Use Records

User Guide

Version: Foundation 22.1

Written by: Documentation Team, R&D
Date: Friday, February 13, 2026

HYLAND™

Documentation Notice

The information in this document may contain technology as defined by the Export Administration Regulations (EAR) and could be subject to the Export Control Laws of the U.S. Government including for the EAR and trade and economic sanctions maintained by the Office of Foreign Assets Control as well as the export controls laws of your entity’s local jurisdiction. Transfer of such technology by any means to a foreign person, whether in the United States or abroad, could require export licensing or other approval from the U.S. Government and the export authority of your entity’s jurisdiction. You are responsible for ensuring that you have any required approvals prior to export.

DISCLAIMER: This documentation contains available instructions for a specific Hyland product or module. This documentation is not specific to a particular customer or industry. All data, names, and formats used in this document’s examples are fictitious unless noted otherwise. This document may reference websites operated by third parties. In such a case, Hyland has no control or liability for the content of such third-party websites. The inclusion of such a link shall not constitute an endorsement or affiliation with such a third-party website; the reference is provided for information purposes only. If you have questions about discrepancies in this document, please contact Hyland. Hyland customers are responsible for making their own independent assessment of the information in this documentation. This documentation: (a) is for informational purposes only, (b) is subject to change without notice, (c) is confidential information of Hyland Software, Inc. and its affiliates, and (d) does not create any commitments or assurances by Hyland. This documentation is provided “as is” without representation or warranty of any kind. Hyland expressly disclaims all implied, express, or statutory warranties. Hyland’s responsibilities and liabilities to its customers are controlled by the applicable Hyland agreement. This documentation does not modify any agreement between Hyland and its customers.

Table of Contents

What is a record?

A record is a captured item in the system that contains specific restrictions and properties. A record is preserved because of the value of data in the record.

The system places a record in a file plan structure hierarchy. The placement in the file plan determines any additional instructions for the record such as how long to maintain the record in the system, to what degree a user can modify the record, and whether a record is categorized as vital.

Along with the access privileges that are available for documents, records security also provides additional access restriction to records. In other words, you can grant users access to a record (just as you do for a document), and you can also deny access to a record.

The following properties are required properties specific to a record: author, originating organization, and publication date. Additional optional properties are available for records.

What are record types?

Capturing a record effectively preserves information and categorizes it according to a predefined list of values.

A record type provides properties that assist in uniquely categorizing and indexing records. You can assign only one record type per record. You assign the record type when you declare the record. Some general properties for record types are mandatory, and when an administrator creates record types, the administrator can add optional custom properties. This means you add data to a record by assigning a record type that includes custom properties. You can create record types that contain a unique set of custom properties or share one or more custom properties with other record types or document types.

> For example, when you capture a record, you can assign all employee W2s and other tax forms to the record type of Taxes. All records that you declare are associated with a record type.

What are record folders?

Record Folder types categorize a record folder according to a predefined list of values.

Record folders contain other records folders or records and are used to group sets of records together based on a relationship. Thus, you can build groups of record types that are specific to one department, process, or set of business rules.

> For example, you can create an Human Resources record folder that contains several records, including resumes, benefits forms, and tax forms.

Glossary of record terms

This table defines terminology specific to the records functionality.

Term	Description
ACM (Access Control Marking)	Access control markings assigned to records, record folders, and record categories prohibit users who lack access to those same markings from detecting or modifying those records, record folders, and record categories.
Connection types	Refers to the types of relationships you can establish between records: Peer, Supersede, and Revision.
Cutoff	Cutoff states trigger disposition actions when a retention policy includes an event rule for the cutoff state.
Cutoff instructions	When a record or record folder in a file plan meets the requirements of the cutoff instructions, the system automatically processes the records, places them in a cutoff state, and the system triggers disposition.
Declare	Convert a document to a record which is located in a file plan. The act of declaration requires additional data associated to the record.
Disposition action	Determines what happens to a document or record when a retention period ends. The following actions may be a disposition action: Accession, Destruction, Next Phase, Offline Transfer, Online Transfer, or Permanent.
File plan	An organizational structure where you apply retention policies and organize records.
File Plan Designer	A tool that helps you create and manage your file plans.
File plan element	The highest level placeholder and container for all elements nested in the organized hierarchy.
Item	Generic term that refers to both documents and

Term	Description
	records.
Page metadata	The data assigned to each page of a record. The type of data you must complete for each page depends on the file type.
Pending cutoff	A state for record folders, in which the system automatically processes the folder and all nested content using the cutoff instructions for the record category.
Picklist	A grouping of ACMs assigned to a record type, record folder type, or record category type. For additional security, you can assign the ACMs individually to any instance of the selected type.
Record category	Contains the cutoff instructions which controls disposition. The top-level folder nested under a record category inherits these instructions. The record category is nested directly below a file plan element and can contain records.
Record container	A generic term that refers to a storage unit. For records, a container can be a record category, record folder, or file plan.
Record folder	Contains records and is nested under a record category or another record folder in a file plan structure.
Record keys	The basic data associated with a record including Name and Fields1 through 5.
Record properties	Required and optional data associated with a record including Record ID, Date filed, Publication date, and so on.
Retention Policy Designer	A designer that allows you to create and activate retention policies.
Reverse Cutoff	A state for record folders, in which the system does not process the record folder and nested content with cutoff instructions or disposition actions.

Term	Description
Revision connection	A revision connection is a direct link between records that designates one record as a revision of another.
State	You can apply the following records states may to a record: • Pending cutoff • Cutoff • Reverse cutoff
Supersede	A supersede connection lets you designate a record as the newest or most relevant record within a series of linked records.
Top-level folder	A record folder nested directly beneath a record category. This placement in the file plan structure is where the cutoff instructions are evaluated.
Vital record	A record that is required for your business to function after an emergency or natural disaster.

Glossary of record icons

The table below contains icons associated with record functionality and a brief description of each function.

Records icons

Refer to the following table for icons specific to record functionality and a description.

Image	Label	Description
	Declare record	Allows you to add information to an existing document to create a record.
	File plan	Represents a file plan record container.
	Record category	Represents a record category, which is a record container in a file plan structure.

Image	Label	Description
	Record	Represents an item that is a record.
	Record custom view	Displays automatic results in the explorer grid for a custom view specific to records.
	All records manual view	Displays a manual view for all records when the user presses Go in the explorer grid.
	Record folder	Represents a record folder, which is a record container in a file plan structure.
	Record folder reversed cutoff state	Represents a record folder with a state of reverse cutoff.
	Record folder cutoff state	Represents a record folder with a state of cutoff.
	All record folders manual view	Displays a manual view for all record folders when the user presses Go in the explorer grid.
	Record folder custom view	Displays automatic results in the explorer grid for a custom view specific to record folders.

Declare

About Declaring Records

Declaring a document as a record changes the content type and associated data from a document to a record. Declaring an email as a record imports the email as a record with all of the required record properties.

You can declare records from the explorer grid or a viewer. You declare an email when you use Interact for Microsoft Outlook. Declaration places the record in a file plan and associates a retention policy, record specific properties, keys, and additional data to the record. You can declare a document that contains multiple file types which become record pages. During declaration you can optionally associate specific metadata to each page, apply connections to other records, and associate access control markings. After you declare a document as a record, you can sort and view the item as a record, but no longer as a document.

Declare a document as a record overview

Declaring a document as a record changes the content type and associated data from a document to a record. You can declare a document as a record from a viewer or the grid. To declare a document as a record, complete the following steps.

When declaring a document as a record, you must place the record in a record folder or a record category of a file plan hierarchy.

1. Open the Declare as a Record dialog.
2. Complete the Application Plan and Location sections.
3. Complete the property sections.
4. Optional. Mark a record for connection.
5. Optional. Add page level metadata to a record.
6. Optional. Assign ACMs when declaring a record.
7. Optional. Associate a Physical File Reference to your record.
8. Click **OK**.

Search

Types of search interfaces

You can use the following search interfaces in Perceptive Content.

Quick Search

A quick search applies a single condition to the items in the current view and returns the results that satisfy that condition. You define the condition on the Quick Search tab of ImageNowExplorer, which includes the property list, operator list, and value box, and the Go button .

The options in the property list vary depending on the view selected in the Views pane of ImageNowExplorer and the set of operators and the method for selecting the value vary with the selection you make in the property list. For example, when you search on a document key, such as Drawer or Field1, only documents and forms are returned. If you search on a record folder property, such as Name, then record folders are returned. A limited subset of the search operators is available in the quick search.

You can create filters based on searches performed using the Quick Search.

Advanced search

An advanced search allows you to define multiple conditions to the documents, folders, forms, records, record folders, tasks, or workflow items in the current view and returns the results that satisfy any or all of the defined conditions. You define the conditions on the Search tab of ImageNowExplorer, in the Add Condition dialog box, which allows you to build conditions using the following elements.

- A search constraint, such as date, a document key, or a custom property.
- A search type, which allows you create a prompted or variable search.
- A search field specific to the constraint and current view selected.
- An extensive list of operators that evaluates the field against the value.
- A value for the search condition.

After you define the search conditions you want to apply, you can group the conditions, reorder the conditions, and save searches performed with the search as a filter. The search evaluates the conditions in the order in which you define them. You can save a multiple condition search as a filter.

Prompted and variable searching

When you build an advanced search in ImageNowExplorer, you can opt to use a variable in your search conditions or create a prompt for the search. To build a prompted search, you simply select Prompted from the type list in the Add Condition dialog box when creating conditions for the advanced search. When you select prompted, you do not need to specify a value for the search. Instead, you type an instruction message that will appear in the Select a Search Value dialog box when the user performs the search. The message appears above the entry box. When you supply a prompt, we recommend you be as specific as possible when writing the instruction message, particularly when using operators such as "starts with" and "is between" to indicate the type of entry the user should make. You can save prompted searches as a filter.

Variable searches allow you to use a variable value, such as the current user or current date and time, instead of a static value. You can specify a user or date variable for any search constraint that could use a date or user variable as a value. You can save variable searches as a filter.

Excluded search characters

Perceptive Content reserves specific characters and character strings for internal application processing. Including these characters in your search criteria may cause errors or return unexpected results.

It is recommended that you exclude the following list of characters and character strings from your Perceptive Content search criteria to avoid unreliable or unexpected results.

Character(s)	Key Strokes
--	(dash)(dash)
%	(percent sign)
_	(underscore)
;	(semicolon)
$true	(dollar sign)true

Character(s)	Key Strokes
$false	(dollar sign)false
$null	(dollar sign)null
startswith	startswith
doesnotstartwith	doesnotstartwith

Set maximum user display limit

You can use this procedure to determine the number of user names or group names that appear in the Value list when defining an advanced user search.

1. On the toolbar, click **Settings > Options**.
2. In the **Explorer Options** dialog box, in the left pane, click **General**.
3. In the right pane, under **Maximum Display Limits**, in the **User or groups in search results** list, select or type a number from 25 to 500.
4. Click **OK**.

Search within the results grid

You can use this procedure to find items within the search results grid that match specified text. Items that match the specified text appear highlighted in the grid.

1. In the **Views** pane, select a view or the filter you would like to search.
2. On the toolbar, click the **Find** button.
3. In the **Find** bar below the results grid, enter the text you want to find from the items currently in the grid. The matching items are highlighted.
4. Optional. To select the next item that matches your search criteria, click the **Next** button. To select the previous item that matches your search criteria, click the **Previous** button.
5. When you are finished, close the **Find** bar.

Create a prompted search

To create a search that prompts the user for a search value, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, select a view.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, do the following substeps:
   1. In the **Constrain by** list, select the search constraint to use.
   2. In the **Type** list, select **Prompted**.
   3. In the **Field** list, select the field to search by.

4. In the **Operator** list, select an operator.

   If you use the **is between** or **is not between** operator in the search, you can enter two boundary values in the **Select a Search Value** dialog box. The value in the first box is the minimum value. The value in the second box is the maximum value.
5. In the **Message** list, type an instructional message to appear in the prompt.
6. Click **OK**.

4. Click the **Go** button.
5. In the **Select a Search Value** dialog box, select or type the value or values for the search and then click **OK**.

   If you use the **is one of** or **is not one of** operator in the search, you can add multiple values in the **Select a Search Value** dialog box.
6. Optional. To cancel a record or record folder search that's in progress, click **Cancel Search**.

Create an application plan search

You can create an advanced search that returns values based on a dictionary element in an application plan. To create an application plan search, complete the following steps.

1. Open your business application to the screen that contains the value you want to use in the search.
2. In **ImageNowExplorer**, in the **Views** pane, select the view to use as a basis for your search.

   Note:
   To view records functionality, you must install a Records Manager license.
3. In the right pane, on the **Search** tab, click the **Add** button.
4. In the **Add Condition** dialog box, in the **Constrain by** list, select a search constraint.
5. In the **Type** list, select **LearnMode**.
6. In the **Plan** list, select the application plan.
7. Define the **Field**, **Operator**, and **Value** to locate results associated with the record represented on your application plan screen.
8. Click **OK** and then click the **Go** button.

Result If the search field and value do not evaluate to a dictionary element in the application plan, the search returns no results.

Search documents

About searching for documents

When searching for documents, you can use the Quick Search or Search tab to perform your search.

When you use the Quick Search feature, you can search for a document based on its name, drawer, or document property value. When you use the Search feature, you can search for a document based on a composite property or custom property value, a document property, status, or a user.

You can save document searches as private filters.

Create a document search with multiple values

To create a condition in an advanced search that includes a list of values, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, select the document, folder, task, or workflow view to use as a basis for the search.
2. In the right pane, click the **Search** tab and then click button.
3. In the **Add Condition** dialog box, In the **Constrain by** list, click the document search constraint to use.
4. In the **Type** list, select **Normal** or **Prompted**.
5. In the **Field** list, select the field to use in the search.
6. In the **Operator** list, complete one of the following actions.
   - To build a list of values, select **is one of**.
   - To build a list of values to exclude, select **is not one of**.
7. To add values, in the **Value** box, complete the following substeps.
   1. Click **Add**.
   2. In the dialog box that appears for the field, type or select a value and then click **OK**.
   3. Repeat substeps to add more values.

   If you want to create a prompted search with multiple values, you must specify the value list when running the search.
8. Click **OK** and then click the **Go** button.

Document search conditions

When you use the Search tab for document searches, several conditions are available. The Add Condition dialog box allows you to build a search using a combination of the constraints, fields, operators, and values described in the following topic.

Document searching guidelines

When building a document search condition in the Add Condition dialog, keep the following guidelines in mind:

- If you are performing a prompted search, you do not specify a value when creating a search condition. A message box appears instead of a value box.
- If you are performing a LearnMode search, you must select an application plan in the Add Condition dialog box.
- If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Composite property

Composite properties are defined by your Perceptive Content administrator. The operators that appear depend on the type of custom property.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by composite property

Composite

In the Composite list, select a composite property.

Possible values include all composite properties the user can access.

Field

In the Field list, select a custom property.

Possible values include all custom properties associated with the selected composite.

Custom property

Custom properties are defined by your Perceptive Content administrator. The operators that appear depend on the type of custom property.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by custom property.

Custom property

Select a custom property.

Possible values include all custom properties the user can access.

Date

The following operators and fields allow you to search for documents based on a date value. To specify a value, type a value or select a value from the calendar.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by date.

Checked out

The date the document was checked out in version control.

Created

The date the document was captured.

Last viewed

The date a user last viewed the document.

Modified

The date a user last modified the document.

Next task due

The nearest date a task is due for the document.

Document key

The following operators and fields allow you to search for documents based on a document key value.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by document key.

Drawer

The drawer value for the document. If you specified a different label for the Drawer column for the selected view, the label you defined appears in the Field list.

Possible values include all drawers the user can access.

Name

The document name value for the document. If you specified a different label for the Document name column for the selected view, the label you defined appears in the Field list.

Possible values include all names the user can access.

Field1

The Field1 value for the document. If you specified a different label for the Field1 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field2

The Field2 value for the document. If you specified a different label for the Field2 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field3

The Field3 value for the document. If you specified a different label for the Field3 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field4

The Field4 value for the document. If you specified a different label for the Field4 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field5

The Field5 value for the document. If you specified a different label for the Field5 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Document type

The document type value for the document. If you specified a different label for the Document type column for the selected view, the label you defined appears in the Field list.

Possible values include all document types the user can access.

Any document key

The value for the Drawer, Name, Type, Field1, Field2, Field3, Field4, or Field5 associated with the document.

Possible values include any alphanumeric value.

Document property

The following operators and fields allow you to search for documents based on a document property value.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by document property.

Check out comments

The comments entered by the user that checked out a version of the document in version control. This field only returns documents that are currently checked out.

Possible values include any alphanumeric value.

Created within (days)

The number of days within which the document was captured.

Possible values include any numeric value.

Current version

The number of the current version of the version controlled document.

Possible values include any numeric value.

Document ID

The unique ID of the document.

Possible values include any alphanumeric value.

Folder path

The path to the folder that stores the document. This field is only available for LearnMode type searches.

Possible values derived from application plan.

Hold name

The name of the retention hold applied to the document.

Possible values include all retention holds the user can access.

Name

The name of the document.

Possible values include any alphanumeric value.

Notes

The contents of the Notes box in the Properties pane for the document.

Possible values include any alphanumeric value.

Number of pages

The total number of pages in the document.

Possible values include any numeric value.

Summary task count (active)

The number of active tasks assigned for the document.

Possible values include any numeric value.

Summary task count (inactive)

The number of inactive tasks associated with the document.

Possible values include any numeric value.

Workflow item ID

The unique ID of the workflow item associated with the document.

Possible values include any alphanumeric value.

Workflow queue

The workflow queue the document is currently in.

Possible values include all workflow queues the user can access.

Physical property

The following operators and fields allow you to search for documents based on a physical property value. Physical file templates and physical properties are defined by your Perceptive Content administrator.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by physical property.

Template

In the Template list, select a physical file template.

Possible values include all physical file templates the user can access.

Field

In the Field list, select a physical property.

Possible values include all physical properties associated with the template.

User

The following operators and fields allow you to search for documents based on a user value. You can type an alphanumeric value or select any valid user name.

Operators

is equal to

is not equal to

starts with

does not start with

ends with

is blank

is not blank

is one of

is not one of

Fields

The following fields are available when constraining by user.

Checked out by

The user who checked out the document in version control.

Created by

The user who created the document.

Last viewed by

The user who last viewed the document.

Modified

The user who last modified the document.

Pending approval by

The user assigned to an approval task for the document.

Private by

The user who marked the document private in version control.

Workflow user

The user who added the item to workflow.

Status

The following operators and fields allow you to search for documents based on a status value.

Operators

is equal to

is not equal to

Fields

The following fields are available when constraining by status.

Digital signature status

The status of the digital signature for the document.

Possible values include Valid, Invalid, Void, and Not signed.

Has physical file reference

Whether the document has a reference to a physical file.

Possible values include yes or no.

Has hold applied

Whether the document is under a direct or inherited retention hold.

Possible values include yes or no.

Has shortcuts

Whether shortcuts to the document appear in other folders or drawers.

Possible values include yes or no.

Is checked out

Whether the document is checked out in version control.

Possible values include yes or no.

Is in workflow

Whether the document is in workflow.

Possible values include yes or no.

Is private

Whether the document is marked private in version control.

Possible values include yes or no.

Is version controlled

Whether the document is in version control.

Possible values include yes or no.

Summary task status

The status of the task associated with the document.

Possible values include Assigned, Returned, Complete, Complete Pending Review, Canceled, and Invalid.

Workflow status

The status of the document in workflow.

Possible values include Idle, Working, On hold, Pending, Waiting for routing, and Waiting for inbound action.

Search for a document

To search for a document using a quick selection or using multiple conditions, complete the following steps.

1. In the **Views** pane, select the view you want to use as a basis for your search.
2. In the right pane, do one of the following actions:

Situation	Steps
Perform a quick search	1. Click the **Quick Search** tab. 2. In the property list, select the property to use. 3. In the operator list, select an operator to use in the comparison. 4. In the value box, select or type a value.
Perform an advanced search	1. On the **Search** tab, click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, click the search constraint to use. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select the item field to use in the search. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. If you are performing a **LearnMode** search in Perceptive Content, in the **Plan** list, select an application plan. 7. In the **Value** box, select or type a value for the search. 8. Click **OK**.

> **Note:** If you selected Prompted in the Type list, the Message box appears instead of the Value list. Enter instructions indicating what value to enter.

3. Optional. To add another search condition, repeat the advanced search steps.
4. Click the **Go** button.

Search for documents by date or time

To search for documents based on any property that contains a date or a time value, such as the Created or Modified fields, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, select a documents view to use as the basis for your search.
2. In the **Add Condition** dialog box, in the **Constrain by** list, click **Date** or **Custom Property** depending on the context of your search.
3. In the **Type** list, select the type of search to perform.
4. In the **Field** list, select the date field or custom property to search.
5. In the right pane, on the **Search** tab, click the button.
6. In the **Operator** list, complete one of the following actions:
   - To search on a specific date range, click **is between** or **is not between**.
   - To search on a list of specific dates, click **is one of** or **is not one of**.
   - To search on a date range without a start date or end date, select an operator such as **is greater than**, **is less than**, or **is equal to**.
   - To search on a specific date, select **is equal to**.
7. In the Value box, complete one of the following actions:
   - To change the date, click the down arrow and select the date you want from the calendar. To change the time value, click inside the hour, minute, or second area and type the value you want to use.
   - If you are searching a specific date range, to change the earliest and latest dates, click the down arrows and select the dates from the calendar. To change the time values, click inside the hour, minute, and second area and type the value you want to use.
   - If you are searching a list of dates and times, define the list.
8. Click **OK**.
9. Click the **Go** button.

Search for text in an item

To search for text in an item, complete the following steps.

1. Open the item you want to search.
2. Position the mouse pointer where you want to begin the search, right-click, and then click **Find**.
3. In the **Find** dialog box, in the **Find what** box, type the text string you want to find.

4. Perform any of the following optional tasks to refine the search:
   - To specify that the results of the search contain the entire string you entered, select **Match whole word only**.
   - To specify that the results of the search match the uppercase and lowercase characters of the value string you entered, select **Match case**.
   - To search up from the mouse pointer position you specified, under **Direction**, select **Up**. To search down, select **Down**.
5. Click **Find Next** to highlight each occurrence of the value string beginning at the insertion point.
6. Optional. If you reach the end or beginning of the item and want to continue searching from the beginning, click **Find Next** again.

Search on composite properties for a document

To search for an document based on the value of a custom property that is part of a composite, complete the following steps.

1. In the **Views** pane, select a view to use as a basis for your search.
2. In the right pane, click the **Search** tab and then complete the following substeps.
   1. Click the button.
   2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Composite property**.
   3. In the **Type** list, select the type of search to perform.
   4. In the **Composite** list, select the composite property to use.
   5. In the **Field** list, select the custom property associated with the composite property.
3. In the **Operator** list, select the operator to use in the search.
4. In the **Value** box, type or select the value you want to specify.

   If you selected Prompted in the Type list, the Message box appears instead. Enter instructions indicating what value to enter.
5. Click **OK**.
6. Optional. To add more conditions to the search, repeat the previous substeps.
7. Click the **Go** button.

Search on document notes content

To search for a document based on the contents of the document’s Notes pane, complete the following steps.

When you search on notes, you can search on only the first 50 characters of the field.

1. In the **Views** pane, select a view to use as a basis for your search.
2. In the right pane, click the **Search** tab and then complete the following substeps.
   1. Click the **Add** button.
   2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Document Property**.
   3. In the **Type** list, select the search type to use.
   4. In the **Field** list, select **Notes**.

5. In the **Operator** list, select the operator to use.

   If you use the **is equal to** operator, you must enter the entire contents of the **Notes** pane in the **Value** box. For this reason, we recommend using a different operator, such as **starts with**.
6. In the **Value** box, type or select a value.
7. Click **OK**.

3. Click the **Go** button.

Search for documents by user

You can search for an document based on the user that created it, last viewed it, or last modified it. To search for items by user, complete the following steps.

1. In the **Views** pane, select a document view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the button.
3. In the **Add Condition** dialog box, in the **Constrain by** list, click **User**.
4. In the **Type** list, select the search type to use.
5. In the **Field** list, select one of the following options:
   - To search for items created by a specific user, select **Created by**.
   - To search for items modified by a specific user, select **Modified by**.
   - To search for items that a specific user viewed recently, select **Last viewed by**.
6. In the **Operator** list, select an operator.
7. In the **Value** list, select or type a value.
8. Click **OK**.
9. Click the **Go** button.

Search folders

About searching for folders

To search for folders, you select the Folders button on the Perceptive Content toolbar. This opens the All Folders view, which you can use as a basis for your folder search.

You can also select another view to use as a basis for your folder search. Normally, you have access to the following views:

- All Folders, which returns all the folders for which you have the necessary privileges.
- My Recycled Folders, which returns all the folders you deleted.

Additional folder views appear under Folders in the Views pane of ImageNowExplorer.

When searching for folders, you can use the Quick Search or Search tab to perform your search. When you use the Quick Search feature, you can only search for a folder based on its name or type or by a custom property. When you use the Search feature, you search for folders based on a composite property, a custom property, a date, a folder property, the folder's status, or a user.

If you have the Filter privilege for the view you use to build the search, you can save the search as a private filter. After you save the search, you can access the filter from the Views pane in ImageNowExplorer.

Folder search conditions

When you use the Search tab for folder searches, several conditions are available.

The Add Condition dialog box allows you to build a search using a combination of constraints, fields, operators, and values described in the following table.

When building a folder search condition in the Add Condition dialog, keep the following guidelines in mind.

- If you are performing a prompted search, you do not specify a value when creating a search condition. A message box displays instead of a value box.
- If you are performing a LearnMode search, you must select an application plan in the Add Condition dialog box.
- If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Constraint	Operators	Field	Field Description	Possible Values
Composite property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Composite list, select a composite property. In the Field list, select a custom property.	Composite properties are defined by your Perceptive Content administrator.	All defined composite properties
Custom property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start	Select a custom property.	Custom properties are defined by your Perceptive Content administrator.	All defined custom properties

	with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between			
Date	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, is one of, is not one of, is between, is not between	Created	The date the folder was created.	Type a date or select a date from the calendar
Modified	The date the folder was last modified.	Type a date or select a date from the calendar.		
Status changed	The date the folder's status changed to active or inactive.	Type a date or select a date from the calendar.		
Next task due	The date the next task associated with the folder is due.	Type a date or select a date from the calendar.		
Folder property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank , is one	Created within (days)	The number of days within which the folder was created.	Type any numeric value

	of, is not one of, is between, is not between			
Folder path	The path to the folder that stores the folder. This field is only available for LearnMode type searches.	Value derived from application plan		
Name	The folder name.	Type any alphanumeric value.		
Folder ID	The unique ID of the folder.	Type any alphanumeric value.		
Summary task count (active)	The number of active tasks for the folder.	Type any numeric value.		
Summary task count (inactive)	The number of inactive tasks for the folder.	Type any numeric value.		
Type	The folder type value.	All folder types the user can access		
Workflow item ID	The workflow item ID for the folder.	Type any alphanumeric value.		
Workflow queue	The workflow queue the folder is currently in.	All workflow queues the user can access		
Status	is equal to is not equal to	Has required documents	Whether the folder has required document types	Yes No
Is in workflow	Whether the folder is in workflow			

Folder status	Whether the folder is active or inactive	Active, Inactive		
Summary task status	The status of the task associated with the folder.	Assigned Returned Complete Pending Review Complete Invalid Canceled		
Workflow status	The status of the folder in workflow.	Idle, Working, On hold Pending Waiting for routing, Waiting for inbound action		
User	is equal to, is not equal to, starts with, does not start with, ends with, is blank, is not blank, is one of, is not one of	Created by	The user who created the folder	Type an alphanumeric value. Any valid user name.
Modified by	The user who last modified the contents or properties of the folder.			
Status changed by	The user who last changed the folder status.			
Workflow user	The user who added the folder to workflow.			

Search for a folder

To search for a folder using a quick selection or using multiple conditions, complete the following steps.

1. On the **Perceptive Content** toolbar, select **Folders**.
2. In the **Views** pane, select the folder view you want to use as a basis for your search.
3. In the right pane, complete one of the following actions.

Situation	Steps
Perform a quick search	1. Click the **Quick Search** tab. 2. In the property list, select the folder property or custom property to use. 3. In the operator list, select an operator to use in the comparison. 4. In the value box, select or type a value.
Perform an advanced search	1. On the **Search** tab, click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, click the folder search constraint to use. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select the folder field to use in the search. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. If you are performing a **LearnMode** search in Perceptive Content, in the **Plan** list, select an application plan. 7. In the **Value** box, select or type a value for the search. 8. Click **OK**.

Note: If you select **Prompted** in the **Type** list, the **Message** box displays instead of the **Value** list. Enter instructions indicating what value to enter.

4. Optional. To add another search condition, repeat the previous substeps.
5. Click the **Go** button.

Search for record folders by date

To search for record folders based on the date they were created or modified, complete the following steps.

1. In the **Views** pane, select the record folder view you want to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the button.
3. In the **Add Condition** dialog box, in the **Constrain by list**, select **Folder property** or **Date**.
4. In the **Type** list, select the type of search to perform.
5. In the **Field** list, select **Created within (days)** or **Created or Modified**.
6. In the **Operator** list, select an operator to use when comparing the field and the value.

7. If you are performing a **LearnMode** search in **Perceptive Content**, in the **Plan** list, select an application plan.
8. In the **Value** box, select or type a date.

   If you selected Prompted in the Type list, the Message box appears instead. Enter instructions indicating what value to enter.
9. Click **OK** and then click the **Go** button.

Search for record folders by status

To search for active and inactive record folders based on the status, the user that changed the status, or the date the status changed, complete the following steps.

1. In the **Views** pane, select the record folder view you want to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the button.
3. In the **Add Condition** dialog box, in the **Constrain by list**, select **Status**, **User** or **Date**.
4. In the **Type** list, select **Normal**.
5. In the **Field** list, select **Folder status** or **Status changed by** or **Status changed**.
6. In the **Operator** list, select **is equal to**, or another operator to use when comparing the field and the value.
7. In the **Value** box, **Active** or **Inactive**.
8. Click **OK** and click the **Go** button.

Search for folders by user

To search for folders based on the user that created or last modified the folder, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, select the folder view you want to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, in the **Constrain by** list, select **Folder property**.
4. In the **Type** list, select the type of search to perform.
5. In the **Field** list, select **Created by** or **Modified by**.
6. In the **Operator** list, select an operator to use when comparing the field and the value.
7. If you are performing a **LearnMode** search in **Perceptive Content**, in the **Plan** list, select an application plan.
8. In the **Value** box, select or type a user name.

   If you selected **Prompted** in the **Type** list, the **Message** box displays instead. Enter instructions indicating what value to enter.
9. Click **OK** and then click the **Go** button.

Folder content

About searching folder contents

To search within the contents of a folder, you simply open a folder. The contents of the folder display according to the folder content view associated with the folder type.

When searching for folder contents, you can use the Search feature on the Content tab to perform your search. When you use the Search feature, you can search for documents, subfolders, and shortcuts based on a composite property, a content property (which applies to the document, folder, or shortcut), a custom property, a date, the document or folder status, a physical property, a user, or a workflow item property.

If the folder type associated with the folder content view allows you to search within subfolders, you can also create a folder content search that also searches within all subfolder levels available in the folder hierarchy.

The Quick Search feature is not available for folder content searching. You cannot create private filters to save folder content searches.

> For example, Alex is a medical records technician who stores each patient chart in a folder. Within each patient folder, Alex creates a subfolder for each visit the patient makes to any of his hospital system'sfacilities.Within each patient visit subfolder, there are additional subfolders for each physician who saw the patient during his visit. Alex needs to find a patient's pathology report, but is unsure of which visit the pathology report is associated with, and which physician created the pathology report. Alex searches the patient's chart folder, chooses to search within subfolders, and the search results contain documents stored in any subfolder associated with the patient's chart, regardless of their position in the hierarchy.

> As another example, Alex knows the patient visit in which the pathology report was created, but does not know which physician created the report. Alex opens the subfolder associated with the patient visit within the patient's chart, searches within subfolders, and the search results only contain documents stored in any subfolder associated with the patient visit he selected.

Folder content search conditions

When you display the Search pane on the Content tab of Folder Viewer, several conditions are available. The Add Condition dialog box allows you to build a search using a combination of constraints, fields, operators, and values described in the following table.

If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Composite property

The Composite property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank is one of, is not one of, is between, and is not between.

The composite properties, which can contain all possible values, are defined by your administrator.

You can select a composite property is the Composite list, or you can select a custom property in the Field list.

Custom property

The Custom property constraint allows the following operators: is equal to, is not equal to, is less than, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between, is equal to, is not equal to

Constraint	Operators	Field	Field Description	Possible Values
Composite property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Composite list, select a composite property. In the Field list, select a custom property.	Composite properties are defined by your administrator.	All defined composite properties
Content property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is	Content type	The type of content in the folder.	• Document • Document Shortcut Folder • Folder Shortcut

Constraint	Operators	Field	Field Description	Possible Values
	not one of, is between, is not between			
Added to folder within (days)	The number of days within which the document, folder, or shortcut was added or moved to the folder.	Type any positive integer.		
Created within (days)	The number of days within which the document, folder, shortcut was created.	Type any positive integer.		
Name	The name value of the document, folder, or shortcut.	Type any alphanumeric value.		
Drawer	The drawer value associated with the document, folder, or item referenced by a shortcut.	Type any alphanumeric value.		
Document ID	The unique ID of the document.	Type any alphanumeric value.		
Field1	The Field1 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field2	The Field2 value associated with the document or	Type any alphanumeric value.		

Constraint	Operators	Field	Field Description	Possible Values
	document referenced by a shortcut.			
Field3	The Field3 value associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field4	The Field4 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Field5	The Field5 associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Document type	The document type associated with the document or document referenced by a shortcut.	Type any alphanumeric value.		
Folder ID	The unique ID of the folder.	Type any alphanumeric value.		
Folder type	The folder type associated with the folder or folder referenced by a shortcut.	Type any alphanumeric value.		

Constraint	Operators	Field	Field Description	Possible Values
Custom property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	Select a custom property.	Custom properties are defined by your administrator.	All defined custom properties
Date	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, is one of, is not one of, is between, is not between	Added to folder	The date the content was added or moved to the folder.	Type or select a date value.
Checked out	The date the document or document referenced by a shortcut was checked out in version control.	Type or select a date value.		
Created	The date the document, folder, or shortcut was created.	Type or select a date value.		
Last viewed	The date the content was last	Type or select a date value.		

Constraint	Operators	Field	Field Description	Possible Values
	viewed by a user.			
Modified	The date the document, folder, or shortcut was last modified.	Type or select a date value.		
Status changed	The date the folder's active or inactive status changed.	Type or select a date value.		
Document Status	is equal to, is not equal to	Digital signature status	The status of the version controlled digital signature of the document.	Valid, Invalid, Void, Not Signed
Has hold applied	Whether the document has a direct or inherited retention hold applied.	Yes, No		
Has physical reference	Whether the document had a physical file reference.	Yes, No		
Is private	Whether the document is marked private in version control.	Yes, No		
Is version controlled	Whether the document is added to version control.	Yes, No		
Folder Status	is equal to, is not equal to	Folder status	The active or inactive status of the folder.	Active, Inactive
Has required	Whether the folder	Yes, No		

Constraint	Operators	Field	Field Description	Possible Values
documents	has required document types.			
Physical property	is equal to is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	In the Template list, select a physical file template. In the Field list, select a physical property.	Physical file templates and physical properties are defined by your administrator.	Template: All physical file templates the user can access, Field: All physical properties associated with the template
User	is equal to, is not equal to, starts with, does not start with, ends with, is blank, is not blank, is one of, is not one of	Checked out by	The user who has the document checked out in version control.	Type an alphanumeric value. Any valid user name.
Created by	The user who created the document, folder, or shortcut.			
Last viewed by	The user who last viewed the document, folder, or item referenced by a shortcut.			
Modified by	The user who last modified the document, folder, or shortcut.			

Constraint	Operators	Field	Field Description	Possible Values
Private by	The user who marked the document private in version control.			
Status changed by	The user who last changed the folder status.			
Workflow item property	is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between	Is in workflow	Whether the document or folder is added to workflow.	Yes, No
Workflow queue	The workflow queue associated with the document, folder, or item referenced by a shortcut.	Type an alphanumeric value.		
Workflow item user	The user who added the document, folder, or item referenced by a shortcut to workflow.	Type an alphanumeric value. Any valid user name.		
Workflow item status	The status of the document, folder,	Idle, Working, On hold, Pending,		

Constraint	Operators	Field	Field Description	Possible Values
	or item referenced by a shortcut in workflow.	Waiting for routing, Waiting for inbound action		

Search for content in a container

To search for items, containers, and shortcuts in a container within Folder Viewer, complete the following steps.

1. Open the container.
2. In the viewer, click **View > Search**.
3. In the **Search** pane, click the **Add** button and then, in the **Add Condition** dialog box, do the following substeps:
   1. In the **Constrain** by list, click the container content search constraint to use.
   2. In the **Type** list, select the type of search to perform.
   3. In the **Field** list, select the container field to use in the search.
   4. In the **Operator** list, select an operator to use when comparing the field and the value.
   5. In the **Value** box, select or type a value for the search.
   6. Click **OK**.
4. Optional. To add another search condition, repeat the previous substeps.
5. Click the **Go** button.

Search for shortcuts in a container

To search for shortcuts in a container, complete the following steps.

1. Open the folder.
2. In the viewer, click **View > Search**.
3. In the **Search** pane, click **Add**.
4. In the **Add Condition** dialog box, in the **Constrain by list**, select **Content property**.
5. In the **Type** list, select **Normal**.
6. In the **Field** list, select **Content type**.
7. In the **Operator** list, select **is equal to**.
8. In the **Value** list, select the type of shortcut you want to search for.
9. Click **OK**.
10. Click **Go**.

Search for results in a container hierarchy

To search for items, containers, and shortcuts in a container and all of its subcontainers in the hierarchy, complete the following steps.

Depending on the number of subcontainers in the container you selected as a basis for the search, the search might take longer than typical for a standard content search.

1. Open the container.
2. In the viewer, click **View > Search**.
3. In the **Search** pane, click **Add**.
4. In the **Add Condition** dialog box, in the **Constrain by list**, click the container content search constraint to use.
5. In the **Type** list, select the type of search to perform.
6. In the **Field** list, select the container field to use in the search.
7. In the **Operator** list, select an operator to use when comparing the field and the value.
8. In the **Value** box, select or type a value for the search.
9. Click **OK**.
10. Select the **Search within subfolders** check box and click **Go**.

Search tasks

About searching for tasks

When searching for tasks, you can use the quick search or advanced search features to perform your search based on one of the predefined task views.

You can search for tasks based on any date, a document property, a folder property, a task property, the task status, or a task user. You can also save the search as a private filter.

Perceptive Content include the following predefined task views:

- `All Tasks`. Displays all tasks for which the user has the necessary privileges.
- `My Assigned`. Displays all incomplete tasks to which the user is assigned.
- `To Review`. Displays all incomplete tasks the user needs to review.
- `Returned to Me`. Displays all tasks that were returned to the user.
- `Complete Pending Review`. Displays all tasks in a complete pending review state for which the user has necessary privileges.
- `Returned by Me`. Displays all tasks the user returned.
- `Complete`. Displays all tasks in a complete state for which the user has the necessary privileges.
- `Canceled`. Displays all tasks in a canceled state for which the user has the necessary privileges.
- `Invalid`. Displays all tasks in an invalid state for which the user has the necessary privileges.

Task search conditions

When you use the Search tab for task searches, several conditions are available. The Add Condition dialog box allows you to build a search using a combination of the constraints, fields, operators, and values described in the following table.

When building a task search condition in the Add Condition dialog, keep the following guidelines in mind:

- If you are performing a prompted search, you do not specify a value when creating a search condition. A message box appears instead of a value box.
- If you are performing a LearnMode search in Perceptive Content, you must select an application plan in the Add Condition dialog box.
- If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Composite property

Composite properties are defined by your Perceptive Content administrator. The operators that appear depend on the type of custom property.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by composite property

Composite

In the Composite list, select a composite property.

Possible values include all composite properties the user can access.

Field

In the Field list, select a custom property.

Possible values include all custom properties associated with the selected composite.

Custom property

Custom properties are defined by your Perceptive Content administrator. The operators that appear depend on the type of custom property.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by custom property.

Custom property

Select a custom property.

Possible values include all custom properties the user can access.

Date

The following operators, fields, and values are available when specifying a date constraint.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

is one of

is not one of

is between

is not between

Field	Field Description
Assigned	The date the task was assigned.
Completed	The date the task was completed.
Created	The date the task was created.
Due	The date the task is due.

Field	Field Description
Modified	The date the task was last modified.
Obsolete	The date the document or folder associated with the task was deleted.
Reviewed	The date the task was reviewed.
Started	The start date for the task.

Possible Values

Type a date or select a date from the calendar.

Document key

The following operators, fields, and values are available when specifying a document key constraint.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Field	Field Description	Possible Values
Drawer	The drawer value for the document. If you specified a different label for the Drawer column for the selected view, the label you defined appears in the Field list.	Any drawer the user can access
Field1	The Field1 value for the document. If you specified a different label for the Field1 column for the selected view, the label you defined appears in the Field list.	Any alphanumeric value
Field2	The Field2 value for the document. If you specified a different label for the Field2 column for the selected view, the label you defined appears in the Field list.	Any alphanumeric value
Field3	The Field3 value for the document. If you specified a different label for the Field3 column for the selected view, the label you defined appears in the Field list.	Any alphanumeric value
Field4	The Field4 value for the document. If you specified a different label for the Field4 column for the selected view, the label you defined appears in the Field list.	Any alphanumeric value
Field5	The Field5 value for the document. If you specified a different label for the Field5 column for the selected view, the label you defined appears in the	Any alphanumeric value

Field	Field Description	Possible Values
	Field list.	
Document type	The document type value for the document. If you specified a different label for the Document type column for the selected view, the label you defined appears in the Field list.	All document types the user can access

Document property

The following operators, fields, and values are available when specifying a document property constraint.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Field	Field Description
Document ID	The unique ID of the document associated with the task.
Name	The name of the document associated with the task.

Possible Values

Any alphanumeric value.

Folder property

The following operators, fields, and values are available when specifying a folder property constraint.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Field	Field Description	Possible Values
Name	The name of the folder associated with the task.	Any alphanumeric value
Folder ID	The unique ID of the folder associated with the task.	Any alphanumeric value
Type	The folder type associated with the task.	Any folder type the user can access.

Physical property

The following operators and fields allow you to search for documents based on a physical property value. Physical file templates and physical properties are defined by your Perceptive Content administrator.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by physical property.

Template

In the Template list, select a physical file template.

Possible values include all physical file templates the user can access.

Field

In the Field list, select a physical property.

Possible values include all physical properties associated with the template.

Status

The following operators, fields, and values are available when specifying a status constraint.

Operators

is equal to

is not equal to

Field	Field Description	Possible Values
Is expedited	Whether the task has been expedited	Yes No
Task status	The current status of the task.	Assigned Returned Complete pending review Complete Canceled Invalid

Task property

The following operators, fields, and values are available when specifying a task property constraint.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Field

Completion Method.

Field Description

The method the task uses for completion.

Possible Values

Automatic with valid digital signature

Complete pending review

Manual

Search for a task

To search for a task using a quick selection or using multiple conditions, complete the following steps.

1. On the toolbar, click **Tasks**.
2. In the **Views** pane, select the task view you want to use as a basis for your search.
3. In the right pane, do one of the following actions:

Situation	Steps
To perform a quick search	1. Click the **Quick Search** tab. 2. In the property list, select the property to use. 3. In the operator list, select an operator to use in the comparison. 4. In the value box, select or type a value.
To perform an advanced search	1. On the **Search** tab, click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, click the task search constraint to use. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select the task field to use in the search. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 7. In the **Value** box, select or type a value for the search. 8. Click **OK**.

Note: If you selected **Prompted** in the **Type** list, the **Message** box appears instead of the **Value** list. Enter instructions indicating what value to enter.

4. Optional. To add another search condition, repeat the advanced search steps.
5. Click the **Go** button.

Search for container tasks

To search for tasks associated with a container based on one of the container's properties, complete the following steps.

1. In the **Views** pane, select the task view you want to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, in the **Constrain by list**, select container property.
4. In the **Type** list, select the type of search to perform.
5. In the **Field** list, select one of the following fields:
   - To search for a container task based on the name of the container, select **Name**.

- To search for a container task based on the container ID, select **Folder ID**.
- To search for a folder task based on the folder type, select **Type**.

6. In the **Operator** list, select an operator to use when comparing the field and the value.
7. If you are performing a **LearnMode** search in **Perceptive Content**, in the **Plan** list, select an application plan.
8. In the **Value** box, select or type a value for the search.

   Note: If you selected Prompted in the Type list, the Message box appears instead. Enter instructions indicating what value to enter.

9. Click **OK**.
10. Click the **Go** button.

Search for tasks by task property

To search for a task based on one or more properties of the task, complete the following steps.

1. In the **Views** pane, select the task view you want to use as a basis for your search.
2. In the right pane, do one of the following options:

Situation	Steps
Perform a quick search	1. Click the **Quick Search** tab. 2. In the property list, select **Task type** or **Days until due**. 3. In the operator list, select an operator, such as is equal to or is greater than to use in the comparison. 4. In the value box, select or type a value.
Perform an advanced search	1. On the **Search** tab, click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Task property**. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select the task property to use in the search. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 7. In the **Value** box, select or type a value for

Situation	Steps
	the search. 8. Click **OK**.

Note: If you selected **Prompted** in the **Type** list, the Message box appears instead. Enter instructions indicating what value to enter.

3. Optional. To add another search condition, repeat the advanced search steps.
4. Click the **Go** button.

Search for tasks by user

To search for tasks by user, complete the following steps.

If no user reassigns the task, the Created by and Assigned by users are the same.

1. In the **Views** pane, select the task view to use as a basis for your search.
2. In the right pane, do one of the following actions:

Situation	Steps
Perform a quick search for the assigned or assigning user	1. Click the **Quick Search** tab. 2. In the property list, select **Assigned by** or **Assigned to**. 3. In the operator list, select an operator. 4. In the value box, select a user.
Create an advanced search	1. Click the **Search** tab and then click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, select **User**. 3. In the **Type** list, select the type of search to perform. 4. If creating a **LearnMode** search, in the **Plan** list, select an application plan. 5. In the **Field** list, select the user to search for. 6. In the **Operator** list, select an operator to use when comparing the field and the value. 7. In the **Value** box, select a user name. 8. Click **OK**.

If you selected **Prompted** in the **Type** list, the Message box appears instead of the Value box. Enter instructions indicating what value to enter.

3. Optional. To add another search condition, repeat the previous step.
4. Click the **Go** button.

Search for tasks assigned to a group

You can create a standard or prompted search for tasks assigned to groups. To search for a task that is assigned to a group, complete the following steps.

1. In the **Views** pane, select the task view you want to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, in the **Constrain by list**, select **User**.
4. In the **Type** list, select the type of search to perform.
5. In the **Field** list, select **Assigned to**.
6. In the **Operator** list, select an operator to use when comparing the field and the value.
7. In the **Value** list, type a group name.

   Note: You cannot select group names from the Value list. If you selected **Prompted** in the **Type** list, the Message box appears instead. Enter instructions indicating what value to enter.

8. Click **OK**.
9. Click the **Go** button.

Search for tasks by date

You can search for tasks based on the date the task was created, assigned, completed, modified, reviewed, started, or made obsolete. To search for tasks by date, complete the following steps.

1. In the **Views** pane, select the task view you want to use as a basis for your search.
2. In the right pane, complete one of the following actions:

Action	Steps
Complete a quick search that uses a single search condition	1. On the **Quick Search** tab, in the **Property** list, click **Assignment date**, **Start date**, **Completion date**, or **Obsolete date**. 2. In the **operator** list, select an operator, such as **is equal to** or **is greater than** to use in the comparison. 3. In the **value** box, select or type a date. 4. Click **Go**.

Action	Steps
Complete an advanced search that uses two or more search conditions	1. On the **Search** tab, click **Add**. 2. In the **Add Condition** dialog box, in the **Constrain by** list, click **Date**. 3. In the **Type** list, select the type of search to perform. 4. If creating a **LearnMode** search, in the **Plan** list, select an application plan. 5. In the **Field** list, select the date field to use in the search. 6. In the **Operator** list, select an operator to use when comparing the field and the value. 7. In the **Value** box, select or type a value for the search. 8. Click **OK**.

3. Optional. Repeat steps to add additional search conditions.
4. Click the **Go** button.

Search for tasks by an item's key

You can search for tasks associated with a document or folder based on one or more of its keys or the drawer or record folder associated with the container location. To search for tasks by the document or folder key, complete the following steps.

1. In the **Views** pane, select the task view you want to use as a basis for your search.
2. In the right pane, on the **Search** tab, and then click the **Add** button.
3. In the **Add Condition** dialog box, complete the following substeps:
   1. In the **Constrain by** list, select **Document or Folder key**.
   2. In the **Type** list, select the type of search to perform.
   3. In the **Field** list, select the field to use in the search.
   4. In the **Operator** list, select an operator to use when comparing the field and the value.
   5. If you are performing a **LearnMode** search in **Perceptive Content**, in the **Plan** list, select an application plan.
   6. In the **Value** box, select or type a value for the search.

      If you selected Prompted in the Type list, the Message box appears instead. Enter instructions indicating what value to enter.
   7. Click **OK**.
4. Click the **Go** button.

Result Tasks associated with folders do not appear in the search results.

Search for tasks by due date

To search for a task based on its due date using a quick selection or using multiple conditions, complete the following steps.

You can also search for a item or container based on the next task that is due for it.

1. In the **Views** pane, select the task view to use as a basis for your search.
2. In the right pane, do one of the following actions:

Situation	Steps
Quick search for a due date	1. Click the **Quick Search** tab. 2. In the property list, select **Due Date**. 3. In the operator list, select an operator, such as is equal to or is greater than, to use in the comparison. 4. In the value box, select or type a value.
Quick search for the days until due	1. Click the **Quick Search** tab. 2. In the property list, select **Days until due**. 3. In the operator list, select an operator, such as is equal to or is greater than, to use in the comparison. 4. In the value box, select or type a value.
Search for tasks by due date	1. On the **Search** tab, click **Add**. 2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Date**. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select **Due Date**. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 7. In the **Value** box, select or type a date for the search. 8. Click **OK**.
Search for tasks due in a certain number of days	1. On the **Search** tab, click **Add**. 2. In the **Add Condition** dialog box, in the

Situation	Steps
	Constrain by list, select **Task Property**. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select **Days Until Due**. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 7. In the **Value** box, type a number for the search. 8. Click **OK**.
Search for tasks with a due date	1. On the **Search** tab, click **Add**. 2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Task Property**. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select **Has Due Date**. 5. In the **Operator** list, select **is equal to**. 6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 7. In the **Value** box, select **Yes**. 8. Click **OK**.
Search for tasks without a due date	1. On the **Search** tab, click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Task Property**. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select **Has Due Date**. 5. In the **Operator** list, select **is equal to**. 6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 7. In the **Value** box, select **No**. 8. Click **OK**.

Note: If you selected **Prompted** in the **Type** list, the Message box appears instead. Enter instructions indicating what value to enter.

3. Optional. To add another search condition, repeat the advanced search steps.
4. Click the **Go** button.

Search for tasks by status

To search for tasks based on the current state of the task and search for expedited tasks, complete the following steps.

1. In the **Views** pane, select the task view you want to use as a basis for your search.
2. In the right pane, do one of the following options:

Situation	Steps
Perform a quick search	1. Click the **Quick Search** tab. 2. In the property list, select **Task status**. 3. In the operator list, select an operator to use in the comparison. 4. In the value box, select or type a status.
Perform an advanced search	1. On the **Search** tab, click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Status**. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select **Is expedited** or **Task status**. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. If you are performing a **LearnMode**, in the **Plan** list, select an application plan. 7. In the **Value** box, select or type a value for the search. 8. Click **OK**.

Note: If you selected **Prompted** in the **Type** list, the Message box appears instead. Enter instructions indicating what value to enter.

3. Optional. To add another search condition, repeat the advanced search steps.
4. Click the **Go** button.

Search for items or containers by task count

To search for items or containers based on the number of active or inactive tasks associated with them, complete the following steps.

1. In the **Views** pane, select the items or container view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, complete the following substeps:
    1. In the **Constrain by** list, click the item property or the container property.
    2. In the **Type** list, select the type of search to perform.
    3. In the **Field** list, click **Summary task count (active)** or **Summary task count (inactive)**.
    4. If you are performing a **LearnMode** search in **Perceptive Content**, in the **Plan** list, select an application plan.
    5. In the **Operator** list, select an operator to use when comparing the field and the value.
    6. In the **Value** box, select or type a value for the search.

        Note: If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Type instructions indicating what value to enter.

    7. Click **OK**.
4. Click **Go**.

Search for items or containers by task due date

To search for items or containers based on the due date associated with them, complete the following steps.

1. In the **Views** pane, select the document or folder view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, in the **Constrain by list**, select **Date**.
4. In the **Type** list, select the type of search to perform.
5. In the **Field** list, select **Next task due**.
6. In the **Operator** list, select an operator to use when comparing the field and the value.
7. In the **Value** box, select or type a date.
8. Click **OK**.
9. Click **Go**.

Search for items or containers by task status

To search for items or containers by task status, complete the following steps.

1. In the **Views** pane, select the view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, complete the following substeps:
    1. In the **Constrain by** list, click **Status**.

2. In the **Type** list, select the type of search to perform.
3. If you are creating a **LearnMode** search, in the **Plan** list, select an application plan.
4. In the **Field** list, click **Summary task status**.
5. In the **Operator** list, select an operator to use when comparing the field and the value.
6. In the **Value** box, select or type a value for the search.

Note: If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Type instructions indicating what value to enter.

7. Click **OK**.

4. Click the **Go** button.

Search custom properties

About searching on custom properties

To search for items based on custom properties, you can use the Quick Search and Search features.

When you perform a quick search, you can search for custom properties assigned to an item or container type. In an advanced search, you can define search conditions for composite and physical properties.

You can save a search that uses a custom property condition as a public or private filter and add custom property columns to the search results grid.

Search on custom properties

To perform a search using quick selection or multiple conditions based a custom property value, complete the following steps.

1. In the **Views** pane, select the view you want to use as a basis for your search.
2. In the right pane, complete one of the following actions:

Situation	Steps
Perform a quick search	1. Click the **Quick Search** tab. 2. In the **Property** list, select **Custom property**. 3. In the **Custom property** dialog box, select a custom property and click **OK**. 4. In the **Operator** list, select an operator to use in the comparison. 5. In the **Value** box, select or type a value.
Perform an advanced search	1. Click the **Search** tab and click the **Add**

Situation	Steps
	button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Custom property**. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select the custom property to use in the search. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. In the **Value** box, select or type a value for the search. 7. Click **OK**.

When performing an advanced search, if you selected **Prompted** in the **Type** list, the Message box appears instead of the Value box. Enter instructions indicating what value to enter.

3. Optional. To add another search condition, repeat the previous step.
4. Click the **Go** button.

Search on composite properties for a document

To search for an document based on the value of a custom property that is part of a composite, complete the following steps.

1. In the **Views** pane, select a view to use as a basis for your search.
2. In the right pane, click the **Search** tab and then complete the following substeps.
   1. Click the button.
   2. In the **Add Condition** dialog box, in the **Constrain by** list, select **Composite property**.
   3. In the **Type** list, select the type of search to perform.
   4. In the **Composite** list, select the composite property to use.
   5. In the **Field** list, select the custom property associated with the composite property.
3. In the **Operator** list, select the operator to use in the search.
4. In the **Value** box, type or select the value you want to specify.

   If you selected Prompted in the Type list, the Message box appears instead. Enter instructions indicating what value to enter.
5. Click **OK**.
6. Optional. To add more conditions to the search, repeat the previous substeps.
7. Click the **Go** button.

Search retention items

Search for documents with an applied hold

To search for a documents with an active retention hold applied, complete the following steps.

1. In the **Views** pane, select the view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the button.
3. In the **Add Condition** dialog box, complete the following substeps.
    1. In the **Constrain by** list, click **Status**.
    2. In the **Type** list, select the type of search to perform.
    3. If you are performing a **LearnMode**, in the **Plan** list, select an application plan.
    4. In the **Field** list, click **Has hold applied**.
    5. In the **Operator** list, click **is equal to**.
    6. In the **Value** list, click **Yes**.

       If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Type instructions that indicate what value to enter.
    7. Click **OK**.
4. Click the **Go** button.

Search for documents with a physical file reference

To search for documents that have a physical file reference associated with them, complete the following steps.

1. In the **Views** pane, select the view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, in the **Constrain by list**, select **Status**.
4. In the **Type** list, select the type of search to perform.
5. In the **Field** list, select **Has physical file reference**.
6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan.
7. In the **Operator** list, select an operator to use when comparing the field and the value.
8. In the **Value** box, select **Yes**.
9. Click **OK**.
10. Click **Go**.

Search for approval tasks

To search for sets of items with an approval task, complete one of the following procedures.

1. In the **Views** pane, select the view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, complete one of the following actions.

Situation	Steps
Search for items pending approval	1. In the **Constrain by** list, select **User**. 2. In the **Type** list, select the type of search to perform. 3. In the **Field** list, select **Pending approval by**. 4. In the **Operator** list, select an operator to use when comparing the field and the value. 5. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 6. In the **Value** box, select or type a user name. 7. Click **OK**.
Search for approval tasks	1. In the **Add Condition** dialog box, in the **Constrain by** list, select **Task** property. 2. In the **Type** list, select the type of search to perform. 3. In the **Field** list, select **Task Type**. 4. In the **Operator** list, select **is equal to**. 5. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 6. In the **Value** box, select **Approval**. 7. Click **OK**.

Note: If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

4. Optional. To add another search condition, repeat the previous substeps.
5. Click the **Go** button.

Search for documents by physical property

To search for documents based on one of the physical properties associated with the item’s physical file reference, complete the following steps.

1. In the **Views** pane, select an document or workflow view to use as a basis for your search.
2. In the right pane, click the **Search** tab and click the button.
3. In the **Add Condition** dialog box, complete the following substeps:
   1. In the **Constrain By** list, select **Physical Property**.
   2. In the **Type** list, select the type of search to perform.

Note: You cannot perform a **LearnMode** search when searching by physical property.

3. In the **Template** list, select the physical file reference associated with the physical property.
4. In the **Field** list, select the physical property you want to use.
5. In the **Operator** list, select the operator to use in the search.
6. In the **Value** box, type or select the value you want to specify.

Note: If you selected **Prompted** in the **Type** list, the **Message** box appears instead of the **Value** box. Enter instructions indicating what value to enter.

7. Click **OK**.

4. Click the **Go** button.

Use conditions

What is a condition?

Conditions form the part of a search, through a view or filter, that controls which results are returned in a view. A condition is analogous to a true-or-false question.

If the answer to the question is true, the result is included in the view. If the result is false, the result does not appear in the view. Conditions are applied one at a time to each result to determine whether the result appears.

When you create conditions at the view level, the condition applies to the view as well as all public and private filters associated with the view. When you create conditions at the filter level, the conditions of the filter and the view apply to the search results. For related views, you can only create conditions at the view level.

Create a condition

To add a condition to a view or public filter in View Designer, perform the following steps.

1. In **View Designer**, on the **View** or **Filter** tab, click the button.
2. In the **Add Condition** dialog box, in the **Constrain By** list, select the constraint to use.
3. In the **Type** list, select the type of search to perform.
4. In the **Field** list, select the field to use in the search.
5. In the **Operator** list, select the operator to use when comparing the field and the value.
6. If you are performing a **LearnMode** search in **Perceptive Content**, in the **Plan** list, select an application plan.
7. In the **Value** box, select or type a value for the search.

   If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.
8. Click **OK**.

Grouping and ordering evaluation of conditions

When you group and reorder multiple search conditions for a view or filter, you determine the method in which the search conditions are evaluated to return the results you want.

Evaluation order of conditions

When building a multiple-condition view or filter, it is important to understand the order in which Perceptive Content evaluates (or applies) the individual conditions. If all of your conditions are connected by AND operators, you can leave them ungrouped, as in Example 1.

Example 1

In this example, all the search conditions are connected by AND operators. For this reason, you can leave the conditions ungrouped. The search expression contains the following three conditions:

```
Drawer is equal to Accounts Receivable

AND Field1 is not equal to Region Two

AND Field4 is greater than 2010
```

In the above example, for an item to be returned by the search, all three conditions must be true. No grouping is necessary because `[A AND (B AND C)]` is equivalent to `[(A AND B) AND C]`. If any condition evaluates to false, the item does not appear in the results grid.

Example 2

In this example, you include an OR operator in the conditions. For this reason, you must group them to ensure uniform order of evaluation. The search expression below shows one effect of grouping conditions.

Ungrouped	**Grouped**

`Drawer is equal to Accounts Receivable`
`OR Field1 is equal to Region 2`
`AND Submit Date is greater than 2010`
	`[(Drawer is equal to Accounts Receivable OR Field1 is equal to Region 2) AND Submit Date is greater than 2010]`

In the above example, grouping the first two conditions ensures that `(Drawer is equal to Accounts Receivable OR Field1 is not equal to Region Two)` is evaluated first. If this grouped condition evaluates to false, the remaining AND condition is ignored, and the item does not appear in the search results grid. However, if the grouped condition evaluates to true, then the third condition must also evaluate to true for the item to appear in the search results grid.

Example 3

In this example, you include an OR operator in the conditions and group the second and third conditions with an AND operator. The search expression below shows one effect of grouping conditions.

Ungrouped	Grouped

`Drawer is equal to Accounts Receivable`
 	
`OR Field1 is equal to Region 2`
 	
`AND Submit Date is greater than 2010`
	`(Drawer is equal to Accounts Receivable OR (Field1 it equal to Region 2 AND Submit Date is greater than 2010))`

In the above example, grouping ensures that the grouped second and third conditions `(Field1 is equal to Region 2 AND Submit Date is greater than 2010)` are evaluated first. The ungrouped first conditions is evaluated one of two ways:

- If the grouped conditions evaluate to true, the condition is satisfied, the condition `(Drawer is equal to Accounts Receivable)` is ignored, and the item appears in the search results grid.
- If the grouped conditions evaluate to false, the condition `(Drawer is equal to Accounts Receivable)` is evaluated. If this condition evaluates to true, the item appears in the search results grid. If the condition evaluates to false, the item does not appear.

Grouping three or more conditions

You can group three or more conditions by creating one group using two conditions and then grouping it with a condition above or below the grouped row. The adjacent row can be a single condition, or it can be a group. The following examples show different ways of grouping three conditions. The condition rows are numbered in the examples for quick reference. Row numbers do not appear in the Search tab.

Example 1: Grouping rows 1 and 2 first

Before grouping, the conditions of search expression are:

```
1 Drawer is equal to Accounts Receivable
```

```
2 OR Field1 is equal to Region 2

3 AND Submit Date is greater than 2010
```

First, you group rows 1 and 2, and then click AND in the grouped row to change it to OR. The search expression becomes:

```
1 Drawer is equal to Accounts Receivable OR Field1 is equal to Region
2)

1) AND Submit Date is greater than 2010
```

Then, you group rows 1 and 2 again. The search expression becomes:

```
1 ((Drawer is equal to Accounts Receivable OR Field1 is equal to
Region 2) AND Submit Date is greater than 2010)
```

Example 2: Grouping rows 2 and 3 first

Before grouping, the conditions of the search expression are:

```
1 Drawer is equal to Accounts Receivable

2 OR Field1 is equal to Region 2

3 AND Submit Date is greater than 2010
```

First, you group rows 2 and 3. The search expression becomes:

```
1 Drawer is equal to Accounts Receivable 2 OR (Field1 is equal to
Region 2 AND Submit Date is greater than 2010)
```

Then, you group rows 1 and 2, then click the first AND in the grouped row to change it to OR. The search expression becomes:

```
(Drawer is equal to Accounts Receivable OR (Field1 is equal to Region
2 AND Submit Date is greater than 2010))
```

Modify a condition

To modify a condition for a view, public filter, or advanced search, complete the following steps.

1. Perform one of the following actions, depending on the situation.

Situation	Steps
Modify a condition in **View Designer**	• In **View Designer**, click the **View** or **Filter** tab.
Modify a condition in a Perceptive Content search	• In **ImageNowExplorer**, click the **Search** tab.

2. Click the text of the condition you want to modify.
3. In the **Add Condition** dialog box, change one or more selections or values.
4. Click **OK**.

Delete a condition

To remove a condition from a view or public filter in View Designer or ImageNowExplorer perform the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
To delete a condition in **View Designer**	• Click the **View** or **Filter** tab.
To delete condition in **ImageNowExplorer**	• Click the **Search** tab.

2. On the selected tab, point to the condition you want to select so that a blue arrow appears in the pane to the left of the condition or conditions.
3. In the pane to the left of the condition, click the blue arrow.
4. In the **Conditions** toolbar, click the **Delete** button.

Group two conditions

You can group two conditions in a view, filter, or advanced search. To group two conditions, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Group conditions in a view or filter in **View Designer**	• In **View Designer**, click the **View** or **Filter** tab.
Group conditions in an advanced search in **Perceptive Content**	• In **ImageNowExplorer**, click the **Search** tab.

2. To select the two conditions you want to group, point to the first condition you want to select so that a blue arrow appears in the pane to the left of the condition.
3. In the pane to the left of the condition, click the blue arrow.
4. Hold down the `CTRL` key, and then repeat the previous steps to select the second condition.
5. In the toolbar, click the **Group** button.
6. Optional. Click the operator to change it from **AND** to **OR**.

Ungroup conditions

You can remove a grouping between two or more conditions to change the way they are evaluated. To ungroup conditions, complete the following steps.

1. Complete one of the following actions, depending on the situation.

Situation	Steps
Modify a condition in **View Designer**	• In **View Designer**, click the **View** or **Filter** tab.
Modify a condition in an Perceptive Content search	• In **ImageNowExplorer**, click the **Search** tab.

2. On the selected tab, point to the grouped conditions you want to select so that a blue arrow appears in the pane to the left of the conditions.
3. In the pane to the left of the grouped conditions, click the blue arrow.
4. In the conditions toolbar, click the **Ungroup** button.

Record search conditions

When you use the Search tab for record searches, several conditions are available. The Add Condition dialog box allows you to build a search using a combination of the constraints, fields, operators, and values described in the following topic.

Record searching guidelines

When building a record search condition in the Add Condition dialog box, consider the following guidelines.

- If you are performing a prompted search, a message box appears prompting you for a value to use in the search.
- If you are performing a LearnMode search, you must select an application plan in the Add Condition dialog box.
- If you are performing a variable search, you can select one of the following values to use as a variable for the current user: user name, first name, last name, title, organization, organization unit, locality, or user ID. You can also use the current date and time as a variable.

Composite property

Composite properties are defined by your Perceptive Content administrator. The operators that appear depend on the type of custom property.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by composite property.

Composite

In the Composite list, select a composite property.

Possible values include all composite properties the user can access.

Field

In the Field list, select a custom property.

Possible values include all custom properties associated with the selected composite.

Custom property

Custom properties are defined by your Perceptive Content administrator. The operators that appear depend on the type of custom property.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by custom property.

Custom property

Select a custom property.

Possible values include all custom properties the user can access.

Date

The following operators and fields allow you to search for records based on a date value. To specify a value, type a value or select a value from the calendar.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by date.

Created

The date the record was captured.

Last viewed

The date a user last viewed the record.

Modified

The date a user last modified the record.

Declared property

The following operators and fields allow you to search for records based on the record's metadata.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by record metadata.

Addressees

The name of the organizations or individuals to whom a record is addressed.

Possible values include any alphanumeric value.

Author

The person, office, or designated position responsible for creation or issuance of a record.

Possible values include any alphanumeric value.

Date filed

The date and time that the electronic document was filed and declared a record.

Format

The computer file format of the record.

Possible values include any alphanumeric value.

Media type

The material or environment on which the record information is inscribed.

Possible values include any alphanumeric value.

Originating organization

The official name or code identifying the office responsible for the creation of a record.

Possible values include any alphanumeric value.

Publication date

The date the author or originator completed the development of the record.

Received date

The date the addressees received the record.

Page metadata

The following operators and fields allow you to search for records based on the page metadata. The operators that appear depend on the type of metadata property.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by page metadata.

Email - Attachment count

The number of files attached to the email.

Possible values include any numeric value.

Email - Bcc

The email address of the recipient who was blind copied on the email.

Possible values include any alphanumeric value.

Email - Cc

The email address of the recipient copied on the email.

Possible values include any alphanumeric value.

Email - From

The sender's email address.

Possible values include any alphanumeric value.

Email - Received date

The date the email was received.

Email - Reply to

The email address of the recipient who received a reply to the original email.

Possible values include any alphanumeric value.

Email - Sent date

The date the email was sent.

Email - Subject

The subject of the email.

Possible values include any alphanumeric value.

Email - To

The recipient's email address.

Possible values include alphanumeric value.

PDF - Creating application

The application used to create initial record content.

Possible values include any alphanumeric value.

PDF - PDF version

The version of the PDF record.

Possible values include 1.0, 1.1, 1.2, 1.3, and 1.4.

PDF - Producing application

The application used to render content to PDF.

Possible values include any alphanumeric value.

PDF - Producing application version

The version of the application used to render content to PDF.

Possible values include any alphanumeric value.

PDF - Security settings

The security settings applied to the PDF record.

Possible values include any alphanumeric value.

Photo - Bit depth

The bit depth of the transferred file.

Possible values include any numeric value.

Photo - Caption

A short description of the image.

Possible values include any alphanumeric value.

Photo - Compression format

The file compression method used (if applicable) for the image.

Possible values include: CCITT G3, CCITT G3 2D, CCITT G4, Deflate, Huffman, IBM MMR, JBIG, JPEG, LZW, Packed Bits, Progressive, RAW, and RLE.

Photo - Compression level

The file compression level (medium, high, and so on) selected for the image.

Possible values include any alphanumeric value.

Photo - Copyright

A restriction on the use of the image due to a copyright or other intellectual property right.

Possible values include any alphanumeric value.

Photo - EXIF information

Exchangeable Image File Format (EXIF). The information embedded in the header of the image files (as TIFF tags or JPEG markers) by certain digital cameras. For example, the digital camera's make and model.

Possible values include any alphanumeric value.

Photo - ICC/ICM profile

International Color Consortium/Image Color Management (ICC/ICM). The custom or generic color profiles, if available, for the digital camera or scanner used. For example, standard Red Green Blue (sRGB).

Possible values include any alphanumeric value.

Photo - Image height

The image height, in pixels.

Possible values include any numeric value.

Photo - Image width

The image width, in pixels.

Possible values include any numeric value.

Photo - Image source

The original medium used to capture the image.

Possible values include any alphanumeric value.

Photo - Photographer

The full name (and rank, if military) and organization (agency, if federal) of the photographer credited with the photograph, if available.

Possible values include any alphanumeric value.

Scanned - Bit depth

The bit depth relative to the image encoding standard.

Possible values include any alphanumeric value.

Scanned - Format

The format of the scanned image.

Possible values include TIFF (4.0, 5.0, and 6.0), JPEG, GIF (87a, 89a), BIFF, and PNG (1.0).

Scanned - Resolution

The image resolution relative to the image encoding standard.

Possible values include any alphanumeric value.

Web - Capture date

The date the record was captured.

Web - Capture method

The name and description of the harvester used to capture the file.

Possible values include any alphanumeric value.

Web - Contact

The point of contact information for the person responsible for capturing the web record.

Possible values include any alphanumeric value.

Web - Content management system

The application used to manage files on the web.

Possible values include any alphanumeric value.

Web - File name

The name of the web file.

Possible values include any alphanumeric value.

Web - Web platform

The software applications and, if available, intended browser applications and versions.

Possible values include any alphanumeric value.

Web - Website name

The title of the website from the landing page.

Possible values include any alphanumeric value.

Web - Website URL

The URL of the transferred content's landing page.

Possible values include any alphanumeric value.

Record key

The following operators and fields allow you to search for records based on a record key value.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by record key.

File Plan

The file plan value for the record. If you specified a different label for the File Plan column for the selected view, the label you defined appears in the Field list.

Possible values include all file plans the user can access.

Field1

The Field1 value for the record. If you specified a different label for the Field1 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field2

The Field2 value for the record. If you specified a different label for the Field2 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field3

The Field3 value for the record. If you specified a different label for the Field3 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field4

The Field4 value for the record. If you specified a different label for the Field4 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Field5

The Field5 value for the record. If you specified a different label for the Field5 column for the selected view, the label you defined appears in the Field list.

Possible values include any alphanumeric value.

Type

The type value for the record. If you specified a different label for the Type column for the selected view, the label you defined appears in the Field list.

Possible values include all record types the user can access.

Any key

The value for the File plan, Type, Field1, Field2, Field3, Field4, or Field5 associated with the document.

Possible values include any alphanumeric value.

Record property

The following operators and fields allow you to search for records based on a record property value.

Operators

is equal to

is not equal to

is less than

is greater than

is less than or equal to

is greater than or equal to

starts with

does not start with

ends with

does not end with

contains

does not contain

is blank

is not blank

is one of

is not one of

is between

is not between

Fields

The following fields are available when constraining by document property.

Created within (days)

The number of days within which the record was captured.

Possible values include any numeric value.

Hold name

The name of the retention hold applied to the record.

Possible values include all retention holds the user can access.

Hold reason

The reason for the hold.

Possible values include all hold reasons the user can access.

Name

The name of the record.

Possible values include any alphanumeric value.

Number of pages

The total number of pages in the record.

Possible values include any numeric value.

Record ID

The unique ID of the record.

Possible values include any alphanumeric value.

Status

The following operators and fields allow you to search for records based on a status value.

Operators

is equal to

is not equal to

Fields

The following fields are available when constraining by status.

Has physical file reference

Whether the record has a reference to a physical file.

Possible values include yes or no.

Has hold applied

Whether the record is under a direct or inherited retention hold.

Possible values include yes or no.

User

The following operators and fields allow you to search for records based on a user value. You can type an alphanumeric value or select any valid user name.

Operators

is equal to

is not equal to

starts with

does not start with

ends with

is blank

is not blank

is one of

is not one of

Fields

The following fields are available when constraining by user.

Created by

The user who created the record.

Last viewed by

The user who last viewed the record.

Modified

The user who last modified the record.

Pending approval by

The user assigned to an approval task for the record.

Types of conditions

View condition types can be Normal, LearnMode, Prompted, Variable, and Relationship. This topic explains when to use each type.

Normal

Most conditions use the Normal type because they do not require the special settings described below. Unless your view requires one of these, use the Normal condition type.

LearnMode

If you want the view or filter to search for matches between a document or record key value and a dictionary field within an application plan, use the LearnMode condition type. Before running a view containing a LearnMode condition, the user must open the corresponding application plan. You cannot create LearnMode conditions for a related view.

Prompted

If you want the user to enter or select a value (as part of a condition) before running the view or filter, use the Prompted condition type. You can prompt for multiple values by adding multiple prompted conditions.

Variable

If you want a document, folder, or record to be included in a view or filter based on the following values, use the Variable condition type.

- The user name of the person running the view
- A user attribute (for example, last name, locality, organization unit)
- The date of the run

Relationship

If you want a related view to search for the following values, use the Relationship condition type.

- Folder property, document, or record key values
- Custom property values that match the specified document or record key
- Custom property value when viewing a document, folder, or record

Variable condition components

When you combine custom properties with the Variable type of condition, you can define views with variable components. The following examples demonstrate how to work with variable condition components.

Define dynamic user name view

You can define a view that includes only items that contain a custom property value that matches the currently logged-in user. For example, to return only items that have an Employee custom property that contains the user name of the person running the view, you would add a condition that determines if the Employee field is equal to the current user's user name. The following table provides the settings you use to define a dynamic user name view.

Condition Component	Value
Constrain by	Custom Property
Type	Variable
Field	User custom property
Operator	Any
Value	Customer user’s user name

If you want to return only items that are captured by the person running the view, you add a condition that determines if the Created By field is equal to the current user's user name. To include only items that are routed in a workflow, checked out, created, last viewed, modified, or marked private by the currently logged-in user, refer to the following settings for the condition:

Condition component	Value
Constrain by	User
Type	Variable
Field	Any
Operator	Any
Value	Customer user’s user name

User attribute view

You can define a user attribute view by including only items that contain a custom property value that matches a specific attribute value of the currently logged-in user (such as first name, last name, locality, or organization unit.) For example, all items are in folders created from a folder type that has a custom property called Region. Region has values such as Northeast, Mid-Atlantic, and Southeast. In the same context, the users are assigned region properties, using exactly the same values (Northeast, Mid-Atlantic, and so on) stored in the user attribute called Locality. The following table provides the settings you use to define the user attribute view.

If you want to return only items with a folder Region custom property that matches the Locality value of the person running the view, add a condition that determines if Region is equal to Current user's locality.

Condition component	**Value**
Constrain by	Custom property
Type	Variable
Field	Any custom property value that uses a user attribute
Operator	Any
Value	Customer user's user name

Dynamic date view

You can define a dynamic date view by including items that contain a custom property date value that can be compared to the date when the view is run. For example, to return invoice items that are past due, you would add a condition that determined if the payment due date is less than the current date and time. The following table provides the settings you use to define a dynamic date view.

Condition component	**Value**
Constrain by	Custom property
Type	Variable
Field	Any date custom property
Operator	Any
Value	Current date and time

Use filters

Create a public filter

You can create a public filter for a view. To complete a public filter, perform the following steps.

You cannot perform this procedure for a related view.

1. In **View Designer**, on the **Filters** tab, click the **New Filter** button.
2. In the **New Public Filter** dialog box, type a name, add a description that will appear as the ToolTip for the filter, and then click **OK**.
3. Optional. Add conditions to the filter.

   The original view conditions appear, dimmed and unavailable, at the top of the conditions area. The filter you create builds upon these conditions.
4. Optional. Modify the column layout for the filter.
5. Click the **Save** button.

Delete a filter

To delete a public or private filter from a view, perform the following steps.

1. In **View Designer**, on the **Filter** tab, select the public or private filter you want to delete and then click the **Delete** button.
2. In the confirmation dialog box, click **Yes**.

Create a private filter

A private filter is saved search criteria that is accessible to you. To create a private filter, complete the following steps.

1. In the **Explorer** grid, in the **Views** pane, select the view you want to use as a basis for your filter.
2. In the right pane, define your quick search or create conditions for an advanced search.
3. If the search returned the results you want, in the **Current View** toolbar, click the **Save private filter** button. If not, refine your search and then repeat this step.
4. In the **Save Filter** dialog box, type a name and an optional description for the filter and then click **OK**.

   After you save the private filter, it appears below the view you used to create it in the **Views** pane.

Delete a private filter

To delete a saved search filter, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, select the view that contains the filter you want to delete.
2. In the **Current View** toolbar, click the **Edit private filters** button.
3. In the **Edit Private Filters** dialog box, select the filter you want to delete and click **Delete**.
4. In the confirmation dialog box, click **Yes** to confirm the deletion of the filter.
5. Click **Close**.

Modify or rename a private filter

You can change the name and description of a saved search filter or the conditions associated with the filter. To modify a private filter, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, select the view associated with the filter.
2. To rename a filter or change its description, complete the following substeps:
   1. In the **Current View** toolbar, click the **Edit private filters** button.
   2. In the **Edit Private Filters** dialog box, select the filter and then click **Modify**.
   3. In the **Modify Filter** dialog box, type your changes in the **Name** and **Description** boxes and then click **OK**.
   4. In the **Edit Private Filters** dialog box, click **Close**.
3. To change a condition in the filter, complete the following substeps:
   1. In the **Views** pane, select the filter.
   2. On the **Search** tab, click the condition you want to change.
   3. In the **Add Condition** dialog box, modify the necessary components of the condition and then click **OK**.
   4. In the **Current View** toolbar, click the **Save private filter** button.
   5. When prompted to overwrite the original filter, click **Yes**.

Add a container search to a public filter

You can narrow a filter to show only records that appear within record folders or record categories that meet certain conditions. To add a container search to a filter, complete the following steps.

You cannot perform this procedure for a related view.

1. In **View Designer**, on the **Filters** tab, click the **New Public Filter**button.
2. In the **New Public Filter** dialog box, type a name, add a description that will appear as the ToolTip for the filter, and then click **OK**.

   Note: You can skip the “Create a public filter” portion of this procedure if you only want to constrain by a container search.

3. To create a public filter, complete the following substeps.
   1. Click the **Add** button.
   2. In the **Add Condition** dialog box, in the **Constrain by** list, click the record search constraint to use.
   3. In the **Type** list, select the type of search to perform.
   4. In the **Field** list, select the record field to use in the search.
   5. In the **Operator** list, select an operator to use when comparing the field and the value.
   6. Click **OK**.
4. To add a container search, complete the following steps.

1. Select the **Add Container Search** check box. A second conditions box opens.
2. Optional. Click the **Save** button to save the search. If you uncheck the **Add Container Search** check box before saving the search, the container search will not be saved.
3. Click the **Add** button on the second conditions box.
4. In the **Type** list, select the type of search to perform.
5. In the **Field** list, select the record field to use in the search.
6. In the **Operator** list, select an operator to use when comparing the field and the value.
7. In the **Value** box, select or type a value for the search.
8. Click **OK**.

Add a container search to a view

You can narrow a view to show only records that appear within record folders or record categories that meet certain conditions. To add a container search to a view, complete the following steps.

1. In **Management Console**, in the left pane, click **Views**.
2. In the right pane, on the **Records** tab, select the view you want to change and click **Modify**.

> **Note:** You can skip the “Create a view” portion of this procedure if you only want to constrain by a container search.

3. Complete the following procedures.

Situation	Steps
Create a view	1. In the **View** tab, click the **Add** button. 2. In the **Add Condition** dialog box, in the **Constrain by** list, click the record search constraint to use. 3. In the **Type** list, select the type of search to perform. 4. In the **Field** list, select the record field to use in the search. 5. In the **Operator** list, select an operator to use when comparing the field and the value. 6. Click **OK**.
Add a container search	1. Select the **Add Container Search** check box. A second conditions box opens. 2. Optional. Click the **Save** button to save the search.

Situation	Steps
	Note: If you uncheck the **Add Container Search** check box before saving the search, the container search will not be saved. 3. Click the **Add** button on the second conditions box. 4. In the **Type** list, select the type of search to perform. 5. In the **Field** list, select the record field to use in the search. 6. In the **Operator** list, select an operator to use when comparing the field and the value. 7. In the **Value** box, select or type a value for the search. 8. Click **OK**.

Work with search results

What is column layout?

Column layout enables you to reorder, rename, hide, and show columns within the search results grid to meet your business needs.

You can define column layout, sorting, and appearance for the active view or filter. You can perform these actions directly in ImageNowExplorer by dragging or right-clicking column headings, or by making changes in the Columns dialog box. You can also add one or more custom property columns. For the active view or filter, you can also group, sort, and number the search results in the column layout.

Change grid lines and text

To change the appearance for the results of a view or filter in the ImageNowExplorer, complete the following steps.

1. Click **File > Options**.
2. In the **Explorer Options** dialog box, in the left pane, click **Grid Appearance** or **Grid Options**.
3. In the right pane, select the font, size, style, color, and line values for the grid lines.

Select columns to display

To show or hide columns in a view or public filter, complete the following steps.

1. In **View Designer**, in the **Preview** pane, click the **Columns** button.

2. In the **Columns** dialog box, do the following substeps:
    1. For the column or columns you want to hide, clear the check box. To hide all columns, right-click anywhere in the dialog box and then click **Clear All**.
    2. For the column or columns you want to show, select the check box. To show all columns, right-click anywhere inside the dialog box and then click **Select All**.
    3. Click **OK**.
3. In the **Designer** toolbar, click the **Save** button.

Rename a column

To rename a property column in a view or filter, complete the following steps.

1. Click the **Columns** button.
2. In the **Columns** dialog box, select one of the following columns:
    - Drawer
    - Field1
    - Field2
    - Field3
    - Field4
    - Field5
    - Type
3. Click **Edit** in the **Label** column, type the new name, and press `ENTER`.
4. Repeat the previous steps to rename additional columns and click **OK**.
5. Save the view or filter to preserve the column names.

Reorder a column

To determine the order of the columns in the search results grid for a view, public filter, private filter, or search results grid, complete the following steps.

1. Do one of the following actions, depending on the situation:
    - In **View Designer**, in the **Preview** pane, click the **Columns** button.
    - In **ImageNowExplorer**, in the **Explorer** toolbar, click the **Columns** button.
2. In the **Columns** dialog box, do the following substeps:
    1. Select the column you want to reorder and then click **Move Up** or **Move Down**.
    2. Repeat the previous step for any other columns you want to rearrange.
    3. Click **OK**.
3. In the **Designer** toolbar, click the **Save** button or save the search results as a private filter.

Add a custom property column

To add columns to display custom property values for content, complete the following steps.

1. Access the view using one of the following methods:

Situation	Steps
Add a custom property column for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. In **Workflow Designer**, open the desired queue. 3. In the **Queue Properties** dialog box, click **Appearance**. 4. In the right pane, click **Preview**.
Add a custom property column for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Add a custom property column for a folder content view	1. In **Management Console**, in the left pane, click **Folder Types**. 2. In the right pane, on the **Folder Types** tab, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click **Preview**.

2. In the **View Preview** window, click the **Columns** button.
3. In the **Columns** dialog box, click **Add**.
4. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on item type, select **Document Types**.
   - To display a custom property based on folder type, select **Folder Types**.
   - To display all custom properties, select **All Custom Properties**.
5. In the **Type** list, select a custom property.

   The **Type** list options change based on the **Filter by** option selected.
6. Select a custom property and click **Add**.
7. Click **OK**.

Sort view or search results

You can sort the rows in the results grid for a view or public filter. To sort view results, complete the following steps.

1. In the view preview or search results grid, to sort by a single column, right-click the column heading and then do one of the following:
   - To sort the results in ascending order, select **Sort Ascending**.
   - To sort the results in descending order, select **Sort Descending**.
2. To sort by additional columns, hold the `SHIFT` key and click the column heading once to sort the results in ascending order or twice to sort the results in descending order.

Note: To sort on multiple columns, you must group the results.

3. Optional. To remove all sorting, right-click a column heading and select **Reset sort order**.
4. Save the view or filter to preserve the sort order.

Group view or search results

You can group the results of a view, filter, or search by one or more columns into groups you can expand and collapse. To group view results, complete the following steps.

1. In the search results grid or view preview grid, right-click a column heading, and then click **Group by this Column**.

   Groups are initially collapsed when the view or filter runs.
2. Optional. To create a subgroup under the grouped column, right-click a column heading, and then click **Group by this Column**.
3. Optional. To expand the grouped results, right-click a column headings, and then click **Expand All Groups**.
4. Save the view or filter to preserve the column grouping.

Group search results by document keys

You can group document or workflow search results for the active view or filter in descending order by the defined document keys. To group search results in Perceptive Content by document keys, complete the following steps.

1. In the search results grid, right-click a column heading, and then select **Group by Keys**.
2. Optional. To expand the grouped results, right-click a column headings, and then click **Expand All Groups**.
3. Optional. To save the current column layout, complete one of the following options.
   - If you selected a view, save the search column layout as a private filter.
   - If you selected a filter, save the column layout for the filter.

Ungroup view or search results

To remove grouped results of a view, filter, or search, complete the following steps.

1. In the view preview or search results grid, right-click a column heading and select **Show Group Area**.
2. Right-click the grouped column heading you want to ungroup, and then select **Remove Column Grouping**.
3. Repeat the previous step for all grouped columns you want to ungroup.
4. Save the view or filter to preserve ungrouped results.

Number search results

You can use this procedure to add row numbers to the list of search results for a view or filter.

1. In the search results grid, right-click a column heading, and then select **Show Row Numbers**.

2. Optional. To save the current column layout, do one of the following options:
   - If you selected a view, save the search column layout as a private filter.
   - If you selected a filter, save the column layout for the filter.

Copy a grid

You can copy an entire grid or specific search grid results to the clipboard as comma-separated values (CSV) and paste the grid data into a word processor, text editor, spreadsheet, or supported email program. To copy a search results grid, complete the following steps.

1. In **ImageNowExplorer**, select the row or rows of the search results grid you want to copy.
2. Right-click the selected rows and then click **Copy Selected Grid Rows**.

   The rows are copied to the clipboard.
3. Paste the rows into the external program.

View

Get started with view

What is Viewer?

ImageNowViewer enables you to view items.

The viewer appears when you double-click an item or task in ImageNowExplorer. Your administrator can replace the title of the viewer window, so the title may not be ImageNowViewer. In ImageNowViewer, the Page pane displays a resizable view of the item you opened. You can open up to nine item viewers (combined) at one time

In addition to displaying the items, ImageNowViewer can also display information about the items in panes that appear when they are selected in the View menu.

- In the Actions pane, you can email the item, export the item to a file, fax or print the item, edit the item properties, apply a hold, digitally sign the item, add the item to a container or workflow, or launch the application that is associated to the item. If the selected item is in version control, the Actions pane includes an additional section that allows you to check out or check in the item, view version history of the item, and remove the item from version control.
- In the Contents Search Results pane, if you have a licensed Content Server, the results of the most recent content search appear. The pane lists all pages in a document where the search content appears. You can display these pages sequentially by clicking the Next or Previous button, or display a specific page by double-clicking a row in the list.
- In the Digital Signatures pane, you can view the details of any signatures on the item.
- In the Forms pane, you can view electronic forms that allow you to capture additional data for the item you opened in ImageNowViewer. You can then type data into the fields on the form you select.
- In the Properties pane, you can display and update the item and custom property values that describe and define the item. You can also add a note to the item or update an existing note.

- In the Related Documents pane, you can select a view in the Relationship list. The relationship view then runs automatically and shows all of the items in Perceptive Content that satisfy the conditions defined in the related view.
- In the Tasks pane, you can view item-related tasks assigned to you as well as complete, return, or temporarily skip a task.
- In the Thumbnails pane, you can double-click a different page of a multiple-page item to display it in the Page pane.

Other elements of ImageNowViewer are the status bar and toolbars.

- The status bar at the bottom of the viewer window provides information that relates to the item you select, including the path, number of tasks, workflow queue, version control status, and number of pages associated with the item.
- Depending on your privileges and the format of the item in the Page pane, you can perform additional functions, such as rotating, smoothing, inverting, or annotating, by selecting items in the View menu or clicking buttons on the toolbars.

What is a view?

A view is a predefined set of criteria you can use as a basis to search for content.

A view contains just the content you need to work with. Because a view is a subset of all content that is tailored for you, the view can hide dozens, hundreds, or even thousands of results that might otherwise clutter your search results list. Views display only the columns you need to see or work with, including custom property columns. In addition, your view is customized so that the appearance, name, and width of columns fit your needs.

A view displays a set of results that are arranged according to the content you wish to create for your users. Views can include any of the following components:

- A condition forms the part of a view or filter that controls which items, containers, or tasks are returned in a view.
- A filter is an optional component of a view that serves as a saved search which narrows the view results.
- A column layout defines column order, sorting, and appearance for a view or a filter.
- Statistics are calculations such as the maximum, minimum, and average of all the values in a specific column.

Open an item in the viewer

To open an item in a viewer, complete the following steps.

- From the **Perceptive Content** toolbar, complete one of the following procedures.

Viewer	Steps
Document	1. Click the Documents button. 2. From the document grid, double-click a document.
Record	1. Click the Records button. 2. From the record grid, double-click a record.
Folder	1. Click the Folders or Record Folders button. 2. From the grid, double-click a folder.
Workflow	1. Click the Workflow button. 2. From the workflow grid, double-click a workflow item.
Package	• Click Capture drop-down arrow and select Package Mode.
QA	1. Click Batchesand select Ready for QA. 2. Double-click an item in the grid.
Link	1. Click Batches and select Ready for Linking. 2. Double-click an item in the grid.
Single Scan	• Click Capture and select the desired single mode capture profile.

Types of views

The following list summarizes views available in Perceptive Content, including views created by you, your view manager, and views created automatically by the Perceptive Content system.

Application Plan

An application plan view returns a set of documents captured using a specific application plan. Application plans that do not have a defined view action do not display results.

Modifiable components

View conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with application plan management privileges can modify application plan views, including view actions and components, in Application Plan Designer.

Users with the View privilege for the application plan can run the view. For the active business application plan screen, the view returns the associated results.

Batches

A batch view returns the batches in your Perceptive Content system. By default, batch users can see all batches, batches that are ready for QA, and batches that are ready for linking.

Modifiable components

Column layout

Sorting and grouping

Document

A document view returns a set of documents. Document views appear in the Views pane under Documents.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a document view.

File Plans

A file plan view returns a set of records within a particular record category or record folder. File plan views appear in the Views pane under File Plans, and are organized according to the hierarchy of file plans, record categories, and record folders in the system. When you select one of these items, Perceptive Content retrieves the set of records within that item.

ImageNowExplorer uses the system-defined view and it cannot be modified. You can modify a view during a viewing session, but you can't create and save filters or views for file plan view.

File plan view does not use Quick Search, only Advanced Search.

Modifiable components

View conditions

Column layout

Sorting and grouping

Security considerations

In the views tree, users see only the file plans for which they have been granted Search privileges, and the record categories and record folders for which they have been granted Use privileges.

Folder

A folder view returns a set of folders. Folder views appear in the Views pane under Folders.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a folder view.

Folder content

When the user opens a folder, Folder Viewer displays a secondary grid that lists the folder's contents. This secondary grid is called a folder content view. Because document and folder shortcuts can belong to any number of folders, the same document or folder might appear as a representation in Folder Viewer with different grid layouts, depending on the type of folder the user opens.

Changes you make apply to all folders associated with the modified folder type. Because you can represent a document or folder using shortcuts in any number of folders, the same item might appear in a folder content view with different grid layouts, depending on the folder's type.

Modifiable conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with folder type management privileges can modify components of the folder content view in Management Console.

Recently received documents

Recently received documents appear in a temporary view that appears when one Perceptive Content user transfers documents to another user with the Send to User feature. This transfer must occur while both users are connected to the same ImageNow Server. The view sorts the received documents according to the name of the sending user and the time they were sent.

Record

To view records functionality, you must install a Records Manager license.

A record view returns a set of records. Record views appear in ImageNowExplorer, in the Views pane under Records.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a record view.

Record Folder

A record folder view returns a set of record folders and record categories. Record Folders views appear in ImageNowExplorer, in the Views pane under Record Folders.

Modifiable conditions

View name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with view access can run a record folder view.

Record Folder Content

When the user opens a record folder, Record Folder Viewer displays a secondary grid that lists the folder's contents. This secondary grid is called a record folder content view. Because record folder shortcuts can belong to any number of record folders, the same record folder might appear as a representation in Record Folder Viewer with different grid layouts, depending on the type of record folder the user opens. Changes you make apply to all record folders associated with the modified record folder type.

Modifiable conditions

Column layout

View statistics

Sorting and grouping

Security considerations

Users with record folder management privileges can modify components of the record folder content view in Management Console.

Recycled documents and document folders

When the user deletes a document or folder, Perceptive Content moves the item to a system view called My Recycled Documents or My Recycled Folders.

Items remain in the recycled view for the number of days that you specify in the *inserverFS.ini* file.

Modifiable conditions

Private filters

Security considerations

If the user is a Department Manager, two additional views appear. These views, All Recycled Documents and All Recycled Folders, display all items deleted by all users. As long as the user can see a recycled document or folder, the user can restore it to its previous state, at which time the document or folder keeps the attributes it had before deletion, if possible.

Related

Related views appear in the Related Documents pane of the document viewer and in the Related Folders pane of the folder viewer. A related view applies the relationship selected in the list to the current document or folder. The view displays a list of all documents or folders that satisfy the conditions of the relationship.

Modifiable conditions

Relationship name

View privileges

View conditions

Public filters

Private filters

Column layout

View statistics

Sorting and grouping

Security considerations

Users with document view management privileges can create and modify document relationships in Management Console. Users with folder view management privileges can create and modify folder relationships in Management Console.

Task

A task view returns a list of tasks assigned to the user according to the type of task, such as My Assigned or To Review. Task views appear in the Views pane under Tasks.

Modifiable conditions

Public filters

Private filters

View statistics

Column layout

Sorting and grouping

Workflow process

A workflow process view returns a list of items (representing documents or folders) when the user accesses a workflow process, which appears in the Views pane under Workflow.

Modifiable conditions

Private filters

Security considerations

Workflow process views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

Security considerations

Users with view access can run a folder view.

Workflow queue

A workflow queue view returns a list of items (representing documents or folders) when the user accesses a workflow queue, which appears in the Views pane under Workflow.

Modifiable conditions

Column layout

View statistics

Private filters

Grouping and sorting

Security considerations

Workflow queue views appear automatically depending on the workflow queues for which a user has the necessary privileges. Users with workflow process management privileges can modify workflow queue view components in Workflow Designer.

What are manual and automatic views?

Views are classified by the way you run them. Run icons appear in the Views pane to the left of each view name. The run state determines how the search results update.

- The manual run icon requires you to click the Go button to display the view results. A manual run view gives you a chance to select or create a filter before displaying the results, thus narrowing the range of the search and displaying fewer results.
- The automatic run icon indicates a view that displays its results as soon as you click it in the Views pane. Automatic views typically return a small number of rows, so that it is less important to apply a filter to the results before displaying them.

What is a related view?

A related view establishes a relationship view for an item.

When a user selects a related view to apply to an active item, the relationship displays items that match the item with respect to the conditions you define for a related view.

Suppose you want to select a related view to apply to an item. For example, you want to view a student information document with a Field2 value that contains the student's ID number. You also want to see all the other items with the same Field2 value. You can create a normal condition for this view, and the Related pane displays any other item that has a Field2 value that matches the student ID number in the active item.

For folders, related views match the condition on folder properties. For example, suppose you work at a hospital. Your environment is set up so that each time a patient visits the hospital, a new folder is created and contains all documents related to that visit. If a patient makes a return visit, that patient will have two folders, one for each visit. You view a recent patient's visit and realize you need to see all other folders from past visits. You can create the conditions for this relationship, and then see all folders that correspond to the patient's identification code and open any folders you need to view.

The Related pane also displays three copied relationships in ImageNow Client, if the relationships are active.

- The Copies of Original relationship returns all items copied from the same original item as the copied item that is active in ImageNowViewer.
- The Copies of this relationship returns all items copied from the same original item when the original item is active in ImageNowViewer.
- The Original relationship returns the original item when the copied item is active in ImageNowViewer.

You can add key and custom property columns to a copied item’s relationship, but you cannot modify it in View Designer.

What is a variable?

A variable is an element you can use to conditionally style a report or to conditionally render a report.

Each variable contains a set of values that completes the condition. A condition is a combination of a variable and its possible values. By combining custom properties with the Variable type of condition, you can define views or filters that return results keyed exclusively to the user name of the person who is running the view, to some attribute of that user (such as the user's location or organizational unit), or to the date on which the user runs the view.

What is a column layout?

A column layout defines column order, sorting, and appearance for a view or filter.

When defining column layout, you can reorder, rename, hide, and show columns within the results grid. You can also add one or more custom property columns and group or sort the search results in the column layout.

Pre-formatting the display of columns is an important advantage of views. This feature saves the user the time and effort required by manually adjusting columns each time the user opens a view or to create private filters.

What is an associated viewer?

An associated viewer allows you to view Folder Viewer documents in an associated viewer.

The association teams the folder name with the viewer, which appears in the title bar of Folder Viewer.

For example, if you open an item while working in ImageNowViewer, the item opens in Folder Viewer. You can view the item and can see the folder name in the viewer title bar. Depending on your preference, you can dock the viewers or open them separately.

Customize your view

Smooth images

To enable a smooth appearance for item images in the viewer, complete the following steps.

1. Open an item.
2. In the viewer, click **File > Options**.
3. In the **Viewer Options** dialog box, on **General > Images > Smooth**, select **Enabled**.
4. Click **OK**.

Next Reopen the viewer to view your change to this option.

Fit image to window size

To fit an image to the window size, complete the following steps.

1. Open an item.
2. In **ImageNowViewer**, click **File > Options**.

3. In the **Viewer Options** dialog box, on the **General** tab, locate the **Images** section.
4. In the **Default size** list, select one of the following options.
   - To maximize the image within the available window height and width, select **Fit Window**.
   - To resize the image to the window height, select **Fit Height**.
   - To resize the image to the window width, select **Fit Width**.
5. Click **OK**.

Next You must close and reopen the viewer for the changes to take effect.

Resize an item

The Page pane displays a resizable view of an item (a document or record) you opened. To resize an item, complete the following steps.

1. Open the item.
2. In the viewer, click **View > Resize** and then select the resize option you want.

Invert an item’s colors

When viewing an item, you can invert its colors, such as changing black to white and white to black. To invert an item's colors, complete the following steps.

1. Open the item.
2. In the viewer, click **View > Invert**.

Rotate an item

You can rotate any raster image item but can only save image rotations for TIF items. To rotate the appearance of the image file for a captured item, complete the following steps.

1. Open the item.
2. In the viewer, click **View > Rotate** and then select the option you want.
3. Optional. For a TIFF document or record type, to save the rotation change, click **View > Rotate > Save Image Rotation to Server**.

Reposition action panes

In ImageNowViewer, you can reposition any action pane. To reposition action panes, complete the following steps.

1. Double-click the **Actions** pane title bar.

   To view records functionality, you must install a Records Manager license.
2. Drag the pane to the desired location.
3. Optional. Click and hold the left mouse button, and then drag the title bar over an arrow either in the middle of the window or at the edge of the window.

   The pane automatically resizes to show the new docking position.
4. Release the mouse button to place the pane in the new position.

Set Folder Viewer options

To configure the default behavior for documents and folders in Folder Viewer, complete the following steps.

1. In **Folder Viewer**, click **File > Options**.
2. In the **Folder Viewer Options** dialog box, under **General**, select one or more of the following options.
   - **Launch a new viewer when opening a folder.** Opens a new viewer for each folder you open.
   - **Open the documents in this folder in an associated viewer**. Opens documents in an associated viewer that teams the document with the folder. You must select this option to create document and page tasks in **Folder Viewer**.
   - **Dock the associated viewer**. Attaches the viewers together.
   - **Set default folder when creating a document.** Sets the location for a new document to the path of the currently open folder. When disabled, Perceptive Content sets the location for a shortcut to the new document to the currently open folder. You can specify a different location for the document or the shortcut.
3. Under **Related Folders**, to remember and run the last viewed relationship, select the **Remember and run the last viewed relationship** check box.
4. Click **OK**.

View documents

View a document in its original application

To open a document in its associated application, such as a spreadsheet in Microsoft Excel or a PDF file in Adobe Acrobat Reader, complete the following steps.

1. If you are viewing a PDF file, choose one of the following methods to verify Adobe Acrobat is configured to display PDFs in a browser.

Situation	Steps
Adobe Acrobat Reader version 8 or 9	1. In Adobe Acrobat Reader, click **Edit > Preferences** and in the **Categories** list, click **Internet**. 2. Clear the **Display PDF in browser** check box and then click **OK**.
Adobe Acrobat Reader version 7 or earlier	• Set Reader to display PDFs.

2. Open the document.
3. In the **File** toolbar, click the **Launch associated application** button.
4. If the **Launch Associated Application** dialog box appears, select the page you want to view and then click **Open**.

View an earlier version of a document

Using version control allows you to manage changes to a document during the content authoring process while ensuring the integrity of your documents at all times. To view an earlier version of a document, complete the following steps.

1. Open the document.
2. Click **File > Version Control > Version History**.
3. In the **Document Properties** dialog box, on the **Version** tab, select the version of the document that you want to view and click **View**.

Edit a text file

You can edit a TXT or RTF file directly in the viewer. To edit an item, complete the following steps.

Prerequisite Before you can edit an item in the viewer, you must set it as the default text editor.

To edit a non-text item, you must edit its latest version in its associated application.

1. Open the item and select the page you want to edit.

   You can edit more than one page at a time and skip back and forth between pages in the Thumbnails pane.
2. In the page toolbar, click the **Start Edit** button.

   If editing a document, Perceptive Content automatically adds it to version control, if necessary, and checks out the document. If the page toolbar does not appear, the document might be checked out by another user.
3. If editing an RTF file, you can select text and click the buttons in the page toolbar to apply bold, italic, and underline or select a font family, size, and color.
4. If editing a document, check in the document when finished.

View a document page

To view a specific page in a multi-page document, complete the following steps.

1. Open the document.
2. Open the **Thumbnails** pane by clicking **View > Thumbnails**.
3. In the **Thumbnails** pane, double-click the page you want to view.

View document properties

To view a document's properties, complete the following steps.

1. Open the document.
2. On the **File**toolbar, click the **Properties** button.
3. In the **Document Properties** window, perform any of the following actions.
   1. On the **General Properties** tab, view the document’s property values and folder location.

   2. On the **Details** tab, view additional document properties, such as the date the document was created.
   3. On the **Custom Properties** tab, view the document’s custom property values.
   4. To view document version information, in the left pane, click **Version History**.
   5. To view document workflow information, in the left pane, click **Workflow**.
4. Click **Close**.

View related documents

To view the related documents defined by a document relationship view, complete the following steps.

1. Open the document.
2. In the viewer if the **Related Documents** pane is not already visible, click **View > Related Documents**.
3. In the **Related Documents** pane, in the **Relationship** list, select the relationship view you want to display.

View multiple pages

To view multiple pages in a viewer, complete the following steps.

1. Open an item.
2. From the **Window** menu, choose from the following options.

Option	Description
Cascade	• Diagonally displays pages in the viewer.
Tile vertically	• Vertically displays pages in the viewer.
Tile horizontally	• Horizontally displays pages in the viewer.

View folders

View a document's folder

To view the folder that contains a document, complete the following steps.

1. Open the document.
2. In **ImageNowViewer**, in the **Actions** pane, click **View this document’s folder**.

View related folders

To view the related folders defined by a folder relationship view, complete the following steps.

1. Open the folder you want to view.
2. In **the viewer**, if the **Related Folders** pane is not already visible, click **View > Related Folders**.

3. In the **Related Folders** pane, in the **Relationship** list, select the relationship view you want to display.

View the folder one level higher

When viewing a folder, to view the folder one level higher in the defined hierarchy, complete the following steps.

1. Open a folder.
2. In **Folder Viewer** in the **Actions** pane, click **View folder**.

View folder properties

To view a folder's properties, complete the following steps.

1. Open the folder.
2. In the **Perceptive Content** toolbar, click the **Properties** button.
3. In the **Folder Properties** dialog box, in the right pane, view the following properties:
   - On the **Details** tab, view general folder properties such as the date the folder was created.
   - On the **Custom Properties** tab, view the custom properties.
4. Click **OK**.

View search results

Export a grid

You can export a search results grid to a CSV file. To export a grid, complete the following steps.

1. Right-click inside the search results grid and then click **Export Grid**.
2. In the **Export Grid Data** dialog box, navigate to the desired file location, enter a file name for the grid file, and click **Save**.

Result This procedure exports all rows of the grid, whether the entire list is visible on the screen or not.

Work with zoom regions

What is a zoom region?

The viewer provides controls in items for the magnification and rotation of raster-based images, and allows you to store specific combinations of magnification, rotation, and positioning as settings referred to as zoom regions.

From the zoom region list, you can name, retrieve, and delete these settings. These settings are always available to any user with View privileges while accessing any ImageNow Server from the same computer that the zoom regions were created.

Create a zoom region

To create a zoom region for an item, complete the following steps.

1. Open the item.

   To view records functionality, you must install a Records Manager license.
2. In the viewer, on the **View** toolbar, complete any of the following actions:
   - To zoom in on the item, click the **Zoom In** button.
   - To zoom out on the item, click the **Zoom Out** button.
   - To rotate the item 90 degrees to the left, click the **Rotate 90º Left** button.
   - To rotate the item 90 degrees to the right, click the **Rotate 90º Right** button.
   - To adjust the item to fit the space available in the window, click the **Fit Window** button.
   - To adjust the item to fit the width of the window, click the **Fit Width** button.
   - To adjust the item to fit the height of the window, click the **Fit Height** button.
3. On the **View** toolbar, select **Create Zoom Region** from the list.
4. In the **Create Zoom Region** dialog box, enter a unique name for the region you just created and click **OK**.

Rename a zoom region

To rename a zoom region for an item, complete the following steps.

1. Open an item.
2. On the **View** toolbar, select **Edit Zoom Regions**.
3. In the **Edit Zoom Regions** dialog box, select the region you want to rename and click **Rename**.
4. In the **Rename Zoom Region** dialog box, type the new name of your zoom region and click **OK**.
5. Click **Close** to close the **Create Zoom Region** dialog box.
6. Click **Close**.

Delete a zoom region

The View toolbar provides controls for the magnification and rotation of raster-based images, and allows you to store specific combinations of item magnification, rotation, and positioning as settings referred to as zoom regions. To delete a zoom region, complete the following steps.

1. Open an item.
2. In **ImageNowViewer**, on the **View** toolbar, click **Edit Zoom Regions**.
3. In the **Edit Zoom Regions** dialog box, select the region you want to delete and click **Delete**.
4. Click **Close**.

Process

Use workflow

Add an item to workflow

To add a document, folder, or shortcut to a queue in a workflow process, complete the following steps.

You can add to workflow using the document, folder, or a shortcut to the document or folder.

1. Open the document or folder you want to add to workflow.
2. In the **Actions** pane, click **Add this folder to workflow** or **Add this document to workflow**.
3. In the **Add to Workflow** dialog box, select a process, select a queue, select a priority, and then click **Add**.

Process an item in workflow

To process an item in a workflow, complete the following steps.

1. Verify that the document is in the workflow.
2. On the **Perceptive Content** toolbar, click **Documents**, and then search for the document you want to process.
3. In **ImageNowExplorer**, in **Documents** view, right-click the document and click **Open in Workflow**.
4. In the viewer, complete one or more of the following actions.
   - View the document
   - Add any annotations
   - Rotate and/or resize the document
   - Apply any other options you want available in the Viewer
5. Click **File > Close Viewer** to return to **ImageNowExplorer**.

Route an item in workflow

To route an item from one workflow queue to another, complete the following steps.

1. Open the workflow item.
2. In viewer, on the **Workflow** toolbar, complete one of the following actions:
   - To send the document to the next queue in the workflow process flow, click the **Route Forward** button and, in the **Route Forward** dialog box, select the route you want. When only a single route is defined for the queue, the **Route Forward** dialog box does not appear and the item is automatically routed.
   - To send the document back to any queue from which it came previously, click the **Route Up** button.
   - To send the document back to the previous queue, click the **Route Back** button.

- To select a queue in the workflow process to which to send the document, click the **Route Anywhere** button.
- To send the document to multiple queues in parallel, click **Route Forward** and, in the **Route Forward** dialog box, under **Automatic**, select a parallel route.
- To send the document to another sub queue within a super queue, click **Route Forward** and, in the **Route Forward** dialog box, under **Peer Routes**, select the sub queue.

Change document keys in workflow

If application plan linking is enabled for the queue, you can change the properties of a document in the workflow queue. To change a document property value, complete the following steps.

1. Open the document in workflow.
2. In **ImageNowViewer**, in the **Properties** pane, under **Document Keys**, change the document keys as needed.
3. Close the document and in the confirmation box, click **Yes**.

Set the status of an item in workflow

To set the workflow status of a document or folder in workflow, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane under **Workflow**, select the workflow queue.
2. In the workflow grid, right-click the item and select one of the following options.
   - **Workflow** > **Mark Item as Idle**.
   - **Workflow** > **Mark Item as On Hold**.
   - **Workflow** > **Mark Item as Pending**.
3. If placing the item on hold, in the **Hold Item** dialog box, enter any comments associated with putting the item on hold, and then click **OK**.

View workflow history

To view the workflow history of a document or folder, complete the following steps.

1. Open the workflow item.
2. In **ImageNowViewer**, click **View > Actions**.
3. In the **Actions** pane, under **Workflow**, click **View workflow history**.
4. In the **Document Properties** or **Folder Properties** dialog box, view the workflow item history, and then click **OK**.

View next item in workflow

When you are viewing a workflow item in ImageNowViewer, you can view the next item in the queue based on the sort order in the workflow view. To view the next workflow item, complete the following steps.

1. In the **Actions** pane, under **Workflow**, click **View next item**.
2. In the dialog box that appears, click **Put on Hold** or **Return to Queue** to view the next item in the

queue.

If you choose to put the item on hold, complete the **On Hold** dialog box to proceed.

Open a workflow item

To view or open a document or folder in its workflow queue, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane under **Workflow**, select a workflow queue.
2. From the search results grid, double-click an item to open it in a viewer.

View item start date and time

To view the date and time a workflow item entered a queue in ImageNowViewer, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane under **Workflow**, select the workflow queue you want.
2. Click **View > Columns**.
3. In the **Columns** dialog box, in the **Column Name** list, select the **Routed** check box.
4. Click **OK**.
5. In the search results grid, in the **Routed** column, verify that the date and time displays. If the time does not display, complete the following substeps:
    1. On the **Perceptive Content** toolbar, click **Settings > Options**.
    2. In the **Options** dialog box, in the left pane, click **General**.
    3. In the right pane, under **Date and Time**, select the **Display Time** check box.
    4. Click **OK**.
6. Verify that the queue start time now displays.

View recently routed items

To view a list of workflow items recently routed to another queue, complete the following steps.

1. Open a workflow item.
2. In **ImageNowViewer**, click **View > Actions**.
3. In the **Actions** pane, under **Workflow**, click **View recently routed items**.

Mark an item as pending

To mark a workflow item as pending, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, expand the **Workflow** tree and select the workflow queue you want.
2. In the workflow grid, right-click the document and select **Workflow > Mark Item as Pending**.

Mark an item as idle

To mark a workflow item with a status of idle, complete the following steps.

Prerequisite This procedure requires the queue lead role.

1. In **ImageNowExplorer**, in the **Views** pane, expand the **Workflow** tree and select the workflow queue you want.
2. In the workflow grid, right-click the document and select **Workflow > Mark Item as Idle**.

Mark item priority

By default, all items are marked with a normal priority. To change the priority of a workflow item, complete the following steps.

1. In **ImageNowExplorer**, in the **Views** pane, expand the **Workflow** tree and select the workflow queue you want.
2. In the workflow grid, right-click the item and point to **Workflow**.
3. To change the priority from normal, complete one of the following actions.
   - To set to a high priority, click **Mark Item as High Priority**.
   - To set to a low priority, click **Mark Item as Low Priority**.

Recall an item in workflow

You can recall an item in workflow to make changes to the item or to reprocess an item. To recall an item in workflow, complete the following steps.

1. In **ImageNowExplorer**, under **Workflow**, select the workflow queue.
2. In the workflow grid, right-click a document and click **Workflow > Recall workflow item**.

Merge with viewed item

To merge an item with an item open in workflow, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Workflow**.
2. In **ImageNowExplorer**, in the left pane under **Workflow**, select the workflow queue you want.
3. Open the workflow item with which you want to merge.
4. In **ImageNowExplorer**, in the workflow queue search results grid, right-click the item you want to merge and select **Workflow > Merge with Viewed Item**.
5. In the **Merge with Viewed Item** confirmation box, to merge the selected item with the open item, click **Yes**.

Place a workflow item on hold

If you are processing a document but need to stop, you can place a workflow item on hold and finish processing the document at a later time. To place a workflow item on hold, complete the following steps.

1. Close the workflow item.

2. At the prompt, click **Put on Hold**.
3. In the **On Hold** dialog box, enter the date, reason for the hold, and comments.
4. Click **OK**.

Archive an item in workflow

When you archive a workflow item, you remove it from the active workflow process but retain the item's workflow history. To archive an item, complete the following steps.

1. Open the workflow item.
2. In **ImageNowViewer**, click **View > Actions**.
3. In the **Actions** pane, under **Workflow**, click **Archive this item**.
4. In the confirmation box, click **Yes**.

Delete an item from workflow

To delete an item from workflow, complete the following steps.

This action permanently deletes the workflow item and the document or folder associated with it.

1. In **ImageNowExplorer**, in the **Views** pane under **Workflow**, select the process or queue.
2. In the search results grid, right-click the item you want to delete and click **Delete**.

Remove an item from workflow

When you remove an item from workflow, you do not permanently delete the document or folder associated with the item. To remove an item from workflow, complete the following steps.

1. Open the workflow item.
2. In the **Actions** pane, under **Workflow**, click **Remove this item from workflow**.
3. In the **Remove from Workflow** confirmation box, click **Yes**.

Customize workflow

Add a custom property column

To add columns to display custom property values for content, complete the following steps.

1. Access the view using one of the following methods:

Situation	Steps
Add a custom property column for a workflow queue view	1. Open the workflow process in **Workflow Designer**. 2. In **Workflow Designer**, open the desired queue.

Situation	Steps
	3. In the **Queue Properties** dialog box, click **Appearance**. 4. In the right pane, click **Preview**.
Add a custom property column for a view	1. Open the view in **View Designer**. 2. In **View Designer**, click **View > Preview**.
Add a custom property column for a folder content view	1. In **Management Console**, in the left pane, click **Folder Types**. 2. In the right pane, on the **Folder Types** tab, select the folder type and click **Modify**. 3. In the **Folder Type** dialog box, on the **Appearance** tab, click **Preview**.

2. In the **View Preview** window, click the **Columns** button.
3. In the **Columns** dialog box, click **Add**.
4. In the **Custom Property** dialog box, select the **Filter by** list and do one of the following actions:
   - To display a custom property based on item type, select **Document Types**.
   - To display a custom property based on folder type, select **Folder Types**.
   - To display all custom properties, select **All Custom Properties**.
5. In the **Type** list, select a custom property.
   The **Type** list options change based on the **Filter by** option selected.
6. Select a custom property and click **Add**.
7. Click **OK**.

Change how items are fetched

To change the way workflow items appear during workflow processing, complete the following steps.

1. Open the **ImageNow Options** dialog box.
2. On the **Perceptive Content** toolbar, click **Settings > Options**.
3. In the **ImageNow Options** or **Explorer Options** dialog box, in the left pane, click **Workflow**.
4. In the right pane, under **Workflow Processing**, perform one or more of the following actions.

Situation	Steps
Designate the next item workflow retrieves	• In the **Next action** list, select **Oldest item in Queue**, **Next item in Workflow Grid**,

Situation	Steps
	or **Next item from top of Workflow Grid**.
Retrieve the next item automatically	• Select the **Automatically fetch new item upon completion of existing item** check box.
Retrieve pending items automatically	• Select the **Allow pending items to be auto fetched for processing** check box.
When selecting a new item	• In the **When selecting a new item** list, select **Put active item on hold**, **Return active item to existing Queue**, or **Prompt user for choice**. **Note:** If your Workflow configuration allows for multiple viewers, the above options only apply when selecting **Next Item** in a viewer. If you select an item from the grid, a new viewer opens, and the status of the item in the already opened viewer does not change.

When you want to retrieve items in a process view, set the **Next action** list to **Next item in Workflow Grid** or **Next item from top of Workflow Grid**. If you set the **Next action** list to **Oldest item in Queue** for a process view, the view determines the starting point for processing. With this option, the next item to display is from the same queue as the previous item, therefore, the item that displays might not be the next item in the process grid.

5. Click **OK**.

Change item color when it revisits a queue

To change the color of an item that has been in a queue more than once, complete the following steps.

1. Open the **ImageNow Options** dialog box.
2. On the **Perceptive Content** toolbar, click **Settings > Options**.
3. In the **ImageNow Options** or **Explorer Options** dialog box, in the left pane, click **Workflow**.
4. In the **General** tab, under **Workflow Grid**, select the color you want from the **Alternate text** list.

Change how a workflow alerts you

Perceptive Content provides alerts in workflow that notify you when an item is left in a workflow queue longer than a specified time. To change how workflow alerts you, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the**ImageNow Options** dialog box, in the left pane, click **Workflow**.
3. In the right pane, under **Alerts**, in the **Alert user when item is older than** boxes, select the number and the time unit (days, weeks, hours, or minutes).
4. Click **OK**.

Change how workflow closes

To change the way workflow closes after a user processes items, complete the following steps.

1. Open the **ImageNow Options** dialog box.
2. On the **Perceptive Content** toolbar, click **Settings > Options**.
3. In the **ImageNow Options** dialog box, click **Workflow**.
4. Under **Workflow Closing**, in the **On workflow session cancel or close** list, choose one of the following options.

Situation	Steps
Place the current item on hold	• Select **Put active item on hold**.
Return the item to the queue	• Select **Return active item to existing Queue**.
Display a dialog box that prompts you to put the item on hold or return it to the queue	• Select **Prompt user for choice**.
Change the way document keys are saved as you exit	• In the **Save changes to document keys** list, choose **Yes**, **No**, or **Prompt**.

5. Click **OK**.

Monitor workflow with Message Center

What is the Message Center?

The Message Center provides interactive workflow status monitoring across all queues you can process.

Show the Message Center

Message Center provides animated alarm notification and displays a workflow queue status list below the Perceptive Content toolbar. To show or hide Message Center, complete the following procedure.

- On the **Perceptive Content** toolbar, click **Settings > Show Message Center**.

Show the queue status list

To set up the queue status list to appear whenever you display the Message Center, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**
2. In the **Perceptive ContentOptions** dialog box, in the left pane, click **Toolbar**.
3. In the right pane, on the**Message Center** tab, under **General**, in the **Default mode** list, click **Expanded**.
4. Click **OK**.

Resize the queue status list

To resize the Message Center queue status list, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **Perceptive Content Options** dialog box, in the left pane, click **Toolbar**.
3. On the **Message Center** tab, under **General**, in the **Window size** list, select **Small**, **Medium**, or **Large**.
4. Click **OK**.

Select queues for status list

To determine the contents of the Message Center queue status list that appears in the lower pane of the Message Center, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **Perceptive ContentOptions** dialog box, click **Toolbar > Message Center**.
3. To designate which workflow queues display in the **Message Center** window, select the queues under **Workflow Queue Status**.
4. Click **OK**.

Change Message Center window animation

You can change the animation settings for the Message Center window. To change window animation, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **Perceptive Content Options** dialog box, in the left pane, click **Toolbar**.
3. In the right pane, on the **Message Center** tab, under **General**, in the **Animation style** list, select one of the following options.

  - **Scroll**. Shows the **Message Center** window moving downward as it opens.
  - **None**. Disables scrolling.
4. Click **OK**.

Modify the Message Center marquee

To modify the font color and scroll rate of the horizontal marquee below the Perceptive Content toolbar, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the**Perceptive Content Options** dialog box, in the left pane, click **Toolbar**.
3. In the right pane, on the **Message Center** tab, under **Marquee**, you can modify the horizontal strip below the toolbar using the following options.
   - In the **Font color** list, select the color you want.
   - In the **Scroll rate** box, type a number from `1` (fastest) to `35` (slowest) to change the speed of the messages as they move across the marquee.
4. Click **OK**.

Use tasks

What is a task?

A task is work that you assign to one or more users for documents and folders.

There are three task types: document deficiency, pointer, and signature required. You choose the task that best matches the work that task assignees must complete. The task types are defined below.

- Document deficiency, which you create to indicate when a document is missing or is incomplete.
- Pointer, which you use to draw attention to a specific document or folder location for further action.
- Signature required, which you assign when a user needs to digitally sign a document. You must have the Document Management Suite license installed on your Perceptive Content system for this task type to be available.

The primary task roles are creator, assignee, and reviewer. A task creator creates and assigns tasks to task assignees. These assignees, in turn, sign, complete, or return tasks. You can assign tasks to multiple users or to a single group. After a task assignee completes a task, a task reviewer may be required to review the task. A review is required when the completion method is set to "Complete pending review" in the task template.

About using tasks with a versioned document

You can create and work with tasks that apply to documents in version control. However, version control does affect the task process.

A task always applies to the most current version of a document. When a task assignee opens a task to process it, the most current version of the document appears. Additionally, when you create and work with tasks for documents in version control, the following statements apply.

- If an incomplete task was created on a version of the document that is not the most current, the following message appears in the Tasks pane: "Task created on another version of this document." If needed, a user can view an earlier version of the document, but the task applies to and can only be completed for the current version.
- To view what the document looked like when the task was completed, select Open completed version in the Tasks pane.
- If you check out a document that has incomplete tasks and you are not the creator, assignee or reviewer for any of them, the following message is displayed: "Other users have incomplete tasks associated with the selected documents." You can continue to check out the document or you can cancel the check out action. Regardless of the action taken, the tasks remain incomplete.
- When a task assignee signs a document, the assignee's digital signature applies only to the current document version and not subsequent versions. When you check out a document that has been digitally signed, the following message appears: "The current version of this document is digitally signed. The signatures will not apply to any subsequent versions." You can continue to check out the document, or you can cancel the check out action.

Create Tasks

What is a task series level?

Task series levels enable you to specify an order to complete a series of sequential tasks.

Each level in a series represents a single task. In a series, you can assign up to 10 levels. When task assignees complete the Level 1 task, Perceptive Content creates the Level 2 task. When task assignees complete the Level 2 task, Perceptive Content creates the Level 3 task, and so on. You can assign multiple users to each level and you can assign the same users to multiple levels. Only the users and groups assigned to the task template are available for assignment.

You can set levels in a task series as a hierarchy where an assignee at a higher level becomes an optional assignee for all prior levels and can complete the task at any time.

> Suppose, for example, that you work in an accounts payable (AP) department that requires two levels of signatures for invoices over a certain amount before the invoice is paid. To address this requirement, you can create a signature required task with two levels. You assign the AP team lead to the first level and AP manager to the second level. Once the team lead completes the signing task for an invoice, a new signing task for that invoice appears for the AP manager.

What is a task series hierarchy?

A task series allows you to accelerate task completion using a hierarchy.

Each level you create establishes the hierarchy for that series. The task series hierarchy starts with Level 1 and must contain at least two levels. The users you assign to a level are mandatory assignees. As you create additional levels, the users on these higher levels become optional task assignees for all prior levels. Any mandatory or optional assignee can complete a task.

When a mandatory user completes a task, the next task in the series appears. If an optional task assignee completes a task, that assignee's level in the hierarchy determines whether the next task in the series appears or if the series is complete. For example, when the top level assignee completes a task as an optional assignee, the task series is complete and no additional tasks appear. In addition, when an optional task assignee completes a task, the mandatory task for that user is also complete. When you create a task series hierarchy, you can assign levels to users only and each level must contain unique users.

Create a signing task

To create and assign a signature required task for a document, complete the following steps.

1. Open the document for which you want to create a signing task.
2. In **ImageNowViewer**, click **View > Tasks**.
3. On the **Tasks** toolbar, right-click the **New signing task** button and select the signing task template you want.
4. In the **New Task** dialog box, on the **Assignments** tab, assign the signing task to one or more users or to a group.
5. On the **Assignment** tab, under **Location**, select one of the following locations to place the task:
   - **Document**. Creates a task for a document. This is the only available option for non-raster images, such as a Word documents.
   - **Page with a visual representation**. Creates a task, along with a visual representation, for a page in a document.
6. In the **Start date** box, set the start date for the task.
7. In the **Due date** box, set the due date.
8. On the **Options** tab, set the task options.
9. Click **OK**.
10. Optional. In the confirmation dialog box, click **OK** and drag the visual representation to the location you want on the document. The dialog box appears when you select **Page with a visual representation** under **Location**.

Create a document deficiency task

To create and assign a new document deficiency task for a document or folder, complete the following steps.

1. Open the document or folder.
2. In **ImageNowViewer**, click **View > Toolbars > Tasks**.
3. On the **Tasks** toolbar, right-click the **New document deficiency task** button and select the document deficiency task template you want.
4. In the **New Task** dialog box, on the **Assignment** tab, click **Add Users** or **Add Group**.
5. In the **Select Users and Groups** dialog box, complete the following substeps.
   1. To add a user, on the **Users** tab, search for and select a user and click **Add**.
   2. To add a group, on the **Groups** tab, search for and select a group and click **Add**.
   3. Add as many users or groups as necessary.
   4. Click **OK**.

6. To conduct additional task assignment procedures, on the **Assignment tab**, perform the following substeps.
   1. Optional. To assign additional task levels, click the **Add Level** tab or the **PLUS SIGN** (+) and then select and add users or a group.

      Note: To add an additional level, clear the individual task check box, if it is selected. When you add an additional level, a single task is created for all task assignees on that level.

   2. To create a task that is created and assigned to each user or group member, select the **Create an individual task for each user or group member** check box. When you do not select this option, a single task is created and assigned to all users.

      Note: When you create a task for the All Users group, this option is ignored and only a single task is created.

   3. Optional. To create a user task series based on hierarchy, select the **Set series as a hierarchy** check box and click **Add Users**.
   4. Repeat the previous substeps to create additional levels. A task series hierarchy must contain at least two levels. You can create a maximum of ten levels.

   Note: When you set the task series to a hierarchy, a single task is created for all task assignees on that level.

   As you add levels, the tab name displays as Level <x>, where <x> is a placeholder for the level number. If only a single user is on the task template Assignment List, that user displays on the Level 1 tab by default.
7. In the **Details** section of the **New Task** dialog box, under **Location**, select one of the following locations:
   - **Folder**- Create a task for a folder.
   - **Document** - Create a task for a document.
   - **Page without a visual representation** - Create a task for a page in a document with no visual representation.
   - **Page with a visual representation** - Create a task, along with a visual representation, for a page in a document.
   1. In the **Start date** box, set the start date for the task.
   2. In the **Due date** box, set the due date.
8. On the **Options** tab, perform the following substeps:
   1. Optional. Under **General**, select the **Expedite this task** check box to present the task to the assignee first when starting automatic task processing.
   2. In the **Instructions** box, type the instructions you want task assignees to see.
   3. In the **Comments** box, type your comments.

      Comments appear in the History box of a task and are not modifiable.
   4. Optional. Under **Workflow**, in the **Send to queue** list, select the queue you want to send

documents or folders to after tasks are assigned to the associated documents or folders.

The queues available in the **Sent to queue** list are those queues for which you have the Add privilege.

5. Optional. Select the **Send folder instead of document** check box to send folders to a workflow queue after you assign a task to a document in the associated folders.

9. Click **OK**.
10. Optional. In the confirmation dialog box, click **OK** and then drag the visual representation to the location you want on the document.

    The dialog box appears when you select Page with a visual representation under Location.

Create a pointer task

To create a new pointer task for a document or folder, complete the following steps.

1. Open the document or folder for which you want to create a pointer task.
2. In **ImageNowViewer**, click **View > Tasks**.
3. On the **Tasks** toolbar, right-click the **New pointer task** button and select a pointer task template.
4. In the **New Task** dialog box, on the **Assignments** tab, assign the pointer task to one or more users or to a group.
5. On the **Assignment** tab, under **Location**, select one of the following locations to place the task.
    - **Folder**. Creates a task for a folder.
    - **Document**. Creates a task for a document.
    - **Page without a visual representation**. Creates a task for a page in a document with no visual representation.
    - **Page with a visual representation**. Creates a task, along with a visual representation, for a page in a document.
6. In the **Start date** box, set the start date for the task.
7. In the **Due date** box, set the due date.
8. On the **Options** tab, set the task options.
9. Click **OK**.
10. Optional. In the confirmation dialog box, click **OK** and drag the visual representation to the location you want on the document. The dialog box appears when you select **Page with a visual representation** under **Location**.

Work with Tasks

Open a task

To open a task and its associated document or folder, complete the following steps.

1. On the **Perceptive Content** toolbar, click the**Tasks** down arrow and click one of the following task views:
    - All Tasks

- My Assigned
- To Review
- Returned to Me
- Complete Pending Review
- Returned by Me
- Complete
- Canceled
- Invalid

2. In the search results grid, select the task.
3. In the **Explorer** toolbar, click the **Open** button.

Sign a task

To apply your digital signature in order to complete a signature required task, complete the following steps.

1. Open the task.
2. In the viewer, in the **Tasks** pane, in the **Reason** list, select a signing reason to indicate why you are signing a document.
3. In the **Tasks** pane, click **Sign**.
4. If prompted, in the **Digital Signature Authentication** dialog box, in the **Password** box, type your password and then click **OK**.

   If this is your first time signing a task, you are prompted to complete information for your digital ID.

Complete a task

To complete a pointer or document deficiency task assigned to you, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Tasks > My Assigned**.
2. Open the task you want to complete.
3. In the viewer, in the **Tasks** pane, in the **Reason** list, select an action reason.

   > **Note:** In the Reason list, None displays if an action reason is marked as not required in the task template.

4. In the **Tasks** pane, click **Complete**.

Return a task

You can return a task if you are unable to complete it or were assigned it in error. To return a task to the user who assigned it, complete the following steps.

1. Open the task you want to return.
2. To return the task to the task creator, in the viewer, in the **Tasks** pane, click **Return**.
3. In the **Return Task** dialog box, complete the following substeps.
   1. In the **Reason** list, select the reason you are returning the task.

2. Optional. In the **Comments** box, type any comments you want the task creator to see.
3. Click **OK**.

Reassign a task

You can reassign a task to users and groups associated with the respective task template in Management Console. When you reassign multiple tasks simultaneously, you can only reassign to users or groups that are associated with every task template referenced by the tasks in your selection. To assign a returned or assigned task to another user or group, complete the following steps.

1. Open the task.
2. In the **Tasks** pane toolbar, click the **Reassign** button.
3. In the **Reassign Task** dialog box, under **Users or Group**, select one of the following options.

Situation	Steps
Reassign a task to one or more user	1. Click **Add Users**. 2. In the **Select Users** dialog box, select one or more users and click **Add**. 3. Click **OK**.
Reassign a task to a group	1. Click **Add Group**. 2. In the **Select Group** dialog box, select a group. 3. Click **OK**.

4. Optional. To override the start or due date defined in a task template, under **Dates**, complete one or more of the following actions.
   - If reassigning one task, in the **Start date** box, set a start date for the task.
   - If reassigning one task, in the **Due date** box, set a task due date.
   - If reassigning multiple tasks, select the **Override start dates** check box and then set a start date.
   - If reassigning multiple tasks, select the **Override due dates** check box and then set a due date.
5. Click **OK**.

Modify a task

To modify an assigned, returned, cancelled, or completed task, complete the following steps.

1. Open the task.
2. In the **Tasks** pane toolbar, click the **Modify** button.
3. In the **Modify Task** dialog box, make your changes and click **OK**.

Cancel a task

When you cancel a task, you remove the task assignments but retain the task history. To cancel a task, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Tasks > My Assigned**.
2. Open the task you want to cancel.
3. In the **Tasks** pane grid, right-click the task you want to cancel and click **Cancel**.
4. In the **Cancel Task** dialog box, to cancel a task and retain the task history, click **Yes**.

Delete a task

When you delete a task, you remove all task assignments and related history. To delete a task, complete the following steps.

1. Open the task.
2. In the **Tasks** pane grid, right-click the task you want to delete and then click **Delete**.
3. In the **Delete Task** confirmation dialog box, click **Yes**.

Skip a task

To skip processing a specific task in the My Assigned tasks view, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Tasks** > **My Assigned**.
2. Open a task.
3. In the viewer, in the **Tasks** pane, click **Skip**.
4. Optional. To view and process skipped tasks, in the **Views** pane, under **Tasks**, click **My Assigned**.

Reset a skipped task

To reset the skipped tasks in the All Tasks and My Assigned views, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Tasks > My Assigned**.
2. In the search results grid, perform one of the following actions:
   - To reset specific tasks in this view, press `CTRL`, select the tasks you want to reset and then click **Reset Skipped Tasks**.
   - To reset all of the skipped tasks in this view, right-click and click **Reset All Skipped Tasks**.

Add a comment to a task

To add a text comment to a task, complete the following steps.

1. Open the task.
2. In the viewer, in the **Tasks** pane, under **Comments**, click **Add**.
3. In the **Task Comments** dialog box, in the **Enter** text box, type the comments you want and click **Add**.

   Comments appear in the History box and are not modifiable.

4. Click **Close**.

Open completed version of a task

When you open the completed version of a task associated with a document in version control, the system displays the completed task and the version of the document in which the task was completed. To open the completed task, complete the following steps.

1. Open the document or folder associated with the task.
2. In the **Tasks** pane grid, right-click the completed task you want to open and then click **Open completed version**.

Create an Out of Office event

To create an Out of Office event, complete the following steps.

1. On the **Perceptive Content** toolbar, on the **Settings** menu, click **Out of Office**.
2. In the **Out of Office New Event** dialog box, specify the following information for your Out of Office event.
   - In the **Begin date** box, specify the date and time you want your Out of Office event to start. The default begin date is the current date and time.
   - In the **End date** box, specify the date and time you want your Out of Office event to end, or leave the box blank if you do not know the end date.

     Note:
     If you leave the box blank, you must disable the event to begin processing items again.

   - In the **Reason** box, select the reason for your Out of Office event.
   - Optional. In the **Delegate User** box, select the user who will serve as the delegate task assignee.
   - Optional. In the **Comments** box, enter any comments about the Out of Office event.
3. Click **OK**.

What is an approval task?

An approval task is a task type that Retention Policy Manager automatically generates for all approvers assigned within a retention policy. An approval task enables you to approve disposition actions such as destruction, offline transfer, or accession.

Retention Policy Manager assigns approval tasks to system-generated folders containing shortcuts to documents. A task assigned to a system-generated folder applies to all shortcuts within the folder.

Retention Policy Manager also assigns approval tasks at the record and record folder levels. An approval task applies to the contents of the record folder. If a record is located directly under a category, an approval task is assigned directly to the record.

Approval task templates for retention approvals are created the first time a retention policy is created within the scope of a department. Individual task templates are created for each of the possible retention approval types.

- Destroy
- Retain Permanent
- Transfer Online
- Transfer Offline
- Accession
- Next Phase

An approver is a user or group member who must approve the disposition action set in a policy before that action can occur. When the retention period ends, Retention Policy Manager creates an approval task and associates that task with the set of items that are ready for approval. After creating the task, Retention Policy Manager assigns that task to the approver. If multiple approvers are defined, then Retention Policy Manager assigns an individual task to each user or group member. To streamline the approval process, Retention Policy Manager sends email notifications to all approvers. A notification includes a link to the approval task and any instructions entered by the policy creator. After an approver processes an approval task, the system deletes the task.

Process an approval task

To approve the disposition action for items that fall under a retention policy, complete the following steps.

1. Open the item with the associated approval task.
2. To verify the disposition action and approver instructions, in the **Tasks** pane, review the **Instructions** field.
3. Optional. To add comments to the task, in the **Tasks** pane, under **Comments**, click **Add** and complete the following substeps.
   1. In the **Task Comments** dialog box, in the **Enter text** box, type the comments you want and click **Add**.

      Comments appear in the **History** box and are not modifiable.
   2. Click **Close**.
4. Optional. To return the task, click **Return**.
5. To approve the disposition action for one or more documents associated with the approval task, or for individual records and record folders, complete one of the following steps.

Situation	Step
Documents	• In the **Approval Request** pane, click **Approve All**.
Records	• In the **Approval Request** pane, click **Approve**.

Situation	Step
Record folders	• In the **Approval Request** pane, click **Approve**.

Search for approval tasks

To search for sets of items with an approval task, complete one of the following procedures.

1. In the **Views** pane, select the view to use as a basis for your search.
2. In the right pane, on the **Search** tab, click the **Add** button.
3. In the **Add Condition** dialog box, complete one of the following actions.

Situation	Steps
Search for items pending approval	1. In the **Constrain by** list, select **User**. 2. In the **Type** list, select the type of search to perform. 3. In the **Field** list, select **Pending approval by**. 4. In the **Operator** list, select an operator to use when comparing the field and the value. 5. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 6. In the **Value** box, select or type a user name. 7. Click **OK**.
Search for approval tasks	1. In the **Add Condition** dialog box, in the **Constrain by** list, select **Task** property. 2. In the **Type** list, select the type of search to perform. 3. In the **Field** list, select **Task Type**. 4. In the **Operator** list, select **is equal to**. 5. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan. 6. In the **Value** box, select **Approval**. 7. Click **OK**.

Note: If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

4. Optional. To add another search condition, repeat the previous substeps.
5. Click the **Go** button.

Skip an approval task

When you skip an approval task in your My Assigned task view list, the task does not reappear for the remainder of your session. To skip an approval task during task processing, complete the following steps.

1. Open the approval task.
2. On the **Tasks** tab, in the **Approval Request** pane, click **Skip**.
   The options you have set for task processing determine which tasks, if any, appear automatically.
3. To verify your **Task Processing** options, perform the following optional substeps.
   1. On the **Perceptive Content** toolbar, click **Settings > Options**.
   2. In the **Options** dialog box, in the left pane, click **Tasks**.
   3. In the right pane, under **Task Processing**, verify the options you have set.

Return an approval task

To return an approval task, complete the following steps.

1. Open the approval task.
2. On the **Tasks** tab, in the **Approval Request** pane, click **Return to return the task**.
3. In the **Return Task** dialog box, complete the following substeps.
   1. In the **Reason** list, verify that **Approval Process** appears.
   2. Optional. In the **Comments** box, type any comments you want the task creator to see.
4. Click **OK**.

Delete an approval task

If you delete an approval task, the items associated with that task are not deleted, but you cannot view that task and the associated item in a viewer. To maintain the ability to approve or deny the disposition action for all items in the document or record set, do not delete an approval task. To delete an approval task, complete the following steps.

1. Open the approval task.
2. In the **Tasks** pane toolbar, click the **Delete** button.
3. To delete the task and its related history, in the **Delete Task** confirmation dialog box, click **Yes**.

What are Folder Viewer tasks?

In Folder Viewer, you can create folders and document tasks to optimize document control functionality.

When you create tasks from Folder Viewer, task assignees are able to view their tasks in the context of a folder. You can create document deficiency and pointer tasks for folders. In addition to folder tasks, you can create tasks for documents in the folder.

Task assignees can view document tasks in the context of the folder if the task is associated with the folder and document. You can create document deficiency, pointer, and signature required tasks for documents.

You set the following Folder Viewer options.

- Launch a new viewer when opening a folder.
- Open the documents in this folder in an associated viewer.
- Dock the associated viewer.

Note that when creating folder and document tasks, the location options available are based on the options selected in the task template you are using.

> As an illustration of a folder task, the admissions department at YUR University creates a folder for each student applicant and routes the student folder to admissions counselors for review. A complete student folder contains the following documents: application letter, counselor evaluation, transcript, and personal statement. When reviewing the documents for applicant Jane Smith's folder in Folder Viewer, the admissions counselor discovers that the application letter is missing. The admissions counselor creates a document deficiency task for the Jane Smith folder, and routes the folder back to the appropriate queue so that the application letter can be added to the folder.

> As an illustration of a document task with folder associations, the Medical Records department at CM Hospital creates folder charts for each patient that visits the hospital. Elle Walker is responsible for reviewing patient charts after an outpatient visit or an inpatient discharge to identify deficiencies. Elle is currently reviewing the chart for patient Z1602037. Based on the Folder Viewer options Elle has selected, patient Z160237's documents opens in a docked viewer. Elle discovers that patient Z160237's chart contains an unsigned physician order. In Folder Viewer, Elle creates a new signing task for the unsigned order. Because Elle creates the task on the document in the Folder Viewer, the signing task is associated with the folder and the document. When the physician of record opens the signing task, it opens in Folder Viewer. The physician is able to review patient Z160237's other documents as needed, and signs the signing task.

Create a folder task

You can create and assign document deficiency and pointer tasks for an entire folder. To create folder tasks, complete the following steps.

1. Open the folder.
2. In **Folder Viewer**, click **View > Toolbars > Tasks**.
3. On the **Tasks** toolbar, perform the following substeps:
    1. Right-click the **New pointer task** or the **New document deficiency task** button to display the

available task templates.
    2. In the template list, click the template you want to use for task creation.
    3. In the **New Task** dialog box, set your options on the **Assignment** and **Options** tabs and then click **OK**.
4. Click **OK**.
5. Click **File > Close**.

Create a document task with a folder association

You can create tasks for the documents in a folder. To create a document task with a folder association, complete the following procedures.

Prerequisite This procedure requires the Task Template > Create privilege.

1. Open the folder.
2. In **Folder Viewer**, click **File > Options**.
3. In the **Folder Viewer** dialog box, under **General**, select one or both of the following options:
    - **Open the documents in this folder in an associated viewer** check box to open folder documents in **ImageNowViewer**.
    - Optional. Dock the associated viewer check box to attach the viewer to **Folder Viewer**.

    This feature is available only when you select the **Open the documents in this folder in an associated viewer** check box.
4. On the **Documents** tab, double-click the document you want to create a task for.

    The document opens in the specified method.
5. Optional. To create a task for a specific page in the document, on the **Navigate** toolbar, in the **Page Selection** box, select or type a page number.

    Note: If you are creating a task that has a page location, verify that the page that is displayed is the page where you want to create the task.
6. On the **Tasks**toolbar, perform the following substeps:
    1. Right-click the **New signing task, New document deficiency task, or New pointer task** button to display the available task templates.
    2. In the template list, click the template you want to use for task creation.
    3. In the **New Task** dialog box, set your options on the **Assignment** and **Options** tabs and then click **OK**.
7. Optional. To view the tasks you have created in relation to the folder, click the **Tasks** tab and in the **Views** box, select **All Tasks**.
8. Click **File > Close**.

Set My Assigned view task options

When you work with tasks in the My Assigned view, you set the startup and processing options. To set the My Assigned task view options, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Settings > Options**.
2. In the **Explorer Options** dialog box, in the left pane, click **Tasks**.
3. In the right pane, under **Task Startup**, in the **Start action** list, select one of the following options to set what tasks appear when you launch the My Assigned view.
   - To display a list of all tasks assigned to you, click **Show list**.
   - To open a task that is next due, click **Get next task due**.
   - To open a selected type of task that is next due, click **Get next task due of selected type** and, in the **Task type** list, select a task type.
   - To open the oldest task, click **Get oldest task**.
   - To open the oldest task of a selected type of task, click **Get oldest task of selected type** and then, in the **Task type** list, select the task type you want.
4. To set the next action processing options in the **My Assigned** view, under **Task Processing**, complete one or more of the following actions.
   - To automatically open a task, select the **Automatically launch next task upon task completion** check box. When you select this option, in the **Next action** list, select a task action.
   - To process all the tasks associated with a folder or document before moving on to the next document or folder where a task is assigned, select the **Process all the tasks for the current folder or document** check box. Clear the check box to move to the next task in the task list without first completing all the tasks associated with the current folder or document.
5. To automatically view tasks you skip in the My Assigned view, under **Skipped Tasks**, select the **Revisit skipped tasks after all other tasks have been completed** check box.
6. Click **OK**.

Revisit skipped tasks

To have skipped tasks open automatically in the My Assigned view after you complete all other tasks, complete the following steps.

1. On the **Perceptive Content** toolbar, click **Options** or **Settings > Options**.
2. In the dialog box that appears, in the left pane, click **Tasks**.
3. In the right pane, under **Skipped Tasks**, select the **Revisit skipped tasks after all other tasks have been completed** check box.
4. Click **OK**.

Set Tasks pane view

To set the view that appears in the current viewer session for tasks, complete the following steps.

1. Open the task.
2. In the **Tasks** pane, on the **Tasks** pane toolbar, in the **Views** box, select one of the following views:

- `All Tasks`. Displays all tasks associated with a document or folder that you have a role or privilege for.
- `My Assigned`. Displays tasks assigned to you.
- `To Review`. Displays tasks you need to review.
- `Returned to Me`. Displays tasks you created that have been returned to you by an assignee.
- `Complete Pending Review`. Displays tasks you completed that still need to be reviewed.
- `Returned by Me`. Displays tasks assigned to you that you returned to the task creator.
- `Complete`. Displays tasks you completed.
- `Canceled`. Displays tasks assigned to you that have been canceled.
- `Invalid`. Displays tasks assigned to you that are invalid.

Work with folders

What is a folder?

Folders allow you to group documents and folders together according to a logic that you and the administrator define.

While documents continue to be grouped or categorized by document keys and properties, folders provide another way for you to group or filter on documents. Based on a folder type set up by a user with folder management privileges, you can create a new folder. When you locate the documents that you want to move to a folder, you can then move them to a folder of a certain folder type. You can also add documents to a folder at capture time.

One advantage of the folder design is that folder types can contain criteria and other metadata, such as assigned document types and other customized properties, which assist users in their review of folders and documents grouped by folder.

A folder hierarchy establishes the structure of your folders as well. The hierarchy establishes types of folders you can add to a folder. For example, an accounts payable clerk is given privileges to access the Accounts Payable folder. This folder contains a separate subfolder for each vendor from whom the clerk typically receives invoices.

> Suppose a Human Resources clerk hires a new employee. Because the new employee does not already have a folder in the Human Resources folder, the clerk creates a new folder for the employee using the New Hire folder type. The New Hire folder type provides a template of the folder types and document types that the employee's folder can contain. In this case, the folder type requires that the application document types be included in Acme Corporation’s folder.

You can search for a folder based on its properties. In Folder Viewer, you can perform various actions for folders and their contents. For example, in Folder Viewer, you can modify the general properties and custom properties, and work with documents as you normally would using the options provided in the Actions pane for documents that appear in all viewing modes. Folders are commonly used for healthcare patient charts, student folders, financial claim packages, and document management users who like to keep related items together in a folder-like context. Folders can contain folders, documents, shortcuts to documents in other folders, and shortcuts to folders in other folders. When you open a folder, the folder contents appear in a grid similar to ImageNowExplorer.

Folder security follows the model for using all features. Users can perform functions to which they are assigned through privileges. To work with folders, you will need one or more folder-specific privileges.

About moving folder content

In Perceptive Content you can move documents, shortcuts, and folders to new folder locations in the same drawer or in a different drawer.

When you move content from one drawer to another, the original drawer is called the "source" drawer and the new drawer is called the "target" drawer. To move a document, folder, or shortcut within your system, you must specify a new drawer or folder to store the document.

When you move a folder, you also move all subfolders, documents, and shortcuts within the folder's hierarchy. Depending on the amount of content in the folder, the move operation might take a few minutes to complete. You cannot move content in a folder hierarchy that another user is moving until the move operation is complete. When you move a shortcut, you do not affect the folder location of the document or folder referenced by the shortcut. To move a document under version control, you must check out the document. Additionally, the source document must not be under a hold.

Modify a folder's type

Modifications from this procedure do not affect any of the folder's subfolders. To modify a folder’s type in Folder Viewer, complete the following steps.

1. Open the folder.
2. In **Folder Viewer**, in the **Properties** pane, select the new folder type from the **Type** list.
3. Close the folder.

Use annotations

What is an annotation?

An annotation is a graphic that you can add anywhere on an item in Perceptive Content to show markups or comments without affecting the original image.

For example, you can express your review of an item by stamping it approved, signing off on it using a pen, or adding a check mark. You can also add sticky notes to add small notes to an item object, either inline or as a global comment on the item. In the ImageNow Client, you can add annotations on the following file types: TIFF, BMP, and JPG. Not all compression formats are supported.

Each annotation requires an annotation template that is created and customized for any supported annotation type. Security options are also available based on the template. For example, you can create a Stamp template with the following text: Received by Accounts Payable. Your administrator can set the template security so that only users in the Accounts Payable group can use, modify, or delete annotations created using that Stamp template. If your administrator does not grant users in the Human Resources access to view stamps created using that stamp template, those users cannot view, modify, or delete this annotation. Contact your administrator if you need new annotation templates.

You cannot conduct a search based on the content of an annotation, such as Stamp or Sticky Note annotations. However, you can search for an item based on the contents of the item's Notes pane.

Add an annotation overview

To apply an annotation based on an existing annotation template to an item, complete any of the following procedures.

- Add a check annotation.
- Add a highlight annotation.
- Add a line annotation.
- Add a pen annotation.
- Add a rectangle annotation.
- Add a stamp annotation.
- Add a sticky note annotation.
- Add a text annotation.
- Add a URL annotation.
- Add an arrow annotation.
- Add an oval annotation.
- In **ImageNow Client**, Add an image, sound, or video as an annotation.

Add a check annotation

The Check button annotation lets you place a check mark on an item image. To add a check annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Check** button and then select a check annotation from the list.
3. Click the item image where you want the check mark to be placed.

Add a highlight annotation

The Highlight button annotation lets you highlight an area on an item image. To add a highlight annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Highlight** button and then select a highlight annotation from the list.
3. Click and hold the mouse button on the item image where you want to start highlighting.

4. While holding the mouse button, drag the mouse to select the area you want to highlight and then release the mouse button.

Add a line annotation

The Line button annotation lets you place a line on an item image. To add a line annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Line** button and then select a line annotation from the list.
3. Click and hold the mouse button on the item image where you want to start the line and, while holding the mouse button, draw a line, and then release the mouse button.

Add a pen annotation

The Pen button annotation enables you to draw on an item image. To add a pen annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Pen** button and then select a pen annotation from the list.
3. Click the mouse button on the item image where you want to start the pen image and, while holding the mouse button, move the mouse to create the drawing.
4. Release the mouse button when you are finished.

Add a rectangle annotation

The Rectangle button annotation lets you place a rectangle on an item image. The rectangle annotation can appear hollow or filled, depending on the appearance defined in the annotation template. To add a rectangle annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Rectangle** button and then select a rectangle annotation from the list.
3. Click and hold the mouse button on the item image where you want to start the rectangle and, while holding the mouse button, draw the rectangle.
4. Release the mouse button at the endpoint of the rectangle.

Add a stamp annotation

The Stamp button annotation lets you stamp predefined (Approved, Confidential, Rejected) or custom messages on item images. To add a stamp annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Stamp** button and then select a stamp

annotation from the list.

3. Click the item image where you want the stamp to appear.

Add a sticky note annotation

The Sticky Note button annotation lets you add small notes to item images. To add a sticky note annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, click the **Sticky Note** button.
3. Click the item image where you want the sticky note to appear.
4. In the **Sticky Note** dialog box, type your text and click **Add**.
   After you add text, you cannot change the sticky note text.
5. Click **Close**.

Add a text annotation

The Text button annotation lets you place text on item images. To add a text annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Text** button and then select a text annotation from the list.
3. Click the item image where you want the text to be placed.
4. In the **Add Text** dialog box, type your text message and then click **OK**.

Add a URL annotation

The URL button annotation lets you place a link to a URL address on an item image. To add a URL annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **URL** button and then select a URL annotation from the list.
3. Click the item image.
4. If you are prompted to do so, in the **URL** dialog box, complete the following substeps.
   1. In **Address**, type the web address.
   2. In **Text to Display**, type the text you want to appear on the item image.
   3. Click **OK**.

Add an arrow annotation

The Arrow button annotation lets you place an arrow on an item image. To add an arrow annotation, complete the following steps.

1. Open an item.

2. In the viewer, on the **Annotations** toolbar, right-click the **Arrow** button and then select an arrow annotation from the list.
3. Click and hold the mouse button on the item image where you want to place the end of the arrow.
4. While holding the mouse button, draw a line towards the area of the item to which you want the arrow to point.
5. Release the mouse button.

Add an oval annotation

The Oval button annotation lets you place an oval on an item image. The oval annotation can appear hollow or filled, depending on the appearance defined in the annotation template. To create an oval annotation, complete the following steps.

1. Open an item.
2. In the viewer, on the **Annotations** toolbar, right-click the **Oval** button and then select an oval annotation from the list.
3. Click and hold the mouse button on the item image where you want to start the oval and, while holding the mouse button, draw the oval.
4. Release the mouse button.

Add an image, sound, or video as an annotation

The OLE annotation uses the Microsoft OLE (Object Linking Embedding) technology to insert objects as annotations. This technology lets you insert images, audio files, video files with audio, or any other object supported by your system. To insert an OLE Item into an item as an annotation by creating a new object or inserting an existing object, complete the following steps.

This annotation type is only available in ImageNow Client.

1. Open the item.
2. In the viewer, on the **Annotation** toolbar, click the **OLE** button.
3. Click the mouse button on the item image where you want to insert an object and then do one of the following actions:

Situation	Steps
Insert an existing object	1. In the **Insert Object** dialog box, select the **Create from File** option. 2. Use the **Browse** button to locate the object you want to insert. 3. Optional. Select the **Link** check box to create a shortcut to the file so changes made outside of Perceptive Content are reflected in the item.

Situation	Steps
Create and insert an object	1. In the **Insert Object** dialog box, select the **Create New** option. 2. Select the type of object you want to insert from the **Object Type** list.

4. Choose how you want the OLE item to display:
   - To display the item as an icon, select the **Display As Icon** check box.
   - Remove the check box selection to display an icon-sized version of the OLE item.
   - Change the icon by clicking **Change Icon**. In the **Change Icon** dialog box, for the icon, select **Current**, **Default**, or **Browse** to the icon of your choice, then click **OK**.
5. Click **OK**.

   If you are creating a new object, the associated application of the object you selected starts.
6. If creating a new object, do the following substeps:
   1. In the associated application, create the object.
   2. Close the application to create the object.

      You do not need to save the object in the associated application to create the OLE annotation.

Result The object appears as an icon in the item. You can view the contents of the OLE annotation by double-clicking the image, which opens the object in its associated application.

Apply annotations to a document in version control

Using version control allows you to manage changes to a document during the content authoring process while ensuring the integrity of your documents at all times. To apply annotations to a document in version control, complete the following steps.

1. Open the document.
2. In **ImageNowViewer**, in the **Actions** pane, under **Version Control**, click **Check Out**.
3. In the **Check Out** dialog box, add any comments.
4. If the **Edit locally check box** is enabled, leave it blank and then click **OK**.
5. To edit the image, on the **Annotations** toolbar, add an annotation.
6. In the **Actions** pane, under **Version Control**, click **Check In**.
7. In the **Check In** dialog box, add any comments, click the **More** button to verify that the **Mark as Private** check box is clear, and then click **OK**.

Hide annotations

Hiding annotations enables you to view the original unmarked item without deleting the annotations. To hide annotations, complete the following steps.

Closing the item with the annotations hidden does not permanently hide the annotations. Annotations show automatically when reopening the item.

1. Open the item.
2. In the viewer, click **Annotation > View** and then do one of the following actions:
   - To hide annotations of a specific type, clear the corresponding check box.
   - To hide all annotations, clear the **All** check box.

View annotation properties

To view annotation properties, complete the following steps.

1. Open the item.
2. In the viewer, right-click the annotation and select **Properties**.

Move or resize an annotation

To move or resize an annotation, complete the following steps.

The stamp, text, and sticky note annotations cannot be resized.

1. Open the item.
2. To move an annotation, complete the following substeps.
   1. On the item image, click and hold the mouse button on the selected annotation, drag the annotation to the location you want, and then release the mouse button.
   2. Click outside of the annotation to deselect it.
3. To resize an annotation, complete the following substeps.
   1. On an item image, click the annotation you want to resize.
   2. Click and hold the mouse button on one of the black squares, drag to resize the annotation as needed, and then release the mouse button.
   3. Click outside of the annotation to deselect it.

Delete an annotation

To delete an annotation, complete the following steps.

1. Open the item.
2. In the viewer, on the **Annotations** toolbar, click the **Select Annotation** button.

3. Choose one of the following options:

Situation	Steps
Delete a single annotation	• Right-click the annotation and select **Delete**.
Delete multiple annotations	1. Use CTRL+click to select multiple annotations. 2. Right-click and select **Delete**.
Delete all annotations	1. Click **Annotation > Select All**. 2. Right-click and select **Delete**.

4. In the confirmation dialog box, click **Yes**.

Stamp annotation codes

You can insert the following predetermined codes in a stamp or text annotation to represent current time, dates, and user attributes. For example, the default code "% m/%d/%y" displays the current date (month/day/year).

The following codes are available:

Code	Description	Example
%%	Percent sign	%
%a	Abbreviated weekday name	FRI
%A	Full weekday name	FRIDAY
%b	Abbreviated month name	OCT
%B	Full month name	OCTOBER
%c	Date and time representation appropriate for locale	10/18/01 10:15:45
%d	Day of month as decimal number (01-31)	18
%H	Hour in 24-hour format (00-23)	22
%I	Hour in 12-hour format (01-12)	10

Code	Description	Example
%j	Day of year as decimal number (001-366)	245
%M	Minute as decimal number (00-59)	02
%m	Month as decimal number (00-12)	05
%m/%d/%y	Mm/ dd/ yy	10/18/01
%m/%d/%Y	Mm/ dd/ yyyy	10/18/2001
%p	Current locales AM/PM indicator for 12-hour clock	AM
%S	Second as decimal number (00-59)	45
%U	Week of year as decimal number, with Sunday as first date of week (00-51)	19
%W	Week of year as decimal number, with Monday as first date of week (00-51)	20
%w	Weekday as decimal number (0-6; Sunday is 0)	5
%x	Date representation for current locale	10/18/01
d %X	Time representation for current locale	10:15:45
%Y	Year with century, as decimal number	2001
%y	Year without century, as decimal number (00-99)	01
%z or %Z	Time-zone name; no characters if	CENTRAL STANDARD TIME

Code	Description	Example
	time zone is unknown	
<user.d>	User description	plan assessment coord
<user.e>	User e-mail	Bwhite@conacm.xyz
<user.eid>	An identifier that logs the user in to a separate system, such as a business application	bwhite77
<user.f>	User fax number	999-000-0000
<user.fn>	User first name	bob
<user.l>	User location	san rafael
<user.ln>	User last name	white
<user.m>	User mobile number	999-000-0000
<user.o>	User organization	consolidated acme
<user.ou>	User organizational unit	budgeting & Planning
<user.p>	User prefix	Dr.
<user.pa>	User pager number	999-000-0000
<user.ph>	User phone number	999-000-0000
<user.s>	User suffix	esq.
<user.t>	User title	vice president Planning
<user>	User name	Bob White

Modify an annotation instance

You can modify the content and appearance of most annotations, except Sticky Note and OLE annotations. To modify an annotation instance, complete the following steps.

1. Open the item.
2. Right-click an annotation that appears on an item image and click **Properties**.
3. In the **Annotation** dialog box, select **Appearance** from the left pane, and modify the available options,

depending on the annotation type.

> **Note:** When you select **Automatic Color** when modifying an annotation instance the system applies black to the color property being modified.

4. To modify the content, in the left pane, select **Content**.
5. Modify any of the font options applicable.
6. Click **OK**.
7. Optional. To edit a Sticky Note, double-click the sticky note, in the **Sticky Note** dialog box, type your text and click **Add**.

Redact information

What is redaction?

A redaction is a solid, rectangular graphic that covers a portion of an item page and provides permanent masking of sensitive, private, or confidential information in an item.

After you add a redaction to a page and generate a redacted item, the system replaces the information that you designate with a solid mask that you cannot move, alter, or hide. For example, you can redact a tax identification number or a social security number from a page so the information is no longer available in the redacted item.

The redaction options available to you are based on annotation templates that your administrator defines with the Redaction annotation type. In ImageNow Client, you can add a redaction to an item page stored in one of the following file formats: TIFF, BMP, and JPG. Not all compression formats are supported.

Your organization's business processes determine if you maintain both the original and redacted items in your system. You can, for example, make the redacted item more available while storing the original item in a highly secured area of your system. This enables your organization to maintain the original item as a legal record for auditing, assessment, or litigation purposes. You can place the redacted item in a separate container from the original item or assign a different Type value to the redacted item.

Another option is to maintain only the redacted item in Perceptive Content. When you generate a redacted item, and you save the redacted item without changing its properties, the system automatically appends the redacted item to the original item. You can then delete any pages from the combined item, such as the pages without redactions, that you do not want to keep in your system.

Add a redaction to a page

To add a redaction to a document page and generate a redacted document, complete the following steps.

You can only perform this procedure on a document page in TIFF, BMP, or JPG format. Not all compression formats are supported.

1. Open the document to which you want to add a redaction.
2. On the **Annotations** toolbar, right-click the **Redact** button and select the type of redaction you want to add to the page.
3. To mask information on the page with a redact rectangle, perform the following substeps.

1. Beginning at one corner of the area where you want to start the redact rectangle, drag a rectangle.
2. Release the mouse button at the endpoint of the redact rectangle.
3. Repeat the previous steps to add additional redact rectangles where needed.

4. Click **File > Generate Redacted Document**.
5. In the **Generate Redacted Document** dialog box, assign the properties for the redacted document, and click **OK**.

Work with digital signatures

What is a digital signature?

A digital signature is an electronic certification that represents the act of signing the document using the Perceptive Content interface.

Digital signatures play an important role in moving processing from paper to electronic systems. A digital signature is usually a cryptographic signature. Although you use digital signatures to electronically replace a handwritten signature, they are not images of handwritten signatures. According to the E-SIGN Act of 2000, digital signatures are legally binding as long as they meet the provisions outlined in the laws governing their use.

Digital signatures provide four benefits for documents:

- Authenticity, which provides proof of the identity of the individual who signs a document.
- Data integrity, which ensures that the document has not been altered by a third-party.
- Non-repudiation, which prevents the signer of a document from later denying association with that document.
- Confidentiality, which ensures that data is only readable to the sender and the intended recipient, providing protection from third party snooping.

Digital signature functionality is separately purchased and licensed as part of the Document Control Suite. Digitally signing a document requires that it be checked in to version control. Once signed, the document is made secure from alterations to the signed version. Signing a document entails entering a password, selecting a reason for the signature, and optionally placing one or more visual representations of the signature on the document. Perceptive Content automatically generates a Digital ID for the signing user if none exists. Otherwise, it uses the existing Digital ID to encrypt the digital signature.

After a document has been digitally signed, any user who can access the document can verify the signature. When a document is opened, the signature is automatically authenticated against the stored hash value of the document that was generated at the time of signing. Verifying a digitally signed document recalculates the document hash value and compares it with the signature to get real-time status. If the recalculated hash value matches the signature, the signature is validated; if the hash value does not match the signature (which could indicate tampering with the document outside of Perceptive Content), the signature is marked invalid.

A document can have multiple valid signatures by a signer, and you can place as many visual representations of your signature on the document as you like. However, visual representations are only supported on images on which annotations are supported (TIFF, JPEG, and BMP).

Sign a document

While you can apply a digital signature annotation to any image file, you can digitally sign documents of any file type. To sign a document, complete the following steps.

1. Open the document.
2. In **ImageNowViewer**, click **File > Digitally Sign**.
3. In the **Digital Signature Authentication** dialog box, complete one of the following actions.

Situation	Steps
If this is your first time signing a document	1. Enter and confirm a password. 2. Optional. In the **Password hint** box, enter a hint for your password. 3. Confirm your user profile information.
If this is not your first time signing a document	• In the **Password** box, enter your password.

> **Note:** If your system has been upgraded from a previous version of ImageNow to Perceptive Content 7.x, you must create a new Digital ID and password to apply digital signatures.

4. In the **Reason** list, select the reason you are signing this document and then click **OK**.

Automatically verify signatures

You can apply automatic verification of signatures to all documents that have a common drawer or document type. To activate automatic verification of signatures, complete the following steps.

Applying this setting to a large number of documents can occasionally slow performance of ImageNow Server.

1. Depending on which category of documents you want to affect, in **Management Console**, in the left pane, click **Drawers** or **Document Types**.
2. In the right pane, click the drawer or document type for which signatures will be automatically verified, and then click **Modify**.
3. Do one of the following actions:
   - In the **Drawer** dialog box, on the **Digital Signatures** tab, select the **Automatically verify signatures for this drawer** check box.
   - In the **Document Type** dialog box, on the **Digital Signatures** tab, select the **Automatically verify signatures for this document type** check box.
4. To specify how often the signatures are verified, in the **Verification interval** boxes, select the number and time unit and then click **OK**.
5. Optional. Repeat this procedure for any additional drawers or document types to which automatic signature verification must be applied.

Move a signature representation

To move a signature representation, complete the following steps.

1. Open the signed document.
2. On the **Annotations** toolbar, click the **Select Annotation** tool.
3. Locate the signature and drag it to its new location on the document.

Delete a digital signature representation

You can delete only signature representations that you created. Deleting a visual representation does not affect the signature status of the document. To delete a digital signature representation, complete the following steps.

1. Open the signed document.
2. On the **Annotations** toolbar, click the **Select Annotation** tool.
3. On the document image, right-click the signature representation and click **Delete**.
4. In the confirmation box, click **OK**.

Set digital signature time out

The time-out feature requires a user who digitally signed a document, but who did not log out before the specified time out value, to re-enter his or her digital signature password. The time out applies globally to all digital signatures. To set digital signature time out, complete the following steps.

1. In **Management Console**, in the left pane, click **Digital Signatures**.
2. On the **Digital Signatures** tab, under **Signing Password**, set the **Prompt user to enter password** option to **Once per session**.
3. In the **Password time out** list, select the amount of time to elapse between the last digital signature activity and timing out (which requires the user to re-enter his or her digital signature password).

   Note: The timeout value can range from **Never** (the default) to specific time values up to 60 minutes.

4. Repeat the previous step for the password time out list, which can have a different value.

Show a digital signature representation

To show a digital signature representation, complete the following step.

- In **ImageNowViewer**, click **Annotation > View > Digital Signatures**.

Void a digital signature

To void a digital signature applied to a document by yourself or another user, complete the following steps.

1. Open the document.
2. If the **Properties** pane is not visible, click **View > Digital Signatures**.

3. In the **Digital Signatures** pane, double-click the row that contains the digital signature you want to void.
4. In the **Digital Signature** dialog box, click **Void**, select a reason for voiding the digital signature, and then click **Close**.

Verify digital signatures

To verify a digital signature, complete the following steps.

1. Open the signed document.
2. Click **File > Properties**.
3. In the **Document Properties** dialog box, in the left pane, open **Version History** and click the version you want to verify.
4. On the **Digital Signatures** tab, do one of the following:
   - To verify all signatures on the selected version, click **Verify All.**
   - To verify a single signature, double-click the item in the list, and then, in the **Digital Signature** dialog box, click **Verify**.

   A message appears indicating that the signatures have been verified as of the current date. In addition, the status indicator for each invalid signature changes to .

View digital signature properties

To view digital signature properties, complete the following steps.

1. Open the signed document.
2. Click **View > Digital Signatures**.
3. In the **Digital Signatures** pane, double-click the signature.

Troubleshoot digital signatures

If you experience issues adding or viewing digital signatures in Perceptive Content, you can try any of the following possible resolutions.

I cannot sign or add a signature representation to a document

Cause	Resolution
The file type does not allow annotations.	You can add visual representation only to raster images, such as the TIFF, BMP, JPEG, GIF, and PNG image format.
The Digital Signature annotation button is not available.	Use the ImageNowViewer File menu to sign the document.

Cause	Resolution
Your Perceptive Content signing password is invalid.	Contact your Perceptive Content administrator to get this resolved.
The document is checked out.	Check the document in or ask the user who has the document checked out to check it in.

My signing password does not work

Cause	Resolution
If the password hint does not remind you, you need your password reset.	Contact your Perceptive Content administrator so he or she can Expire a Digital ID or Void a Digital ID.
When systems are upgraded from ImageNow 6.x to Perceptive Content 7.x and when patches for version 7.x are applied, the Digital IDs and passwords are not retained.	You must create a new Digital ID and password to sign a document.

The current version of a document I signed does not show my signature

Cause	Resolution
Each version of a document in version control is signed separately.	If you sign one version, only that version is signed. If you check out and check in that version, you are then working on the next version of the document. This version remains unsigned until you or other users sign it.

Modify content

Delete a page

Pages that you delete with this procedure cannot be recovered. To delete a page from an item, complete the following steps.

1. Open the item.
2. If the item is in version control, check it out.
3. In the viewer, click **View > Thumbnails**.
4. In the **Thumbnails** pane, right-click the page you want to delete and then click **Delete**.
5. In the **Delete Page** dialog box, click **Yes**.

Copy

Copy a page using a thumbnail

To copy a page from one item to another using a thumbnail, complete the following steps.

1. Open the item that contains the page you want to copy.
2. In the viewer, click **View > Thumbnails**.
3. In the **Thumbnails** pane, click on the page you want to copy and, in the **Thumbnails** pane toolbar, click the **Copy**button.
4. Open the item to which you want to copy the page. If the item is a document in version control, check it out.
5. In the **Thumbnails** pane, click the **Paste**button.
   You can move the page thumbnail to a different position in the document.
6. If applicable, check in any documents you checked out.

Move

Move a page

Items normally consist of one or more pages. You can move pages within the same item or move a page from one item to another. To move a page, complete the following steps.

1. Open the item.
2. If the item is a document in version control, check it out.
3. Complete one of the following actions, depending on the situation.

Situation	Steps
Move a page within the same item	• In the **Thumbnails** pane, drag the item page to the new position.
Move a page to another item	1. In the **Thumbnails** pane, right-click the page you want to move and select **Cut**. 2. Open the item to which you are moving the page. If the item is a document in version control, check it out. 3. Right-click in the **Thumbnails** pane and then click **Paste**.

4. If applicable, check in any documents you checked out.

Result When you move a page from one item to another, Perceptive Content do not remove the page from the first item until you paste it into the second item.

Share content

Export an item to a file

When you export an item using an output profile, the settings automatically appear for the export. You must modify or complete the settings manually. To export an item to a file, complete the following steps.

1. Open the item.
2. Click **File > Export**.
3. In the **Export** dialog box, under **General**, in the **Profile** list, select an output profile.
4. In the **Format** list, select one of the following output formats for the item.
   - **Individual files**
   - **Multi-page TIFF for each item**
   - **Single PDF**
5. To change or define the export destination, in **File Name**, click **Browse** and select the directory.
6. Under **Pages**, select which pages of the item to include in the output file.
7. Optional. Create a folder hierarchy for output files.
8. Optional. Define output content settings to change the settings inherited from the output profile.
9. Click **OK** to export the item.

Fax an item

If you have a configured fax output profile, you can fax items using the settings defined in the output profile. You can change these settings when faxing or enter them manually. To fax an item, complete the following steps.

1. Open the item.
2. Click **File > Fax**.
3. In the **Fax** dialog box, in **Profile**, select the appropriate output profile for the individual or group you want to fax the item.
4. Optional. Define fax settings for an output profile to change the settings inherited from the output profile.
5. Optional. Define output content settings to change the settings inherited from the output profile.
6. In the **Fax number** box, enter or change the fax number.
7. Under **Notifications**, in the **Email** box, type the email address of the individual or company to where you want to send a notification of a sent fax.

   The email address is remembered and displayed here the next time you send a fax.
8. Click **OK**.

Send documents from the client

About sending documents

You can choose to e-mail a document to a user, fax a document, or send a document to another user.

There are three available formats for e-mailing a document to another user.

- With the Perceptive Content link format, you send a document link through e-mail. The recipient clicks this link to open the document in the ImageNowViewer.
- With the Attachments format, the document object is sent as an attachment to the recipient in its native format. The recipient can then view the document using a native application.

For example, if you send a document that is a TIFF file, the user can open the attachment using any application that can view graphics files. If you send a document that is a Word file, the user can open the file in Microsoft Word.

If you have Fax Agent, you can choose to fax a document to a user. This feature also requires that you are using the TR1034 fax board and you enable the outbound fax feature in the Fax Agent configuration file. See the Fax Agent Installation Guide for more details on configuration. All file types that are supported by the ImageNowViewer can be sent. You can fax documents to any fax number you set in the Fax Numbers dialog box, or you can enter fax numbers ad-hoc for one-time use. Typically, your administrator sets up the fax numbers and security privileges required for this procedure.

You can choose to send a document to other users who are logged into the same ImageNow Server. With this method, the document you send opens in the ImageNowViewer for the recipients you select. Additionally, recipients can set options to control how the document is received, such as whether to display the document immediately, be prompted to accept or reject the document, or disable the receipt of any documents sent from other users. Recipients can also choose whether the sent document appears in an existing instance of the ImageNowViewer window or opens a new one.

Send a document to users

You can send a document to a user using either the document or a shortcut to the document. The following steps explain how to send documents to users who are currently logged into the same ImageNow Server.

1. Open the document.
2. Click **File > Send to > User**.
3. In the **Send Document to Connected Users** dialog box, search for and select the recipients.
4. Optional. Under **Notes**, type any comments you want the recipient to receive along with the document.
5. Click **Send**.

Result This feature notifies you of a failed send when you attempt to send a document to a user who is not connected to ImageNow Server. However, you are not notified that the recipient has viewed the document.

Email items

Email an item link

To email a link to an item, complete the following steps.

1. Open the item.
2. Click **File > Send to > Email**.
3. In the **Email** dialog box, to use settings from an email output profile, select it from the **Profile** list.
4. In the **Email** box, confirm or enter the recipient email addresses or leave the box blank to select the recipient in your email client.
5. In the **Method** list, select the method you want to use to email the link.
6. In the **Email** dialog box, click **OK**.
7. Optional. If emailing through SMTP, in the **Output Item** dialog box, enter the name or IP address of the SMTP server that your organization is using.

   After you enter this information, the system remembers these settings and you no longer receive this prompt.

Email an item as an attachment

To email an item with at least one page as an attachment, complete the following steps.

1. Open the item.
2. In the **File** toolbar, click the **Email** button.
3. Optional. To use an email output profile to set the email options, in the **Email** dialog box, in the **Profile** list, select an output profile.
4. Verify the recipients in the **Email** box or leave the box blank to select recipients in your email client.
5. In the **Method** list, select **Attachment**.
6. Optional. To change the format inherited from the output profile or to set the format manually, from the **Format** list, select one of the following options.
   - **Individual files**
   - **Multi-page TIFF for each item**
   - **Single PDF**
7. Optional. Define output content settings to change the settings inherited from the output profile.
8. Under **Pages**, select the pages you want to include if applicable.
9. Click **OK** to send the email.
10. Optional. If emailing through SMTP, in the **Output Item** dialog box, enter the name or IP address of the SMTP server that your organization is using.

    After you enter this information, the system remembers these settings and you no longer receive this prompt.

Output items

Output file name variables

The following topic lists the variable text you can use when generating a custom file name to email an item as an attachment or export an item to a file.

Note:
You can only use these variables with the multi-page TIFF and Individual file export formats. The Single PDF file export does not support using these variables.

Guidelines

When entering variables, separate text with underscores and enclose variables with square brackets. The entire file path, which includes the file name and extension, cannot exceed the character limit of your operating system.

Variables

Variable	Description	Example
[DOCID]	The item ID	Document_[DOCID]
[DRAWER]	The item drawer value	[DOCID]_Account_[DRAWER]
[FIELD1]	The item Field1 value	[DOCID]_Account_[FIELD1]
[FIELD2]	The item Field2 value	[DOCID]_Patient_[FIELD2]
[FIELD3]	The item Field3 value	[DOCID]_Invoice_[FIELD3]
[FIELD4]	The item Field4 value	[DOCID]_Student_[FIELD4]
[FIELD5]	The item Field5 value	[DOCID]_Program_[FIELD5]
[DOCTYPE]	The item type	[DOCTYPE]_[DOCID]

Output items as individual files

When emailing or exporting items to a file, you can output multiple pages within each item as individual output files. To output items as individual files, complete the following steps.

1. Perform one of the following actions, depending on the situation.

Situation	Steps
Set the output format in an output profile.	1. In **Management Console**, in the left pane, click **Output Profiles**. 2. In the right pane, click the **Email** or **File** tab, select the output profile, and click **Modify** to display the **Output Profile** dialog box. 3. If you select **Email**, on the **Output** tab, in the **Method** list, select **Attachment** and from the **Format** list, select **Individual files**. 4. If you select **File**, on the **Output** tab, from the **Format** list, select **Individual files**.
Set the output format manually when emailing an item in Perceptive Content.	1. Open the item. 2. Click **File > Send To > Email** 3. In the **Email** dialog box, in the **Method** list, select **Attachment**. 4. In the **Format** list, select **Individual files**. 5. Click **Options**.
Set the output format manually when exporting an item to a file.	1. Open the item. 2. Click **File > Export**. 3. In the **Export** dialog box, in the **Format** list, select **Individual files**. 4. Click **Options**.

2. On the **Content** tab, in **Name Format**, select one of the following methods to name the output file:
   - **ID** to name the output file with the item ID.
   - **Keys** to name the output file with the item’s key string.
   - **Name** to name the output file with the item’s name.
   - **File name** to name the output file with the original file name.
   - **Custom** to enter your own file name for the output file.
3. If you selected **Custom** for the name format in the previous step, for **File name**, type a name for the output file.

   You can define one or more variables to generate the name or part of the name of the output file.
4. For **Image color conversion**, select one of the following options:
   - **None** to not modify the color of the output file.
   - **Grayscale** to convert the color of an output file to grayscale.
   - **Black and White** to convert the color of an output file to black and white.

Converting a black and white output file to grayscale increases its size. Converting a color output file to grayscale reduces its size. Selecting black and white reduces the size of the output file.

5. Click **OK**.

Output items as a single PDF

To output multiple pages within an item as a single PDF when emailing or exporting items to a file, complete the following steps.

1. Perform one of the following actions, depending on the situation.

Situation	Steps
Set the output format in an output profile	1. In **Management Console**, in the left pane, click **Output Profiles**. 2. In the right pane, click the **Email** or **File** tab, select the output profile, and click **Modify**. 3. If you select **Email**, on the **Output** tab, in the **Method** list, select **Attachment** then select **Single PDF** from the **Format** list. 4. If you select **File**, on the **Output** tab, select **Single PDF**.
Set the output format manually when emailing an item in Perceptive Content	1. Open the item. 2. Click **File > Send to > Email**. 3. In the **Email** dialog box, in the **Method** list, select **Attachment**. 4. In the **Format** list, select **Single PDF**. 5. Click **Options**.
Set the output format manually when exporting an item to a file	1. Open the item. 2. Click **File > Export**. 3. In the **Export** dialog box, in the **Format** list, select **Single PDF**. 4. Click **Options**.

2. On the **Content** tab, in the **File name** box, type a name for the output file.
3. For **Image color conversion**, select one of the following options:
   - **None** to not modify the color of the output file.
   - **Grayscale** to convert the color of an output file to grayscale.
   - **Black and White** to convert the color of an output file to black and white.

   Converting a black and white output file to grayscale increases its size. Converting a color output file to grayscale reduces its size. Selecting black and white reduces the size of the output file.

4. Click **OK**.

Output item as a multi-page TIFF

You can email or export an item as a multi-page TIFF. To output an item as a multi-page TIFF, complete the following steps.

1. Perform one of the following actions, depending on the situation.

Situation	Steps
Set the email or file output format in an output profile.	1. In **Management Console**, in the left pane, click **Output Profiles**. 2. In the right pane, click the **Email** or **File** tab, select the output profile, and click **Modify** to display the **Output Profile** dialog box. 3. If you select **Email**, on the **Output** tab, in the **Method** list, select **Attachment** and from the **Format** list, select **Multi-page TIFF for each item**. 4. If you select **File**, on the **Output** tab, in the **Format** list, select **Multi-page TIFF for each item**.
Set the output format manually when emailing an item in Perceptive Content.	1. Open the item. 2. On the **File** toolbar, click **Email**. 3. In the **Email** dialog box, in the **Method** list, select **Attachment**. 4. In the **Format** list, select **Multi-page TIFF for each item**. 5. Click **Options**.
Set the output format manually when exporting an item to a file.	1. Open the item. 2. Click **File > Export**. 3. In the **Export** dialog box, in the **Format** list, select **Multi-page TIFF for each item**. 4. Click **Options**.

2. On the **Content** tab, in **Name Format**, select a method for naming the output file.
3. If you selected **Custom** for the name format in the previous step, for **File name**, type a name for the output file.

   You can define one or more variables to generate the name or part of the name of the output file.
4. For **Image color conversion**, select one of the following options:

- **None** to not modify the color of the output file.
- **Grayscale** to convert the color of an output file to grayscale.
- **Black and White** to convert the color of an output file to black and white.

Converting a black and white output file to grayscale increases its size. Converting a color output file to grayscale reduces its size. Selecting black and white reduces the size of the output file.

5. Click **OK**.

Troubleshoot item output

If you experience issues outputting an item to email, file, fax, or printer, you can try any of the following possible resolutions.

Output takes longer than expected

Cause	Resolution
The output job submitted is too large for ImageNow Client.	For large and complex output jobs, consider using Output Agent, a server-side process that allows you to output items on a job-by-job basis or in a batch.
Added colors and annotations are slowing the output job.	For best performance, configure your output profiles to convert color images to black and white and only use the color conversion option when needed.

Microsoft Outlook settings are not available when outputting an item to email

Cause	Resolution
Perceptive Content only supports a text-based editor in Outlook.	If you are using Microsoft Word as your default email editor in Outlook, settings such as signature, spell-check, and other editing capabilities may not be available when outputting an item.

What are ImageNow links?

Perceptive Content links let you transfer objects and files easily between Perceptive Content and your desktop, any folder on your file system, or a communication program such as Microsoft Outlook or IBM Lotus Notes.

Perceptive Content links are created automatically whenever you drag an item from Perceptive Content onto the desktop. You can also create an item when you drag a file such as a spreadsheet or a graphic, from the desktop to Perceptive Content.

Create an ImageNow link overview

To create a Perceptive Content link, complete any of the following procedures.

- Create a task link.
- Create a workflow link.

Open an ImageNow document link

When you drag an object from Perceptive Content onto your desktop, into a folder or another application, you create a document link. You can click on this link to open the object in the corresponding destination. To open a document link, complete the following steps.

1. Double-click the link icon on the desktop.
2. Depending on the server on which you are logged in, perform the following actions.
   - If the document is on the same server, the console displays the document.
   - If the document is not on the same server, when you are asked to log out and log into a different server, click **OK** and log into the other server.
   - If you are not connected to an ImageNow Server, a login screen appears. Log in to view the document.

Share an ImageNow link

To link to an item in Perceptive Content in an email or message, complete the following steps.

1. Open the **Perceptive Content** window that contains the item you want to send as a link.
2. Drag the item from **Perceptive Content** into the message window of an email or chat program, or drag the item to the desktop and then send it as an attachment to an email message.

Print items

Print an item

If you have a configured print output profile, you can print items using the settings defined in the output profile. You can change these settings when printing or enter them manually. To print an item, complete the following steps.

1. Open the item.
2. Click **File > Print**.
3. In the **Print** dialog box, to use settings defined in a print output profile, select it from the **Profile** list.
4. Under **Printer**, select the printer to which you want to send the item.
5. Under **Print Range**, select the pages you want to print.
6. Under **Copies**, select the number of copies you want to print.
7. Click **Print**.

Print a form

Using the standard Print feature does not print the form. To print the form field and data entered in the form fields, complete the following steps.

1. Open the form.
2. In **Perceptive Content Folder Viewer**, in the **Forms** pane, click the **Print Form** button.
3. In the **Print** dialog box, click **Print**.