition” window (#2 below)

Note: On your computer the words “Tech ID is equal to” (#1) may be different and is based on a previously defined filter. In all cases click the blue text to start the process of setting your first search condition.

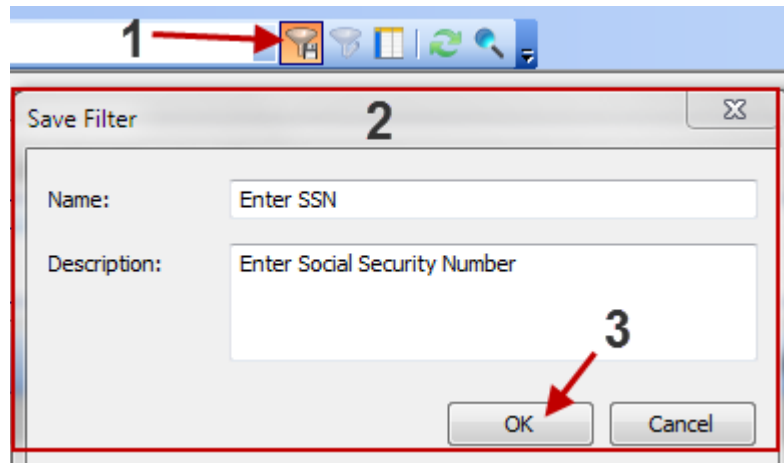


- in our example we want to modify this condition to return documents based on a social security number (see below)
 - change the Type: to “Prompted”
 - click the down arrow for Field: and select “SSN”
 - keep the Operator: “is equal to”
 - for Message: enter some text to describe what action is required
 - then click the OK button to save the condition

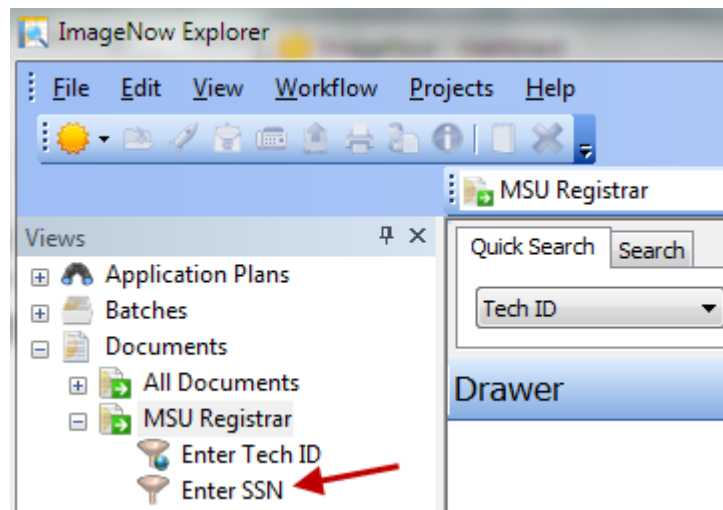


Note: The “Field:” items available to you are going to vary depending on the index fields that have been established for your current default application.

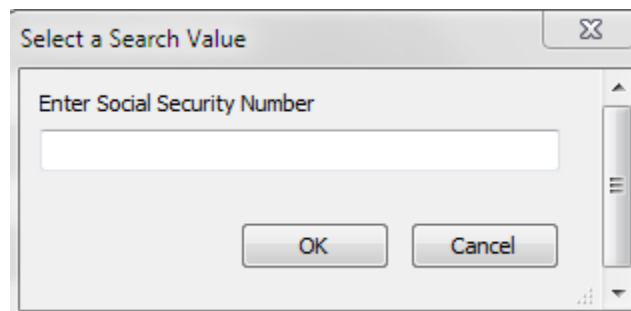
- to save the filter (see below) click the icon of the funnel and floppy disk (#1) and this will open the “Save Filter” window (#2) and then click the OK button (#3) to save the filter



- in the example below our new private filter has been added in the Views pane for our default application “MSU Registrar”



- to use the filter simply click “Enter SSN” in the Views pane and a window will open and you will be prompted to enter a social security number (see below)



- private filters can save you time when you do reoccurring searches
- private filters can also have multiple conditions