ImageNow Views

Getting Started Guide

ImageNow Version: 6.7.x

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Table of Contents

Overview

The views feature of ImageNow includes the View Designer. This guide introduces and explains how to set up and use views so that you can quickly start working with them. The guide is divided into four sections.

- The first section introduces the views feature to the ImageNow owner and managers and to ImageNow and WebNow Client users.

- The second section, of interest primarily to the owner and managers, explains how to use View Designer to set up view definitions and perform related tasks that are accessible only to a person with manage privileges.

- The third section, of interest primarily to ImageNow and WebNow Client users, explains how to find documents and folders using the view and filter concepts as well as how to narrow the results of the views or filters provided by your managers.

- The reference section contains tables of toolbars, toolbar buttons, and a detailed explanation of view conditions and the use of variables in conditions.

More specialized topics on working with views appear on the Perceptive Software website, in the Customer Portal, under Product Documentation.

Welcome to ImageNow Views

In this section, you'll learn the features and benefits of views, the different types of views, and the differences between a view and a view definition. You'll also find answers to the questions most commonly asked about the views feature by users of previous versions of ImageNow.

What is a view?

In ImageNow, a view is a set of documents, folders, tasks, or workflow items selected according to a view definition created by a view manager for ImageNow and WebNow Client users.

Views provide three principal advantages:

- **Simplification** - Views are a convenience because they can display just the documents users need to work with, while at the same time preventing the display of dozens, hundreds, or even thousands of results that might otherwise clutter the ImageNow Explorer search results grid.

- **Preformatting of Columns and Rows** - Views are preset to display only the columns that users need to see or work with, including custom property columns. In the view definition, you can preset column names to give meaningful labels to each data field as well as accommodate length of the data values by presetting column width. In the view definition, you can also predefine sort order and grouping of rows of results.

- **Heightened Search Security** - Views add another layer of protection to the documents stored in ImageNow Server, in addition to drawer privileges. A view allows selective searching of documents such that users can see just the documents that satisfy the conditions of the view definition.

Users can double-click a row in a view, assuming they have the appropriate privileges, to display a document image, the contents of a folder, the document and folder tasks, or workflow items. The following figure shows the Views pane of the ImageNow Explorer or WebNow Explorer. Views are shown under Documents, Folders, Tasks, and Workflow.

In a document view type, the Views pane shows the views and filters that display a list of documents that satisfy the conditions in the view definition.

In a folder view type, the Views pane shows the views and filters that display a list of folders that satisfy the conditions in the view definition.

In a task view type, the Views pane shows nine automatic lists of tasks and their filters that display a list of tasls that satisfy the task rules.

In a workflow view type, the Views pane shows a list of processes and queues the user can access that display the workflow items in the process and queue.
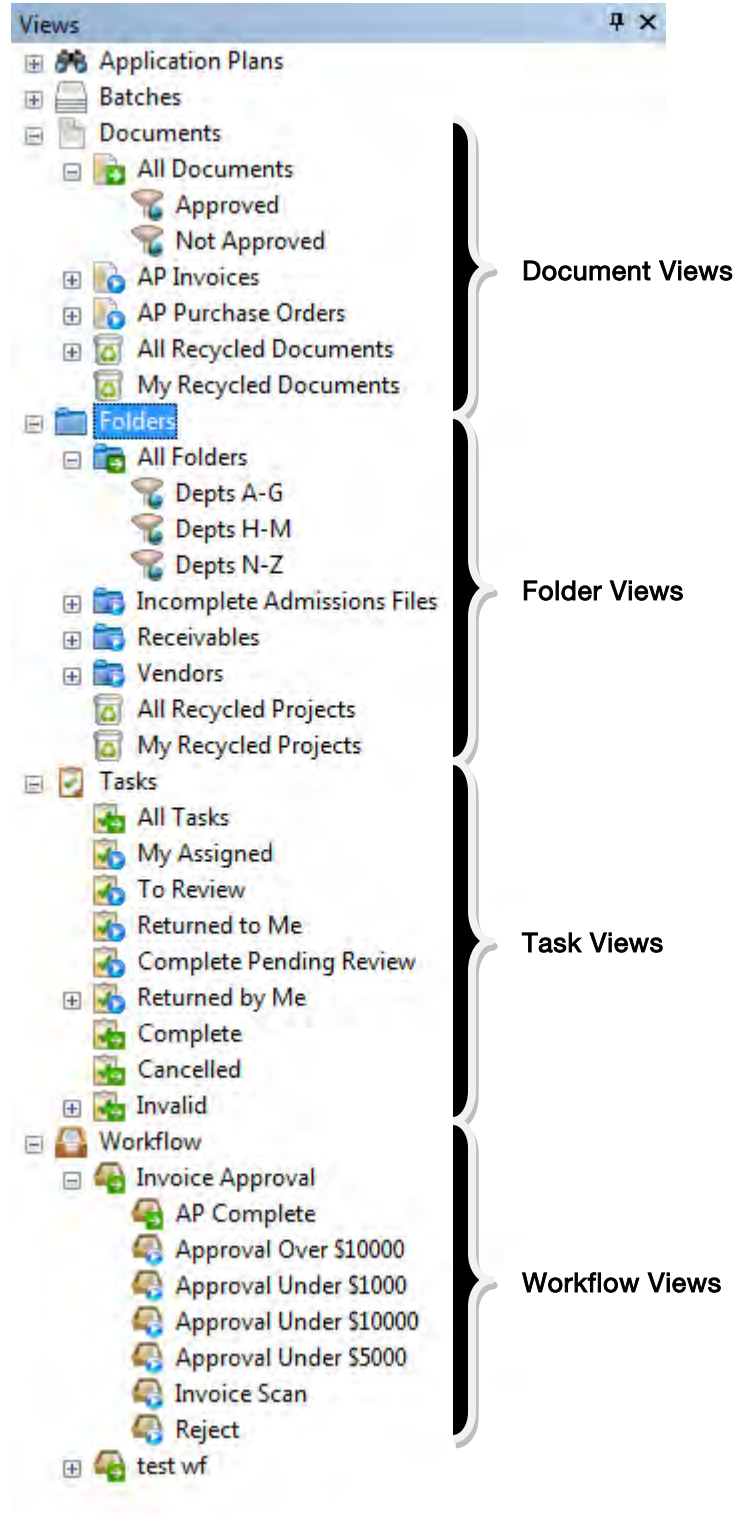
View roles

The following table outlines the different roles users can have with views.

ImageNow role	Role function	Global Privileges	View Privileges
ImageNow owner or manager	Create or modify any view and grant view management privileges.	Owner or manager	n/a
Document view manager	Create, modify, and grant access to document view definitions.	Manage Document Views	Access, Manage
Folder view manager	Create, modify, and grant access to folder view definitions.	Manage Folder Views	Access, Manage
Task view manager	Create, modify, and grant access to task view definitions	Manage Task Views	Access, Manage
View user	Run and create filters for accessible views	Search privilege for applicable drawers	Access, Access by URL, Filter

Views and view definitions

In ImageNow View Designer, view managers create view definitions that generate views in ImageNow and WebNow. A view definition contains conditions that narrow the scope of documents that can appear in the view. A view, on the other hand, contains documents, folders, tasks, or workflow items. For example, a view definition can cause ImageNow to return all documents that have been assigned to the Accounts Payable drawer with a Waiver custom property value of Approved or an Amount custom property value of less than $40.00.

The results of a view can change even if the view definition that generated it remains the same. For example, the contents of a view can change if:

- A user assigns tasks that satisfy the conditions of the view definition.

- A user removes documents or folders that were originally displayed in the view.

- A user routes a list of items to another workflow queue.

- Values of document properties in a view are changed by the user or by an iScript such that the document no longer satisfies the conditions of the view definition.

- The view definition contains variables (user or date and time) in one or more of its conditions. Results can then depend on either which user is running the view, or on the date and time the view is run, or on both variable values.

Manual and automatic views

Document, folder, task, and workflow views are classified by the way users run them. The following list describes the two methods in which you run views:

- The manual [icon] icon usually indicates that a potentially large number of results, so the user can chance to enter additional search criteria, or select a filter, before clicking the Go button.

- The automatic [icon] icon indicates a view that displays its results as soon as the user clicks it in the Views pane. You typically use an auto run view to return a small number of results, when it is less important to apply a filter to the results before displaying them.

Document views

Users with the Manage Document Views privilege can create view definitions for documents. After the document view manager creates the view, the view appears in the Documents drop-down menu on the ImageNow toolbar, and the view and its public filters appear in the Views pane of ImageNow or WebNow explorer. Two document views exist by default for all users:

- **All Documents:** This manual run view returns all documents the user can access.
- **My Recycled Documents:** This automatic view returns all documents the user deleted.

Folder views

Users with the Manage Folder Views privilege can create view definitions for folders. After the view manager creates the view, the view appears in the Folders drop-down menu on the ImageNow toolbar, and the view and its public filters appear in the Views pane of ImageNow or WebNow Explorer. Two folder views exist by default for all users:

- **All Folders:** This manual run view returns all folders the user can access.
- **My Recycled Folders:** This automatic view returns all folders the user deleted.

Task views

Users with the Manage Task Views privilege can modify the column layout, but not the conditions, of the following system view definitions, available by default to all users:

- **All Tasks:** This manual run view displays all tasks the user can access.

- **My Assigned:** This automatic view displays all the incomplete tasks to which the user is assigned.

- **To Review:** This automatic view displays all the incomplete tasks the user needs to review.

- **Returned to Me:** This automatic view displays all the tasks that were returned to the user.

- **Complete Pending Review:** This automatic view displays all tasks in a complete pending review state for which the user has necessary privileges.

- **Returned by Me:** This automatic view displays all tasks the user returned.

- **Complete:** This manual run view displays all tasks in a complete state for which the user has the necessary privileges.

- **Canceled:** This manual run view displays all tasks in a canceled state for which the user has the necessary privileges.

- **Invalid:** This manual run view displays all tasks in an invalid state for which the user has the necessary privileges.

Task view managers can also add public filters to these system views. These views appear in the Tasks drop-down menu on the ImageNow toolbar, and the views and their public filters appear in the Views pane of ImageNow or WebNow Explorer.

Workflow views

Workflow views appear automatically for each workflow process and queue the user can access. View managers cannot modify these views or create additional workflow view definitions. Each workflow process appears in the Workflow drop-down menu on the ImageNow toolbar and appears as a manual run view in ImageNow or WebNow Explorer. Each workflow queue appears in the menu for the associated workflow process in the Workflow drop-down menu on the ImageNow toolbar and appears as an automatic view in ImageNow or WebNow Explorer. Complete queues appear as manual run views.

View definition components

All view definitions can contain any or all of the following components.

Conditions

View managers build document, folder, task, and workflow views using conditions. Views can include multiple conditions or groups of conditions, which consist of a search constraint, a search type, a field, an operator, and a value. In View Designer, on the Views tab, conditions and groups of conditions are displayed as rows.

A condition acts like a true-or-false question. If the answer to the condition is true, the result is returned in the ImageNow or WebNow Explorer results grid when you click the Go button. If the answer to the condition is false, the result does not appear.

Column layout

View managers can define column layout, sorting, and appearance for the view or one of its public filters. When defining column layout, you can reorder, rename, hide, and show columns within the search results grid. You can also add one or more custom property columns and group and sort the view results.

Public filters

In ImageNow View Designer, a filter is an optional part of a view definition that narrows the results returned by the view. When you create a filter in View Designer, that filter becomes available to all users with access to the corresponding view. It is called a public filter. Each public filter associated with the view can have its own conditions, column layout, and statistics.

Statistics

Any view definition can include calculated statistics of columns. If your view includes statistics, they appear below the search grid. When you click the **Select in grid** 🔍 button for a statistic, the Explorer highlights documents in the search grid that correspond to the function, such as Maximum or Mode value, that generated the statistic. If an **Open** 📖 button appears for a statistic, you can click it to open the corresponding document or folder in ImageNow, WebNow, or Folder Viewer.

Security

View managers can determine which users can access, create filters for, and manage specific document, folder, and task views.

Frequently asked questions

The following questions and answers address the most common concerns of users familiar with previous versions of ImageNow.

Question	Answer
Can a view manager create a view definition that shows all the documents, folders, or tasks in ImageNow?	Yes. When ImageNow is installed, default views are already in place to do this: All Documents, All Folders, and All Tasks. An owner or manager can modify or remove these views. Users of the views still see only results in drawers for which they have the Search privilege.
Can a view manager limit access to a view by user or group?	Yes, a view manager can allow users and groups to see the results of a view. A view manager can also selectively grant the ability to save private filters and edit the view definition.
Can a user further limit the number of items displayed in a view?	Yes, using either the Search or Quick Search tab. If the user has the Filter privilege, he can also save his search criteria in a private filter. A filter resembles the saved query of previous versions of ImageNow, but a filter can also save information for column width, name, arrangement, sorting, and grouping.

Question	Answer
Can a user save a search?	Yes. If the user has the Filter privilege for a view, he can save the conditions from the Search or Quick Search tab as a private filter.
Can a user display items that don't satisfy the conditions of a view definition?	No. No searching technique can display more documents or folders than the view was originally defined to display. However, if a view manager grants the Manage privilege to a user for the specified view, as well as the global Manage View privilege, the user can then change the view definition to return more or different documents, folders, or tasks.
What happens if a view includes documents in drawers for which the user does not have access privileges?	Those documents do not appear in any of the views granted to the user.
Can a view manager create filters that can be applied by any user who can see the associated view?	Yes, using public filters. The view manager can define a public filter independently or publish a user's private filter so that it becomes public. The view manager can view and publish any private filter in View Designer.
Does ImageNow automatically refresh the view grid whenever a change occurs to any of the documents in the view?	If the user changes the document, the search results grid refreshes automatically. Your ImageNow administrator can also configure automatic refresh settings in ImageNow.ini file. Otherwise, ImageNow does not refresh the grid.
Can a view manager create additional task views?	No. The view manager can only modify the column layout and public filters of the nine system task view definitions.
Can a view manager create additional workflow views?	No. Workflow views appear automatically based on the user's workflow process and queue privileges.

View security for ImageNow owners or managers

In this section, you'll learn how to grant view management privileges if your ImageNow security profile includes one of the following:

- ImageNow owner

- ImageNow manager

- User with global Manage User Security privilege

View management privilege definitions

Users with specific view management privileges can perform the actions outlined in the following table.

Privilege	Description	Privilege Location
Manage Document Views	The user or group can create new document views and copy existing document views for which the user has the Access privilege. The user or group can modify any document views for which the user or group has the Manage privilege.	This privilege is located in ImageNow Management Console, on the Global Privileges tab, under Manage.
Manage Folder Views	The user or group can create new folder views and copy existing folder views for which the user has the Access privilege. The user or group can modify any folder views for which the user or group has the Manage privilege.	This privilege is located in ImageNow Management Console, on the Global Privileges tab, under Manage.
Manage Task Views	The user or group can define public filters and customize the column layout of a system task view for which the user or group has the Manage privilege.	This privilege is located in ImageNow Management Console, on the Global Privileges tab, under Manage.
Manage	The user can modify the view. This privilege requires the global privilege for the view type.	This privilege is located in ImageNow View Designer, in the View Properties dialog box, on the Security tab.

Grant view management privileges

ImageNow owners, managers, or users with management privileges can grant view management privileges to users and groups.

1. Open ImageNow Management Console and, in the left pane, select one of the following options:

    - To grant view management privileges to a user, click **Users**.

    - To grant view management privileges to a group, click **Groups**.

2. In the right pane, on the **Security** tab, search for and select the user or group and then click **Modify**.

3. In the **Security Settings** dialog box, on the **Global Privileges** tab, under **Manage**, grant the **Document Views**, **Folder Views**, or **Task Views** privilege by clicking the column in front of the privilege until the **Grant** icon appears.

4. Click **OK** and then click **Close**.

Views for view managers

In this section, you'll learn how to create a document or folder view definition in ImageNow View Designer by completing the following actions:

- Defining conditions for the view definition

- Adding public filters to the view

- Customizing the column layout of the view

- Adding statistics to the view

- Defining user access to the view

Getting started with ImageNow View Designer

ImageNow View Designer enables you, as a view manager, to create and manage view definitions. In it you can set up the conditions, column formatting, and user access that give views their power, versatility, and convenience. You can define public filters, which act as special-purpose refinements of a view, and you can inspect any private filters created by the persons who use your view definitions on a daily basis. You can also make private filters available to all users of the corresponding view by publishing them.

About the View Designer Interface

ImageNow View Designer is divided into three functional areas.

The **View** tab lets you create the conditions, or rules that control which results are returned by the view definition. In this tab, you add or modify the conditions that a result must satisfy to appear.
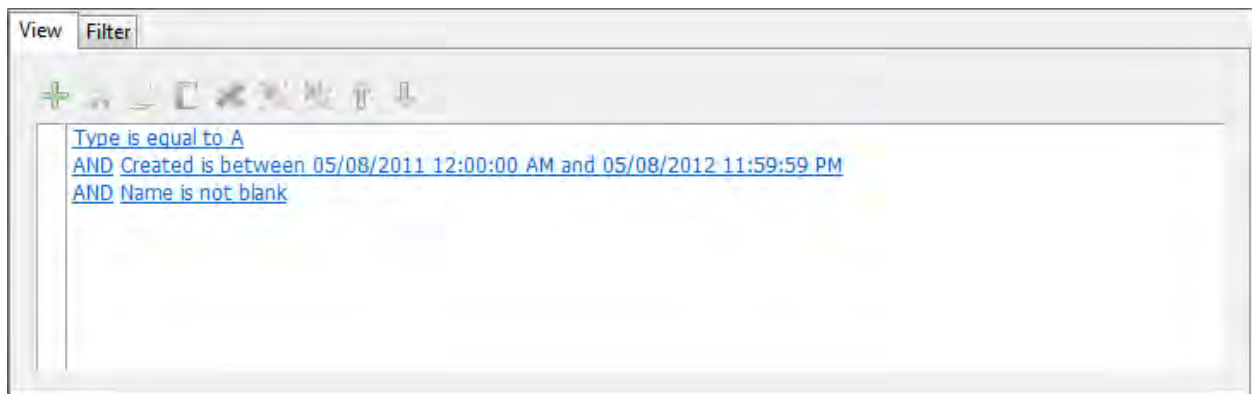
The **Filter** tab lets you create public filters that return subsets of results for the view, and it lets you manage the private filters created by view users.
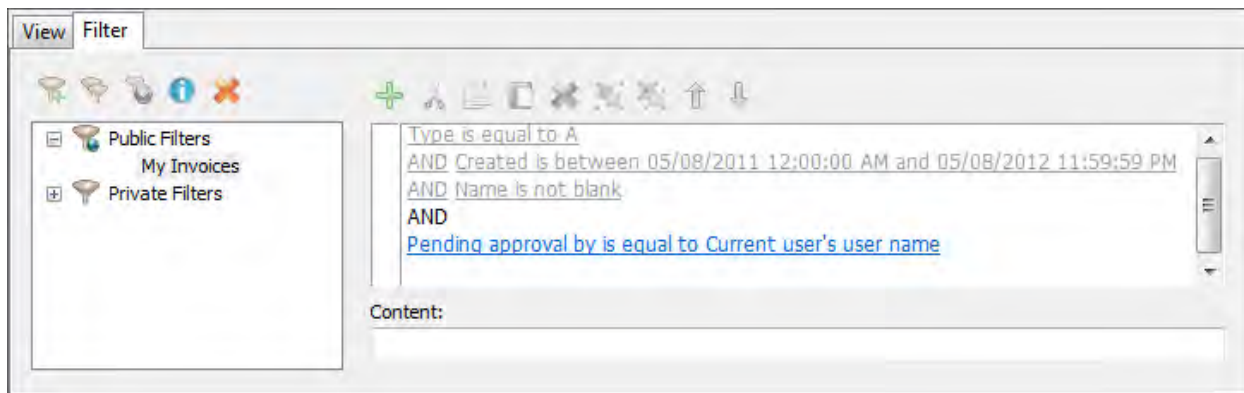
The **Preview** pane allows you to sample the results of your view, rearrange the columns, add statistics, add new columns for custom properties, define sort order of rows, group the resulting rows by any column heading, and create preview variables to determine what the results of the view will look like for your view users. For more information about creating preview variables, refer to the "Enabling the view in ImageNow and WebNow Explorer" section in this document.

Create a new view definition

Before a view manager can perform this procedure, he or she must have one of the following global privileges:

- Manage Document Views

- Manage Folder Views

View managers cannot create new task view definitions.

1. Open ImageNow Management Console and then, in the left pane, click **Views**.

2. In the right pane, do one of the following options:

- To create a new document view, click the **Documents** tab.

- To create a new folder view, click the **Folders** tab.

3. Click **New**.

4. In the **New View** dialog box, in the **Name** box, type a name and, in the **Description** box, type the description of the view that appears in the ToolTip for the view.

5. Click **OK** and, with the new view selected, click **Modify** to open View Designer.

Define the conditions for the view

To review the use of conditions and the definitions of the conditions available for documents, folders, tasks, and workflow items, refer to the topics in the "Work with Conditions" section in ImageNow User Help.

1. With the view open in ImageNow View Designer, on the **View** tab, click the **Add** ✛ button.

2. In the **Add Condition** dialog box, in the **Constrain by** list, click the view constraint to use.

3. In the **Type** list, select the type of search to perform.

4. In the **Field** list, select the field to use in the search.

5. In the **Operator** list, select an operator to use when comparing the field and the value.

6. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan.

7. In the **Value** box, select or type a value for the search.

   Note If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

8. Click **OK**.

9. To add another condition to the view, repeat the previous steps.

   Note When you define a search with multiple conditions, each new row begins with AND by default. To change AND to OR, click AND.

Rearrange the view conditions

After you create all the search conditions you want to define for the view, you can reorder them in ImageNow View Designer.

1. To select the condition you want to reorder, in View Designer, on the **View** tab, complete the following substeps:

   1. Position your mouse cursor over the condition you want to select so that a blue arrow appears in the pane to the left of the condition.

   2. In the pane to the left of the condition, click the blue arrow.

2. To order the condition, do one of the following options:

- To move the condition up one position, click the **Move Up** ⬆ button.

- To move the condition down one position, click the **Move Down** ⬇ button.

Group the view conditions

If your view contains two conditions you want to evaluate simultaneously, you can group them in ImageNow View Designer. To review how ImageNow evaluates grouped and ungrouped conditions, refer to the "Grouping and ordering evaluation of conditions" topic in ImageNow User Help.

1. To select the condition you want to reorder, in View Designer, on the **View** tab, complete the following substeps:

    1. Position your mouse cursor over the condition you want to select so that a blue arrow appears in the pane to the left of the condition.

    2. In the pane to the left of the condition, click the blue arrow.

    3. Hold down the CTRL key, and then repeat the previous steps to select the second condition.

2. In the toolbar, click the **Group** button.

3. Optional. To change the group operator from **AND** to **OR** or from **OR** to **AND**, click the operator inside the parentheses.

Define the view run mode

The view manager can determine whether a view the user accesses in ImageNow or WebNow Explorer runs as soon as he or she clicks the icon in the Views pane or runs after the user defines additional criteria.

If a view might generate a large number of results, the user typically prefers to limit the number of rows returned by defining additional search criteria or by running a public or private filter under the view name. In this case, a manual run view is preferable.

1. In View Designer, on the **View** tab, click the **Properties** button.

2. In the **View Properties** dialog box, on the **General** tab, do one of the following actions:

    *   To automatically display the view results when the user selects the view in ImageNow or WebNow Explorer, select the **Automatically run this view** check box.

    *   To require the user to define additional search criteria or click the **Go** button before displaying the view results, clear the **Automatically run this view** check box.

3. Click **OK**.

Defining public filters for views

View managers can add public filters to a view definition. When you add a public filter, the filter contains all the search conditions defined for the view and allows you to define additional conditions that can return a subset of the view data. Public filters can be active (visible to users) or inactive (hidden from users even when the view itself is active).

Filters are unlike views in two ways:

*   When the user clicks a filter, the results are always displayed immediately. There is no need to click the **Go** button.

*   When the user clicks a filter (and the view manager included the prompting feature in the filter definition), the filter can prompt the user to select or enter values before it generates the result set. In this way, the user's values become part of a condition in the filter.

When the view manager creates a filter in View Designer, that filter becomes available to all users with access to the corresponding view. This type of filter is called a public filter 🝖. When a user creates and saves a filter, it is available only to that user and is called a private filter 🝖. View managers can also evaluate the private filters users created for the view and modify them to become public filters. Changing a private filter to a public filter is called publishing.

View definitions vs. public filters

Although there is no absolute rule to determine when you should create a new view definition, as opposed to creating a filter in an existing view definition, the following guidelines will help in your planning.

Situation	Recommendation
Conditions in existing view definitions exclude any of the documents or folders you need to display.	Create a new view definition
The documents or folders returned by a view definition should be seen by users who are different from those who have access to existing views.	Create a new view definition
The view definition by itself returns more documents, folders, or tasks than the user wants to see all at once.	Create one or more public filters
You want to securely determine who can view the results of a view.	Create a new view definition
You want to define search criteria for a task view that differs from the conditions in a system view.	Create one or more public filters

Add a public filter to a view

Before a view manager can perform this procedure, he or she must have one of the following global privileges:

- Manage Document Views

- Manage Folder Views

- Manage Task Views

View managers can add any number of public filters to the view. The original view conditions appear, grayed, at the top of the conditions area. The filter you create builds upon these conditions.

You can add a public filter to an existing task view.

1. In **View Designer**, on the **Filters** tab, click the **New Filter** 🝖 button.

2. In the **New Public Filter** dialog box, type a name, add a description that appears as the ToolTip for the filter, and then click **OK**.

3. To add the conditions that apply to the filter, but not the view, click the **Add** ✚ button and then, in the **Add Condition** dialog box, do the following substeps:

    1. In the **Constrain by** list, click the view constraint to use.

    2. In the **Type** list, select the type of search to perform.

3. In the **Field** list, select the field to use in the search.

4. In the **Operator** list, select an operator to use when comparing the field and the value.

5. If you are performing a **LearnMode** search, in the **Plan** list, select an application plan.

6. In the **Value** box, select or type a value for the search.

   Note If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

7. Click **OK**.

4. To add another condition to the filter, repeat the previous steps.

   Note When you define a search with multiple conditions, each new row begins with AND by default. To change AND to OR, click AND.

5. To preview the search results that will appear for the filter, in the **Preview** pane, click the **Run** button.

Enable or disable the filter

By default, when the view manager creates a public filter, the filter is enabled and available for all users who can access the view. You can disable the view if you plan to use it in the future.
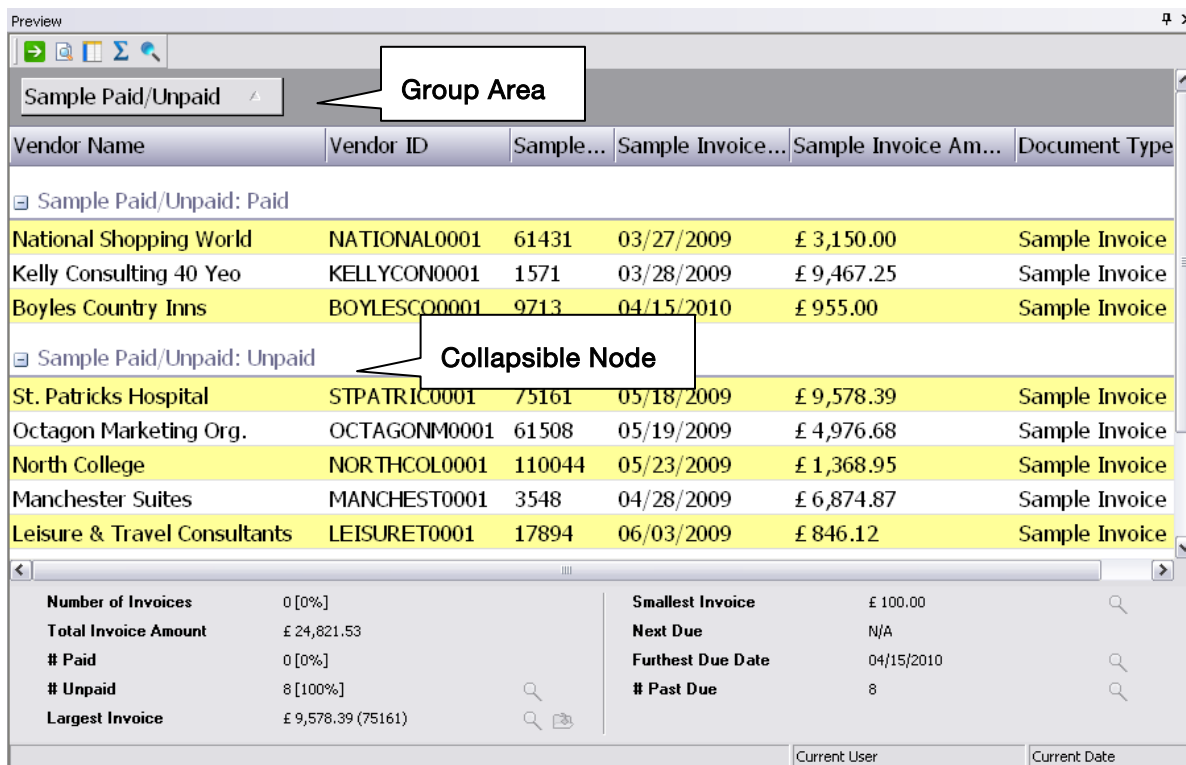
1. In View Designer, on the **Filter** tab, under **Public Filters**, right-click the filter and then click **Properties**.

2. In the **Modify Filter** dialog box, do one of the following options:

   - To enable the public filter, select the **Is active** check box.

   - To disable the public filter, clear the **Is active** check box.

3. Click **OK** and then save the view.

Customize the view column layout

Preformatting the display of columns is an important advantage of ImageNow view definitions. This feature saves the user the time and effort required by manually adjusting columns each time the user opens a view. You define column formatting in the Preview pane of the View Designer window. You can perform these tasks directly in the Previews pane (by dragging or right-clicking column headings) or by clicking the Columns ▦ button and making changes in the Columns dialog box.

In addition to specifying column layout for each view definition, the view manager can define a separate column layout for each public filter of a view definition. Likewise, a user with the Filter privilege for a view can define a separate column layout in each private filter of that view. In the following procedures, you'll learn how to show and hide columns, rename, resize, and rearrange columns, and add one or more custom property columns in document views and folder views. You can customize the column layout for any document, folder, or task view.
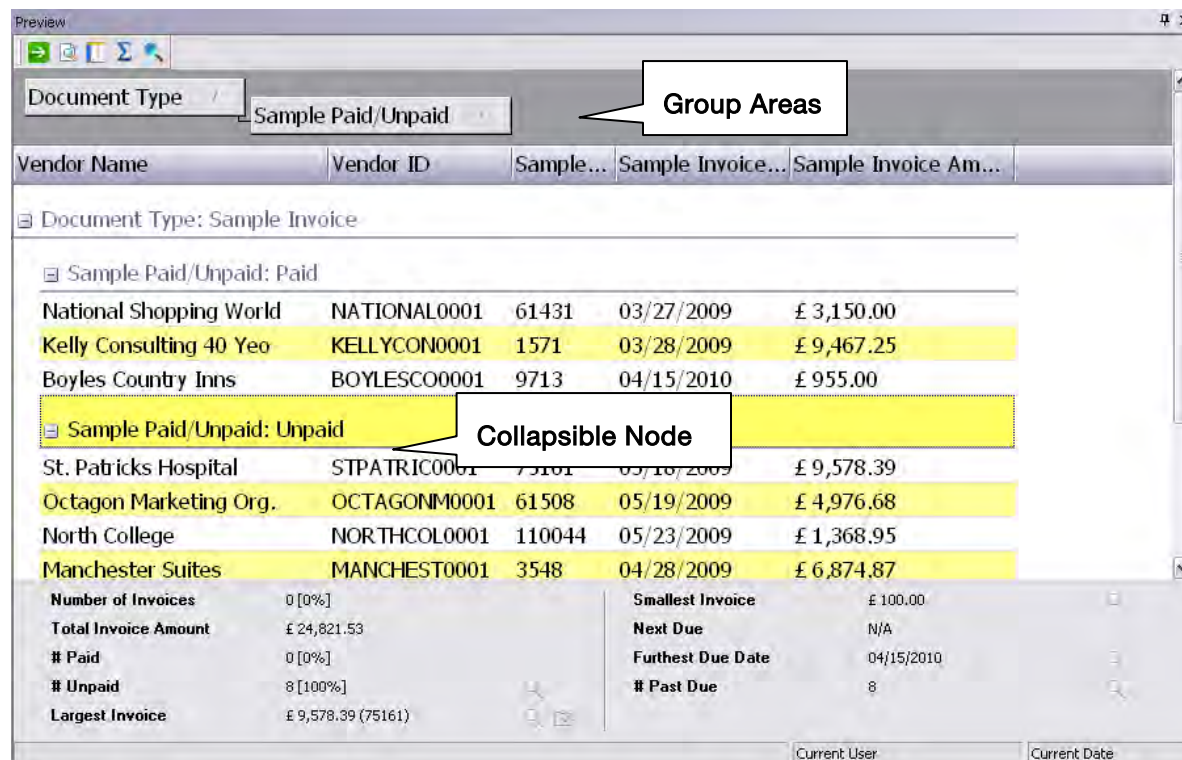
The view manager can also sort columns in a view or public filter and group columns into collapsible nodes that group the search results automatically. You can sort the results by group. The following figure shows the view manager's setup in the Preview pane for grouping invoices into Paid and Unpaid with the two groups expanded.

You can also create multiple group levels.

Select columns to display

The view manager can determine which columns to display to any user who accesses the view.

1. In View Designer, do one of the following options:
   - To select the columns to display in the view, select the **View** tab.
   - To select the columns to display in a public filter of the view, select the **Filter** tab and, under **Public Filters**, select the filter.
2. In the **Preview** pane, click the **Run** ⬛ button to display the current column layout and click the **Columns** ⬛ button.
3. In the **Columns** dialog box, select the check box of the columns you want to display and click **OK**.
4. Click the **Run** ⬛ button to display the new column layout.

Reorder view or filter columns

After you add the columns to display in the view or public filter, you can determine the order of the columns. You can reorder the columns in a document, folder, or task view or public filter.

1. With the view or filter displayed in View designer, in the **Preview** pane, click the **Columns** ⬛ button.
2. In the **Columns** dialog box, select the column you want to move and then click **Move Up** or **Move Down**.
3. Repeat the previous steps for all columns you want to reorder.

4. In the **Columns** dialog box, click **OK**.

5. Click the **Run** ➜ button to display the new column layout.

Add a custom property column

The view manager can add a column that displays a custom property value in a document or folder view or in a public filter of a view.

1. With the view or filter displayed in View designer, in the **Preview** pane, click the **Columns** button.

2. In the **Columns** dialog box, click the **Add** button.

3. In the **Custom Property** dialog box, do the following substeps:

   4. To view the custom properties assigned to a specific document or folder type, in the **Select a document type** or **Select a folder type** list, select the type.

   5. Under **Select a custom property**, select the custom property column or columns you want to add.

   6. Click **Add**.

4. Optional. To change the position of the custom property column, in the **Columns** dialog box, reorder the column.

5. Click **OK**.

Sort the view results

The view manager can define the sort order of the columns that appear in the search results grid for a view or public filter.

1. In View Designer, do one of the following options:

   - To define the sort order of the view, click the **View** tab.

   - To define the sort order of a public filter, click the **Filter** tab and select the filter.

2. To sort by a single column, right-click the column heading and do one of the following options:

   - To sort the results in ascending order, select **Sort Ascending**.

   - To sort the results in descending order, select **Sort Descending**.

3. To sort by multiple columns, do the following substeps:

   1. Click the column heading you want to use for the primary sort.

   2. Optional. To sort the primary column in ascending order, click the column heading again.

   3. Hold down the SHIFT key and click the heading of the column you want to use for the secondary sort.

   4. Optional. To sort the secondary column in ascending order, click the column heading again.

4. Repeat the previous substeps for each additional column you want to sort by.

Group the view results

The view manager can group the columns into collapsible nodes that appear in the search results grid for a view or public filter.

1. In View Designer, do one of the following options:

   - To define the sort order of the view, click the **View** tab.

   - To define the sort order of a public filter, click the **Filter** tab and then select the filter.

2. Right-click the heading of the column you want to group and select **Group by this Column**.

3. To create additional groups, drag the heading of the column to the gray **Group Area** using the following options:

   - To create a group one level above the current group, drag the column heading to the left of the current group in the **Group Area**.

   - To create a group one level below the current group, drag the column heading to the right of the current group in the **Group Area**.

Adding statistics to views

For any view, a view manager can define statistics that provide calculations such as maximum, minimum, and average of all the values in a specific column in the view. For example, if an accounts payable administrator adds a sum statistic for a numeric custom property column that contains an invoice amount, the sum of all rows, which might be called "Total", appears below the search grid.

As another example, you might define a view to find unpaid invoices with discount dates that have not passed. Using a statistic, the view could display counts on the various discount percentages. The customer could use the information to determine whether to focus on a certain discount percentage or on the total of payment amounts.

Statistic data types

A view manager can add a statistic to a document, folder, or task view or public filter. The following statistics are available for the specified data types. Count, which totals the number of documents, folders, or tasks that contain a specified text in the column you select, requires a variable. You can apply Count to a string, list, string custom property, or flag column.

Column data type	Statistic types
string	Count (not case sensitive)
numeric	Average, Maximum, Median, Minimum, Mode, Sum
date	Average date, Count Future, Count Past, Next, Previous, First, Last
list	Count (not case sensitive)
flag	Count

Add a statistic to a view or filter

The view manager can add any number of statistics to a document, folder, or task view or public filter of a view. By default, the statistics pane appears below the search results in ImageNow or WebNow Explorer, but can be modified to appear above the results.

1. With the view or filter open in View Designer, in the **Preview** pane, click the **Statistics** ![Statistics icon] button.

2. In the **Statistics** dialog box, do one of the following subprocedures.

Add a statistic for a string value

View managers can use this procedure to add a non-case-sensitive Count statistic that distinguishes string values, such as a task template or user name.

1. In the **Statistics** dialog box, click **Add**.

2. Under **Label**, type a label that describes the statistic function to appear in ImageNow or WebNow Explorer.

3. Under **Column**, select the column with the string values.

4. Under **Function**, select **Count**.

5. Under **Variable**, type the value for the statistic. For example, if you want to count the number of search results where a custom property value is a vendor name, type the vendor name.

6. Optional. Under **Caption**, type the text to display when the statistic applies to only one search result in the view. For example, if there is only one document in the search results list for the vendor specified in the Variable column, you can use the Caption column to show the document type of the search result to determine if it is an invoice or a purchase order.

7. Click **OK**.

Add a statistic for a numeric value

View managers can use this procedure to display the average, sum, median, or mode statistic that distinguishes numeric values, such as the number of tasks or an amount custom property. You can also use numeric statistics to show the highest and lowest numeric value in the list.

1. In the **Statistics** dialog box, click **Add**.

2. Under **Label**, type a label that describes the statistic function to appear in ImageNow or WebNow Explorer.

3. Under **Column**, select the column with the numeric values.

4. Under **Function**, select one of the following options:

   - To display the average of all the numeric values, select **Average**.

   - To display the highest numeric value, select **Maximum**.

   - To display the lowest numeric value, select **Minimum**.

   - To display the total of all numeric values, select **Sum**.

   - To display the middle numeric value, select **Median**.

   - To display the most frequently occurring numeric value, select **Mode**.

5. Optional. Under **Caption**, type the text to display when the statistic applies to only one search result in the view. For example, if one folder has the most tasks in a Maximum statistic, you can use the caption column to show the folder name.

6. Click **OK**.

Add a statistic for a date value

View managers can use this procedure to display the oldest, newest, or next date value in a list of search results or display the total number of dates in the past or dates in the future.

1. In the **Statistics** dialog box, click **Add**.

2. Under **Label**, type a label that describes the statistic function to appear in ImageNow or WebNow Explorer.

3. Under **Column**, select the column with the date values.

4. Under **Function**, select one of the following:

   - To display the total number of dates in the future, select **Count Future**. If no future dates exist, the statistic displays a value of N/A.

   - To display the total number of dates in the past, select **Count Past**. If no past dates exist, the statistic displays a value of N/A.

   - To display the oldest date value, select **First**.

   - To display the newest date value, select **Last**.

   - To display the next future date, select **Next**. If no future dates exist, the statistic displays a value of N/A.

   - To display the most recent date, select **Previous**.

5. Optional. Under **Caption**, type the text to display when the statistic applies to only one search result in the view. For example, if you use a Next statistic to show the next task due for a folder, you can use the Caption column to display the name of the folder with the next task due.

6. Click **OK**.

Add a statistic for a list value

View managers can use this procedure to add a statistic that distinguishes a unique value of a list custom property.

1. In the **Statistics** dialog box, click **Add**.

2. Under **Label**, type a label that describes the statistic function to appear in ImageNow or WebNow Explorer.

3. Under **Column**, select the list custom property.

4. Under **Function**, select **Count**.

5. In the **Variable** list, select the list member value you want to use for the statistic.

6. Optional. Under **Caption**, type the text to display when the statistic applies to only one search result in the view. For example, if there is only one document in the search results list for the list value specified in the Variable column, you can use the Caption column to show the name of the list member.

7. Click **OK**.

Add a statistic for a flag value

View managers can use this procedure to add a statistic that distinguishes a true or false (boolean) condition.

1. In the **Statistics** dialog box, click **Add**.

2. Under **Label**, type a label that describes the statistic function to appear in ImageNow or WebNow Explorer.

3. Under **Column**, select the column with the boolean values.

4. Under **Function**, select **Count**.

5. Under **Variable**, select whether you want to count the results that meet the TRUE condition or the FALSE condition.

6. Optional. Under **Caption**, type the text to display when the statistic applies to only one search result in the view. For example, if there is only one document in the search results list in workflow, you can use the Caption column to show the workflow queue the item is in.

7. Click **OK**.

Modify view statistics

After you create all the statistics you want to appear in the statistics pane in ImageNow or WebNow Explorer, you can determine the order and position of the statistics.

1. To preview the appearance of the statistics, in the **Preview** pane, click the **Statistics** ∑ button.

2. In the **Statistics** dialog box, click the row of the statistic you want to change and then do one of the following options:

    *   To reorder the statistic, click **Move Up** or **Move Down**.

    *   To remove the statistic, click **Remove**.

3. Click **OK**.

4. In the **Preview** pane, click the **Run** button to display the statistics pane.

Defining view and filter security

After the view manager creates the view and customizes all the view components, he or she can grant user access to the view. Users and groups with access to the view see it in the Views pane of ImageNow or WebNow Explorer.

View security definitions

View managers define user and group privileges on the Security tab of the View Properties dialog box.

Privilege	Description
Access	The user or group can see the view. In addition, the user can use the Quick Search and Search tabs to narrow the number of results returned. A user can never access more results than the view allows.

Privilege	Description
Access By URL	The user can access the results of the view and its public filters using a WebNow or ImageNow link. A user can never access more results than the view allows.
Filter	The user or group can create and save private filters based on this view.
Manage	Lets the user manage the current view. This privilege also requires the associated global privilege for the view type.

Grant access to a view

1. In **View Designer**, in the toolbar, click the **Properties** button.

2. In the **View Properties** dialog box, on the **Security** tab, click **Add**.

3. In the **Select Users and Groups** dialog box, search for and select the users or groups you want to add to the view and then click **OK**.

4. In the **View Properties** dialog box, under **Users and Groups**, select a user or group and then, under **Privileges**, grant a privilege by clicking in the column to the left of the privilege until the **Granted** icon appears, or deny a privilege by clicking in the same position until the **Denied** icon appears.

5. Repeat the previous step for each user or group you want to define.

6. Click **OK**.

Enabling the view in ImageNow and WebNow Explorer

The view manager uses the Preview pane in View Designer to view the results of a view definition or public filter before making the view visible to users. When the view manager clicks the Run button in the Preview pane, ImageNow returns the results that would appear to a user with Access privileges in ImageNow Explorer or WebNow Explorer if the view were activated at that time. This feature enables the view manager to remain in View Designer instead of using to the respective Explorer to check the accuracy of the definition.
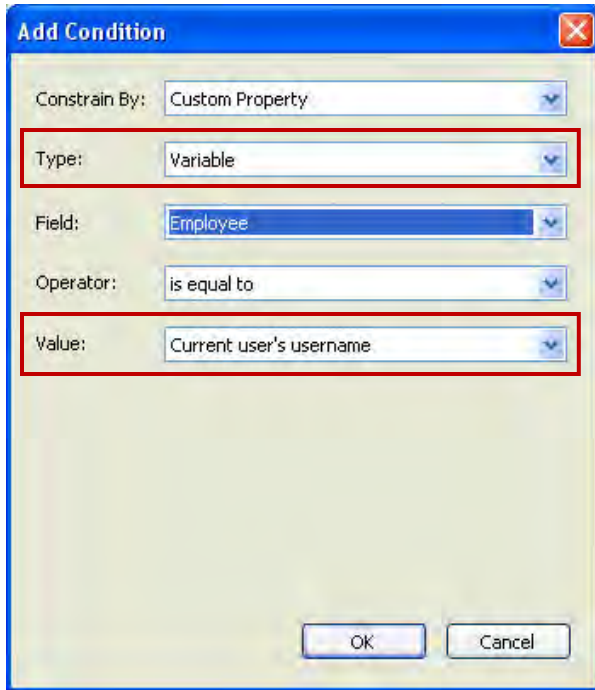
The view manager can also use a preview variable to simulate and the view results for a specific user or specific date when the view definition contains one or more variable type conditions.

What is a preview variable?

A preview variable is a value, such as a user name or date, that the view manager substitutes in the Preview pane to simulate the view or filter results. A preview variable can include the following options:

- A user name different from the view manager's

- A date different from the current date

Preview variables appear in the status bar at the bottom of the View Designer window as a reminder of the values the view manager substituted. For example, you can include a condition in a view or filter that tests for a user name, such as custom property field called Employee as a User data type, as shown in the following figure.

If the view manager runs the view or filter without a preview variable, the results are based on the view manager's user name and the current date.

Preview the view results with a variable

The view manager can use this procedure to simulate the results of a view or public filter for another user or date. Preview variables are not saved with a view.

1. On the **View** or **Filter** tab, verify or add a variable type condition. For more information on adding conditions to the view, refer to the "Define the conditions for the view" section of this document.

2. In the **Preview** pane, click the **Preview Variable** button.

3. In the **Preview Variables** dialog box, do one or both of the following options:

    *   To preview using a different date for the current date, under **Date and Time**, click the second button and enter the date and time.

    *   To substitute a different user name for your own user name, under **User**, click the second button and enter the user name.

4. Click **OK**.

5. Click the **Run** button to preview the view results using the variables.

Activate the view

Before any of your users can begin using the view, the view manager must activate and save the view. After the view is active, users can begin running the view in ImageNow and WebNow Explorer.

1. In View Designer, on the **View** tab, click the **Properties** button.

2. In the **View Properties** dialog box, on the **General** tab, select the **Is active** check box and click **OK**.

3. In View Designer, on the **View** tab, click the **Save** button.

Views for ImageNow and WebNow client users

All searches in ImageNow begin with a view or with one of the public or private filters displayed below a view.

- Users and groups with the Access privilege for a document, folder, or task view can run the view and its public filters in ImageNow or WebNow Explorer.

- Users and groups assigned to a workflow process or queue can run the view associated with the process and queues.

- Users and groups with the Access by URL privilege for a document, folder, or task view can run the view and its filters from a WebNow or ImageNow link.

- Users and groups with the Filter privilege for a document, folder, or task view can create a filter in ImageNow or WebNow Explorer that is only visible to them.

- Users and groups with the Manage privilege for a document, folder, or task view are considered view managers for that specific view.

In this section, you'll learn how to search for document, folders, tasks, and workflow items using a view as a basis for your search and how to create private filters in ImageNow and WebNow Explorer.

Using a view to search in ImageNow and WebNow

The Views pane enables you to use a view or public filter as a basis for a search in ImageNow and WebNow Explorer. Using the Views pane, you can search for documents, folders, tasks, and workflow items. If the view returns the search results you want, you do not need to define additional search criteria in the right pane of ImageNow or WebNow Explorer. Ideally, your view manager creates views and public filters that eliminate the need for building advanced searches for frequent queries.

Search for a document

Users with access to a document view can search for a document using a quick selection or using multiple conditions.

1. On the **ImageNow** or **WebNow** toolbar, select **Documents**.

2. In **ImageNow** or **WebNow Explorer**, in the **Views** pane, select the document view you want to use as a basis for your search.

   - If you selected an automatic view, the results are displayed immediately.

   - If you selected a manual run view, you can perform a quick search or advanced search to narrow the results.

3. In the right pane, do one of the following actions:

- **To perform a quick search:**
    1. Click the **Quick Search** tab.
    2. In the property list, select the custom property or document key to use.
    3. In the operator list, select an operator to use in the comparison.
    4. In the value box, select or type a value.

- **To perform an advanced search:**
    1. Click the **Search** tab and do the following substeps:
        1. Click the **Add** ➕ button.
        2. In the **Add Condition** dialog box, in the **Constrain by** list, click the document search constraint to use.
        3. In the **Type** list, select the type of search to perform.
        4. In the **Field** list, select the document field to use in the search.
        5. In the **Operator** list, select an operator to use when comparing the field and the value.
        6. If you are performing a LearnMode search, in the **Plan** list, select an application plan.
        7. In the **Value** box, select or type a value for the search.

            Note If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

        8. Click **OK**.
    2. Optional. To add another search condition, repeat the previous substeps.

4. Click the **Go** button.

If you need to create an advanced search with multiple conditions to obtain the search results you need, ask your view manager to create a view or public filter to simplify finding the documents you want.

Search for a folder

Users with access to a folder view can search for a folder using a quick selection or using multiple conditions.

1. On the **ImageNow** or **WebNow** toolbar, select **Folders**.
2. In **ImageNow** or **WebNow Explorer**, in the **Views** pane, select the folder view you want to use as a basis for your search.

    - If you selected an automatic view, the results are displayed immediately.
    - If you selected a manual run view, you can perform a quick search or advanced search to narrow the results.

3. In the right pane, do one of the following actions:

    - **To perform a quick search:**
        1. Click the **Quick Search** tab.

2. In the property list, select the folder property or custom property to use.

3. In the operator list, select an operator to use in the comparison.

4. In the value box, select or type a value.

- **To perform an advanced search:**

  1. Click the **Search** tab and then do the following substeps:

     1. Click the **Add** ➕ button.

     2. In the **Add Condition** dialog box, in the **Constrain by** list, click the folder search constraint to use.

     3. In the **Type** list, select the type of search to perform.

     4. In the **Field** list, select the folder field to use in the search.

     5. In the **Operator** list, select an operator to use when comparing the field and the value.

     6. If you are performing a LearnMode search, in the **Plan** list, select an application plan.

     7. In the **Value** box, select or type a value for the search.

        Note If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

     8. Click **OK**.

  2. Optional. To add another search condition, repeat the previous substeps.

4. Click the **Go** ➡ button.

If you need to create an advanced search with multiple conditions to obtain the search results you need, ask your view manager to create a view or public filter to simplify finding the folders you want.

Search for a task

Users with access to task views can search for a task using a quick selection or using multiple conditions.

1. On the **ImageNow** or **WebNow** toolbar, click **Tasks**.

2. In **ImageNow** or **WebNow Explorer**, in the **Views** pane, select the task view you want to use as a basis for your search.

   - If you selected an automatic 🔵 view, the results are displayed immediately.

   - If you selected a manual run 🟢 view, you can perform a quick search or advanced search to narrow the results.

3. In the right pane, do one of the following actions:

   - **To perform a quick search:**

     1. Click the **Quick Search** tab.

     2. In the property list, select the property to use.

3. In the operator list, select an operator, such as **is equal to** or **is greater than** to use in the comparison.

4. In the value box, select or type a value.

- **To perform an advanced search:**

   1. Click the **Search** tab and then do the following substeps:

      1. Click the **Add** ✚ button.

      2. In the **Add Condition** dialog box, in the **Constrain by** list, click the task search constraint to use.

      3. In the **Type** list, select the type of search to perform.

      4. In the **Field** list, select the task field to use in the search.

      5. In the **Operator** list, select an operator to use when comparing the field and the value.

      6. If you are performing a LearnMode search, in the **Plan** list, select an application plan.

      7. In the **Value** box, select or type a value for the search.

         Note If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.

      8. Click **OK**.

   2. Optional. To add another search condition, repeat the previous substeps.

4. Click the **Go** ➡ button.

If you need to create an advanced search with multiple conditions to obtain the search results you need, ask your view manager to create a public filter to simplify finding the tasks you want.

Search for a workflow item

Users with access to workflow process and queue views can search for an item using a quick selection or using multiple conditions.

1. On the **ImageNow** or **WebNow** toolbar, select **Workflow**.

2. In **ImageNow** or **WebNow Explorer**, in the **Views** pane, select the workflow process or queue view you want to use as a basis for your search.

   - If you selected an automatic 🔵 view, the results are displayed immediately.

   - If you selected a manual run 🔵 view, you can perform a quick search or advanced search to narrow the results.

3. In the right pane, do one of the following actions:

   - **To perform a quick search:**

      1. On the **Quick Search** tab, in the property list, select the workflow item property, document key, folder property, or custom property to use.

      2. In the property list, select the property to use.

      3. In the operator list, select an operator to use in the comparison.

      4. In the value box, select or type a value.

- **To perform an advanced search:**
    1. Click the **Search** tab and do the following substeps:
        1. Click the **Add** ✛ button.
        2. In the **Add Condition** dialog box, in the **Constrain by** list, click the workflow search constraint to use.
        3. In the **Type** list, select the type of search to perform.
        4. In the **Field** list, select the workflow field to use in the search.
        5. In the **Operator** list, select an operator to use when comparing the field and the value.
        6. If you are performing a LearnMode search, in the **Plan** list, select an application plan.
        7. In the **Value** box, select or type a value for the search.

            Note If you selected **Prompted** in the **Type** list, the **Message** box appears instead. Enter instructions indicating what value to enter.
        8. Click **OK**.
    2. Optional. To add another search condition, repeat the previous substeps.
4. Click the **Go** ➡ button.

If you need to create an advanced search with multiple conditions to obtain the search results you need, you can create a private filter to simplify finding the workflow items you want.

Using statistics in a view

If the view or one of its public filters includes one or more statistics, you can use the statistics pane in ImageNow or WebNow Explorer after you run the view in any of the following ways.

Action	Procedure
Highlight the search results that apply to a statistic	In the statistics pane, click the **Select in grid** 🔍 button to the right of the statistic.
Open a single document that applies to a statistic	In the statistics pane, click the **Open** 🔲 button to the right of the statistic.
Apply the statistic to a selection of search results	Using the SHIFT key for continuous results or the CTRL key for discontinuous results, select the results in the grid.

When the view or selection changes, the statistics recalculate automatically. For more information about creating statistics in a view, refer to the "Adding statistics to views" section in this document.

Using private filters

A filter lets you select a predefined subset of results returned by a view and simplifies the task of processing a large number of search results. As soon as you click a filter, ImageNow applies the filter to the view and displays the results in the grid.

If you have the Filter privilege for the selected view, you can create as many private filters as you need. Unlike public filters, no other users can see your filters unless they have been granted the Manage

privilege for the same view. The view manager can create public filters along with view definitions. If you want to share a private filter, the view manager can publish your filter as a public filter.

Apply a filter

You can use this procedure to apply a filter to a view in the Views pane of ImageNow or WebNow Explorer.

1. In ImageNow or WebNow Explorer, in the **Views** pane, select a view to show its filters.

2. Click the filter you want to apply to the view.

3. If the **Select a Search Value** dialog box appears, select or type a value as instructed and click **OK**.

Create a private filter

You can use this procedure to save a search you performed as a filter accessible to you in the Views pane of ImageNow or WebNow Explorer.

1. In ImageNow or WebNow Explorer, in the **Views** pane, select the view you want to use as a basis for your filter.

2. In the right pane, define your quick search or create conditions for an advanced search. For more information about creating a search, refer to one of the following sections in this document:

    - "Search for a document"

    - "Search for a folder"

    - "Search for a task"

    - "Search for a workflow item"

3. If the search returned the results you want, in the **Current View** toolbar, click the **Save private filter** button. If not, refine your search and repeat this step.

4. In the **Save Filter** dialog box, type a name and an optional description for the filter and click **OK**.

After you save the private filter, it appears below the view you used to create it in the **Views** pane.

Modify a private filter

You can use this procedure to change the name and description of a saved search filter or the conditions associated with the filter.

1. In ImageNow or WebNow Explorer, in the **Views** pane, select the view associated with the filter.

2. To rename a filter or change its description, do the following substeps:

    1. In the **Current View** toolbar, click the **Edit private filters** button.

    2. In the **Edit Private Filters** dialog box, select the filter and click **Modify**.

    3. In the **Modify Filter** dialog box, type your changes in the **Name** and **Description** boxes and click **OK**.

    4. In the **Edit Private Filters** dialog box, click **Close**.

3. To change a condition in the filter, do the following substeps:

    1. In the **Views** pane, select the filter.

2. On the **Search** tab, click the condition you want to change.

3. In the **Add Condition** dialog box, modify the necessary components of the condition and click **OK**.

4. In the **Current View** toolbar, click the **Save private filter** button.

5. When prompted to overwrite the original filter, click **Yes**.

Publish a private filter

A view manager can publish an existing private filter as a new public filter for the view. Only a user with the Manage privilege for the view can perform this procedure.

1. On the **ImageNow** toolbar, click **Manage**.

2. In **Management Console**, in the left pane, click **Views** and, in the right pane, on the **Document** or **Folder** tab, select the view definition that contains the private filter you want to publish.

3. Click **Modify**.

4. On the **Filter** tab, expand **Private Filters**   and then open the private filters of the user who created the private filter.

5. Under the user name selected, click the filter you want to publish.

6. Click the **Publish** button.

Reference

This section contains information about views that you can reference when setting up and working with views. The following information is provided in this section:

- View Designer toolbars
- Current View toolbar
- View privilege definitions

View Designer toolbars

View toolbar

Tool	Name	Description
	Save	Lets you save changes to a view, which includes any of the filters for the view.
	Properties	Lets you activate or deactivate a view, grant view privileges to users and groups, specify the maximum number of rows that a view can display, and designate whether the view is run manually or automatically.

Condition toolbar

Tool	Name	Description
	Add condition	Inserts a new row into the condition list of the view definition.
	Cut	Enabled if you have selected any conditions. Clicking Cut then removes the conditions and places them on the Clipboard. You select a condition by clicking to the left or right of the condition.
	Copy	Enabled if you have selected any conditions. Clicking Copy then places them on the Clipboard.
	Paste	Enabled if you have any conditions on the Clipboard. Clicking Paste then inserts them at the bottom of the condition list.
	Delete	Enabled if you have selected any conditions. Clicking Delete then removes the conditions without placing them on the Windows Clipboard.
	Group	Enabled if you have selected exactly two conditions. Clicking Group then removes the lower condition and adds it to the end of the upper condition with parentheses where appropriate.
	Ungroup	Enabled if you have selected a grouped condition. Clicking Ungroup then separates the grouped condition by removing the right most condition and inserting that condition in the row below the selected condition.
	Move Up	Enabled if you have selected a single condition below the top row. Clicking Move up then causes the selected condition to trade places with its upper neighbor.
	Move Down	Enabled if you have selected a single condition above the bottom row. Clicking Move down then causes the selected condition to trade places with its lower neighbor.

Filter toolbar

Tool	Name	Description
	Add Filter	Adds a new filter definition to the selected view.
	Copy Filter From	Enabled when you have a public filter selected. Clicking Copy Filter From lets you import a filter from another view.
	Publish	Enabled when you have a private filter selected. Clicking Publish changes that filter to a public filter.

| Tool	Name	Description
	Properties	Enabled when you have a public filter selected. Clicking Properties lets you edit the filter name and description.
	Delete	Enabled when you have a public filter selected. Clicking Delete removes the filter from the view and from View Designer.

Preview toolbar

Tool	Name	Description
	Run	Lets you display the result set of the current view or filter definition
	Preview variables	Lets you substitute a different user, date, or time in place of the current user, date, and time, so that you can simulate run-time conditions to test the view or filter definition.
	Columns	Lets you define the layout of columns in which the result set is displayed.
	Statistics	Lets you manage the statistics that appear in the statistics pane below the search results.
	Find	Lets you search for a specific search result.

Current View toolbar

The Current View toolbar in ImageNow and WebNow Explorer enables you to work with the view you are running.

Tool	Name	Description
	Documents	Display the selected document view.
	Folders	Display the selected folder view.
	Tasks	Display the selected task view.
	Workflow	Display the selected workflow view.
	Save Private Filter	Save the current conditions as a private filter.
	Edit Private Filters	Open the selected filter for modifications.

Tool	Name	Description
	Columns	Display the Columns dialog box, which lets you customize the appearance of the columns in the grid.
	Refresh	Refresh the current view.
	Find	Display the Find bar, which lets you highlight character search results in the grid.

View privilege definitions

Privilege Type	Privilege	Description	Privilege Location
Global	Manage Document Views	The user or group can create new document views and copy existing document views for which it has the Access privilege. The user or group can modify any document views for which the user or group has the Manage privilege.	This privilege is located in ImageNow Management Console, on the Global Privileges tab, under Manage.
	Manage Folder Views	The user or group can create new folder views and copy existing folder views for which it has the Access privilege. The user or group can modify any folder views for which the user or group has the Manage privilege.	This privilege is located in ImageNow Management Console, on the Global Privileges tab, under Manage.
	Manage Task Views	The user or group can define public filters and customize the column layout of a system task view for which the user or group has the Manage privilege.	This privilege is located in ImageNow Management Console, on the Global Privileges tab, under Manage.
View level	Access	The user or group can see the view. In addition, the user can use the Quick Search and Search tabs to narrow the number of results returned. A user can never access more results than the view allows.	This privilege is located in ImageNow View Designer, in the View Properties dialog box, on the Security tab.

Privilege Type	Privilege	Description	Privilege Location
	Access by URL	When displaying the view using a WebNow URL, the user or group can see the view and display its results and use the Quick Search and Search tabs to narrow the number of results returned. A user can never access more results than the view allows.	This privilege is located in ImageNow View Designer, in the View Properties dialog box, on the Security tab.
	Filter	The user or group can save private filters based on this view.	This privilege is located in ImageNow View Designer, in the View Properties dialog box, on the Security tab.
	Manage	The user can modify the view. This privilege requires the global privilege for the view type.	This privilege is located in ImageNow View Designer, in the View Properties dialog box, on the Security tab.

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