

Interact Mobile for iPad Getting Started Guide

Version: 6.6.x



Written by: Product Documentation, R&D
Date: July 2013



ImageNow and CaptureNow are registered trademarks of Perceptive Software, Inc. All other products produced by Perceptive Software, Inc., including WebNow, are Perceptive Software trademarks. All other brands and product names mentioned in this document are trademarks or registered trademarks of their respective owners.

Copyright© 2013 Perceptive Software, Inc. All rights reserved.

Table of Contents

What is Interact Mobile for iPad?	3
Set up Interact Mobile.....	3
Download and install Interact Mobile.....	3
Log in to Interact Mobile	3
Log out of Interact Mobile	3
Interact Mobile navigation.....	4
Landscape view.....	4
<i>Toggle the list of workflow items in landscape view</i>	<i>5</i>
Portrait view	6
<i>Toggle the list of workflow items in portrait view</i>	<i>7</i>
Toggle between Page view and Properties view	8
Toggle the toolbar.....	9
Use Interact Mobile	10
About workflow items in ImageNow	10
View an image of a workflow item	10
Route an item in workflow	10
Place a workflow item on hold	11
Refresh the view	11

What is Interact Mobile for iPad?

Interact Mobile for iPad enables you to work with your ImageNow workflow items using an iPad, iPad 2, or iPad Generation 3. Interact Mobile for iPad provides the following features so that you can easily view and route your workflow items.

- You can use your existing ImageNow account login ID and password to securely access Interact Mobile on an iPad.
- You can view ImageNow workflow items along with their associated document keys and custom properties.
- You can route workflow items to other workflow queues.
- You can place workflow items on hold for a duration you specify.

This guide provides the information you need to get started with Interact Mobile and demonstrates how to use the application.

Set up Interact Mobile

The steps in the following sections explain how to install Interact Mobile and how to log in and out of the application.

Download and install Interact Mobile

The following steps explain how to download and install Interact Mobile.

1. On your iPad, open the **App Store** application.
2. Search for **Interact Mobile**.
3. Find **Interact Mobile** in the list of results and tap **Free**.
4. Tap **Install App**.
5. Enter your Apple ID password and tap **OK**.

Log in to Interact Mobile

The following steps explain how to log into Interact Mobile.



1. Tap the **Interact Mobile** application icon on your iPad.
2. Tap **Settings**.
3. Enter the server address provided by your ImageNow administrator and tap **Verify**.
4. Enter your ImageNow user name and password in the **Username** and **Password** fields.
5. Tap **Connect**.

Notes

- Interact Mobile remembers the user name of the last successful login.
- Interact Mobile prompts you to log in again if you do not use the application for 15 minutes.

Log out of Interact Mobile

The following steps explain log out of Interact Mobile.

1. If the list of workflow processes or workflow items is not visible, tap .
2. Tap  and then tap **Disconnect**.

Interact Mobile navigation

The following section provides tips on how to work with Interact Mobile, such as the differences between landscape and portrait views.

Landscape view

Like most iPad applications, you can view Interact Mobile in either landscape or portrait view. Simply turn your device to either orientation and Interact Mobile automatically adjusts.

The advantage of landscape view is that the list of workflow processes or workflow items does not overlap the view of the workflow item or document keys, as shown below.

Back **Invoice Approval** **Page 1 of 1** **Hold** **Route**

Drawer: Accounts Payable
Folder: 5054
Tab: General Supply Company
Field 3: 10546
Field 4: 08/27/2009
Field 5: 452.00
Type: Invoices

Drawer: Accounts Payable
Folder: 7543
Tab: Print Express
Field 3: 54677
Field 4: 08/31/2009
Field 5: 350.00
Type: Invoice

Drawer: Accounts Payable
Folder: 5054
Tab: General Supply Company
Field 3: 108781
Field 4: 09/08/2009
Field 5: 1225.00
Type: Invoices

Drawer: Accounts Payable
Folder: 3098

General Supplies Corporation
1600 Main Street
Chicago, IL 60600
302.555.1200 Phone
302.555.1300 Fax
www.gsc.com

INVOICE # 10546
DATE: August 27, 2009
Terms: Net 30

Bill To:
ACME Construction
22701 West 68th Terrace
Shawnee, KS 66226
800.941.7460

Ship To:
ACME Construction
22701 West 68th Terrace
Shawnee, KS 66226
800.941.7460

Comments or special instructions:



QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
2	RBG-747x Power Panel	100.00	200.00
15	Canon 24 Black Ink Cartridges	10.00	150.00
10	Cases of 8x11 Copy Paper	8.00	80.00
SUBTOTAL			\$430.00
SALES TAX			22.00
FREIGHT CHARGES			.00
TOTAL DUE			\$452.00




Make all checks payable to **General Supplies Corporation**
If you have any questions concerning this invoice, contact Billing at 1.800.800.8000

THANK YOU FOR YOUR BUSINESS!

Toggle the list of workflow items in landscape view

When you initially open a workflow item, the list of workflow items remains open on the left side of the screen.


- In landscape view, tap  to collapse the list of workflow items. This provides more space to display the workflow item, as shown below.
- To redisplay the list of workflow items, tap .



Page 1 of 1

Hold

Route

**General Supplies Corporation**
1600 Main Street
Chicago, IL 60600

302.555.1200 Phone
302.555.1300 Fax
www.gsc.com

INVOICE

INVOICE # 10546
DATE: August 27, 2009
Terms: Net 30

Bill To:
ACME Construction
22701 West 68th Terrace
Shawnee, KS 66226
800.941.7460

Ship To:
ACME Construction
22701 West 68th Terrace
Shawnee, KS 66226
800.941.7460

Comments or special instructions:


QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
2	RBG-747x Power Panel	100.00	200.00
15	Canon 24 Black Ink Cartridges	10.00	150.00
10	Cases of 8x11 Copy Paper	8.00	80.00
SUBTOTAL			\$430.00
SALES TAX			22.00
FREIGHT CHARGES			.00
TOTAL DUE			\$452.00

Make all checks payable to **General Supplies Corporation**
If you have any questions concerning this invoice, contact Billing at 1.800.800.8000

THANK YOU FOR YOUR BUSINESS!

Portrait view

The advantage of portrait view is that you can see a larger view of your workflow items, as shown below.



Page 1 of 1

Hold

Route



General Supplies Corporation
1600 Main Street
Chicago, IL 60600

302.555.1200 Phone
302.555.1300 Fax
www.gsc.com

INVOICE

INVOICE # 10546
DATE: August 27, 2009
Terms: Net 30

Bill To:

ACME Construction
22701 West 68th Terrace
Shawnee, KS 66226
800.941.7460

Ship To:

ACME Construction
22701 West 68th Terrace
Shawnee, KS 66226
800.941.7460

Comments or special instructions:


QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
2	RBG-747x Power Panel	100.00	200.00
15	Canon 24 Black Ink Cartridges	10.00	150.00
10	Cases of 8x11 Copy Paper	8.00	80.00
SUBTOTAL			\$430.00
SALES TAX			22.00
FREIGHT CHARGES			.00
TOTAL DUE			\$452.00

Make all checks payable to **General Supplies Corporation**
If you have any questions concerning this invoice, contact Billing at 1.800.800.8000

THANK YOU FOR YOUR BUSINESS!

Toggle the list of workflow items in portrait view

In portrait view, by default, the list of workflow items is on top of the image of the workflow item.

- Tap in the workflow item space, indicated by the orange outline below, to display the full image of the workflow item.
- To redisplay the list of workflow items, tap .

Back

Invoice Approval

Page 1 of 1

Hold

Route

Drawer: Accounts Payable
Folder: 5054
Tab: General Supply Company
Field 3: 10546
Field 4: 08/27/2009
Field 5: 452.00
Type: Invoices

Drawer: Accounts Payable
Folder: 7543
Tab: Print Express
Field 3: 54677
Field 4: 08/31/2009
Field 5: 350.00
Type: Invoice

Drawer: Accounts Payable
Folder: 5054
Tab: General Supply Company
Field 3: 108781
Field 4: 09/08/2009
Field 5: 1225.00
Type: Invoices

Drawer: Accounts Payable
Folder: 3098
Tab: Johnson Lumber
Field 3: 10672
Field 4: 08/29/2009
Field 5: 7701.82
Type: Invoices

Drawer: Accounts Payable
Folder: 1054
Tab: Same Day Delivery
Field 3: 165667
Field 4: 08/29/2009

INVOICE

INVOICE # 10546
DATE: August 27, 2009
Terms: Net 30

Ship To:
 ACME Construction
 22701 West 68th Terrace
 Shawnee, KS 66226
 800.941.7460

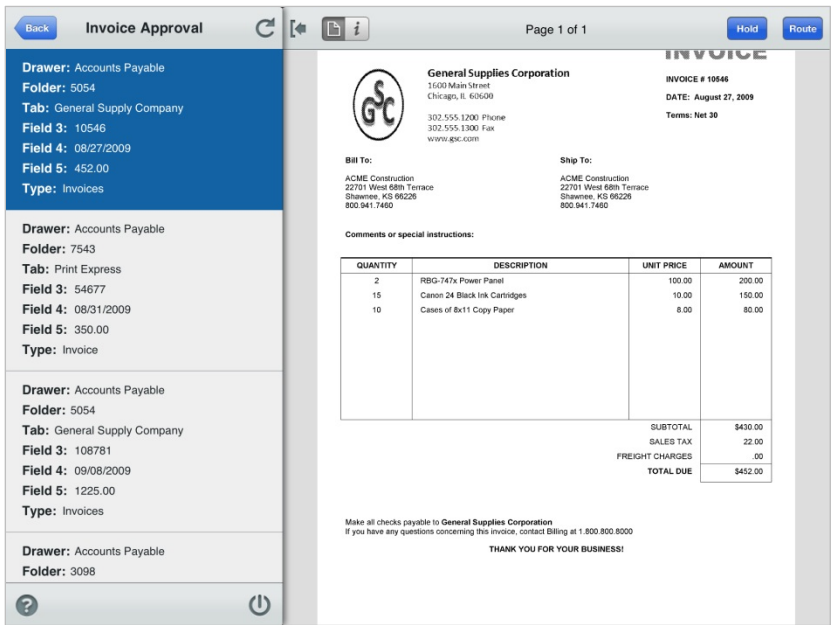
DESCRIPTION	UNIT PRICE	AMOUNT
	100.00	200.00
	10.00	150.00
	8.00	80.00
SUBTOTAL		\$430.00
SALES TAX		22.00
FREIGHT CHARGES		.00
TOTAL DUE		\$452.00


Contact Billing at 1.800.800.8000
FOR YOUR BUSINESS!

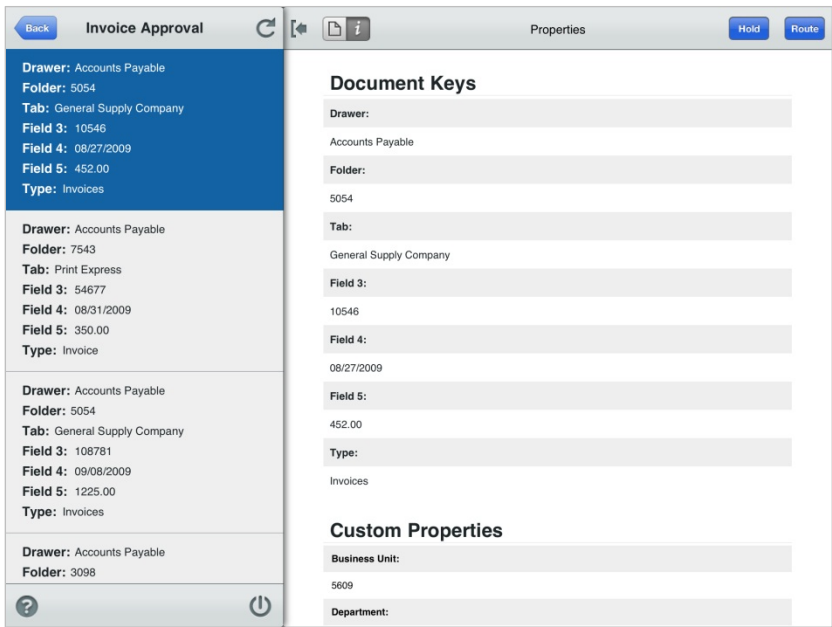
Toggle between Page view and Properties view


When you view a workflow item, Interact Mobile either displays **Page view**, which provides images for each page of the workflow item, or displays **Properties view**, which shows the document keys and custom properties associated with the workflow item. Page view is the default view.

For Page view, tap . An example of Page view is shown below.



For Properties view, tap . An example of Properties view is shown below.



Interact Mobile remains in the selected view until you change it. So, if you view a workflow item and tap  for Properties view, when you view a different workflow item, Interact Mobile opens the workflow item in Properties view.

Toggle the toolbar

You can hide the toolbar so that you can see more of your workflow item. The orange outline in the image below highlights the toolbar.

- To hide the toolbar, tap the image of the workflow item.
- To redisplay the toolbar, tap the image of the workflow item again.

Back

Invoice Approval

Page 1 of 1

Hold

Route

Drawer: Accounts Payable
Folder: 5054
Tab: General Supply Company
Field 3: 10546
Field 4: 08/27/2009
Field 5: 452.00
Type: Invoices

Drawer: Accounts Payable
Folder: 7543
Tab: Print Express
Field 3: 54677
Field 4: 08/31/2009
Field 5: 350.00
Type: Invoice

Drawer: Accounts Payable
Folder: 5054
Tab: General Supply Company
Field 3: 108781
Field 4: 09/08/2009
Field 5: 1225.00
Type: Invoices

Drawer: Accounts Payable
Folder: 3098

General Supplies Corporation
 1600 Main Street
 Chicago, IL 60600
 302.555.1200 Phone
 302.555.1300 Fax
 www.gsc.com

INVOICE # 10546
DATE: August 27, 2009
Terms: Net 30

Bill To:
 ACME Construction
 22701 West 68th Terrace
 Shawnee, KS 66226
 800.941.7460

Ship To:
 ACME Construction
 22701 West 68th Terrace
 Shawnee, KS 66226
 800.941.7460

Comments or special instructions:

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
2	RBG-747x Power Panel	100.00	200.00
15	Canon 24 Black Ink Cartridges	10.00	150.00
10	Cases of 8x11 Copy Paper	8.00	80.00
SUBTOTAL			\$430.00
SALES TAX			22.00
FREIGHT CHARGES			.00
TOTAL DUE			\$452.00

Make all checks payable to **General Supplies Corporation**
 If you have any questions concerning this invoice, contact Billing at 1.800.800.8000
THANK YOU FOR YOUR BUSINESS!

Use Interact Mobile

The following sections explain how to view a workflow item, route a workflow item, and put a workflow item on hold.

After logging into Interact Mobile, the application displays a list of workflow processes. Each workflow process may contain a list of workflow items that are available for you to review and route forward or put on hold.

About workflow items in ImageNow



An ImageNow administrator can create a workflow for your documents that coordinates with your business process. ImageNow creates a workflow item for every document sent to the workflow environment. The item points to a document and routes around the workflow environment on behalf of that document. With Interact Mobile, you can view a document in a workflow process, route a document through a workflow process, and place a document that is in a workflow process on hold.

View an image of a workflow item

The following steps explain how to view an image of a workflow item.

1. In the **Process** list, select a workflow process.
2. In the list of workflow items, select a workflow item. Interact Mobile displays an image of the workflow item.

Tips

- For workflow items with multiple pages, swipe left to go forward a page or swipe right to go backward a page. Interact Mobile displays the total number of pages and the page number you are currently viewing in the toolbar.
- Tap  to view the document key and custom property values for the workflow item.
- If you are in portrait view, tap the image of the workflow item to hide the list of workflow items, and tap  to redisplay the list of workflow items.
- To return to the list of workflow processes, tap **Back** in the workflow item list.

Route an item in workflow

The following steps explain how to route a workflow item to a different queue in workflow.

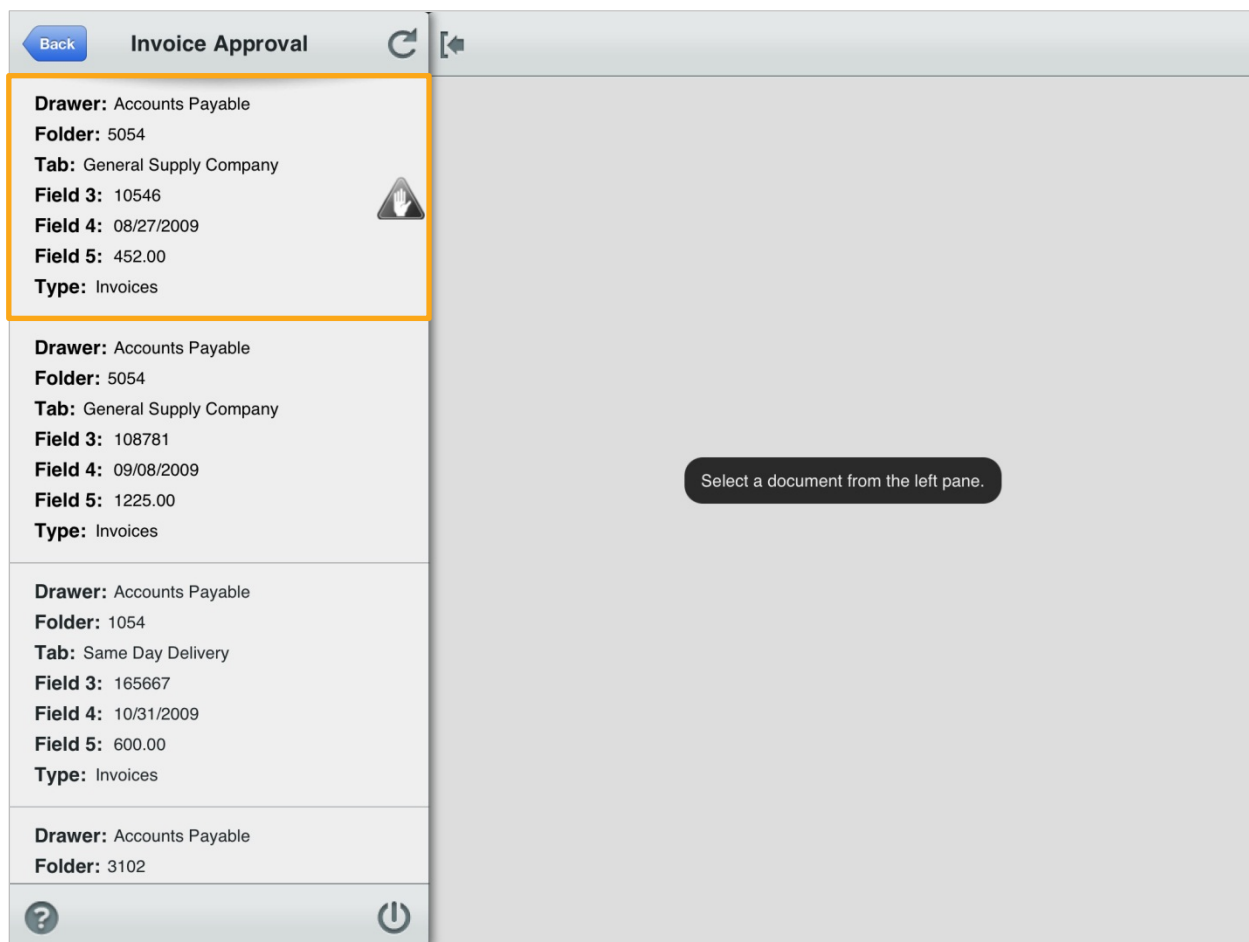
1. In the **Process** list, select a workflow process.
2. In the list of workflow items, select a workflow item.
3. To route the item to another queue in the workflow process flow, tap **Route**.
4. In the **Select Route** dialog box, select the route you want and then tap **Route**. Interact Mobile routes the item and removes it from the list of workflow items.

Place a workflow item on hold

The following steps explain how to place a workflow item on hold.


1. In the **Process** list, select a workflow process.
2. In the list of workflow items, select a workflow item.
3. To place the item on hold, tap **Hold**.
4. In the **On Hold** dialog box, flick the calendar to set the appropriate date and then tap **Hold**.

Interact Mobile indicates that an item is on hold by placing the hold icon next to the workflow item, as shown below. The orange outline in the following image shows a document on hold.



Refresh the view

Interact Mobile automatically refreshes the list of workflow processes and workflow items when you route a document or place a document on hold. You can also manually refresh the view.

- To refresh the list of workflow processes or workflow items, tap .