WebNow

Description

WebNow is an online, browser-based companion to the ImageNow document imaging, management and workflow software. WebNow shares some of the functionality of ImageNow—searching, viewing, and routing documents in workflow—while allowing for access to documents from virtually anywhere.

Logging on to WebNow

Step 1: Access UMS WebNow Website

To access the UMS WebNow homepage, open your web browser (Internet Explorer, Firefox, etc.) and enter http://webnow.its.maine.edu into the URL field. To log on to the WebNow client, click on the link, as shown below:

LOOKING FOR WEBNOW?
The University of Maine System's document imaging system can be accessed via the web if you are an authorized user. To log on to WebNow click here.

Step 2: Log on to WebNow

After the WebNow page has loaded, log on to WebNow by entering your user name (UMS ID) and password (UMS password) and click Connect.
After connecting, WebNow will load in your browser window.

WebNow Header Features

The WebNow header is essentially the control panel for WebNow. The header contains four options:

- **Search**: Opens the Search page. Here you can conduct two types of searches: Simple and Advanced.

- **Workflow**: Opens the Workflow page. Here you can do a variety of actions, including viewing, annotating, and routing documents.

- **Disconnect**: Logs off current user and returns to the login page.

- **Help**: Opens the Help page.

Searching for Documents
Run a Simple Search

**Step 1:** In the WebNow header, click on the **Search** icon. Then, click on the **Simple** tab.

**Step 2:** From the **Applet** pull-down menu, select the appropriate applet for your search.

**Step 3:** From the **Find documents where** pull-down menu, select what field you want to search.
Step 4: From the operator pull-down menu, select how you want to structure your search.

![Search interface](image)

Step 5: Type your search query and then click the **Search** button.

**Note:** Search results can be constrained to a specified time frame by clicking on the **Constrain results to last** box and selecting how many **days** you want to constrain the results to from the pull-down menu.

![Search results](image)

### Run an Advanced Search

**Step 1:** In the WebNow header, click on the **Search** icon. Then, click on the **Advanced** tab.

**Step 2:** From the **Applet** pull-down menu, select the appropriate applet for your search.
Step 3: To add a search condition, click the Add… button. The Add Condition window will open.

You may select from the following options:
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- **Condition:** This field selects how the search is conducted. The condition selected determines the options available in the **Field** list.
- **Field:** This field is dynamic and depends on the option selected in the **Condition** field.
- **Operator:** This field determines how the search is structured.
- **Type:** This field selects how the search is conducted. You will be using **Normal**.
- **Value:** This field is dynamic and depends on the options selected in the **Condition** and **Field** fields.

**Step 4:** Once each field is set, click **OK** to set the condition in the search query.

**Step 5:** To add operators or another condition, click on the **AND** or **OR** button, followed by the **Add**... button. Repeat **Steps 3 and 4** to add another search condition.

**Step 6:** Once you have selected all the conditions of your search, click on the **Search** button.

**Note:** Search results can be constrained to a specified time frame by clicking on the **Constrain results to last** box and selecting how many **days** you want to constrain the results to from the pull-down menu.

**Step 7 (Optional): Sort Search Results**

To sort the search results before displaying them, click the **Sorting**... button. The **Sorting** window will open.
From the **Available Fields**, select which field(s) you want to sort by and click the **Add >** button. The fields that have been added are shown in the **Sort By** column. To take away fields from that column, click on the field(s) you want to remove and click the **< Remove** button.

To prioritize the fields in the **Sort By** column, click on the radio button that corresponds with either **Ascending** or **Descending**, depending on which is appropriate.

Once you have selected all the fields you want to sort by, click **OK** and then click on the **Search** button.

### Viewing Documents in Workflow

**Step 1:** From the WebNow header, click on the **Workflow** icon.

**Step 2:** From the **Applet** pull-down menu, select the appropriate applet for your viewing.
Step 3: From the **Queue** pull-down menu, select the queue you want to view.

After selecting a queue, WebNow will display all the documents in that workflow queue.

Step 4: From the list of documents in workflow, double-click the document you want to view. The document will open in the **PowerView** window.
The PowerView window in Workflow Mode provides various toolbars to do such things as view, annotate, or route in workflow. The toolbar options that are available are dependent on the securities privileges provided to the user. These toolbars are:
1 File Toolbar

- **Print**: Print a copy of the displayed page.
- **Save**: Save a copy of the displayed page.
- **Send**: Send a link of the displayed page in an e-mail message.
- **Properties**: View the properties of the displayed page.

2 View Toolbar

- **Zoom In**: Increase the viewing size of the displayed page.
- **Zoom Out**: Decrease the viewing size of the displayed page.
- **Rotate Left**: Turn the image counterclockwise 90°.
- **Rotate Right**: Turn the image clockwise 90°.
- **Fit Window**: Resize the displayed page to fit the viewing window.
- **Fit Width**: Resize the displayed page to fit the width of the viewing window.
- **Fit Height**: Resize the displayed page to fit the height of the viewing window.

3 Annotations Toolbar

- **Navigate Page**: De-select currently selected annotation tool. This allows you to navigate the displayed page.
- **Move/Resize Annotation**: Move or resize annotation on the displayed page.
- **Stamp**: Stamp a predefined message on the displayed page.
- **Text**: Type text on the displayed page.
- **Highlight**: Highlight selected area on the displayed page.
- **Check**: Place a checkmark on the displayed page.
- **Redline**: Draw a line on the displayed page.
- **Arrow**: Draw an arrow on the displayed page.
- **Solid Rectangle**: Block out a section of the displayed page.
- **Hollow Rectangle**: Draw a square box around a section of the displayed page.
- **Hollow Circle**: Draw a circle around a section of the displayed page.
- **Toggle Annotations On/Off**: Display or hide annotations on the displayed page.
- **Width**: Change the width of specified annotations.
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n. **Color**: Change the color of specified annotations.

### Workflow Toolbar

- **Route Back**: Send the selected document to previous workflow queue.
- **Route**: Send the selected document to the next workflow queue.
- **Hold**: Place the selected document on hold.
- **Cancel**: Quit workflow processing and close PowerView.
- **Delete**: Delete the selected document from the workflow queue.
- **Pending**: Change status of selected document as ‘pending’.

### Page Toolbar

- **Previous Document**: Navigate to the previous document.
- **First Page**: Navigate to the first page of the selected document.
- **Previous Page**: Navigate to the previous page of the selected document.
- **Go To Page**: Navigate to a specific page of the selected document.
- **Next Page**: Navigate to the next page of the selected document.
- **Last Page**: Navigate to the last page of the selected document.
- **Next Document**: Navigate to the next document

### Printing Documents

**Step 1**: Open a document in the **PowerView** window.

**Step 2**: Click on the **Print** icon in the **File Toolbar**. This will open the **Print Options** prompt.

**Step 3**: Select the appropriate options for your print job and click **OK**. This will open the **Print** prompt.
Step 4: Select the appropriate **Printer**, **Print Range**, and **Number of Copies** for your print job and click **OK**. The document will begin to print.

**E-mailing Documents**

**Step 1:** Open a document in the **PowerView** window.

**Step 2:** Click on the **Send** icon in the **File Toolbar**. This will open your default e-mail program (Windows Outlook, Mozilla Thunderbird, etc.) and will insert the WebNow link to the document in the body of an e-mail.
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**Quick Guide**

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**Step 3:** Enter the e-mail addresses of your intended recipients in the **To** field.

**Step 4:** Type any notes or messages in the body of the e-mail.

**Step 5:** Click **Send** within the e-mail program to send the e-mail to your intended recipients.

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**Routing Documents**

**Step 1:** Open a document in the **PowerView – Workflow Mode** window.

**Step 2:** Click on the **Route** icon in the **Workflow Toolbar**.

**Step 3:** Select the appropriate queue from the list. The document will then be moved from the current workflow queue to the selected workflow queue.

**Note:** Routing options will vary depending on the workflow processes.

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**List of Terms**

**Applet**
A component that enables ImageNow and WebNow to communicate with a host application to gather key data to form the DocKey. The DocKey is then used to link documents to the host application record.

**Drawer**
A DocKey that is used to separate document images into logical categories.
DocKey
This is data used by ImageNow and WebNow to index and retrieve captured documents. There are a total of six DocKeys in ImageNow and WebNow.

Host Application
A software application typically used in an office environment that stores customer data.

PowerView
A component used to view images within ImageNow and WebNow.

Queue
A system of electronic inboxes in which workflow items get routed to and from.

Route
A process of sending an item to a selected workflow queue.

Workflow
A component which enables administrators to create a framework of queues which are connected with automatic or manual routes that simulate the path a document would follow as if it were in an office environment.