# Interact Mobile for iPad Getting Started Guide



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## 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  $\blacksquare$ .
- 2. Tap **(U)** 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	[+	l i	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		Bill To: ACME Construction 22701 West 86h T Shawnee, KS 6622 800,941,7460	errace	ion INVOICE	August 27, 2009 Net 30
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		Comments or spe QUANTITY 2 15 10	DESCRIPTION RBG-747x Power Panel Canon 24 Black Ink Cartridges Cases of 8x11 Copy Paper	UNIT PRICE 100.00 10.00 8.00	AMOUNT 200.00 150.00 80.00
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 ①			yable to General Supplies Corporation stions concerning this invoice, contact Bil THANK YOU FOR		\$430.00 22.00 .00 \$452.00

#### 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 🏓.

•] [	ìi		Page	1 of 1			Hold	Route
		GCC Bill To: ACME Construction 22701 West 88th To: Shawnee, KS 66224 800.941.7460	errace	ion Ship To: ACME Construction 22701 West 68th Ter Shawnee, KS 66226 800.941.7460	INVOICE : DATE: A Terms: N	igust 27, 2009		
		Comments or spec	cial 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		
				FRE	IGHT CHARGES	.00		
					TOTAL DUE	\$452.00		
		Make all checks pay If you have any que	vable to General Supplies Corporation stions concerning this invoice, contact Bi THANK YOU FOR	lling at 1.800.800.8000 YOUR BUSINESS!				

## **Portrait view**

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

			INN	OICE
GC	General Supplies Corporat 1600 Main Street Chicago, IL 60600 302.555.1200 Phone 302.555.1300 Fax www.gsc.com	tion	INVOICE DATE: A Terms: N	ugust 27, 2009
Bill To:		Ship To:		
ACME Construction 22701 West 68th Te Shawnee, KS 66226 800.941.7460		ACME Construction 22701 West 68th Ter Shawnee, KS 66226 800.941.7460	race	
Comments or spec	ial 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 SALES TAX	\$430.00
		FRE	IGHT CHARGES	.00
			TOTAL DUE	\$452.00
Make all checks pay If you have any ques	able to General Supplies Corporation tions concerning this invoice, contact Bi THANK YOU FOR	illing at 1.800.800.8000		

#### 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  $\blacksquare$ .

Back Invoice Approval	C Page 1 of 1		Hold Rou
Drawer: Accounts Payable			OICE
Folder: 5054			VIVE
Tab: General Supply Company	oration	INVOICE #	10546
Field 3: 10546		DATE: Au	gust 27, 2009
Field 4: 08/27/2009		Terms: Ne	t 30
Field 5: 452.00			
Type: Invoices			
Drawer: Accounts Payable	Ship To:		
Folder: 7543		nstruction	
Tab: Print Express		est 68th Terrace KS 66226	
Field 3: 54677	800.941.7	460	
Field 4: 08/31/2009			
Field 5: 350.00			
Type: Invoice	ION	UNIT PRICE	AMOUNT
		100.00	200.00
Drawer: Accounts Payable		10.00	150.00
Folder: 5054		8.00	80.00
Tab: General Supply Company			
Field 3: 108781			
Field 4: 09/08/2009			
Field 5: 1225.00			
Type: Invoices			
Drawer: Accounts Payable			
Folder: 3098		SUBTOTAL SALES TAX	\$430.00 22.00
Tab: Johnson Lumber		SALES TAX	.00
Field 3: 10672		TOTAL DUE	\$452.00
Field 4: 08/29/2009		TOTAL DUE	ψ <del>1</del> 32.00
Field 5: 7701.82			
Type: Invoices	ation		
Drawer: Accounts Payable	tact Billing at 1.80		
<b>Folder:</b> 1054	FOR YOUR BU	SINESS!	
Tab: Same Day Delivery			
Field 3: 165667			
Field 4. 10/01/0000			
0			

## **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.

Back Invoice Approval C	[+	lì i	Page	1 of 1	Hold	Route
Drawer: Accounts Payable Folder: 5054 Tab: General Supply Company Field 3: 10546 Field 4: 0827/2009 Field 5: 452.00 Type: Invoices		GCC Bill To: ACME Construction 2670 Hoved 68m 2870 Hoved 68m 2870 Hoved 68m	Terrace	tion INVOICE	ugust 27, 2009	
Drawer: Accounts Payable Folder: 7543 Tab: Print Express Field 3: 54677 Field 4: 08/31/2009 Field 5: 350.00 Type: Invoice		Comments or specific according to the specif	Cial Instructions: DESCRIPTION RBG-747x Power Panel Canon 24 Black Ink Carnidges Cases of 8x11 Copy Paper	UNIT PRICE 100.00 10.00 8.00	AMOUNT 200.00 150.00 80.00	
Drawer: Accounts Payable Folder: 5054 Tab: General Supply Company Field 3: 108781 Field 4: 09/08/2009				SUBTOTAL SALES TAX FREIGHT CHARGES TOTAL DUE	\$430.00 22.00 .00 \$452.00	
Field 5: 1225.00 Type: Invoices Drawer: Accounts Payable Folder: 3098		Make all checks p If you have any qu	systele to General Supplies Corporation estions concerning the invokes, contact Bi THANK YOU FOR			

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

Back Invoice Approval	! [•	l i	Properties	Hold	Route
Drawer: Accounts Payable Folder: 5054		Docume	ent Keys		
Tab: General Supply Company		Drawer:			
Field 3: 10546 Field 4: 08/27/2009		Accounts Paya	able		
Field 5: 452.00		Folder:			
Type: Invoices					
		5054			
Drawer: Accounts Payable		Tab:			
Folder: 7543		General Supply	y Company		
Tab: Print Express		Field 3:			
Field 3: 54677					
Field 4: 08/31/2009		10546			
Field 5: 350.00 Type: Invoice		Field 4:			
Type. Invoice		08/27/2009			
Drawer: Accounts Payable		Field 5:			
Folder: 5054 Tab: General Supply Company		452.00			
Field 3: 108781		Туре:			
Field 4: 09/08/2009		Invoices			
Field 5: 1225.00					
Type: Invoices		Custom	n Properties		
Drawer: Accounts Payable			•		
Folder: 3098		Business Unit:	:		
•		5609			
0 U		Department:			

Interact Mobile remains in the selected view until you change it. So, if you view a workflow item and tap *i* 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		Hold Route	е
Drawer: Accounts Payable Folder: 5054 Tab: General Supply Company Field 3: 10546 Field 4: 08/27/2009 Field 5: 452.00		GC BII TO: ACME Constructio	General Supplies Corporation 1600 Main Street Chicago, IL 60600 302.555.1200 Phone 302.555.1300 Fax www.gsc.com	INVOICE DATE: A Terms: N	ugust 27, 2009	
Type: Invoices Drawer: Accounts Payable		22701 West 68th 1 Shawnee, KS 6622 800.941.7460	Ferrace 2270 26 Shaw 800.9	UI West 88th Terrace wnee, KS 66226 941.7460		
Folder: 7543 Tab: Print Express	L	QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT	
Field 3: 54677		2	RBG-747x Power Panel	100.00	200.00	
Field 4: 08/31/2009		15	Canon 24 Black Ink Cartridges Cases of 8x11 Copy Paper	10.00 8.00	150.00 80.00	
Field 5: 350.00						
Type: Invoice						
Drawer: Accounts Payable						
Folder: 5054						
Tab: General Supply Company				SUBTOTAL SALES TAX	\$430.00 22.00	
Field 3: 108781				FREIGHT CHARGES	.00	
Field 4: 09/08/2009				TOTAL DUE	\$452.00	
Field 5: 1225.00						
Type: Invoices			ayable to General Supplies Corporation estions concerning this invoice, contact Billing at	1.800.800.8000		
Drawer: Accounts Payable			THANK YOU FOR YOUR	R BUSINESS!		
Folder: 3098						
<b>(</b> )						

## **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 *i* 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 into 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.

Back Invoice Approval C	[ <b>4</b>
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: 5054 Tab: General Supply Company Field 3: 108781 Field 4: 09/08/2009 Field 5: 1225.00 Type: Invoices	Select a document from the left pane.
Drawer: Accounts Payable Folder: 1054 Tab: Same Day Delivery Field 3: 165667 Field 4: 10/31/2009 Field 5: 600.00 Type: Invoices	
Drawer: Accounts Payable Folder: 3102	

#### **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 C.