

ImageNow Related Documents and Folders

Getting Started Guide

ImageNow Version: 6.7.x

© 2014 Perceptive Software. All rights reserved

CaptureNow, ImageNow, Interact, and WebNow are trademarks of Lexmark International Technology SA, registered in the U.S. and other countries. Perceptive Software is a stand-alone business unit within Lexmark International Technology SA. All other brands and product names mentioned in this document are trademarks or registered trademarks of their respective owners. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or any other media embodiments now known or hereafter to become known, without the prior written permission of Perceptive Software.

Table of Contents

Related Views	4
Related Documents.....	4
Creating a related documents view	4
Viewing a document relationship	5
Related Folders.....	6
Creating a related folder view	6
Viewing a folder relationship	7
Appendix: Related Documents and Enhanced Copy.....	8
Enhanced Copy.....	8
<i>Set up Enhanced Copy.....</i>	<i>9</i>
Index.....	11

Related Views

A user can display one or more related views from ImageNow Viewer or WebNow Viewer. When the user selects a related view to apply to the active document, the Related Documents pane displays documents that match the document with respect to the conditions you define for the related view.

Suppose, for example, the user views a student information document with a Field2 value that contains the student's ID number. The user wants to see all the other documents with the same Field2 value. If you define the appropriate related view, the user can select this view, and the Related Documents pane displays any other documents that have a Field2 value that matches the student ID number in the active document. A document view or folder view definition cannot achieve this goal because those view definitions must specify a specific value in the condition. A related view, on the other hand, takes as its comparison value whatever it finds in the specified document or custom property of the active document.

As another example, suppose that a user views an inventory document with a custom property that contains a check number. Another set of business documents contains check number in Field3 rather than in a custom property. Therefore, the user wants to see all documents with a Field3 value that matches the Check Number custom property in the active document. If you define the appropriate related view, the user can select this view, and the Related Documents pane displays any other documents that have a Field3 value that match the Check Number custom property in the active document.

With owner or manager privileges, you can create, rename, and delete related views in ImageNow. When you modify a related view, you automatically enter ImageNow View Designer, where you can create or modify relationship conditions, activate the view, and assign security settings to it.

Related Documents

In ImageNow, you can create relationships between documents. These relationships allow you to view a set of documents that share common attributes, such as a common document property (name or drawer).

You can create relationships between documents using Copy Document. This lets you make a copy of one or more pages of a document and change the document keys or custom properties for those pages—to distinguish the copied documents from the original pages. When you create a new document using Copy Document, the original document is called the parent and the copied document is called the child. If several related documents are created from the original document, they are called siblings. During the Copy Document procedure, you have the option of removing the copied pages from the original document.

Creating a related documents view

The following steps describe how to create a related documents view based on document keys and custom properties. To perform these procedures, you must be a user with management privileges, a manager, or the owner.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console** dialog box, in the left pane, click **Relationships**.
3. Click the **Related Documents** tab and then click **New**.

4. In the **New Relationship** dialog box, complete the following substeps:
 1. In the **Name** box, type a name for your new relationship.
 2. In the **Description** box, type an optional description for your new relationship.
5. Click **OK**.
6. Verify that the new relationship is selected and then click **Modify**.
7. In the **View Designer** window, in the **View** tab, click the **Add +** button to add a condition.
8. In the **Add Condition** dialog box, perform the following substeps:
 1. In the **Constrain By** list, click either **Document Key** or **Custom Property**.
 2. In the **Type** list, click **Relationship**.
 3. In the **Field** list, select the document key or custom property in the original document or folder that ImageNow will compare to a field in other documents or folder. If you selected **Custom Property**, remember that the relationship will return results only when the document or folder opened in ImageNow Viewer includes the custom property you select in this step.
 4. In the **Operator** list, for a simple matching relationship, click **equal to**. Other operators are also valid but generate more complex relationships.
 5. In the **Value** list, select the document key or custom property that you want to compare to the field you selected from the Field list. You can compare document key to document key, document key to custom property, custom property to document key, or custom property to custom property.
 6. If you want to narrow the results returned by the relationship view, you can repeat these substeps to add another relationship condition, or add normal or variable conditions.
9. When you have finished adding condition rows, click **OK**.
10. Save the view and then close **View Designer**.

Viewing a document relationship

The following steps describe how to view a document relationship.

1. Open the document.
2. If the **Related Documents** pane is not already visible, on the **View** menu, select **Related Documents**.
3. On the **Related Documents** pane, in the **Relationship** list, select the related view you want.

Note Depending on the relationships you have created, you can display the original document from which this document was copied, copies of this document, or copies of the original document. You can also display documents with document keys or custom properties that are identical to the ones in your base document.

Related Folders

In ImageNow, you create relationships between folders. These relationships allow you to view a set of folders that share common attributes, such as document type or a common document property (name or drawer).

Related folders allow you to run a predefined query to match on these related fields or custom properties against other defined folders in ImageNow. For example, Sally works at a hospital as a nurse and uses ImageNow. Her ImageNow environment is set up so that each time a patient visits a hospital the system creates a new folder that contains all of the documents for that visit. If a patient visits Sally's hospital twice, that patient will have two folders, one for each visit. Sally is viewing a recent patient's visit and realizes she needs to see all other folders from past visits. When viewing the Related Folders pane, Sally can see this and select any folder she needs to view.

Creating a related folder view

The following steps describe how to create a related folder view. To perform these procedures, you must be a user with management privileges, a manager, or the owner.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console** dialog box, in the left pane, click **Relationships**.
3. Click the **Related Folders** tab and then click **New**.
4. In the **New Relationship** dialog box, complete the following substeps:
 1. In the **Name** box, type a name for your new relationship.
 2. In the **Description** box, type an optional description for your new relationship.
5. Click **OK**.
6. Verify that the new relationship is selected and then click **Modify**.
7. In the **View Designer** window, in the **View** tab, click the **Add +** button to add a condition.
8. In the **Add Condition** dialog box, perform the following substeps:
 1. In the **Constrain By** list, click either **Folder Property** or **Custom Property**.
 2. In the **Type** list, click **Relationship**.
 3. In the **Field** list, select the folder property or custom property in the original document or folder that ImageNow will compare to a field in other documents or folders. If you selected Custom Property, remember that the relationship will return results only when the document or folder you opened includes the custom property you select in this step.
 4. In the **Operator** list, for a simple matching relationship, click is equal to. Other operators are also valid but generate more complex relationships.
 5. In the **Value** list, select the folder property or custom property that you want to compare with the field from the Field list. You can compare folder property to folder property, folder property to custom property, custom property to folder property, or custom property to custom property.
 6. If you want to narrow the results returned by the relationship view, you can repeat these substeps to add another relationship condition, or add normal or variable conditions.
9. When you have finished adding condition rows, click **OK**.
10. Save the view and then close **View Designer**

Viewing a folder relationship

The following steps describe how to view a folder relationship.

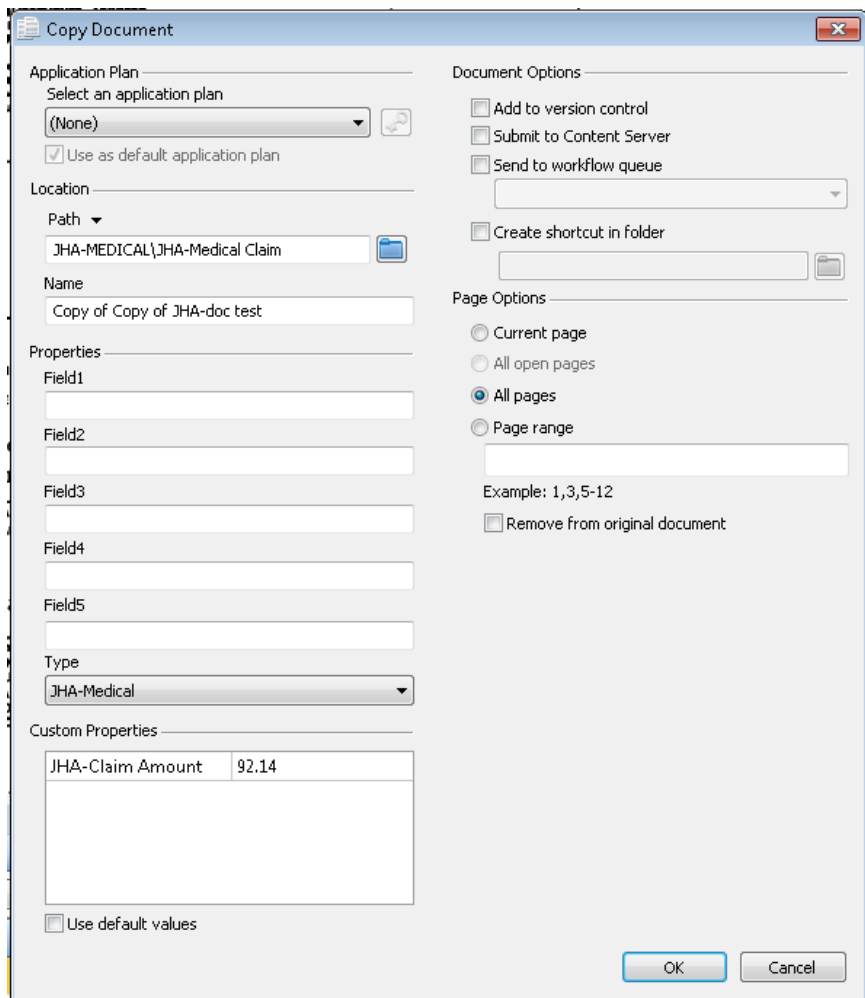
1. In the **ImageNow Explorer** grid, right-click the document for which you want to view related folders and the documents they contain and then click **View Related Folders**.
2. In the **Related Folders** pane, in the **Relationships** list, select the appropriate relationship and then double-click the folder you want to view.
3. Optional. In **ImageNow Folder Viewer**, do any of the following actions:
 - To view all of the documents added to the folder you selected, click the **Documents** tab.
 - To view all of the tasks associated to the folder you selected, click the **Tasks** tab.
4. Close **ImageNow Folder Viewer**.

Appendix: Related Documents and Enhanced Copy

Enhanced Copy functionality can address a specific business process within the health care and insurance industry. Explanation of Benefits (EOB) documents are descriptive documents that support insurance payments to health care companies. As part of routine business, an insurance company will cut one check to a hospital that pays for many different patients. The accompanying EOB document describes how the single payment breaks down across the many patient accounts. When you receive a summary document, such as an EOB file from an insurance company, you can copy information from the summary document to individual accounts. All the copies are related documents that are also children of the summary document.

Enhanced Copy

You must add a numeric custom property to the summary document to use as a check sum. Each time you copy a page or pages to a patient's folder, you enter the claim payment amount in this custom property. For example, in the figure below, a copy of the original document is created. In the Copy Document dialog box, ImageNow displays the claim payment amount of \$92.14.




After you finish copying all pages, you can display the child documents of the summary document and compare the total of the amounts in the custom property field to the check amount.

Drawer	Field1	Field2	Document Type	JHA-Claim Amount
JHA-MEDICAL			JHA-Medical	92.14
JHA-MEDICAL			JHA-Medical	92.14
JHA-MEDICAL			JHA-Medical	92.14

ImageNow maintains the relationship with the original document, as seen in the View Related Documents pane. This enables you to easily access details, such as reason codes, on other pages. ImageNow also allows you to modify the document using the redaction feature to mask personal information for other patients to protect their privacy. You can then route the pages for further processing.

Set up Enhanced Copy

The following steps describe how to set up enhanced copy:

1. In **ImageNow Explorer**, double-click the document you want to open. ImageNow displays the document in **ImageNow Viewer**.
2. If the **Related Documents** pane is not already visible, on the **View** menu, select **Related Documents**.
3. In the **Related Documents** pane, click the **Manage**  button.
4. Complete the following substeps:
 1. Add a column to the Related Documents pane
 1. In the **Related Documents** dialog box, select the relationship whose column content you want to validate and then click **Modify**.
 2. In the **Modify Relationship** dialog box, click **Add**.
 3. In the **Add Column** dialog box, under **Filter by**, select **Document Keys** or **All Custom Properties**.
 4. In the resulting list, select the row you want and then click **OK**.
 2. Validate content in a column
 1. In the **Related Documents** dialog box, select the relationship whose column content you want to validate and then click **Modify**.
 2. In the **Modify Relationship** dialog box, select **Enable validation** check box and then, in the list, select the column you want.
 3. Click **OK**. When you view the Related Documents pane for the parent document, the Validation Amt box appears under Validation. Any amount you then enter in the Validation Amt box has the Subtotal amount subtracted from it, and the result appears in the Difference row.

3. Activate a document relationship.
 1. In the **Related Documents** dialog box, select the relationship you want to activate and then click **Modify**.
 2. In the **Modify Relationship** dialog box, select the **Is active** check box and then click **OK**.
4. Run the last viewed document relationship
 - In the **Related Documents** dialog box, select **Remember** and run the last viewed relationship.
5. On the **Related Documents** dialog box, click **Close**.

Index

appendix			
enhanced copy	8		
example	8		
setup	9		
creating			
document relationships	4		
folder relationships	6		
		relationships	
		documents	4
		folders	6
		viewing	
		document relationships.....	5
		folder relationships.....	7