

Content Modeling for Administrators

Getting Started Guide

ImageNow Version: 6.7.x



perceptivesoftware

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Content modeling overview

ImageNow version 6.7 introduces the capability to structure, manage, and preserve your content using content models, which store content in folders that reside in drawers. ImageNow enables you to define a content model for each drawer to best fit your business needs. This guide provides details about defining a content model in your ImageNow system. You can expect the following advantages when using content modeling:

- A level of organization in addition to drawers and document keys.
- A path to a document that is an absolute location.
- Shortcuts that allow your users to reference a document or folder in multiple folders but maintain the integrity of storing content in a single location.
- The option to restrict the folder hierarchy to a structure you define, requiring your users to create folders and folder content according to your organization's best practices.
- The capability for your users to group related documents and folders based on your business processes, which can include multiple levels of folders.
- Support for new ImageNow features and products that use folders, such as Interact for Microsoft Outlook.

Identify your content model

Before you define a content model, your organization must identify a structure that best suits your users and business processes. Your Perceptive Software Professional Services team can help you determine how your desired structure translates into ImageNow components such as drawers, folder types, and document types. Consider the following questions when identifying your content model structure:

- How are your users likely to browse to content and how frequently will a user need to create a new folder? For example, do your employee benefits processes best translate into placing the "John Jones" folder inside the "2013" folder, or by placing the "2013" folder inside the "John Jones" folder?
- What types of documents do you intend to store in ImageNow and which of those documents, if any, do you want to require a user to include in a folder?
- Because access to content depends on privileges defined for the Drawer and Type values assigned to a folder, document, or shortcut, which document types and folder types will you store in a particular drawer?
- What metadata do you want to store in a document's property fields?
- Would your users benefit from accessing customized views to locate content?

Define your content model

This document explains how to define the following components to establish your content model, which you should define in the listed order:

1. The following ImageNow objects:
 - Custom properties
 - Document types

- Document type lists
 - Drawers
 - Folder types
 - Folder type lists
2. Folder type hierarchy
 3. Content model privileges
 4. Location and property options for content

This document defines each component in the applicable section, and you can refer to Appendix E for a glossary. Additionally, you can access more information about all of these components in Administrator Help. You define most of these components using Management Console, and you must be an owner or a manager, or have the following management privileges: Global Privileges in the Manage group for Drawers, Document Types, Folder Types, Custom Properties, and User Security.

Consider upgrade scenarios

When upgrading from a previous version of ImageNow, keep in mind the following considerations as you begin to implement content modeling:

- You will likely use two document filing structures: one in which you organize documents at the drawer level using document keys (the filing structure available prior to ImageNow 6.7), and one in which you store documents in a content model that includes folders and shortcuts.
- For a document stored at the drawer level using document keys, the document's keys make it unique in your ImageNow system. For a document stored in a content model, the document's path makes it unique.
- If a user with privileges enters a name for a document stored at the drawer level, that document changes to the content model filing structure.
- For a content model, we recommend that your organization store documents in folders that reside within a drawer. When implementing content models for existing documents, however, it is likely that you will have documents that reside at the drawer level while being in a content model.
- Some components required for a content model already exist in your ImageNow system. To enable storing content in a content model, however, you must define new application plan maps, capture profiles, and content model-specific privileges.
- With the addition of content models, some ImageNow terminology changed. For example, the term "document keys" now fits under the general term "properties." Also, the "Folder" and "Tab" document keys are now the "Field1" and "Field2" properties.

For a full description of the differences between filing structures available in ImageNow, refer to the *Content Modeling Upgrade Guide*.

Define ImageNow objects

The following sections explain the ImageNow objects that perform roles in your content model and how to define them.

Custom properties

Custom properties provide optional property fields that enable you to store additional data for a document or folder. They offer another method to categorize documents and folders for easy sorting. Custom properties enable you store unlimited data beyond the standard document and folder properties. You make custom properties available to documents and folders by assigning them to document types or folder types. ImageNow provides the following custom property data types: Date, Flag, List, Number, String, and User.

Suppose, for example, that the Human Resources Department has a "New Hire" folder type that the HR clerk uses to create a folder for each new employee. The clerk adds a document assigned the "Medical Enrollment Form" document type to each new employee's folder. The clerk also assigns string and date custom properties that you defined as shown in the following tables:

Folder Type	Custom Property Data Type	Custom Property	Custom Property Value
New Hire	String	Job Title	Marketing Director
	Date	Date of Hire	05/08/12

Document Type	Custom Property Data Type	Custom Property	Custom Property Value
Medical Enrollment Form	String	Plan Year	2012
	Date	Coverage Start Date	01/01/12

Define a date custom property

The following steps explain how to define a custom property that stores a date as a string value.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **Date**.
3. In the **New Date Property** dialog box, in the **Name** box, type the name of the custom property.
4. For **Default value**, perform one of the following actions:
 - To always use the current date as the default value, verify that the **Default to the current date** check box is selected.
 - To select a date for the default value, clear the **Default to the current date** check box, click the **Default value** arrow, and then on the Calendar control, select the default date for this custom property.

- To use no default date, leave the **Default value** empty and clear the **Default to current date** check box.
5. In the **Display Format** section, select the **Month**, **Day**, **Year**, and **Weekday** check boxes to show the respective portion of the date.
 6. Click **OK**.

Define a flag custom property

The following steps explain how to define a custom property that stores a Boolean field where a user can select from two options.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **Flag**.
3. In the **New Flag Property** dialog box, in the **Name** box, type a name for the custom property.
4. Optional. In the **Default value** list, select **True** or **False** for the default value for this custom property. If you leave this setting empty, no default value appears in the custom property.
5. In the **Positive Label** box, type the value to display when the condition is true.
6. In the **Negative Label** box, type the value to display when the condition is false.

Note The Flag property stores values of 0 or 1 based on the value that is selected by the user. The Positive Label and Negative Label boxes allow you to adjust the labels that represent the stored values.

7. Click **OK**.

Define a list custom property

The following steps explain how to define a custom property that stores a predefined list of values from which a user can select a value.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **List**.
3. In the **New List Property** dialog box, in the **Name** box, type a name for the custom property.
4. To add values to the list, do the following substeps:
 1. Under **Display Format**, in the **Values** list, click **Add**.
 2. Type the value you want to add to the list and press ENTER.
 3. Repeat the previous substeps for each value you want to display in the list.
5. Optional. After you add all list values, use the **Move Up** and **Move Down** buttons to reorder the listed items.
6. Optional. In the **Default value** list, select the default list value for this custom property.
7. Click **OK**.

Define a number custom property

The following steps explain how to define a custom property that stores a number value such as currency.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **Number**.
3. In the **New Number Property** dialog box, in the **Name** box, type a name for this custom property.
4. Optional. In the **Default value** box, type the number to use for the default value for this custom property.
5. Under **Display Format**, perform one of the following actions:
 - To define a number custom property based on currency, perform the following substeps:
 1. In the **Format** list, select **Currency** and select **USD**, **GBP**, or **EUR** as the currency type.
 2. In the **Decimal Places** box, type or select the number of decimal places.
 3. Optional. To remove the thousands separator from numbers greater than 999, clear the **Punctuated at thousands** check box.
 - To define a number custom property based on any numeric value, perform the following substeps:
 1. In the **Format** list, select **Decimal**.
 2. In the **Decimal Places** box, type or select the number of decimal places.
 3. Select **Fixed** or **Varying**. If you select **Varying**, the **Decimal Places** box is dimmed and unavailable.
 4. Optional. To remove the thousands separator from numbers greater than 999, clear the **Punctuated at thousands** check box.
6. Click **OK**.

Define a string custom property

The following steps explain how to define a custom property that stores a text value.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **String**.
3. In the **New String Property** dialog box, in the **Name** box, type a name for the custom property.
4. Optional. In the **Default value** box, type the default string value for this custom property.
5. Click **OK**.

Define a user custom property

The following steps explain how to define a custom property that stores an ImageNow user's name.

1. In **Management Console**, in the left pane, click **Custom Properties**.
2. In the right pane, click the **New** button and select **User**.

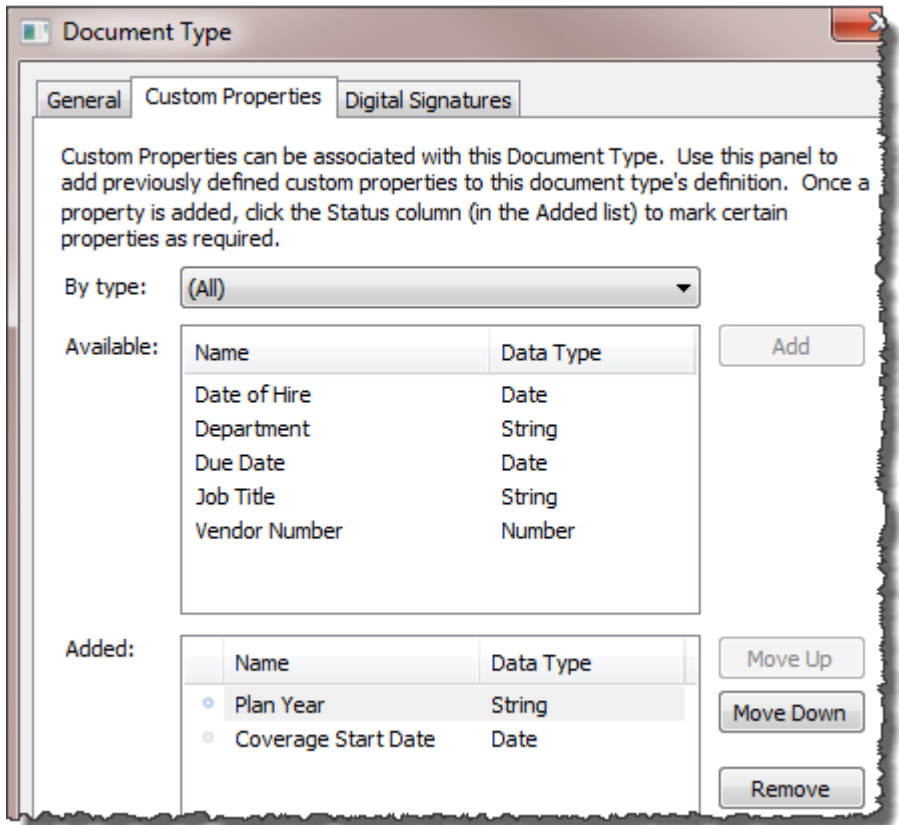
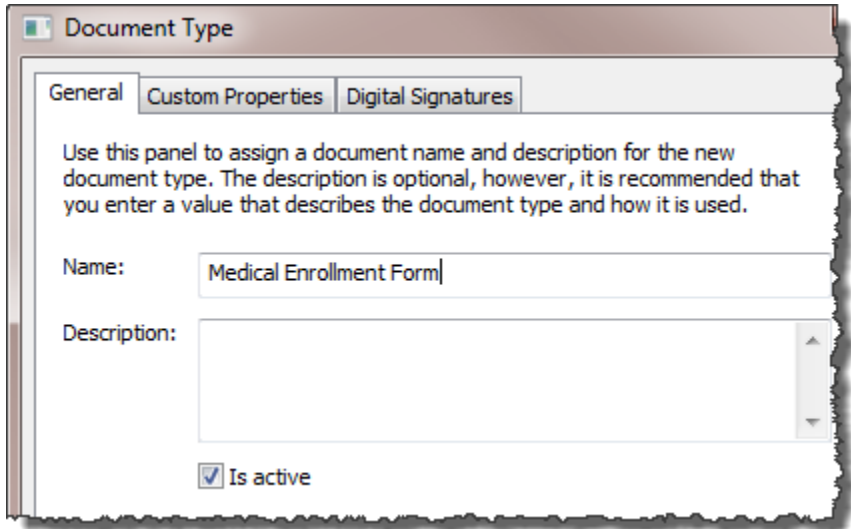
3. In the **New User Property** dialog box, in the **Name** box, type a name for the custom property, and perform one of the following actions:
 - To use an ImageNow group for user list values, in the **Source** list, select **Group** and, in the **Group** list, select the group you want.
 - To create individual user list values, in the **Source** list, select **Predefined list** and to add members to the list of user values, click **Add**.
4. In the **Default value** list, choose one of the following options:
 - Select **(Current user)** to display the logged in user as the default.
 - Select the blank line to show the empty line as the default.
 - Select a user name to display as the default.
5. Under **Display Format**, in the **Format** list, select a display format.
6. Optional. If you selected a display format other than **User name**, to use a display prefix, such as Mr., when displaying this custom property, select the **Display prefix** check box.
7. Optional. If you selected a display format other than **User name**, to use a display suffix, such as Jr., when displaying this custom property, select the **Display suffix** check box.
8. Click **OK**.

Document Types

You must define document types for a content model. You can use document types to define:


- A value that categorizes a document so that your users can easily identify its purpose.
- The document types you want to allow in a folder or drawer.
- The custom properties a user can or must assign to a document.
- Access to a document.

Suppose, for example, that an HR clerk assigns the “Medical Enrollment Form” document type to a document regardless of the document’s folder or drawer location. In Management Console, you define a document type for the HR clerk in the Document Type dialog box to include the “Plan Year” and “Coverage Start Date” custom properties.



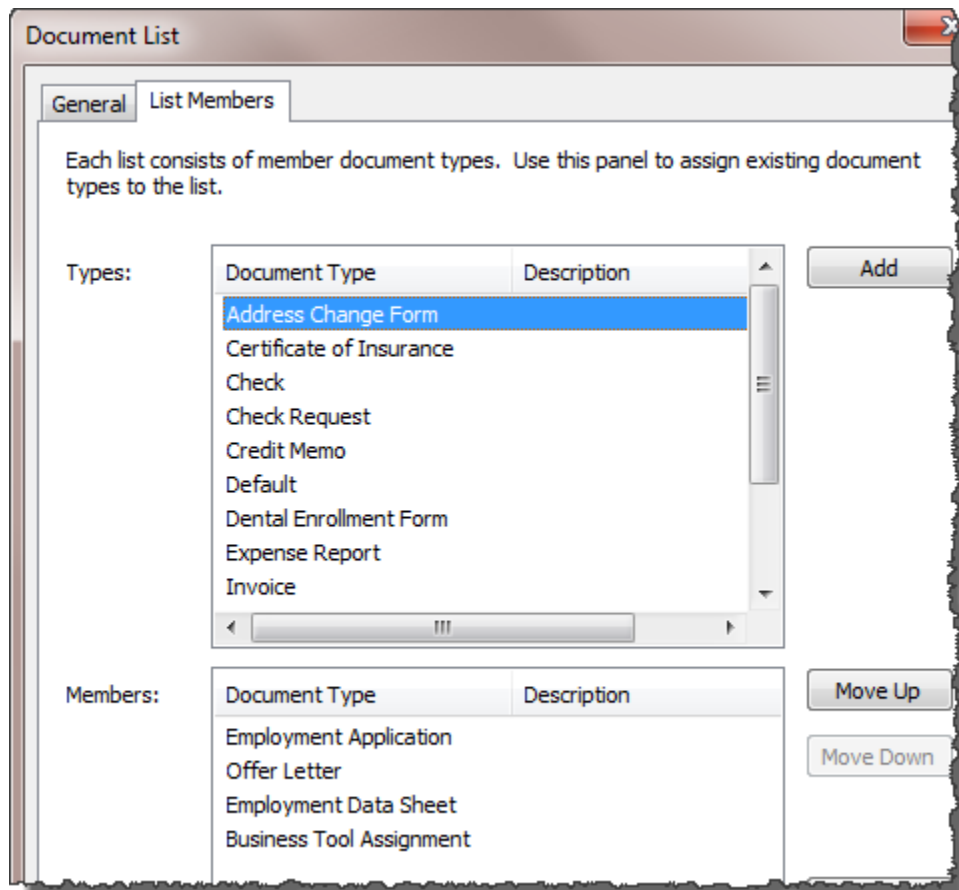
Define a document type

The following steps explain how to define a document type and assign custom properties to it.

1. In **Management Console**, in the left pane, click **Document Types**.
2. In the right pane, on the **Document Types** tab, click **New**.
3. In the selected row under **Document Type**, type a name for the document type and press ENTER.
4. Select the new document type and click **Modify**.
5. In the **Document Type** dialog box, on the **General** tab, perform the following substeps:
 1. Optional. In the **Description** box, type a description of the document type.
 2. Verify the **Is Active** check box is selected.
6. Optional. To assign a custom property to this document type, click the **Custom Properties** tab and add custom properties to the document type as follows:
 1. To filter the custom property rows displayed in the **Available** list to a single data type, in **By type**, select the type you want.
 2. In the **Available** list, select a custom property and click **Add**.
7. To make the custom property required for this document type, in the **Added** list, click in the column in front of the custom property type. The **Required**  icon appears.
8. Optional. To reorder the custom properties, in the **Added** list, click **Move Up** or **Move Down**. For example, you can move the most commonly used document types to the top of the list.
9. If you want ImageNow to verify signatures for this document type, click the **Digital Signatures** tab, select the **Automatically verify signatures for this document** type check box and, to specify how often the signatures are verified, in the **Verification interval** boxes, select the number and time unit and then click **OK**.
10. Click **OK**.

Document type lists

A document type list enables you to group sets of document types based on a relationship. Although document type lists are an optional component of a content model, administrators and users generally find document type lists helpful because they provide the capability to easily locate a particular document type to change its settings or assign it to a document. You set the order of the document types in a list, so you can place the commonly used types at the beginning of the list for ease of use. Suppose, for example, that a document type list named “HR – Onboarding” includes the following document types: Employment Application, Offer Letter, Employment Data Sheet, and Business Tool Assignment. In Management Console, you define a document type list in the Document List dialog box.



Define a document type list

The following steps explain how to define a document type list.

1. In **Management Console**, in the left pane, click **Document Types**.
2. In the right pane, on the **Document Types Lists** tab, click **New**.
3. In the selected row under **Document Type List**, type a name for the list.
4. Select the new document type list and click **Modify**.
5. On the **General** tab, perform the following substeps:
 1. In the **Name** box, modify the name as needed.
 2. Optional. In the **Description** box, describe the document type list.
6. To add document types to the list, on the **List Members** tab, perform the following substeps:
 1. In the **Types** list, select a document type and click **Add**.
 2. Optional. To reorder the document types in the list, in the **Members** box, select a document type and click **Move Up** or **Move Down**.
7. Click **OK** and, in the confirmation box, click **Yes**.

Drawers

Drawers provide the first hierarchical level in ImageNow and contain folders. You must define a drawer for a content model. Drawers also enable you to define:

- The document types you want to allow at the drawer level.
- Access to content.

For example, you might create a “Human Resources” drawer to contain multiple levels of Human Resources-related folders that each contains many documents.

Define a drawer

The following steps explain how to define a drawer.

1. In **Management Console**, in the left pane, click **Drawers**.
2. In the right pane, click **New**.
3. In the **Add Drawer** dialog box, on the **General** tab, type the drawer name and an optional description.
4. To restrict the drawer to allow only specified document types, on the **Document Types** tab, perform the following substeps:
 1. Select the **Allow only selected document types** check box.
 2. Optional. To filter the document types according to the list in which they were assigned, in the **By list**, select a document type list.
 3. Under **Available**, select a document type and click **Add**. Continue to add document types that you want to allow at the drawer level.
 4. To change the order in which the document types display in the drawer, in the **Selected** list, click **Move Up** or **Move Down**. For example, you can move the most commonly used document types to the top of the list.
 5. To delete a document type from the list, in the **Selected list**, select the document type you want to remove and click **Remove**.
5. Click **OK**.

Folder types

A folder type provides a template from which a user creates a folder. You must define folder types for a content model. In a folder type, you define:


- The types of documents a user can or must store in the folder.
- The custom properties a user can or must assign to a folder.
- How ImageNow displays the folder contents to a user.

For example, suppose you create a "New Hire" folder type that an HR clerk selects each time she needs to create a folder for a new employee. To the "New Hire" folder type, you allow only the "Employment application," "Offer Letter," "Employee Data Sheet," and "Business Tool Assignment" document types as shown in the following table.

Folder Type	Folder Type Custom Properties	Folder Name	Document Types Allowed in Folder
New Hire	Job Title	John Jones	Employment Application
			Offer Letter
			Employee Data Sheet
	Business Tool Assignment		
Date of Hire			


Define a folder type

The following steps explain how to define a folder type.

1. In **Management Console**, in the left pane, click **Folder Types**.
2. On the **Folder Types** tab, click **New** and type a name for your folder type.
3. Verify that your new folder type is selected and click **Modify**.
4. On the **General** tab, perform the following substeps:
 1. Optional. In the **Description** box, type a description explaining briefly how this folder type is used.
 2. To display the folder type to users, verify the **Is active** check box is selected
5. To assign a document type to the folder type, on the **Document Types** tab, perform the following substeps:
 1. To restrict the folder type to allow only the document types that you specify, select the **Allow only selected document types** check box.
 2. To filter the document types according to the list in which they were assigned, select a document type list.
 3. Under **Available**, select from the list of document types and click **Add**.
6. To make a document type required for the folder type, in the **Selected** list, click in the column in front of the document type. The **Required**  icon appears.

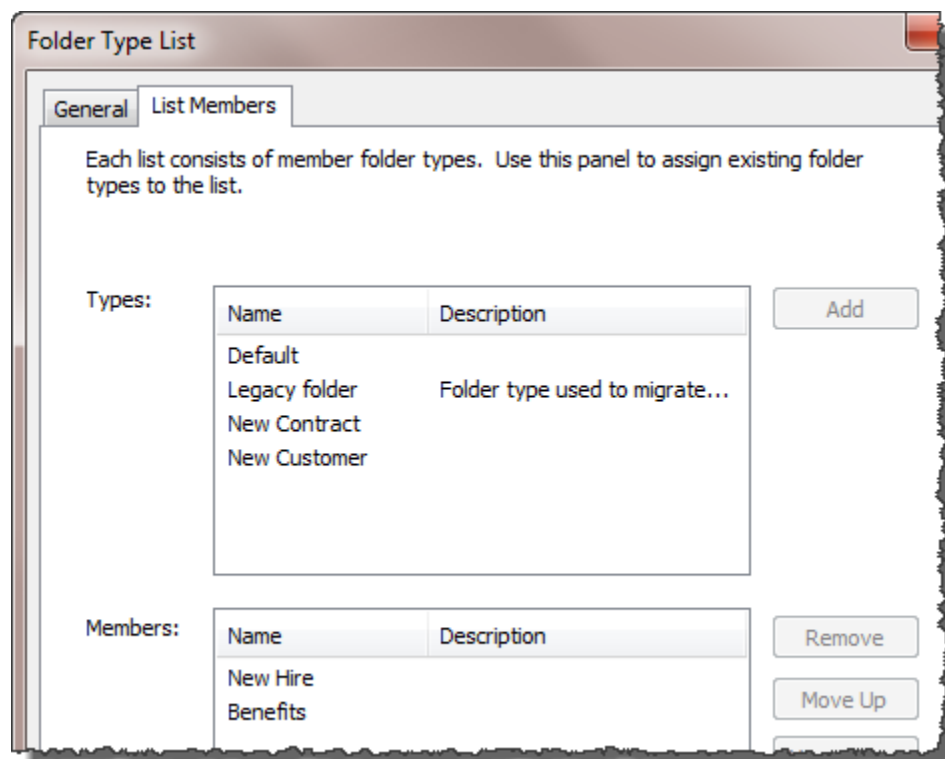
Note When you define required document types for a folder, your users can view a list of the required document types in the Folder Viewer. You can also configure your ImageNow workflow process to identify when a folder contains all of the required document types.

7. To reorder how the document types appear in a folder, in the **Selected** list, click **Move Up** or **Move Down**.

8. To delete a document type from the list, in the **Selected** list, select the document type you want to remove and click **Remove**.
9. To assign custom properties to the folder type, on the **Custom Properties** tab, perform the following substeps:
 1. Select a custom property type to filter the master list of properties.
 2. Under **Available**, select from a custom property and click **Add**.
 3. To change the order in which the custom properties appear for a folder, under **Added**, click **Move Up** or **Move Down**.
 4. To make a custom property required for the folder type, in the **Added** list, click the column in front of the custom property. The **Required**  icon appears.
 5. To delete a custom property from the list, select the custom property and click **Remove**.
10. Click **OK**.

Folder type lists

A folder type list enables you to group sets of folder types based on a relationship. Although folder type lists are an optional component of a content model, administrators and users generally find folder type lists helpful because they provide the capability to easily locate a particular folder type to change its settings or assign it to a folder. You set the order of the folder types in a list, so you can place the commonly used types at the beginning of the list for ease of use. Suppose, for example, that a folder type list named “HR – Onboarding” includes the “New Hire” and “Benefits” folder types. In Management Console, you define a folder type in the Folder Type List dialog box.



Define a folder type list

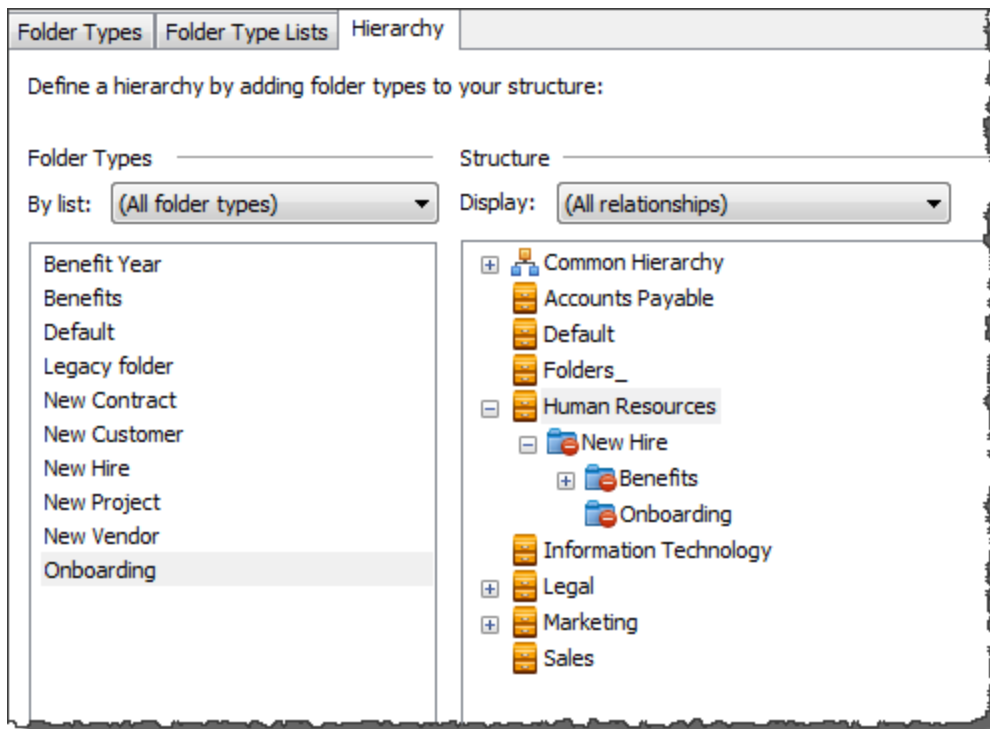
The following steps explain how to define a folder type list.

1. In **Management Console**, in the left pane, click **Folder Types**.
2. In the right pane, on the **Folder Types Lists** tab, click **New**.
3. Under **Select a folder type** list, in the selected row, type a name for the list.
4. Select the new folder type list and click **Modify**.
5. Optional. In the **Folder Type List** dialog box, on the **General** tab, in the **Description** box, describe the folder type list.
6. On the **List Members** tab, perform the following substeps:
 1. To add a folder type, in the **Types** list, select a folder type and click **Add**. Repeat this step for each folder type that you want to add to the list.
 2. Optional. To reorder the folder types, in the **Members** list, select a folder type and click **Move Up** or **Move Down**.
7. Click **OK** and, in the confirmation box, click **Yes**.

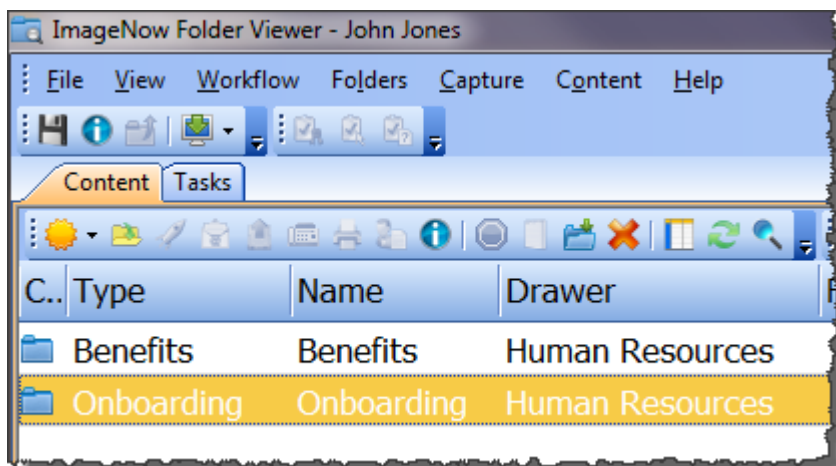
Define the folder type hierarchy

A folder type hierarchy restricts a drawer to allow only the defined folder types and subfolder types. ImageNow does not require that you define a folder type hierarchy for your users with privileges to create folders; however, we recommend that you establish a hierarchy so that the folders your users create in your ImageNow system adhere to a specifically-defined structure. A well designed structure enhances the storage and retrieval of documents.

In addition to a folder type hierarchy for each drawer, the hierarchy includes the Common Hierarchy. The Common Hierarchy displays the relationships between folder types regardless of the drawers they exist in. The following graphic shows an example hierarchy with a “Human Resources” drawer that allows the Benefits and Onboarding folder types.



Suppose the HR clerk creates a folder named “John Jones” and assigns the "New Hire" folder type to it. Based on the example folder type hierarchy discussed above, inside the “John Jones” folder, the HR clerk creates the “Benefits” and “Onboarding” folders. For this scenario, the folder name matches the assigned folder type value. As shown in the following graphic, a user with appropriate privileges can open the “John Jones” folder in ImageNow Folder Viewer to view its subfolders.



Define a folder type hierarchy for a drawer

The following steps explain how to define a folder type hierarchy for a drawer.

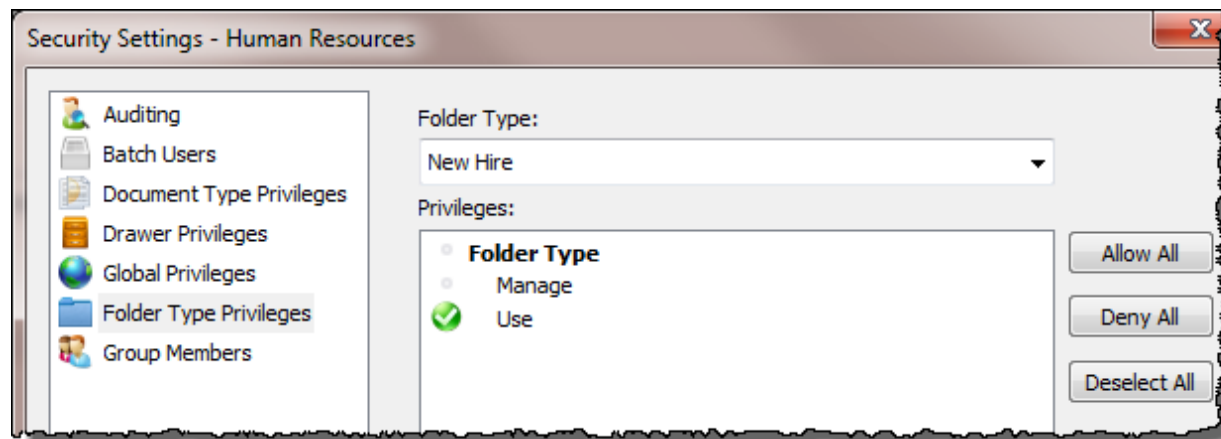
1. In **Management Console**, in the left pane, click **Folder Types** and, in the right pane, click the **Hierarchy** tab.
2. In the right pane, under **Structure**, in the **Display** list, select the name of the drawer you want to restrict.
3. In the left pane, under **Folder Types**, perform the following substeps:
 1. Optional. For **By list**, select a folder type list to filter the list of folder types.
 2. From the list of folder types, select the folder type you want to define in the hierarchy and drag it to the right, dropping it under the drawer where you want it to appear.

Note You can press the CTRL or SHIFT keys to select multiple folder types.
3. Continue to add folder types under the drawer's name and use the **Move Up** or **Move Down** buttons to arrange the folder types to fit your business needs.
4. If you define more than one level of folder types in the hierarchy, and you want to restrict the last folder type level so that a user cannot create a folder below this level, in the right pane, right-click the last folder type level and click **Restrict**.
5. To apply your changes to the hierarchy, click **Save**.

Define content model privileges

To enable users to use or manage the content model, you must define privileges for individual users or groups of users. Your users need privileges related to document types, folder types, and drawers, as well as global content privileges. Refer to Appendix A for additional details about privileges related to a content model.

You can assign a privilege using one of three actions: grant a privilege by allowing it, revoke a privilege by denying it, or choose not to set a privilege assignment at all. The following graphic shows that the Human Resources group was granted the Use privilege for the New Hire folder type.



In most cases, you grant privileges to groups of users who need similar privileges. However, certain users may need specific privileges. For example, you can grant a user access to delete documents in a particular drawer regardless of the privileges set for groups in which the user is a member. The following table shows the privilege hierarchy, where user privileges are higher priority than group privileges, and deny privileges are higher priority than allow privileges.

<p>Highest Priority</p> <p>Lowest Priority</p>	Privilege	User	Deny
		User	Allow
	Group	Group	Deny
		Group	Allow

Define privileges for a user

The following steps explain how to define use or manage privileges for a user.

1. In **Management Console**, in the left pane, click **Users**.
2. In the right pane, on the **Security** tab, perform one of the following actions:
 - In the **Select a user** list, select a user, and click **Modify**.
 - In the **Search for users** box, type all or part of a user name and click **Search**. In the **Select a user** list, select a user and click **Modify**.
3. In the **Security Settings** dialog box, in the left pane, select the type of privileges you want to define and, in the right pane, click the column to the left of the privilege you want to define. The **Grant Privilege** icon or **Deny Privilege** icon appears.
4. Click **OK**.

Define privileges for a group

The following steps explain how to define use or manage privileges for a group of users.

1. In **Management Console**, in the left pane, click **Groups**.
2. In the right pane, on the **Security** tab, perform one of the following actions:
 - In the **Select a group** list, select a group and click **Modify**.
 - In the **Search for groups** box, type all or part of a group name and click **Search**. In the **Select a group** list, select a group and click **Modify**.
3. In the **Security Settings** dialog box, in the left pane, select the type of privileges you want to define and, in the right pane, click the column to the left of the privilege you want to define. The **Grant Privilege** icon or **Deny Privilege** icon appears.
4. Click **OK**.

Define location and property options for content

When performing tasks, such as creating or moving content, a user must assign a folder location (a path) and additional property values. The following sections describe the options available to enable a user to assign these values to content.

About properties

ImageNow uses properties to store, secure, and retrieve content. Properties provide details about content such as its location in your ImageNow system, when the content was created, and if the content is in workflow. ImageNow automatically generates some of these properties, while also providing properties that you define to customize the content model. The following table outlines the definable properties for a document, folder, and shortcut. The table also identifies which of these properties you must define for each type of content. Appendix B, C, and D provide a description and example of each definable property.

Definable Property	Document	Folder	Shortcut
Required			
Path	•	•	•
Name	•	•	•
Drawer	•	•	•
Type (Document Type or Folder Type)	•	•	_____
Optional			
Field1 - Field5	•	_____	_____
Custom Properties	•	•	_____
Notes	•	_____	_____

Each document, folder, and shortcut in a content model has a path that specifies its location in your ImageNow system. The content's path makes it distinguishable from other content in your system. The path contains the drawer and folder levels where the content is stored. For a document, a path also includes the document name. For example, a document named "Application" that resides in the "Human

Resources” drawer, the “John Jones” folder, and the “Onboarding” subfolder has the following path: Human Resources \ John Jones \ Onboarding \ Application.

You define the path and other properties for content in an application plan, a capture profile, or a basket definition. ImageNow provides flexible options to define these components to best meet your organization’s unique business needs. The following subsections provide an overview of defining these components to assign the path and other property values to content. Refer to the Administrator Help for additional information.

About application plans

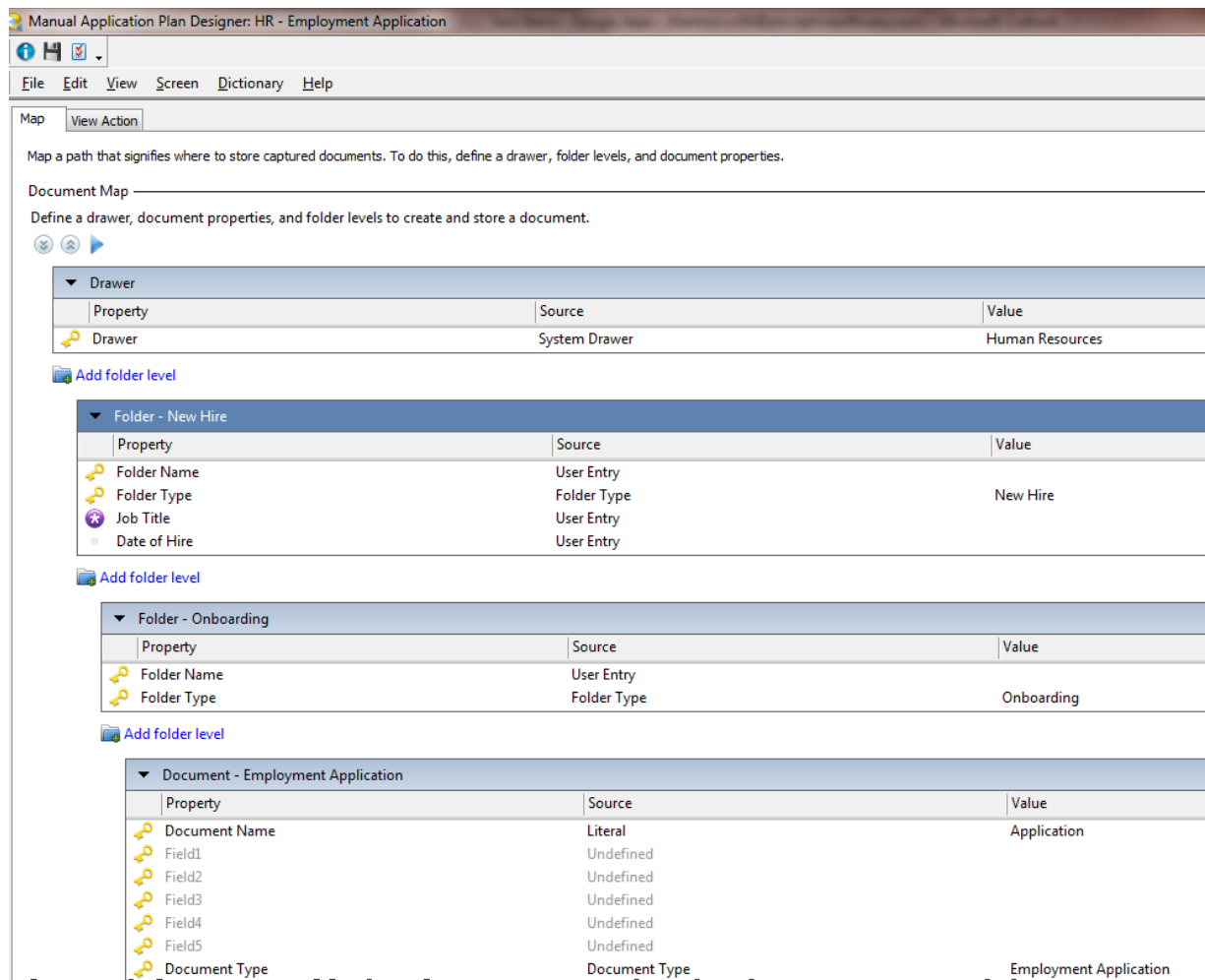
An application plan contains mapped data used to specify a path and other property values for content. ImageNow provides the following application plan types:

- **Manual.** Maps data to content based on a dictionary you define.
- **LearnMode.** Gathers data from a record displayed in your business application and maps it to ImageNow content.
- **Agent.** Maps data to content captured through Fax Agent or Import Agent.
- **External.** Maps data to content captured through iScript.

You can define an application plan to automatically assign property values to content upon capture. When you define a document path in an application plan map for use during capture and other processing needs, ImageNow creates any folders that do not already exist to construct the document path. Additionally, you can define an application plan to create shortcuts to the newly captured document. A shortcut provides a link to a document or folder so that you can reference it in multiple folders while maintaining the integrity of storing the content in a single location.

A user can use a Manual or LearnMode application plan to assign property values to content for multiple purposes. For example, a user might select a Manual or LearnMode application plan to assign values when creating or moving content. A user might also use a Manual or LearnMode application plan to assign values when copying a document, generating a redacted document, or creating a new physical file reference.

Suppose the HR clerk needs to create a redacted copy of an employment application that is already stored in ImageNow. The clerk opens the employment application she needs to redact, adds the redaction masks and, from the File menu, selects Generate Redacted Document. In the Generate Redacted Document dialog box, the clerk selects the application plan named “HR – Employment Application” and, based on the settings in the application plan, ImageNow prompts the HR clerk to enter two folder names, a job title, and a hire date to store the newly created employment application with redacted content. The following graphic shows how you might configure a Manual application plan with a Document map defined for an employment application.

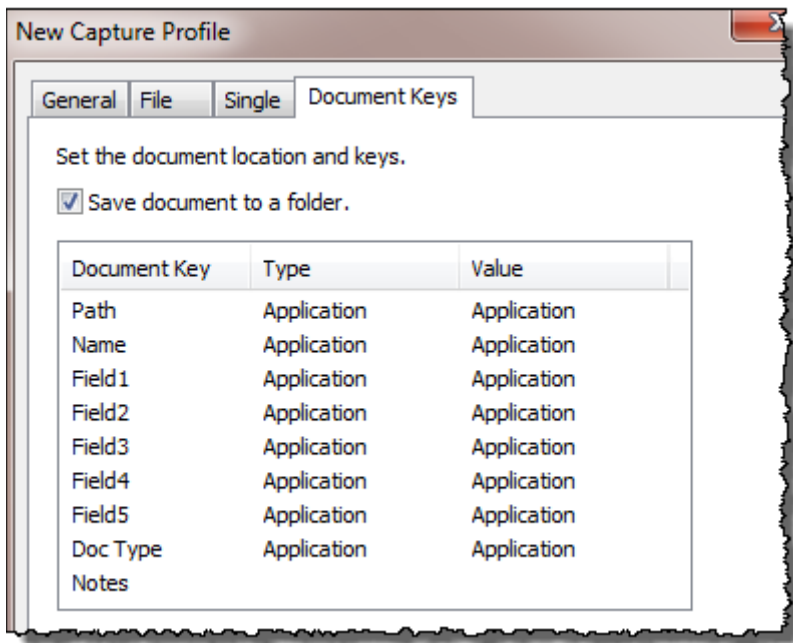
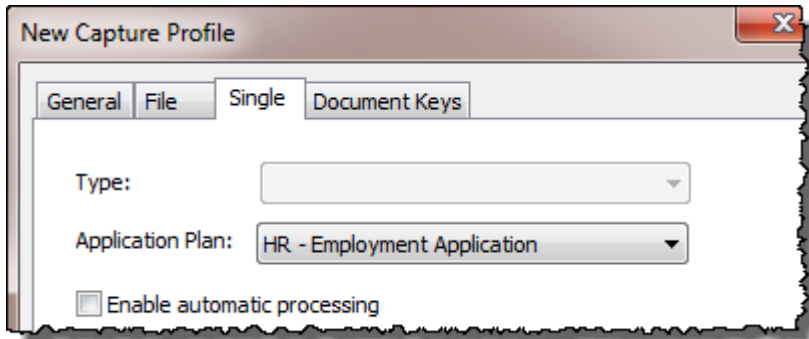


About capture profiles and basket definitions

You define a capture profile or a basket definition to specify how to assign property values, as well as other processing needs, for content during the capture process. Basket definitions apply only to CaptureNow Package mode. In the capture profile or basket definition, you specify whether you want ImageNow to gather data from an application plan or another source such as a barcode.

Suppose the HR clerk needs to import an employment application. The clerk selects the capture profile from the ImageNow toolbar and selects the employment application she wants to import. ImageNow imports the file and, based on the settings in the application plan named “HR – Employment Application,” ImageNow prompts the HR clerk to enter two folder names, a job title, and a hire date to store the new employment application.

The following graphics show a client-based capture profile set to Single mode and File source. The settings defined on the Single and Document Keys tabs instruct ImageNow to use the settings defined in the application plan for all properties.



Profile and basket configuration options

The following table outlines options to define how ImageNow assigns the property values to content during the capture process.

Component to Define	Capture Method	Configuration Options	Configuration Steps
Client-based capture profile	Single mode and Batch mode in CaptureNow	Define the path in the capture profile to require a user to select from a list of existing paths to store the document.	<p>To set Path to the Manual type in a client-based capture profile, perform the following steps:</p> <ol style="list-style-type: none"> 1. On the Document Keys tab, select the Save document to a folder check box. 2. Double-click Path and select User selects existing folder at capture. <p>After you define Path, you must define the other required properties. On the Document Keys tab, double-click a property to define it. Refer to Administrator Help for additional details.</p>
		Define the path in the capture profile for ImageNow to use the settings defined in an application plan.	<p>To set Path to the Application type in a client-side capture profile, perform the following steps:</p> <ol style="list-style-type: none"> 1. On the Document Keys tab, select the Save document to a folder check box. 2. Double-click Path and select Application plan defines path. <p>After you define Path, you must define the other required properties. On the Document Keys tab, double-click a property to define it. Refer to Administrator Help for additional details.</p>
Server-based capture profile	Import Agent, Fax Agent, SAP ArchiveLink, Interact for Outlook, and external ImageNow interfaces such as iScript.	Define the path in the capture profile for ImageNow to use the settings defined in an application plan.	<p>To specify an application plan in a server-based capture profile, perform the following step:</p> <ul style="list-style-type: none"> • In the Capture Profile Definition, in the Application Plan list, select an application plan. <p>Refer to Administrator Help for additional details.</p>

Component to Define	Capture Method	Configuration Options	Configuration Steps
Basket definition	Package mode in CaptureNow	<p>Define the path in the basket definition to require a user to select from a list of existing paths to store the document.</p>	<p>To set Path to the Manual type in a basket definition, perform the following steps:</p> <ol style="list-style-type: none"> 1. On the General tab, select the Save document to a folder check box. 2. Double-click Path and, for Type, select Manual. <p>After you define Path, you must define the other required properties. On the General tab, double-click a property to define it. Refer to Administrator Help for additional details.</p>
		<p>Define the path in the basket definition to use the settings defined in an application plan.</p>	<p>To set Path to the Application type in a basket definition, perform the following steps:</p> <ol style="list-style-type: none"> 1. On the General tab, select the Save document to a folder check box. 2. Double-click Path and, for Type, select Application. <p>After you define Path, you must define the other required properties. On the General tab, double-click a property to define it. Refer to Administrator Help for additional details.</p>

Appendix A: Content model privilege definitions

The following table outlines the privilege definitions available for performing operations in folders and where to define them.

Type	Definition	Dependency
Folder Type Privileges		
The following privileges determine the actions a user can perform for the folder type. Management Console provides these privileges on the Users or Groups pane, on the Security tab, in the Security Settings dialog box, in the Folder Type pane.		
Manage	Opens access points to the Folder Types tab so the user can modify or remove Folder Types on an item-by-item basis. User can also build hierarchies using this folder type.	Requires the Manage Folder Types global privilege.
Use	The user can use the Folder Type for which the privilege is granted to create, modify, and search for folders for that folder type.	Requires the Create Folders global privilege.
Drawer Privileges		
The following privileges determine the actions a user can perform for folders for which they have the Use privilege for the associated folder type. Management Console provides these privileges in the Users or Groups pane, on the Security tab, in the Security Settings dialog box, on the Drawer Privileges pane, under Content and Folders.		
Open	Users can open a folder in this drawer.	Requires the Use privilege for the associated folder type. Requires the Access privilege for at least one folder view. To display folder contents results, the user must have the Search privilege for the associated drawer.
Search	Users can search for folders in this drawer.	
Create/Append	Users can create a new folder in this drawer.	
Move	Users can move a folder in this drawer.	

Type	Definition	Dependency
Rename	Users can rename a folder in this drawer.	
Delete	Users can delete an existing folder in this drawer and restore folders they delete.	
Edit Custom Properties	User can modify a folder's custom property values in this drawer.	
Edit Drawer	User can change the value of the drawer for documents that are not part of a folder hierarchy, move documents to another drawer, or move documents to the subfolders of another drawer.	
Edit Type	Users can change the folder type of folders in this drawer.	
Create Shortcuts	Users can add document and folder shortcuts to folders in this drawer.	
Remove Shortcuts	Users can remove documents and folder shortcuts from folders in this drawer.	
Edit Status	User can change a folder status to active or inactive in this drawer.	
Folder Management Privileges		
<p>The following privileges determine the management actions a user can perform for folders. Management Console provides these privileges in the Users or Groups pane, on the Security tab, in the Security Settings dialog box, on the Global Privileges pane, under Manage.</p>		

Type	Definition	Dependency
Folder Types	Grants access to the Folder Types pane and the Folder Type Lists in the Management Console so the user can add, modify, and delete folder types and folder type lists, associate custom properties with folder types, and set folder types to inactive.	<p>Requires the Manage privilege for Folder Types on the Folder Type Privileges pane and the Use privilege for Folder Types on the Folder Types Privileges pane for each folder type.</p> <p>By default, the Manage privilege for Folder Types and the Use privilege for Folder Types on the Folder Type Privileges pane are granted by default to the creator of the folder type.</p>
Folder Views	The user can create, delete or modify folder views and folder relationship views.	<p>Requires the Manage privilege for at least one folder view.</p> <p>When the user creates a folder view, he or she is automatically granted the Manage privilege for the view.</p>

Appendix B: Definable folder properties

The following table describes each definable folder property and how you might define the properties for the Human Resources Department.

Folder Property	Description	Required?	Example Configuration	Example Value
Path	A folder path indicates where a folder resides in your ImageNow system. The path contains the values assigned to the Drawer and Name property fields. The path also contains each folder level in which the folder is stored.	Yes	The following structure applies to the folder path: <Drawer> \ <folder name> \ <subfolder name>	Human Resources \ John Jones \ Onboarding
Name	Name provides a unique identifier for the folder within the drawer or folder it resides. A name cannot exceed 128 characters.	Yes	John Jones	John Jones
Drawer	Drawer provides the highest level within the hierarchical structure and is often defined as a department or function, such as Accounts Payable, Human Resources, Registrar, or Financial Aid. You can restrict access to a folder based on its assigned Drawer value.	Yes	Human Resources	Human Resources
Type (Folder Type)	Type categorizes a folder so that your users can easily identify its purpose. Type also provides a template for you to define the settings for a folder. Based on the assigned Type value, you can restrict access to a folder and you can restrict the folders allowed in a drawer and folder.	Yes	New Hire	New Hire
Custom properties	You can define custom property values for a specific folder type. Custom properties let you define and store unlimited data beyond the standard definable folder properties.	No	Job Title	Marketing Director
			Date of Hire	05/08/12

Appendix C: Definable document properties

The following table describes each definable document property and how you might define the properties for the Human Resources Department.

Document Property	Description	Required?	Example Configuration	Example Value
Path	A document path indicates where a document resides in your ImageNow system. The path contains the values assigned to the Drawer and Name property fields. The path also contains each folder level in which the document is stored. Each document path is unique.	Yes	The following structure applies to the document path: <Drawer> \ <folder> \ <subfolder> \ <Name>	Human Resources \ John Jones \ Onboarding \ Application
Name	Name provides a unique identifier for the document within the folder it resides.	Yes	Application	Application
Drawer	Drawer provides the highest level within the hierarchical structure and is often defined as a department or function, such as Accounts Payable, Human Resources, Registrar, or Financial Aid. You can restrict access to a document based on its assigned Drawer value.	Yes	Human Resources	Human Resources
Type (Document Type)	Type categorizes a document so that your users can easily identify its purpose. Based on the assigned Type value, you can restrict access to a document and you can restrict the documents allowed in a drawer and folder.	Yes	Employment Application	Employment Application
Field1	Field1 through Field5 provides you with the option to define values through a selected data element in your application plan dictionary, a literal value that you enter, the name of the current user, the date and time, a number in a sequence, or a unique ID assigned by ImageNow.	No	Employee ID	12345
Field2			Last Name	Jones
Field3			First Name	John
Field4			Employment Status	Full Time
Field5			Job Code	32156
Custom properties	You can define custom property values for a specific document type. Custom properties let you define and store	No	Job Title	Marketing Director

Document Property	Description	Required?	Example Configuration	Example Value
	unlimited data beyond the standard definable document properties.		Posted Date	05/08/12
			Scan Date	05/11/12
Notes	The Notes field enables a user to type and view additional text about a document.	No	Notes	Samantha Smith at Acme Corporation called September 9 to verify employment dates.

Appendix D: Definable shortcut properties

The following sections describe the properties you can define for a folder shortcut and a document shortcut.

Folder shortcuts

The following table describes each definable folder shortcut property and how you might define the properties for the Human Resources Department. A folder shortcut inherits the Type and custom property values from its target folder.

Shortcut Property	Description	Required?	Example Configuration	Example Value
Path	A folder shortcut path indicates where a folder shortcut resides in your ImageNow system. The path contains the values assigned to the Drawer field as well as each folder level in which the shortcut is stored.	Yes	The following structure applies to the folder path: <Drawer> \ <folder name> \ <subfolder name>	Human Resources \ John Jones \ Onboarding
Name	Name provides a unique identifier for the folder shortcut within the folder it resides.	Yes	John Jones	John Jones
Drawer	Drawer provides the highest level within the hierarchical structure. You can restrict access to a shortcut based on its assigned Drawer value.	Yes	Human Resources	Human Resources

Document shortcuts

The following table describes each definable document shortcut property and how you might define the properties for the Human Resources Department. A document shortcut inherits the Type, Field1 through Field5, custom property, and Notes values from its target document.

Shortcut Property	Description	Required?	Example Configuration	Example Value
Path	A document shortcut path indicates where a shortcut resides in your ImageNow system. The path contains the values assigned to the Drawer field as well as each folder level in which the shortcut is stored.	Yes	The following structure applies to the document path: <Drawer> \ <folder name> \ <subfolder name>	Human Resources \ John Jones \ Onboarding
Name	Name provides a unique identifier for the document shortcut within the folder it resides.	Yes	Application	Application
Drawer	Drawer provides the highest level within the hierarchal structure. You can restrict access to a shortcut based on its assigned Drawer value.	Yes	Human Resources	Human Resources

Appendix E: Glossary

The following table provides an overview of the terms used throughout this document.

Term	Description
Application plan	Contains mapped data used to assign location and property values to content.
Basket definition	Contains the settings used to capture a package of documents into ImageNow. CaptureNow Package mode uses settings in a basket definition.
Capture profile	Contains the settings used to capture documents into ImageNow.
Content model	Enables you to structure, manage, and preserve your content while storing it in folders.
Custom property	Stores additional data about a document or folder based on its assigned Type value.
Custom property data type	Specifies the type of data your users can store in a custom property field.
Document	Contains data and pages. Each page is a file captured into ImageNow.
Document type	Specifies a document's purpose and provides a template to define which users can access the document and which custom properties a user can assign to the document.
Document type list	Provides a filtered set of document types.
Drawer	Contains folders.
Folder	Contains documents, subfolders, and shortcuts.
Folder type	Specifies a folder's purpose and provides a template to define which users can access the folder, which documents a user can store in a folder, and which custom properties a user can assign to a folder.
Folder type hierarchy	Specifies which folders a user can store in a drawer and in other folders.
Folder type list	Provides a filtered set of folder types.
Location	Specifies in which drawer, folder, and subfolders content resides. The content's path displays its location.
Property	Stores data about a document, folder, or shortcut. You must define a group of these properties to fit your business needs. ImageNow generates additional properties, such as the date the content was created, to provide more information about the document, folder, or shortcut.
Shortcut	Provides a link to a document or folder so that it can be referenced in multiple folders while maintaining the integrity of storing the content in a single location.

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