ImageNow Output Packaging

Getting Started Guide

ImageNow Version: 6.7.x

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Table of Contents

Overview **4**
What is output packaging? **4**
Create an output profile **5**
Create an email output profile 5
Create a new profile *5*
Enter a profile name and description *5*
Enable user and group access *5*
Choose an output method *6*
Set attachment options *6*
Create a fax output profile 9
Create a file output profile 11
Create a new profile *11*
Enter a profile name and description *11*
Enable user and group access *11*
Select an output format and location *12*
Set output file content *12*
Create a print output profile 15
Use output packaging **16**
Email a document 16
Select a document to email *16*
Choose an output profile to automatically set email settings *16*
Manually set email settings *16*
Fax a document 20
Export a document to a file 21
Select a document to export *21*
Choose an output profile to automatically set export settings *22*
Manually set export settings *22*
Print a document 26
Appendix: Variables to Create Output File Names **27**
Index **28**

Overview

This guide introduces and explains output packaging, first introduced in ImageNow version 6.2. The following sections guide you through the process of creating your own output profile and using those profiles when outputting files.

- What is output packaging?
- Creating an output profile
- Using output packaging

More specialized topics on working with output packaging are available from Product Help in ImageNow Administrator.

What is output packaging?

Output packaging is a client-side process designed for small, ad-hoc output jobs. An output profile allows you to save output packaging configuration settings for reuse. After an output profile is created, the system automatically adjusts the settings each time you select an output method and an associated profile. You can create, modify, and delete output profiles for all four output methods: email, fax, file, and print.

When you output a copy of an ImageNow document to email, file, printer, or fax, several factors may determine the amount of time the process takes to complete. For example, the speed of your computer, the number of documents you want to output, the file type, and adding annotations and color to the document may all slow the process. For best performance, configure your output profiles to convert color images to black and white and only use the color conversion option when needed.

Although output packaging can handle large and complex output jobs, it is designed primarily for small output jobs. When outputting a large job, the process may take several minutes to complete. The system will notify you when the process starts and ends. Until then, you can continue to work in ImageNow.

For large and complex output jobs, consider using ImageNow Output Agent, a server-side process that allows you to output ImageNow documents on a job-by-job basis or in a batch. For additional details about Output Agent, refer to the *Output Agent Installation and Setup Guide*.

Note An ImageNow document is a single document object that can contain multiple files created by various applications. For example, an ImageNow document might contain a two-page Word document, a five-page Excel workbook, and a one-page Photoshop file. When you output an ImageNow document, ImageNow creates an output file. The output file is a copy of the document, and the original document remains unaltered within the ImageNow repository.

Create an output profile

The following sections outline the steps for creating output profiles for email, file, printer, and fax.

Create an email output profile

You can complete this procedure only if you are a user with management privileges for output profiles, a manager, or the owner.

Create a new profile

To begin the process to create a new email output profile, perform the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. In **ImageNow Management Console**, in the left pane, click **Output Profiles**.
3. Click the **Email** tab and click **New**.

Enter a profile name and description

To create a profile name and description, on the **General** tab, perform the following steps.

1. For **Name**, type a name for your output profile.
2. For **Description**, type a description for your output profile.
3. If you want your profile to be active, select **Is active**.

Enable user and group access

To enable user or group access to the profile, on the **Access** tab, perform one of the following actions:

- **Add a user or users**
  1. Click **Add**.
  2. In the **Select Users and Groups** dialog box, click the **Users** tab.
  3. For **Search for users**, type the name of the user you want to add and click **Search**.
  4. Under **Search results**, select the appropriate user names and click **Add**.
  5. Click **OK**.

  Note To remove a user, select the user you want to remove from the **Selected users** list and click **Remove**.
- **Add a group or groups**
  1. Click **Add**.
  2. In the **Select Users and Groups** dialog box, click the **Groups** tab.
  3. For **Search for groups**, type the name of the group you want to add and click **Search**.

4. Under **Search results**, select the appropriate group names and click **Add**.
5. Click **OK**.

Note To remove a group, select the group you want to remove from the **Selected groups** list and click **Remove**.

Choose an output method

To choose an output method, on the **Output** tab, under **General**, perform the following steps.

1. For **Email**, perform one of the following actions:
   - Type the email address where you want to send the output file.
   - Leave the **Email** box empty to select the email address from the address book of your email client.
2. For **Method**, select one of the following methods for sending the document:
   - **Attachment** to attach the output file to your email.
   - **ImageNow Link** to place an ImageNow link within the email that can open the document directly within ImageNow.
   - **WebNow URL** to place a WebNow link within the email that can open the document within WebNow.
3. If you selected **ImageNow Link** or **WebNow URL** as the method for sending the document, in the **Output Profile** dialog box, click **OK** to create the email output profile.
4. If you selected **Attachment** as the sending method, perform the steps provided in the following “Set attachment options” section.

Set attachment options

If you selected **Attachment** as the method to send the output file, you must choose one of the following formats for the attachment:

- **Individual files** to output multiple files within the ImageNow document as individual output files.
- **Multi-page tiff for each document** to output the document as a single, multi-page TIFF file. If you output multiple documents, ImageNow creates a multi-page TIFF output file for each document.
- **Single PDF** to output the document as a single PDF file. If you output multiple documents, ImageNow **creates** a single PDF output file.

Perform the steps provided in the following section that are applicable to the attachment format you want.

Output as individual files

If you selected **Attachment** as the output method and you want to output files in a document as **Individual files**, perform the following steps.

1. On the **Output** tab, perform the following substeps:
    1. Under **General**, for **Format**, select one **Individual files**.
    2. Under **Annotations**, for **Include**, select one of the following options:
        - **Annotations** to output the document with annotations.
        - **No annotations** to output the document without annotations.
        - **Current view** to output the current view of the document.
2. On the **Content** tab, perform the following substeps:
    1. For **Name format**, select one of the following methods to name the output file:
        - **Document ID** to name the output file with its ImageNow Document ID.
        - **Document keys** to name the output file with its ImageNow document keys.
        - **Name** to name the output file with its ImageNow name.
        - **File name** to name the output file with its original file name.
        - **Custom** to enter your own file name for the output file.
    2. If you selected **Custom** for the name format in the previous step, for **File name**, perform one of the following actions:
        - Type a name for the output file.
        - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.
    3. For **Image color conversion**, select one of the following options:
        - **None** to not modify the color of the output file.
        - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
        - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.
    4. Under **Include**, select whether to include sticky note contents with the output file.
    5. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
3. Click **OK**.

Output as multi-page tiff

If you selected **Attachment** as the output method and you want to output documents as a **Multi-page tiff for each document**, perform the following steps.

1. On the **Output** tab, perform the following substeps:
   1. Under **General**, for **Format**, select **Multi-page tiff for each document**.
   2. Under **Annotations**, for **Include**, select one of the following options:
      - **Annotations** to output the document with annotations.
      - **No annotations** to output the document without annotations.
      - **Current view** to output the current view of the document.
2. On the **Content** tab, perform the following substeps:
   1. For **Name format**, select one of the following methods to name the output file:
      - **Document ID** to name the output file with its ImageNow Document ID.
      - **Document keys** to name the output file with its ImageNow document keys.
      - **Name** to name the output file with its ImageNow name.
      - **Custom** to enter your own file name for the output file.
   2. If you selected **Custom** for the name format in the previous step, for **File name**, perform one of the following actions:
      - Type a name for the output file.
      - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.
   3. For **Image color conversion**, select one of the following options:
      - **None** to not modify the color of the output file.
      - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
      - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.
   4. Under **Include**, select whether to include sticky note contents with the output file.
   5. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
3. Click **OK**.

Output as single PDF

If you selected **Attachment** as the output method, and you want to output documents as a **Single PDF**, perform the following steps.

1. On the **Output** tab, perform the following substeps:
    1. Under **General**, for **Format**, select **Single PDF**.
    2. Under **Annotations**, for **Include**, select one of the following options:
        - **Annotations** to output the document with annotations.
        - **No annotations** to output the document without annotations.
        - **Current view** to output the current view of the document.
2. On the **Content** tab, perform the following substeps:
    1. For **File name**, type a name for the output file.
    2. For **Image color conversion**, select one of the following options:
        - **None** to not modify the color of the output file.
        - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
        - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.
    3. Under **Include**, select whether to include sticky note contents with the output file.
    4. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
3. Optional. To specify the order of the files in the PDF, on the **Order** tab, perform one of the following actions:
    - For **List**, select a document type list to email the selected documents in a specific order. Click Edit if you want to modify the document type list or the order in which the documents are emailed.
    - For **List**, select **(New Document Type List)** to create a new document type list.
4. Click **OK**.

Create a fax output profile

You can complete this procedure only if you are a user with management privileges for output profiles, a manager, or the owner.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **ImageNow Management Console**, in the left pane, click **Output Profiles**.
3. Click the **Fax** tab and click **New**.
4. On the **General** tab, perform the following actions:
    - For **Name**, type a name for your output profile.
    - For **Description**, type a description for your output profile.

- Select **Is active** if you want your profile to be active.

5. On the **Access** tab, click **Add** to give a user or group access to this profile and perform one of the following actions:
   - **Add a user or users**
     1. In the **Select Users and Groups** dialog box, click the **Users** tab.
     2. For **Search for users**, type the name of the user you want to add and click **Search**.
     3. Under **Search results**, select the appropriate user names and click **Add**.
     4. Click **OK**.

     Note To remove a user, select the user you want to remove from the **Selected users** list and click **Remove**.
   - **Add a group or groups**
     1. In the **Select Users and Groups** dialog box, click the **Groups** tab.
     2. For **Search for groups**, type the name of the group you want to add and click **Search**.
     3. Under **Search results**, select the appropriate group names and click **Add**.
     4. Click **OK**.

     Note To remove a group, select the group you want to remove from the **Selected groups** list and click **Remove**.
6. On the **Output** tab, perform the following substeps:
   1. Under **General**, perform one of the following actions:
      - If you have added fax numbers to your Address book, select the number from the **Fax Number** list.
      - If you are using a number that is not in your Address book, enter the fax number to where you want to send the document.
   2. Under **Cover Page**, perform any of the following actions to add content to the fax cover page:
      - For **Attention**, type the name of the recipient of the fax.
      - For **Comments**, type any additional information you want to include with the fax.
   3. Under **Annotations**, from the **Include** list, select one of the following options:
      - **Annotations** to output the document with annotations.
      - **No annotations** to output the document without annotations.
      - **Current view** to output the current view of the document.
7. On the **Content** tab, perform any of the following actions:
   - Under **Include**, select whether to include sticky note contents in the faxed document.
   - Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number in the faxed document.

8. On the **Order** tab, if you want to specify the order of the faxed documents, perform one of the following actions:
   - In the **List**, select the document type list to fax the selected documents in a specific order. Click **Edit** if you want to modify the document type list or the order in which the documents are faxed.
   - In the **List**, select **(New Document Type List)** to create a new document type list.
9. Click **OK**.

Create a file output profile

You can complete this procedure only if you are a user with management privileges for output profiles, a manager, or the owner.

Create a new profile

To begin the process to create a new file output profile, perform the following steps.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **ImageNow Management Console**, in the left pane, click **Output Profiles**.
3. On the **File** tab, click **New**.

Enter a profile name and description

To enter a profile name and description, perform the following steps.

1. On the **General** tab, for **Name**, type a name for your output profile.
2. For **Description**, type a description for your output profile.
3. If you want your profile to be active, select **Is active**.

Enable user and group access

To enable user or group access to the profile, on the **Access** tab, perform one of the following actions:

- **Add a user or users**
  1. Click **Add**.
  2. In the **Select Users and Groups** dialog box, click the **Users** tab.
  3. For **Search for users**, type the name of the user you want to add and click **Search**.
  4. Under **Search results**, select the appropriate user names and click **Add**.
  5. Click **OK**.

  Note To remove a user, select the user you want to remove from the **Selected users** list and click **Remove**.
- **Add a group or groups**
  1. Click **Add**.
  2. In the **Select Users and Groups** dialog box, click the **Groups** tab.
  3. For **Search for groups**, type the name of the group you want to add and click **Search**.

4. Under **Search results**, select the appropriate group names and click **Add**.
5. Click **OK**.

Note To remove a group, select the group you want to remove from the **Selected groups** list and click **Remove**.

Select an output format and location

To select an output format and location for an output file, on the **Output** tab, perform the following steps.

1. For **Format**, select one of the following output formats:
   - **Individual files** to output multiple files within an ImageNow document as individual output files.
   - **Multi-page tiff for each document** to output the document as a single, multi-page TIFF file. If you output multiple documents, ImageNow creates a multi-page TIFF output file for each document.
   - **Single PDF** to output the document as a single PDF file. If you output multiple documents, ImageNow creates a single PDF output file.
2. To set the output directory, click **Browse** and choose a location to store the output files.

   Note Users can change the output directory when they use the profile to output a document.
3. Under **Annotations**, for **Include**, select one of the following options:
   - **Annotations** to output the document with annotations.
   - **No annotations** to output the document without annotations.
   - **Current view** to output the current view of the document.

Set output file content

To set the content for an output file, perform the steps provided in the applicable section.

Output as individual files

If you selected **Individual files** as your output format, perform the following steps.

1. On the **Content** tab, for **Name Format**, select one of the following methods to name the output file:
   - **Document ID** to name the output file with its ImageNow Document ID.
   - **Document keys** to name the output file with its ImageNow document keys.
   - **Name** to name the output file with its ImageNow name.
   - **File name** to name the output file with the original file name.
   - **Custom** to enter your own file name for the output file.
2. If you selected **Custom** for the name format in the previous step, for **File name**, perform one of the following actions:
   - Type a name for the output file.
   - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.

3. For **Image color conversion**, select one of the following options:
   - **None** to not modify the color of the output file.
   - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
   - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.
4. Under **Include**, select whether to include sticky note contents with the output file.
5. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
6. Optional. To create a folder hierarchy for output files, do one of the following actions:
   - To create a copy of the existing folder hierarchy, on the **Folder Hierarchy** tab, click the check box.
   - To create a new folder hierarchy, on the **Folder Hierarchy** tab, perform the following substeps:
     1. To select the document properties to create folders for the output files, click **Add**.
     2. To change the order of the properties you added, click a property and click **Move Up** or **Move Down**.
     3. To remove a property from the list, click the property and click **Remove**.
7. Click **OK**.

Output as multi-page tiff

If you selected **Multi-page tiff for each document** as your output format, perform the following steps.

1. On the **Content** tab, under **File Generation**, for **Name Format**, select one of the following methods to name the output file:
   - **Document ID** to name the output file with its ImageNow Document ID.
   - **Document keys** to name the output file with its ImageNow document keys.
   - **Name** to name the output file with its ImageNow name.
   - **File name** to name the output file with the original file name.
   - **Custom** to enter your own file name for the output file.
2. If you selected **Custom** for the name format in the previous step, for **File name**, perform one of the following actions:
   - Type a name for the output file.
   - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.

3. For **Image color conversion**, select one of the following options:
   - **None** to not modify the color of the output file.
   - **Grayscale** to convert the color of an output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
   - **Black and White** to convert the color of an output file to black and white. This setting reduces the size of the output file.
4. Under **Include**, select whether to include sticky note contents with the output file.
5. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
6. Optional. To create a folder hierarchy for output files, do one of the following actions:
   - To create a copy of the existing folder hierarchy, on the **Folder Hierarchy** tab, click the check box.
   - To create a new folder hierarchy, on the **Folder Hierarchy** tab, perform the following substeps:
     1. To select the document properties to create folders for the output files, click **Add**.
     2. To change the order of the properties you added, click a property and click **Move Up** or **Move Down**.
     3. To remove a property from the list, click the property and click **Remove**.
7. Click **OK**.

Output as single PDF

If you selected **Single PDF** as your output format, perform the following steps.

1. On the **Content** tab, type a name for the output file.
2. For **Image color conversion**, select one of the following options:
   - **None** to not modify the color of the output file.
   - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
   - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.
3. Under **Include**, select whether to include sticky note contents with the output file.
4. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
5. Optional. To specify the order of the documents in the PDF file, on the **Order** tab, perform one of the following actions:
   - For **List**, select a document type list. Click **Edit** if you want to modify the document type list or the order in which the documents are appear in the PDF file.
   - For **List**, select **(New Document Type List)** to create a new document type list.
6. Click **OK**.

Create a print output profile

You can complete this procedure only if you are a user with management privileges for output profiles, a manager, or the owner.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **ImageNow Management Console**, in the left pane, click **Output Profiles**.
3. Click the **Print** tab and click **New**.
4. On the **General** tab, perform the following actions:
   - For **Name**, type a name for your output profile.
   - For **Description**, type a description for your output profile.
   - Select **Is active** if you want your profile to be active.
5. On the **Access** tab, click **Add** to give a user or group access to this profile and perform one of the following actions:
   - To add a user or users, perform the following substeps:
     1. In the **Select Users and Groups** dialog box, click the **Users** tab.
     2. For **Search for users**, type the name of the user you want to add and click **Search**.
     3. Under **Search results**, select the appropriate user names and click **Add**.
     4. Click **OK**.

     Note To remove a user, select the user you want to remove from the **Selected users** list and click **Remove**.
   - To add a group or groups, perform the following substeps:
     1. In the **Select Users and Groups** dialog box, click the **Groups** tab.
     2. For **Search for groups**, type the name of the group you want to add and click **Search**.
     3. Under **Search results**, select the appropriate group names and click **Add**.
     4. Click **OK**.

     Note To remove a group, select the group you want to remove from the **Selected groups** list and click **Remove**.
6. On the **Output** tab, perform the following substeps:
   1. Under **Annotations**, from the **Include** list, select one of the following options:
      - **Annotations** to output the document with annotations.
      - **No annotations** to output the document without annotations.
      - **Current view** to output the current view of the document.
   2. Under **Include**, select whether to include document keys, notes, and sticky note contents with the printed document.
   3. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number on the printed document.

7. On the **Order** tab, perform one of the following actions:
   - In the **List**, select the document type list to print the selected documents in a specific order. Click **Edit** if you want to modify the document type list or the order in which the documents are printed.
   - In the **List**, select **(New Document Type List)** if you want to create a new document type list.
8. Click **OK**.

Use output packaging

The following sections outline the steps for using output packaging and selecting an output profile for email, file, printer, and fax.

Email a document

To email an ImageNow document, perform the following steps.

Select a document to email

To select a document to email, perform the following steps.

1. In **ImageNow Explorer**, select the documents you want to email.
2. On the **File** menu, point to **Send To** and click **Email**.
3. In the **Email** dialog box, perform one of the following actions:
   - To select an email output profile, perform the steps in the “Choose an output profile to automatically set email settings” section.
   - To enter email settings manually, perform the steps in the “Manually set email settings” section.

Choose an output profile to automatically set email settings

To select an output profile for the document you want to email, perform the following steps.

1. Under **General**, for **Profile**, select the appropriate output profile for the individual or group you want to email the document. ImageNow automatically populates the remaining fields.
2. To output the document, click **OK**.

Manually set email settings

You must choose an output method to manually set email settings. If you select **Attachment** as the output method, you must also set attachment options. To perform these actions, complete the steps in the “Choose an output method” and “Set attachment options” sections.

Choose an output method

To choose an output method, under **General**, perform the following steps.

1. Optional. For **Email**, type the email address of the individual or group you want to email the document.

   Note Leave the **Email** box empty if you want to select the email address from the address book of your email client.

2. For **Method**, select one of the following methods to email the document:
   - **Attachment** to attach the document to the email.
   - **ImageNow Link** to place an ImageNow link within the email that can open the document directly within ImageNow.
   - **WebNow URL** to place a WebNow link to within the email that can open the document in within WebNow.
3. If you selected **ImageNow Link** or **WebNow URL** as the method for sending the document, in the **Email** dialog box, click **OK** to output the links to your email client.
4. If you selected **Attachment** as the sending method, perform the steps provided in the following "Set attachment options" section.

Set attachment options

If you selected **Attachment** as the output method, you must choose one of the following formats for the attachment:

- **Individual files** to output multiple files within the ImageNow document as individual output files.
- **Multi-page tiff for each document** to output the document as a single, multi-page TIFF file. If you output multiple documents, ImageNow creates a multi-page TIFF output file for each document.
- **Single PDF** to output the documents as a single PDF file. If you output multiple documents, ImageNow creates a single PDF output file.

Perform the steps provided in the following section that are applicable to the attachment format you want.

Output as individual files

If you selected **Attachment** as the output method and you want to output files in a document as **Individual files**, perform the following steps.

1. For **Format**, select **Individual files.**
2. Under **Pages**, select which pages of the document you want to email.
3. Under **Annotations**, for **Include**, select one of the following options:
   - **Annotations** to output the document with annotations.
   - **Current view** to output the current view of the document.
   - **No annotations** to output the document without annotations.

4. Optional. To change the attachment settings, click **Options** and, in the **Email Output Options** dialog box, perform the following substeps:
    1. Under **File Generation**, perform the following substeps:
        1. For **Name format**, select one of the following methods to name the output file:
            - **Document ID** to name the output file with its ImageNow Document ID.
            - **Document keys** to name the output file with its ImageNow document keys.
            - **Name** to name the output file with its ImageNow name.
            - **File name** to name the output file with its original file name.
            - **Custom** to enter your own file name for the output file.
        2. If you selected **Custom** for the name format in the previous step, for **File name**, perform one of the following actions:
            - Type a name for the output file.
            - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.
    2. For **Image color conversion**, select one of the following options:
        - **None** to not modify the color of the output file.
        - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
        - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.
    3. Under **Include**, select whether to include sticky note contents.
    4. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number.
    5. Click **OK** to close the **Email Output Options** dialog box.
5. Click **OK** and send the email as you normally do.

    Note To send email, ImageNow uses the default email program configured on your system.

Output as multi-page tiff

If you selected **Attachment** as the output method, and you want to output documents as a **Multi-page tiff for each document**, perform the following steps.

1. For **Format**, select **Multi-page tiff for each document**.
2. Under **Pages**, select which pages of the document you want to email.
3. Under **Annotations**, for **Include**, select one of the following options:
    - **Annotations** to output the document with annotations.
    - **No annotations** to output the document without annotations.

4. Optional. To change the attachment settings, click **Options** and, in the **Email Output Options** dialog box, perform the following substeps:
    1. Under **File Generation**, perform the following substeps:
        1. For **Name format**, select one of the following methods to name the output file:
            - **Document ID** to name the output file with its ImageNow Document ID.
            - **Document keys** to name the output file with its ImageNow document keys.
            - **Name** to name the output file with its ImageNow name.
            - **Custom** to enter your own file name for the output file.
        2. If you selected **Custom** for the name format in the previous step, for **File name**, perform one of the following actions:
            - Type a name for the output file.
            - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.
        3. For **Image color conversion**, perform one of the following actions:
            - **None** to not modify the color of the output file.
            - **Grayscale** to convert the color of an output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
            - **Black and White** to convert the color of an output file to black and white. This setting reduces the size of the output file.
    2. Under **Include**, select whether to include sticky note contents.
    3. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number.
    4. Click **OK** to close the **Email Output Options** dialog box.
5. Click **OK** and send the email as you normally do.

    Note To send email, ImageNow uses the default email program configured on your system.

Output as single PDF

If you selected **Attachment** as the output method and you want to output documents as a **Single PDF**, perform the following steps.

1. For **Format**, select **Single PDF**.
2. Under **Pages**, select which pages of the document you want to email.
3. Under **Annotations**, for **Include**, select one of the following options:
    - **Annotations** to output the document with annotations.
    - **No annotations** to output the document without annotations.

4. Optional. To change the attachment settings, click **Options** and, in the **Email Output Options** dialog box, perform the following substeps:
    1. Under **File Generation**, perform the following substeps:
        1. For **File name**, type a name for the output file.
        2. For **Image color conversion**, perform one of the following actions:
            - **None** to not modify the color of the output file.
            - **Grayscale** to convert the color of an output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
            - **Black and White** to convert the color of an output file to black and white. This setting reduces the size of the output file.
    2. Under **Include**, select whether to include sticky note contents.
    3. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number.
    4. Optional. If you selected to email multiple documents, on the **Order** tab, perform the following substeps:
        1. To change the order in which the documents are emailed, select a document and click **Move Up** or **Move Down**.
        2. To apply a predefined order to the list of documents, click **From List**. In the **Document Type List** dialog box, select a document type list, select a document type order and click **OK**.
    5. Click **OK** to close the **Email Output Options** dialog box.
5. Click **OK** and send the email as you normally do.

    Note To send email, ImageNow uses the default email program configured on your system.

Fax a document

You must have the ImageNow Fax Agent configured for outbound faxing on the fax server and a Fax Agent license installed to perform this task. For more information, refer to the *Fax Agent Installation and Setup Guide*.

1. In **ImageNow Explorer**, select the documents you want to fax.
2. On the **File** menu, point to **Send To**, and click **Fax**.
3. In the **Fax** dialog box, perform one of the following actions:
    - To select an output profile, under **General**, in **Profile**, select the appropriate output profile for the individual or group you want to fax the document. ImageNow automatically populates the remaining fields.
    - To enter fax settings manually, perform the following substeps:
    1. Under **General**, perform the following substeps:
        1. From the **Profile** list, select **Default**.
        2. In the **Fax number** box, type the fax number.

2. Under **Annotations**, from the **Include** list, select one of the following options:
   - **Annotations** to output the document with annotations.
   - **No annotations** to output the document without annotations.
3. Optional. Under **Cover Page**, perform the following substeps to add content to the fax cover page:
   1. In the **Attention** box, type the name of the recipient of the fax.
   2. In the **Comments** box, type any comments you want to include on the cover page.
4. Under **Notifications**, in the **Email** box, type the email address of the individual or company to where you want to send a notification of this fax. ImageNow remembers the email address and displays it here the next time you send a fax.

   Note The cover page and email notification will only create if properly setup on the server-side Fax Agent configuration.
5. Optional. To modify fax settings, click **Options** and in the **Fax Output Options** dialog box, perform the following substeps:
   1. On the **Content** tab, perform the following substeps:
      1. Under **Include**, select whether to include sticky note contents.
      2. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, or page number.
   2. If you selected multiple documents to fax, on the **Order** tab, perform the following substeps:
      1. To change the order in which the documents are faxed, select a document and click **Move Up** or **Move Down**.
      2. To apply a predefined order to the list of documents, click **From List**. In the **Document Type List** dialog box, select a document type list, select a document type order, and then click **OK**.
      3. Click **OK** to close the **Fax Output Options** dialog box.
4. Click **OK** and fax the document as you normally do.

Export a document to a file

To export a copy of an ImageNow document, perform the following steps.

Select a document to export

1. In **ImageNow Explorer**, select the document or set of documents you want to export.
2. On the **File** menu, click **Export**.
3. In the **Export** dialog box, perform one of the following actions:
   - To select an output profile for the document you want to export to a file, perform the steps in the “Choose an output profile to automatically set export settings” section.
   - To enter export settings manually, perform the steps in the “Manually set export settings” section.

Choose an output profile to automatically set export settings

To select an output profile for the document you want to export, perform the following steps.

1. Under **General**, from the **Profile** list, select the appropriate output profile. ImageNow automatically populates the remaining fields.
2. To export the document, click **OK**.

Manually set export settings

You must choose one of the following formats to manually export the output file:

- **Individual files** to export multiple files within the ImageNow document as individual output files.
- **Multi-page tiff for each document** to export the document as a single, multi-page TIFF file. If you output multiple documents, ImageNow creates a multi-page TIFF output file for each document.
- **Single PDF** to export the document as a single PDF file. If you output multiple documents, ImageNow creates a single PDF output file.

To manually set export settings, perform the steps in the following section that are applicable to the export format you want.

Export as individual files

If you want to export files in a document as **Individual files**, perform the following steps.

1. On the **Output** tab, from the **Format** list, select **Individual files**.
2. To set the output directory and name the output file, click **Browse**.
3. Under **Pages**, select which pages of the document you want to save to a file.
4. Under **Annotations**, from the **Include** list, select one of the following options:
   - **Annotations** to output the document with annotations.
   - **No annotations** to output the document without annotations.
5. To modify output settings, click **Options** and, in the **File Output Options** dialog box, perform the following steps:
   1. On the **Content** tab, under **File Generation**, perform the following substeps:
      1. For **Name Format**, select one of the following methods to name the output file:
         - **Document ID** to name the output file with its ImageNow Document ID.
         - **Document keys** to name the output file with its ImageNow document keys.
         - **Name** to name the output file with its ImageNow name.
         - **File name** to name the output file with the original file name.
         - **Custom** to enter your own file name for the output file.

2. If you selected **Custom** for the name format in the previous step; for **File name**, perform one of the following actions:
   - Type a name for the output file.
   - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.
3. For **Image color conversion**, select one of the following options:
   - **None** to not modify the color of the output file.
   - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
   - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.

2. Under **Include**, select whether to include sticky note contents with the output file.
3. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.

6. Optional. To create a folder hierarchy for output files, do one of the following actions:
   - To create a copy of the existing folder hierarchy, on the **Folder Hierarchy** tab, click the check box.
   - To create a new folder hierarchy, on the **Folder Hierarchy** tab, perform the following substeps:
     1. To select the document properties to create folders for the output files, click **Add**.
     2. To change the order of the properties you added, click a property and click **Move Up** or **Move Down**.
     3. To remove a property from the list, click the property and click **Remove**.
7. Click **OK**.

Export as multi-page tiff

If you want to export documents as a **Multi-page tiff for each document**, perform the following steps.

1. On the **Output** tab, from the **Format** list, select **Multi-page tiff for each document**.
2. In the **File Name** box, enter a name for the output file and click **Browse** to set the output directory.
3. Under **Pages**, select which pages of the document you want to save to a file.
4. Under **Annotations**, from the **Include** list, select one of the following options:
   - **Annotations** to output the document with annotations.
   - **No annotations** to output the document without annotations.

5. Optional. To modify output settings, click **Options** and, in the **File Output Options** dialog box, perform the following substeps:
    1. On the **Content** tab, under **File Generation**, perform the following substeps:
        1. For **Name Format**, select one of the following methods to name the output file:
            - **Document ID** to name the output file with its ImageNow Document ID.
            - **Document keys** to name the output file with its ImageNow document keys.
            - **Name** to name the output file with its ImageNow name.
            - **Custom** to enter your own file name for the output file.
        2. If you selected **Custom** for the name format in the previous step, for **File name**, perform one of the following actions:
            - Type a name for the output file.
            - Type variables, with or without text, to name the output file. These variables appear in the appendix of this document.
    2. For **Image color conversion**, select one of the following options:
        - **None** to not modify the color of the output file.
        - **Grayscale** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
        - **Black and White** to convert the color of an individual file, a single PDF, or a multi-page TIFF output file to black and white. This setting reduces the size of the output file.
    3. Under **Include**, select whether to include sticky note contents with the output file.
    4. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
6. Optional. To create a folder hierarchy for output files, do one of the following actions:
    - To create a copy of the existing folder hierarchy, on the **Folder Hierarchy** tab, click the check box.
    - To create a new folder hierarchy, on the **Folder Hierarchy** tab, perform the following substeps:
        1. To select the document properties to create folders for the output files, click **Add**.
        2. To change the order of the properties you added, click a property and click **Move Up** or **Move Down**.
        3. To remove a property from the list, click the property and click **Remove**.
7. Click **OK**.

Export as single PDF

If you want to export documents as a **Single PDF**, perform the following steps.

1. On the **Output** tab, from the **Format** list, select **Single PDF**.
2. In the **File Name** box, enter a name for the output file and click **Browse** to set the output directory.

3. Under **Pages**, select which pages of the document you want to save to a file.
4. Under **Annotations**, from the **Include** list, select one of the following options:
   - **Annotations** to output the document with annotations.
   - **No annotations** to output the document without annotations.
5. Optional. To modify output settings, click **Options** and, in the **File Output Options** dialog box, perform the following steps:
   1. On the **Content** tab, under **File Generation**, perform the following substeps:
      1. If you selected **Single PDF** as your output format, type a name for the output file.
      2. For **Image color conversion**, select one of the following options:
         - **None** to not modify the color of the output file.
         - **Grayscale** to convert the color of an output file to grayscale. Converting a color output file to grayscale reduces its size. Converting a black and white output file to grayscale increases its size.
         - **Black and White** to convert the color of an output file to black and white. This setting reduces the size of the output file.
   2. Under **Include**, select whether to include sticky note contents with the output file.
   3. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number with the output file.
   4. Optional. If you selected to export multiple documents, on the **Order** tab, perform the following substeps:
      1. To change the order in which the documents are exported, select a document and click **Move Up** or **Move Down**.
      2. To apply a predefined order to the list of documents, click **From List**. In the **Document Type List** dialog box, select a document type list, select a document type order and click **OK**.
   5. Click **OK** to close the **File Output Options** dialog box.
6. Click **OK**.

Print a document

1. In **ImageNow Explorer**, select the document or set of documents you want to print.
2. On the **File** menu, click **Print**.
3. In the **Print** dialog box, perform one of the following actions:
   - To select an output profile for the document you want to print, under **General**, for **Profile**, select the appropriate output profile. ImageNow automatically populates the remaining fields.

     Note Because printer settings are not controlled by ImageNow, under **Printer**, verify the printer name and properties.
   - To enter print settings manually, perform the following substeps:
     1. Under **Printer**, perform the following substeps:
        1. Select the printer to which you want to send the document.
        2. Click **Properties** and adjust the printer properties for the printer you selected.
     2. Under **Print Range**, select the pages you want to print.
     3. Under **Copies**, select the number of copies you want to print.
     4. Under **Annotations**, select one of the following options:
        1. **Current view** to output the current view of the document.
        2. **With annotations** to output the document with annotations.
        3. **Without annotations** to output the document without annotations.
4. Optional. To include ImageNow data such as document keys on the printed document, click **Options** and, in the **Print Output Options** dialog box, perform the following substeps:
   1. On the **Content** tab, perform the following substeps:
      1. Under **Include**, select whether to include document keys, notes, and sticky note contents with the printed document.
      2. Under **Header Includes** and **Footer Includes**, select whether to include date and time, document keys, and page number on the printed document.
   2. If you selected to print multiple documents, on the **Order** tab, perform the following substeps:
      1. To change the order in which the documents are printed, select a document and click **Move Up** or **Move Down**.
      2. To apply a predefined order to the list of documents, click **From List**. In the **Document Type List** dialog box, select a document type list, select a document type order and click **OK**.
   3. Click **OK** to close the **Print Output Options** dialog box.
5. Click **Print**.

Appendix: Variables to Create Output File Names

When you output an ImageNow document as a file or as an email attachment in the Individual Files or Multi-page tiff for each document format from ImageNow Client, you can define one or more variables for ImageNow to generate the file name of each output file. You can also provide static text for part of the file name. You must enclose variables in brackets. You can separate text and variables with underscores (such as [FIELD1]_Account_Number_[FIELD2]). The entire file path, which includes the file name and extension, cannot exceed the character limit set by your operating system. For example, Windows XP allows a file path up to 255 characters in length.

Note that an output file is a copy of an ImageNow document that remains unaltered within the ImageNow repository. Also, an ImageNow document is a single document object that can contain multiple files.

You can assign the following variables for ImageNow to generate file names for output files:

- **[DOCID]** names the output file of an ImageNow document with its Document ID.
- **[DRAWER]**, **[FIELD1]**, **[FIELD2]**, **[FIELD3]**, **[FIELD4]**, **[FIELD5]**, or **[DOCTYPE]** names the output file of an ImageNow document with its specified document keys.
- **[DOCNAME]** names the output file with its ImageNow name.

Index

Email a document 16
email output profile 5
Export a document to a file.....21
Fax a document 20
fax output profile 9
file output profile 11
output method 6
output packaging 4
Print a document.....26
print output profile.....15
Variables
[DOCID] 27
[DOCNAME] 27
[DOCTYPE].....27
[DRAWER] 27
[FIELD1].....27
[FIELD2].....27
[FIELD3].....27
[FIELD4].....27
[FIELD5].....27
Variables to Create Output File Names 27