M UNIVERSITY OF MICHIGAN

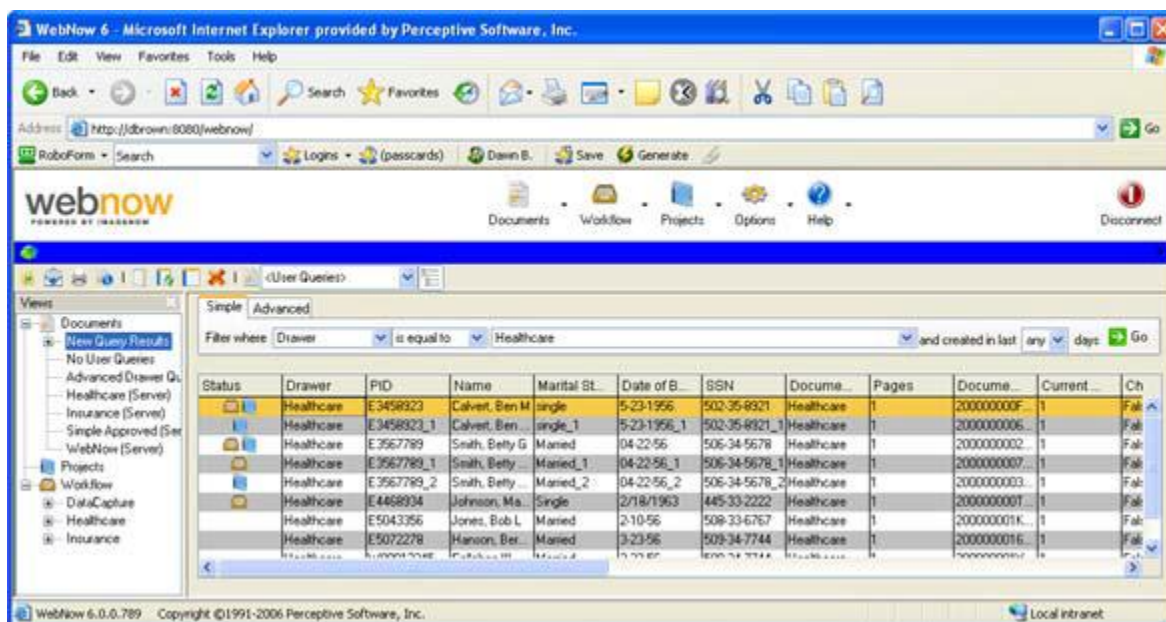# WebNow Overview

Overview

WebNow 6 is a browser-based solution for use with ImageNow document imaging, management, and workflow software. WebNow works with ImageNow to instantly deliver to your browser secure, digital versions of paper or other electronic documents.

When you launch WebNow, it opens in your Internet browser, as shown below.

You can run WebNow on UNIX, Apple Macintosh, and Microsoft Windows, and integrate it easily with the host application to retrieve ImageNow software documents in context with core daily work. With an Internet connection to WebNow, document access is worldwide and SSL encryption is supported. You have the ability to add annotations and notes to documents, and send email containing hyperlinks to documents and other images. Multiple search options are also available to conduct advanced searches on documents in the ImageNow repository.

Contents

Last Updated: 6/3/2013

Connect to WebNow

Before you log in, you must have a valid ImageNow user name and password, and a working Internet connection.

1. Open an Internet browser. Type in the URL for your WebNow home page, and then press ENTER, or click WebNow on the Faculty & Staff tab of Wolverine Access.

2. As your WebNow page opens, the **Connect to WebNow** dialog box displays.

3. In the **User Name** box, enter your user name.

4. In the **Password** box, enter your password.

5. Click **Connect** to initiate the connection to the WebNow Server.

6. Upon manual log-in, you are taken to the Documents grid if you have proper access privileges. Otherwise, if you only have workflow privileges, then the Workflow grid displays

About the WebNow toolbar

The WebNow toolbar provides you with access to all of the functions and documents you need. Click the drop-down arrows next to the feature buttons to select specific actions within that feature.
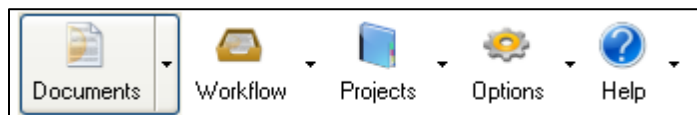
Click **Documents** or **Workflow** to open the WebNow Explorer.

Documents – Use this option to search for ImageNow documents in the WebNow Explorer

Workflow – Click this button to process workflow items in your workflow process, starting in the WebNow Explorer

Projects – Click this button to run a search query to locate specific projects

Options – Set up your general options, toolbar options, WebNow Explorer options, your host applet and more

Help – View help files for WebNow

About using the ImageNow Help system

The ImageNow Help system contains a set of topics designed to help you to complete tasks in ImageNow. Good Help systems advocate for the customer, and aim to translate any difficult areas into your own language so that you can easily identify the Help you need. The content in ImageNow Help is categorized into four types of Help topics or card types: Procedure, Concept, Reference, and Troubleshooting.

If end-user based, the majority of information in any Help system is procedural; if the Help is optimized for programmers, the information is mainly reference material, containing examples. The ImageNow Administration Help system contains mostly procedural topics, and aims to support this content with conceptual, reference and troubleshooting topics.

When you are working in the ImageNow interface and are not sure how to move forward with the next step, open Help, and ask your question. An intelligent result set of answers will return, from which you can choose the type of help you want. The goal of the ImageNow Help system is to provide you with the answers you need that are documented in a manner that is easy to read, conscious of your time, and ensures that you have a successful experience in the Help.

Topic titles are your clue

Procedure topics - Begin with an imperative verb cue and the topics almost always contain numbered steps that walk you through completing the task that is reflected in the topic title. For example, "Copy a Capture Profile." Copy is the action, and the Capture Profile is being acted upon.

Concept topics – Begin with "About" or "What is..." Conceptual topics typically cover a feature area or subsystem, and aim to give you just the conceptual sound-bites you need to makes sense of all the procedures that are documented for that area. Remember, Help systems are not manuals; they are not online books. The ImageNow Help system is optimized to answer a question that you have in the moment while working with ImageNow. Concepts and reference information aim to support you in the completion of tasks in a timely manner.

Shortcut keys

You can perform many WebNow functions using shortcut keys. Shortcuts key functions vary depending on which grid or component of WebNow you use.

Shortcut	Description
Ctrl + P	Print
F2	Resize Fit Image
F3	Resize Fit Width
F4	Resize Fit Height
F6	Scale to Gray (Toggle)
F7	Show Properties Pane
F9	Show Thumbnails
F11	Invert Image
Ctrl + Click	Select Annotation
Delete	Delete Annotation

Document and Workflow grid

Shortcut	Description
Page Down	Scroll Down
Page Up	Scroll Up
Ctrl + Page Down	Page Right
Ctrl + Page Up	Page Left

Toolbars and Tooltips

File / View / Annotations toolbar

Use any of the following toolbar options to save, print, alter the display of the document, and add annotations.

Icon	Option	Description
	Save	Save modifications to the document.
	E-mail WebNow Link	E-mails a WebNow link.
	Export	Saves a local copy of the displayed page.
	Print	Prints the displayed page.
	Launch Associated Application	Launches the native application associated with this document.
	Properties	View the properties of the displayed document, including document ID, created and modified information, index keys, workflow history, file type and other properties.
	Zoom In	Increases the magnification of the displayed page.
	Zoom Out	Decreases the magnification of the displayed page.
	Rotate 90° Left	Rotates the displayed page counterclockwise 90°.
	Rotate 90° Right	Rotates the displayed page clockwise 90°.
	Fit Window	Resizes the displayed page to fit in the window.
	Fit Width	Resizes the displayed page to fit the entire width in the window.
	Fit Height	Resizes the displayed page to fit the entire height in the window.
	Show/Hide Annotations	Hides annotations made on the displayed page.

	Navigate Page	De-selects the currently selected annotation. Allows you to move the page.
	Select Annotation	Selects an annotation so that you can move or resize any annotations on the displayed page.
	Digital Signature	Places a visual representation of a digital signature on a document image.
	Stamp Annotation	Stamps various messages (Approved and, Confidential are examples) on the displayed page.
	Sticky Note Annotation	Inserts a sticky note on the displayed page into which you can type text.
	Text Annotation	Enters text on the displayed page.
	Highlight Annotation	Highlights selected areas of the displayed page.
	Check Annotation	Places a checkmark on selected areas of the displayed page.
	Pen Annotation	Draw text in any direction on the displayed page.
	Line Annotation	Draws a line on the displayed page.
	Arrow Annotation	Draws an arrow on the displayed page.
	Hollow Rectangle Annotation	Highlights selected areas of the displayed page with a rectangular outline.
	Hollow Oval Annotation	Highlights selected areas of the displayed page with a circular outline.
	URL Annotation	Inserts an email URL link onto the displayed page.

Navigator / Workflow / Version Control toolbar

Use any of the following toolbar options to process documents through workflow.

Icon	Option	Description
	Next workflow item	Go to the next item in the workflow queue.
	Route Up	Route a workflow item forward to a specified queue in the workflow process.
	Route Back	Routes a workflow item back to the previous workflow queue.
	Route Forward	Routes a workflow item forward to the next workflow queue.
	Route Anywhere	Route a to any queue in the workflow process.
	Recall workflow item	Bring a workflow item back to the queue it was routed from last.
	Hold	Places the selected workflow itemon hold for later processing.
	Pending	Designates a workflow item as pending.
	Archive	Archive the workflow item.
	Remove from workflow	Deletes the selected workflow item from the workflow queue.
	View history	View the history of an archived workflow item.
	View recently routed items	View a list of recently routed workflow items.

Use any of the following toolbar options to navigate through multiple page documents.

Icon	Option	Description
◀◀	**Previous Document**	Opens previous document.
◀|	**First Page**	Opens first page of document.
◀	**Previous Page**	Opens previous page of document.
▶	**Next Page**	Opens next page of document.
|▶	**Last Page**	Opens last page of document.
▶▶	**Next Document**	Opens next page of document.

Use any of the following toolbar options if you have Document Management to manage documents in Version Control.

Icon	Option	Description
🔒	**Check in**	Check document into Version Control.
🔒	**Check out**	Check document out of Version Control.
🔒	**Undo check out**	Undo the last check-in into Version Control for that document.
🔒	**History**	Show Version Control history for that document.

Move a toolbar

The **WebNow Viewer** toolbar contains file, view and annotation options. Other features, such as Workflow, have their own toolbars. In **WebNow Viewer**, drag the toolbars with your mouse to move them.

Show or hide a toolbar

1. Open a document in **WebNow Viewer**.
2. On the **View** menu, point to **Toolbars**, and then click the toolbar name you want to display or hide.

Set WebNow toolbar options

1. On the **WebNow** toolbar, point to **Options**, and then click **Toolbar**.
2. On the **Explorer Options** dialog box, on the **Toolbar** tab, set the following:
   - In the **Documents** list, select your default query for the **Documents** button.
   - In the **Help** list, select your default help action for the **Help** button.
   - In the **Projects** list, select your default project for the **Projects** button.
   - In the **Workflow** list, select your default workflow for the **Workflow** button.
3. Click **OK**.

View tooltips

Tooltips offer help about icons in WebNow. With the Microsoft Windows appearance set to "Windows XP style," icons appear highlighted as you mouse over them.

1. Click **Start**, point to **Settings**, and then click **Control Panel**.

2. In the **Control Panel** window, click **Appearance and Themes**.

3. In the **Appearance and Themes** dialog box, click **Display**.

4. In the **Display Properties** dialog box, click the **Appearance** tab.

5. From the **Windows and buttons** list, click **Windows XP style,** and then click **Apply**.

Work with documents in Explorer

View a document

1. Conduct your WebNow search, and from the result set, double-click the document you want to view.

2. In **WebNow Viewer**, use the options provided on the **Page** toolbar to move between pages in your document.

View multiple documents

1. Conduct your WebNow search, and from the result set, double-click each of the documents you want to view.

2. To view multiple documents in **WebNow Viewer**, from the **Window** menu, choose from the following options:

   - Cascade
   - Tile Vertically
   - Tile Horizontally
   - Name of open document that you can tile.

Copy a document

- In the Documents grid, right-click the document you want to copy, and then click **Copy**. A copy of the document is created in the same Drawer, but with all other document keys renamed to include "_1" at the end of the original name.

Create or edit a note

A note, previously called document keywords, is a text field that allows you to type a message and attach it to a document.

1. In the Documents grid or Workflow grid, right-click the document to which you want to add or edit a note, and then click **Edit Notes**.

2. In the **Notes** dialog box, type your note, and then click **OK**.

Tip – To create or edit a note in **WebNow Viewer**, on the **View** menu, click **Properties** to display the **Properties** pane, and type your note into the **Notes** box.

Edit one or more document keys

A document key, also called DocKey, is data from your host program that allows you to file a document in an organized and searchable manner within WebNow.

1. In the Documents grid, right-click the column containing the document key you want to edit, and then click **Edit Document keys**.

2. Make your changes, and then press ENTER.

3. In the WebNow confirmation dialog box, click **Yes**.

Tip – To edit document keys in **WebNow Viewer**, on the **View** menu, click **Properties** and then make your changes in the **Properties** pane under the **Document Keys** section.

Merge one or more document

1. Perform a search to display all of the documents that you want to merge.

2. In the Document grid, click the first source document.

    Note You cannot perform a merge with source documents that are under Version Control. (The target document, however, can be under Version Control.)

3. Hold down the CTRL key while you click the remaining source documents if there are any.

4. With the CTRL key still held down, click the target document (the document with which the source documents will be merged).

    Note If the target document is under Version Control, it will be automatically checked in following the merge.

5. Right-click the target document and then click **Merge**.

6. When asked if you want to merge the documents in a single document with the document keys displays in the **Merge Documents** dialog box**,** click **Yes**.

View document properties

Document properties include the ability to view document ID, captured and modified information, index keys, workflow history, and file type.

• In the Documents or Workflow grid, right-click on a document, and then click **Properties**. Additionally, in **WebNow Viewer**, on the **File** menu, you can also click **Properties**.

Delete a document

1. In the Documents or Workflow grid, right-click the document you want to delete, and then click **Delete**.

2. In the WebNow confirmation dialog box, click **Yes**.

Note To delete more than one document at once, hold down the CTRL key and click on each document you want to delete.

About the Explorer toolbar

The WebNow Explorer toolbar appears on the main WebNow window. This toolbar provides shortcuts for working with your documents in the Documents and Workflow grids. It also lets you customize which columns appear in the search grid.

Display or hide the Views pane

- On the **Explorer** toolbar, click the ⊞ button to display and hide the **Views** pane.

Customize the Explorer grid

1. On the **WebNow** toolbar, click the **Options** down-arrow, and then click **Grid Options**.
2. On the **Explorer Options** dialog box, on the **Grid Options** tab, select the row settings you want for the Document and Workflow grids.
3. Click the **Column Headings** tab, and select the column header settings you want for the Document and Workflow grids.
4. Click **OK**.

Show or hide a grid column

1. In the Documents grid or Workflow grid, click **Table Control** ▦.
2. In the **Table Control** dialog box, select the check boxes for the columns you want to display in the Documents or Workflow grid.
3. Click **OK**.

Sort a grid column

- In the Documents grid or Workflow grid, click once on the column heading to sort that column in ascending order. Click the column heading again to sort the column in descending order.

Note Depending on the database, data may have to be re-retrieved from the server to re-sort, in which case, resorting is not immediate.

Resize a grid column

- In the Documents grid or Workflow grid, move your mouse pointer to the right of the column you want to resize. When the pointer becomes a double-headed arrow, drag the pointer to set the desired column width.

Reorder a grid column

- In the Documents grid or Workflow grid, move your mouse pointer to the column heading you want to reorder. Drag the column to the desired position.

Show or hide queue alarms

- Just above the **Explorer** toolbar, click the Message Center 🌐 icon, and then click **Show Alarms** to display or click **Hide Alarms** to close the queue alarms from the Message Center.

Show or hide queue status

• Just above the **Explorer** toolbar, click the Message Center 🌐 icon, and then click **Show Queue Status** to display or click the ▪ at the right end of the blue bar to close the Message Center.

Verify Document Key edits

1. On the **WebNow** toolbar, click the **Options** drop-down arrow, and then click **General**.

2. On the **Explorer Options** dialog box, on the **General** tab, select or clear the **Prompt to verify document key edits** check box.

3. Click **OK**.

Work with Documents in the Viewer

E-mail a document link

The sender of a WebNow link must enable WebNow for e-mailing prior to performing the following steps. The recipient of a WebNow link must have access to the internal WebNow web application server. You may need to adjust your firewall settings to allow access. The e-mail recipient may also need to set up anonymous login if the recipient does not have an ImageNow user account.

1. In the Documents or Workflow grid, double-click the document for which you want to e-mail a link.

2. In **WebNow Viewer**, verify this is the document you want.

3. Verify the **Document Tasks** pane is open.

   How?
   • In the **WebNow Viewer**, on the **View** menu, click **Tasks**.

4. In the **Document Tasks** pane, click **E-mail WebNow Link** 📧.

5. Address and save your e-mail.

Export or save as document

The Export/Save As option enables you to export documents for viewing outside of WebNow. Saving as a file is also helpful when you want to send a document via e-mail to a non-ImageNow user.

1. In the Documents or Workflow grid, double-click the document you want to export/save as a file.

2. In **WebNow Viewer**, verify this is the document you want.

3. Verify the **Document Tasks** pane is open.

   How?
   • In the **WebNow Viewer**, on the **View** menu, click **Tasks**.

4. In the **Document Tasks** pane, click **Export this document** or **Save a copy of this document**, depending on which version of ImageNow 6 you have, and then do one of the following:

   • To export only the page currently being viewed, click **OK**, and then in the **Export/Save As** dialog box, select a filename and location to export the document.
   • To export every page of the document, click **Select All**, and then in the **Export All/Save As** dialog box, browse to the location to which you want to export the document.

   Note When **Export All/Save All** is selected, a new folder is created inside the directory you select, named after the date and time (mmddyyyy_hhmmss). An index file named **Export.idx** is created in that folder.

5. Click **Export/Save As**.

Tip – You can also export a document by right-clicking it from the Documents grid, and then clicking **Export**.

Invert a document

•   In **WebNow Viewer**, on the **View** menu, click **Invert**. To undo, click **Invert** again.

Resize a document

This procedure sets the default document size for all documents.

1. Open a document in **WebNow Viewer**.

2. On the **File** menu, click **Options**.

3. In the **Viewer Options** dialog box, on the **General** tab, in the **Image Size** list, select either **Fit Image**, **Fit Width**, or **Fit Height**, and then click **OK**.

4. In the confirmation box, click **OK**. The change takes affect after you close and reopen **WebNow Viewer**.

Tip – To resize only the document you are currently viewing in **WebNow Viewer**, on the **View** menu, point to **Resize**, and then click **Fit Image**, **Fit Width**, or **Fit Height**.

Rotate a document

•   In **WebNow Viewer**, on the **View** menu, point to **Rotate**, and then click **Rotate Normal**, **90° Right**, **90° Left**, or **180° Flip**.

View a specific page in a multipage TIFF document

1. Conduct your WebNow search, and from the result set, double-click the document you want to view.

2. To view subsequent pages of the document, In the lower right corner of **WebNow Viewer**, click the page number navigation controls.
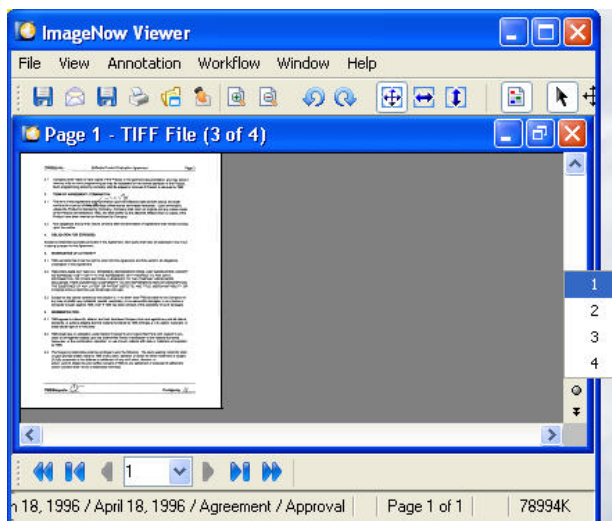
Modify the Document Keys

1. In the Documents or Workflow grid, double-click the document for which you want to modify the document keys.

2. In **WebNow Viewer**, verify this is the document you want.

3. Verify the **Properties** pane is open.

   How?
   • In the **WebNow Viewer**, on the **View** menu, click **Properties**.

4. In the **Properties** pane, in the Document Keys area, modify the Document Keys.

5. On the **File** menu, click **Close Viewer**.

Turn grayscale on or off

To change the grayscale for the document you are viewing:

• In **WebNow Viewer**, on the **View** menu, click **Smooth** or **Grayscale**. To turn it off, click the option again.

To change the grayscale for all documents:

1. Open a document in **WebNow Viewer**.

2. On the **File** menu, click **Options**.

3. In the **Viewer Options** dialog box, on the **General** tab, in the **Gray Scale** or **Smooth images** list, select **Enabled** or **Disabled**, and then click **OK**.

4. In the **Viewer Options** dialog box, click **OK**. If there is a confirmation dialog box, click **OK** again. Some of the changes do not take affect after you close and reopen **WebNow Viewer**.

Tip - To turn on grayscale for only the document you are currently viewing, on the **View** menu, click **Grayscale**. To turn it off, click the **Grayscale** option again.

View the status bar

This procedure displays the status bar for all documents. The status bar feature lets you view the document index keys and current page number at the bottom of the **WebNow Viewer**.

1. Open a document in **WebNow Viewer**.

2. On the **View** menu, click **Status Bar**.

View the Thumbnails pane

This procedure displays the Thumbnails pane for all documents. The Thumbnails pane feature lets you click an icon to switch to a different page of a document.

1. Open a document in **WebNow Viewer**.

2. In **WebNow Viewer**, on the **View** menu, click **Thumbnails**.

Zoom in or out of a document

1. In **WebNow Viewer**, on the **View** menu, click one of the following:

   • **Zoom In**
   • **Zoom Out**

2. Optional: Repeat step 1 to zoom further.

Show or hide panes in the Viewer

1. Open a document in **WebNow Viewer**.

2. On the **View** menu, click one or more of the following:

- To display or hide the **Document Tasks** and the **Workflow** pane, click **Tasks**.
- To display or hide the **Thumbnails** pane, click **Thumbnails**.
- To display or hide the **Worksheets** pane, click **Worksheets**. Worksheets are on a tab on the **Properties** pane
- To display or hide the **Properties** pane and the **Properties** tab, for access to Document Keys, Custom Properties, and Notes, click **Properties**.

Set WebNow Viewer options

1. On the **File** menu, click **Options**.

2. In the **Viewer Options** dialog box, on the **General** tab, in the **Gray Scale** or **Smooth images** list, select **Enabled** or **Disabled**, and then click **OK**.

3. In the **Default image Size** list, select either **Fit Image**, **Fit Width**, or **Fit Height**, and then click **OK**.

4. Select or clear the **Limit the number of open pages** check box.

   Note This option is only available if the global-max-open-pages-enabled setting in web.xml file is set to false (disabled).

5. If you selected the **Limit the number of open pages** check box, type or select the number of open pages you want to allow in the **pages** box.

6. Under **Launching**, select the check boxes for the features you want to enable, or clear the check boxes for the features you want to disable.

7. In the **Viewer Options** dialog box, click **OK**. If there is a confirmation dialog box, click **OK** again. Some of the changes do not take affect until after you close and reopen **WebNow Viewer**.

Printing

Print a document

1. In the Documents or Workflow grid, double-click the document.

2. In **WebNow Viewer**, verify this is the document you want.

3. Verify the **Document Tasks** pane is open.

   How?
   - In the **WebNow Viewer**, on the **View** menu, click **Tasks**.

4. In the **Document Tasks** pane, click 🖨 **Print this document**.

5. In the Print Options dialog box, select any options you want, such as with or without annotations, and more, and then click OK.

6. In the standard **Print** dialog box, under **Print Range**, choose from the following options:

   - **All**
   - **Pages from** and **to**, and then enter the page ranges that you want to print.
   - **Selection**
7. Click **OK**.

Note The shortcut key to print from WebNow is CTRL+P.

Print search results

This procedure is only available when running Java 5 or higher.

1. After running your search in the Documents grid, right-click on one of the items, and then click **Print Grid**.

2. In the **Print** dialog box, set the options you want, and then click **Print**.

Note All rows of the grid are printed, whether the entire list is visible on the screen or not.

Print multiple documents at once

1. In the Documents or Workflow grid, to select the documents you want to print, do one of the following:

    • To select a group of consecutive documents, click the first document you want to print, press the SHIFT key, and then click the last document in the group.
    • To select a group of random documents, press the CTRL key, and then click the documents you want.

2. Right-click the documents, and then click **Print**.

3. In the **Print Options** dialog box, select any options you want, such as with or without annotations, and more, and then click **OK**.

4. In the standard **Print** dialog box, under **Print Range**, choose from the following options:

    • **All**
    • **Pages from** and **to**, and then enter the page ranges that you want to print.
    • **Selection**

5. Click **OK**.

Adapted from: WebNow 6.0 Print Guide by Perceptive Software