

# Perceptive Nolij Web

User Guide

Version: 6.7.x



**perceptive**software

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## Welcome to Nolij Web

Refer to these topics for more information about Nolij Web:

- [What is Nolij Web? on page 9.](#)
- [What Can Nolij Web Do? on page 9.](#)

### What is Nolij Web?

Nolij Web is a web-based document imaging and management solution for higher education institutions. It provides an automatic, integrated workflow process that enhances the flow of information between departments and individuals, significantly increasing productivity.

Nolij Web provides a variety of other features, such as reporting, instant messaging, and content management. Based fully on Java, Nolij Web works with all leading higher education Student Information System (SIS) software, integrates with all leading Enterprise Resource Planning (ERP) databases, and is supported on most browser and server platforms.

Your administrator can also configure Nolij Web so that you can use the Nolij Web interface to view and work with ImageNow workflows and views. All tasks you perform in ImageNow workflows and views occur in ImageNow; Nolij Web is only the means by which you can access ImageNow workflows and views. Refer to the appropriate ImageNow documentation for more information about working with ImageNow.

### What Can Nolij Web Do?

Nolij Web provides these key features:

- [Document Imaging](#)
- [Document Management](#)
- [Forms](#)
- [Workflow](#)
- [Reporting](#)
- [Collaboration](#)

### Document Imaging

You can scan, store, enhance, manage, and view hardcopy documents in Nolij Web.

### Document Management

You can store, track, and maintain all of your electronic business information, regardless of file type or format.

## Forms

Your administrator can create custom forms to retrieve and save data for records of information.

## Workflow

The Workflow feature automates how documents, information, and tasks are passed from one individual to another according to predefined rules and procedures. With this feature, you can:

- Automate the paper and folder flow within or across academic departments to streamline decision making for admissions processes.
- Manage electronic content and distribute work according to workflow rules based on internal policy and procedure.
- Give users unlimited conditional inboxes, allowing support staff to route work to holding queues.
- Allow system administrators to track work and to reroute work systematically based on problems caused by bottlenecks, short-staffing, or sick employees.
- Use email for notification of work that must be completed.
- Review and design workflow paths for highly repetitive processes.

Some of the workflow processes that Nolij Web can provide include:

- [Priority Student Filter](#)
- [Financial Aid Folder Review Assistant](#)
- [Human Resources Performance Reviewer](#)
- [Finance Grant Organizer](#)

### Priority Student Filter

A priority student workflow automatically prioritizes student folders so you can concentrate on preferred applicants. It is driven by internal functional requirements, such as automatic acceptance or applicant weighting, which gives applicants an overall decision score. It can:

- Prioritize folders based on criteria, such as minimum GPA or SAT scores, defined as the important indicators of a successful applicant.
- Ensure that preferred applicants' folders are reviewed soonest, enabling staff to focus time effectively and to respond quickly to applicants.

### Financial Aid Folder Review Assistant

A financial aid folder review assistant workflow automates the review and approval of a student's financial aid folder. You can:

- Automatically route financial aid folders to the appropriate reviewer.
- Readily access a student's financial aid history.

- Easily append and circulate comments.
- Attach supporting documents, such as tax forms and receipts.

### Human Resources Performance Reviewer

A human resources performance reviewer workflow automates the review and approval of employee bonuses and pay raises. It allows you to:

- Automatically link performance reviews to the employee's human resources record.
- Control and monitor the flow of each review throughout the approval process.
- Enable supervisors to record comments and sign off on a review.
- Route approved reviews to human resources or payroll for salary action in a timely manner.

### Finance Grant Organizer

A finance grant organizer workflow converts institutional grant-related documentation into an intuitive virtual filing system. These documents can be automatically routed based on the rules surrounding a specific grant. With it, you can:

- Automatically route support documents, such as grant applications, approval signatures, and supporting documentation.
- Secure access to grant documents by user.
- Enable simultaneous access to grant documents for committee review.

For more information about workflow, see [Starting and Logging in to Nolij Web on page 18](#).

## Reporting

You can create ad hoc data models that display critical data for review and planning, and you can probe historical information quickly and easily to compare it to current information. In addition, you can export data to spreadsheet programs such as Microsoft Excel and Corel Quattro Pro.

You can use these data models to identify important trends and to forecast outcomes. You can also combine administrative data reports with process enhancement data to better understand process efficiencies or deficiencies.

## Collaboration

You can communicate directly with other Nolij Web users using the Collaboration tool.

## Scanning Basics and Concepts

Refer to the following topics for information on planning for your hardware needs, as well as basic scanning concepts and best practices:

- [Determining Documents to Manage on page 12.](#)
- [Determining Your Hardware Needs on page 12.](#)
- [Before You Scan on page 16.](#)
- [Retaining Paper on page 16.](#)

### Determining Documents to Manage

When deciding which documents you want to convert to an electronic format, you should choose to manage the documents that you are processing in large volumes and those that you need to access and retrieve most frequently.

### Determining Your Hardware Needs

Consider some of these issues when determining what hardware you need:

- The volume of documents you will be scanning.
- The speed at which you need the scanner to operate.
- Your budget.
- The importance of the quality of scanned documents.

Refer to the following topics for more information:

- [Determining Cost, Volume, and Speed Requirements on page 12.](#)
- [Determining Duplex Versus Simplex Scanning Requirements on page 13.](#)
- [Determining Scanned Image Quality Requirements on page 13.](#)

### Determining Cost, Volume, and Speed Requirements

Nolij Web works with most types of scanning hardware, including those that scan at 5 pages per minute (ppm); 20 ppm; 40 ppm, single-sided documents; and 60 ppm, double-sided documents.

The number and type of scanners you need depend on the volume of images you will be scanning. For planning purposes, a typical medium volume scanner costs between \$3,500 and \$7,500 and can process approximately 40 or more ppm. Plan to use your scanners at about 40% of their rated capacity to cover the overhead of paper ordering, insertion, extraction, filing, and jam removal.

For example, using a typical 40 ppm scanner at 40% utilization, you can scan at 16 ppm. This means that approximately 7,500 pages that can be scanned per an 8-hour day, allowing you to scan over 30,000 pages per week.

Various setup scenarios may be appropriate depending on your needs, such as using multiple lower-cost and lower-volume scanners in different locations. Nolij consultants can assist you with determining the number, placement, and types of scanners for your requirements.

## Determining Duplex Versus Simplex Scanning Requirements

A significant factor in determining your hardware needs is whether you require simplex or duplex scanners. Simplex scanners scan a single side of a document only; duplex scanners scan both sides of a document.

## Determining Scanned Image Quality Requirements

The following topics help you understand the issues that impact the quality of scanned documents:

- [Keeping the Scanner Clean on page 13.](#)
- [Using a Good Original on page 13.](#)
- [Understanding Color Depth on page 13.](#)
- [Understanding Resolution on page 14.](#)
- [Understanding Dynamic Range on page 15.](#)
- [Understanding Output File Formats on page 15.](#)
- [Understanding Image File Formats on page 15.](#)
- [Understanding Non-image File Formats on page 15.](#)

### Keeping the Scanner Clean

Make sure your scanner glass is clean before you scan images. You may periodically need to clean your scanner of dust, dirt, and other contaminants to maintain a high quality image.

Refer to your scanner manufacturer's instructions for information on cleaning your scanner.

**Note** Always remove paper clips and staples from documents before scanning.

### Using a Good Original

A good original is the most important factor that determines the final quality of the scanned image. It is important to use the highest quality original document as possible, as enhancement tools may not improve the condition of a poor quality document.

Additionally, the color depth of images that you scan affect the scanning process in different ways. Refer to [Understanding Color Depth on page 13](#) for more information.

### Understanding Color Depth

A computer uses units of picture elements, or pixels (also referred to as dots), to represent image information in a digital format. An image file, for instance, is a representation of hundreds, thousands, or

millions of pixels arranged to appear as numbers, letters, or pictures. Computers record the intensity and color of each pixel in 1 or more bits of data. Bits are binary digits—either 0s or 1s—and are the smallest unit of measurement on a computer.

Bit depth, or color depth, describes the number of bits used to represent the color of a single pixel of an image. The greater the bit-depth of an image, the greater the information stored about each pixel. Images can be single-bit, grayscale, or color.

### **Single-bit Images**

Single-bit images are the simplest kinds of images, using 1 bit of data to record each pixel. A maximum of 2 colors that can be displayed at any given time for a single-bit image is 2.

There are 2 types of single-bit images—line art and halftone.

Line art images are black and white, such as a photocopy. They may be single color images also—for example, mechanical blueprints or single color drawings and logos. Line art images do not contain any shade of gray.

Halftone images, such as newspaper pictures, are reproductions of images that give the illusion of gray. The black and white dots that make up the image are arranged so that the image appears in shades of gray.

### **Grayscale Images**

Grayscale images contain black and white dots as well as shades of gray. More information is encoded in each pixel in a grayscale image than in a black and white image, allowing gray shades to be recorded and displayed.

4 bits of data are needed to reproduce up to 16 levels of gray; 8 bits are needed to reproduce the 256 levels of gray required to accurately represent most black and white photos.

### **Color Images**

Color images contain the most complex information. To capture color images, scanners use a process based on the red, green, and blue (RGB) color model, in which red, green, and blue light are combined in various ways to produce a range of colors.

In the RGB model, 0% intensity of each of the red, green, and blue colors creates the color black; 100% intensity of each color create the color white. Equal amounts of red, green, and blue create intermediate shades of gray.

A typical low volume scanner can record and reproduce a large amount of color information—anywhere from 16.7 million colors for 24-bit scanners to 68.7 billion colors for 36-bit scanners. The extra information that can be processed by 36-bit scanners translates to more vivid color reproduction, as the scanners can display more subtle gradations of color to provide images that approach lifelike color accuracy.

## **Understanding Resolution**

High resolution is important if you are processing an image through a high-end color system that carries continuous tone data from the scanner through the final film output. High resolution improves the sharpness and clarity of the dots that make up the image.

If the desired output is line art printed on a 1200 dots per inch (dpi) output device, you can interpolate, or scale, the original resolution to up to 1200 dpi, which produces smoother lines and eliminates some of the rough edges in line art scans.

### Understanding Dynamic Range

Dynamic range is the ability of a scanner to register a wide range of tonal values from near-white to near-black. A scanner with a good dynamic range can correctly map input shades to output shades so you can see more detail in an image. A scanner with poor dynamic range cannot detect as many tonal values, therefore tending to fill in shadow areas or lose detail in brighter areas.

Most mid-range scanners have a dynamic range capable of registering a wide palette of tones and translating them into photo-realistic color.

### Understanding Output File Formats

The size of a scanned image file and, to some extent, its quality, compared to the original size depend on both the resolution in which it is scanned and the file type in which it is saved.

There are many formats available in which to store scanned images, and you can view them in Nolij Web. Refer to [Understanding Image File Formats on page 15](#) and [Understanding Non-image File Formats on page 15](#) for information on available output formats.

### Understanding Image File Formats

The following list describes common graphics file formats:

- Tagged Image File Format (TIFF): TIFF is supported by nearly all display and editing applications; therefore, it is recommended that you save images in this format.
- PICT, PICT2: PICT is generally used for line art with limited color, usually 256 colors. PICT2 is used for 8-bit grayscale or 24-bit color images.
- Graphic Interchange Format (GIF): GIF is a highly compressed image format used to store images with 256 unique colors or less.
- Joint Photographic Experts Group (JPG or JPEG): Among the smallest in file size, the JPEG format is used to store large color or grayscale files. However, they suffer from lossy compression, losing data every time they are saved. It is not recommended that you use this format because of degradation of the image quality over time.
- PCX: PCX is a format widely supported in various paint programs and suitable for scanned images.

### Understanding Non-image File Formats

Nolij Web can collect and manage both scanned images and electronic documents, allowing you to keep electronic documents in their native file formats for enhanced display and manipulation. Some of the file formats supported include Microsoft Office documents, web content, email, and multimedia.

## Before You Scan

Refer to the following topics for important information you should know before scanning documents:

- [Selecting the Proper Scanning Resolution on page 16.](#)
- [Selecting Optimal Scanner Settings on page 16.](#)
- [Using Available Scanning Tools on page 16.](#)

### Selecting the Proper Scanning Resolution

Before scanning, choose the appropriate image format and set the desired resolution and scaling. If you have single-color line art, even if it is not black and white, you should scan using the line art setting. For black and white photos, set the scanner to capture as grayscale.

Typically, a resolution of 150 dpi to 240 dpi is appropriate for both display and printing. The higher the resolution setting, the larger the file size of the scanned image.

### Selecting Optimal Scanner Settings

To determine your optimal scanner settings, it is recommended that you experiment with typical originals until you find the best compromise between quality and file size.

For example, if your sole requirement is to display scanned images on a monitor, you do not need to scan images any higher than at 72 dpi, because monitors are capable of displaying images at 72 dpi only. Conversely, if you must print your scanned images, consider scanning at a resolution between 200 dpi and 300 dpi.

Increasing the scan resolution results in a nonlinear increase in file size. For example, all other variables being equal, the file size of a document scanned at 300 dpi will be over four times larger than the same document scanned at 150 dpi.

### Using Available Scanning Tools

Most scanner software packages come with image adjustment tools and preconfigured settings to compensate for lower quality originals. It is recommended that you experiment with these adjustments, using a few typical originals, to determine the combination of scanner hardware settings and software adjustments that produce the best results.

Often, brightness and contrast adjustments can improve how the image looks. Additional features, such as the black border removal, deskew, and despeckle are typically available through more robust image processing hardware.

## Retaining Paper

Ensure that you review and understand your institutional policies for record retention and maintenance. All documents must be kept for the same length of time, whether they are electronic or hard copy.



For example, if an Admissions Office policy states that records must be kept for 10 years, the records should be kept in the imaging system for those 10 years. As long as the integrity of the original document is maintained, it does not matter that the record maintained in the imaging system is electronic.

Imaging and electronic document management standards state that a scanned copy is as acceptable as the hard copy document, as long as you can prove that the electronic document is the source of the decision making for a process.

It is recommended that you maintain original hard copy documents, after scanning them, for a minimum of one full processing period. For example, perform one years' worth of scanning and imaging-related processing using Nolij Web before destroying original documentation. Nolij can assist with archival strategies and storage policy development and implementation.

## Before You Begin

Refer to the following topics before you start using Nolij Web:

- [Starting and Logging in to Nolij Web on page 18.](#)
- [Understanding the User Interface on page 19.](#)
- [Understanding Nolij Web Workflow on page 28.](#)
- [Understanding Nolij Web User Roles and Privileges on page 29.](#)


## Starting and Logging in to Nolij Web

To start and log in to Nolij Web, do the following:



1. Start the application by doing one of the following:
  - Open a web browser and type the Nolij Web location. You can type the location in your browser address bar, or you can open it from the browser by selecting **File > Open** from the browser menu.
  - Double-click the Nolij Web shortcut icon, or (in Microsoft Windows) right-click it and click **Open**, or (in Apple Mac and Linux) control-click it and click **Open**.

By default, there is no shortcut icon. You can create a desktop shortcut, or you can bookmark the startup page, to quickly access it when you subsequently log in to the application.

To add a shortcut on your desktop, do one of the following:

- In the browser toolbar, click the browser icon that appears to the left of the Nolij Web URL; then, drag and drop it to the desktop.
- In Microsoft Internet Explorer, select, from the menu bar, **File > Send > Link to Desktop**.
- In Google Chrome, click  and select **Create application shortcuts...**

To bookmark the page, do one of the following:

- In Internet Explorer, select **Favorites > Add to Favorites...** from the menu bar. Then, set the bookmark name and location.
- In Firefox, either select **Bookmarks > Bookmark This Page** from the menu bar or click  in the address bar. Then, set the bookmark name and location.
- In Apple Safari, click **+** in the address bar. Then, set the bookmark name and location.
- In Chrome, click  in the address bar. Then, set the bookmark name and location.

The log in screen appears.

2. Type your username and password in the Username and Password fields. Your username and password are usually the same as those you use to log in to your administrative system.

**Note** If there are issues starting Nolij Web or entering data in the login screen, contact your Nolij Web system administrator for assistance in establishing the necessary connection rights and privileges.

3. Click **Log in**.
4. Depending on your configuration, a usage disclaimer dialog box may appear; the usage text is configured by the administrator at the department level. It may appear only one time when you log in and when you change roles, or it may appear every time you log in or change roles.

**Note** Each user role must accept the disclaimer separately, even if the roles are in the same department.

5. To accept the disclaimer text, check the **I accept** checkbox and click **OK**. If you do not accept the disclaimer, you must click **Logout**; you cannot log in to Nolij Web.
6. If the disclaimer is configured to allow you to choose if you want to display the dialog box to appear only once when you log in or change roles, the **Do not show this again** checkbox appears; check this checkbox if you do not want it to be displayed again when you log in or change roles.

You are logged in to Nolij Web, and the application starts.

You are logged in to Nolij Web with your default user role. Specific product functions and features are available depending on the role you use. Refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

**Note** After a period of inactivity, configured by your Nolij Web administrator, you are prompted that you will be logged out within five minutes of further inactivity.

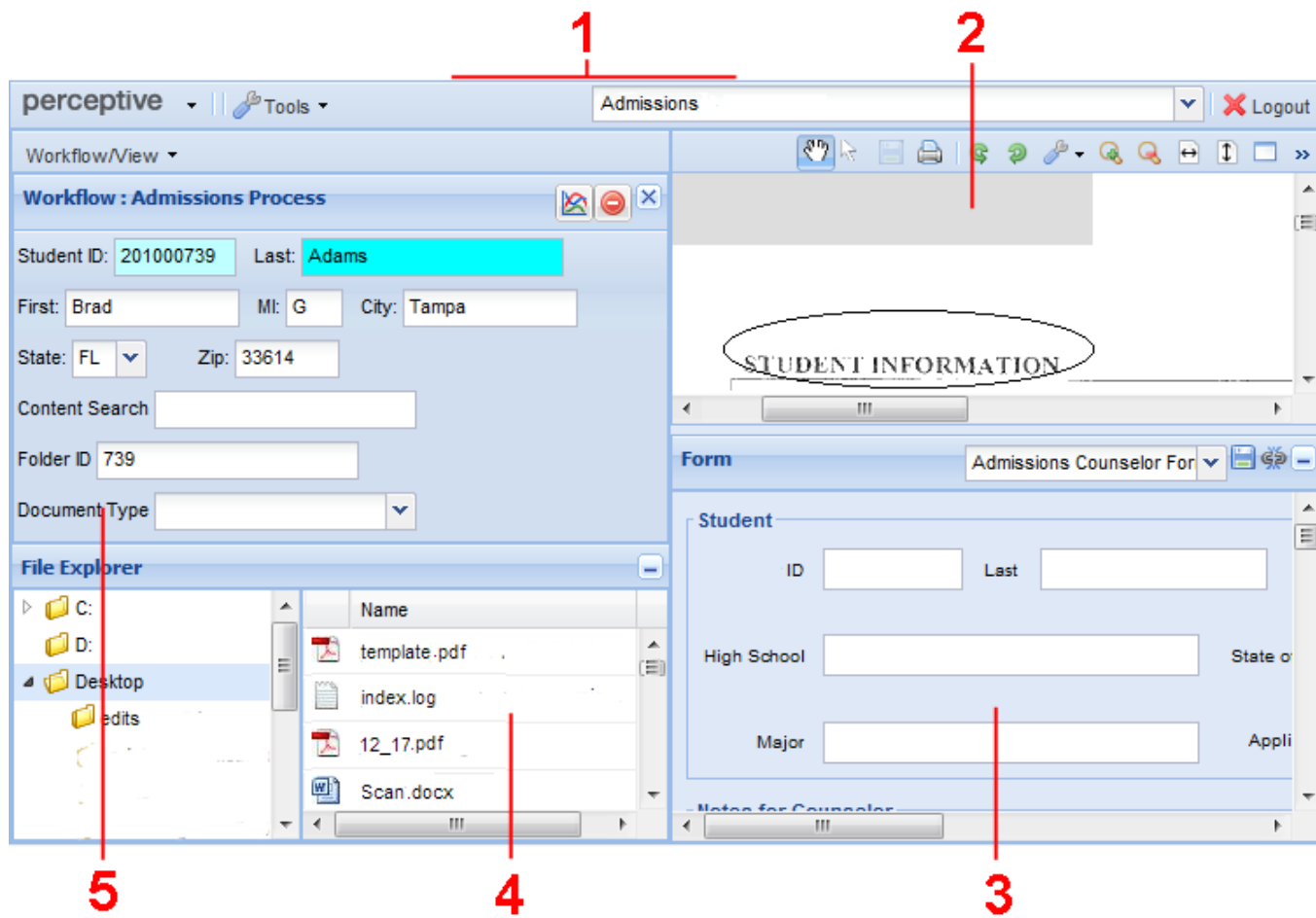
**Note** You can log into Nolij Web multiple times.

## Understanding the User Interface

The user interface is customized according to your institution's specifications and for different user roles configured in Nolij Web. The features you can use and panes displayed also depend on whether you use Nolij Web workflows, ImageNow views, or ImageNow workflows.

The following figure shows an example of the Nolij Web interface.

Figure 1: User Interface Elements and Descriptions








The following table describes the user interface elements.


**Table 1: User Interface Elements and Descriptions**

| Callout No. | Element                                    | Description   |
|-------------|--|---|
| 1           | Toolbar                                    | <p>Contains the following options.</p> <ul style="list-style-type: none"> <li>• Perceptive button: Provides access to the online PDF user guide and also provides information about Nolij Web.</li> <li>• Tools menu: Provides access to Nolij Web features. <ul style="list-style-type: none"> <li>○ Communication Window: Allows you to communicate with Nolij Web users. Refer to <a href="#">Working with the Communication Window on page 126</a>.</li> <li>○ Workflow Summary: Allows you to view workflow summary information for Nolij Web workflows only. Refer to <a href="#">Viewing the Workflow Summary on page 93</a>.</li> <li>○ Themes: Allows you to change Nolij Web colors. Refer to <a href="#">Changing Themes on page 24</a>.</li> <li>○ Preferences: Allows you to configure preferences. Refer to <a href="#">Configuring Preferences on page 24</a>.</li> <li>○ View Reports: Allows you to view configured reports. Refer to <a href="#">Working with Reports on page 123</a>.</li> <li>○ View Advanced Reports: Allows you to view configured advanced reports. Refer to <a href="#">Working with Reports on page 123</a>.</li> </ul> </li> <li>• Role selector drop-down box: Allows you to change your user role. Refer to <a href="#">Changing Your Role on page 28</a> for more information.</li> <li>• Logout button: Logs you out of the application.</li> </ul> |
| 2           | Document Viewer or Graphical Workflow pane | <p>This pane displays either the Document Viewer when you select a document to view it or the Graphical Workflow pane when you view graphical workflow information for Nolij Web workflows.</p> <p>Refer to <a href="#">Working with Documents in the Document Viewer on page 103</a> and <a href="#">Viewing the Graphical Workflow for Nolij Web Workflows on page 88</a> more information.</p>   |

**Table 1: User Interface Elements and Descriptions (Continued)**

| Callout No. | Element            | Description   |
|-------------|--------------------|---|
| 3           | Form pane          | <p>The Form pane displays forms, which display SIS information associated with a query folder. Forms can also collect and save information back to the database; later, this information can be retrieved, modified, and resaved to the database. You can view forms for Nolij Web workflows, ImageNow views, and ImageNow workflows.</p> <p>Refer to <a href="#">Working With Forms on page 119</a> for more information.</p>  |
| 4           | File Explorer pane | <p>This pane displays the folders on your computer or on a network location. After you click a folder, its contents are displayed. Click  to expand folders; click  to collapse them.</p> <p>You can drag and drop files from the File Explorer pane into Nolij Web if you are using Nolij Web workflows only. If you are using ImageNow workflows or views, you cannot drag and drop files from the File Explorer into Nolij Web.</p>  |
| 5           | Workflow/View area | <p>You can open Nolij Web workflows, ImageNow workflows, and ImageNow views by selecting the workflow or view from the Workflow/View drop-down box. The view or workflow appears in a separate pane below.</p> <p>The following icons denote the type of workflow or view that you can select to work in.</p> <ul style="list-style-type: none"> <li>•  : Nolij Web workflow.</li> <li>•  : ImageNow workflow.</li> <li>•  : ImageNow view.</li> </ul> <p>You can display multiple workflows and views, which appear in separate panes below each other. You can reorder the display by dragging and dropping the workflow or view to the appropriate location.</p> <p>If you are working in a Nolij Web workflow, the Query Results and Folder Objects panes appear within the Workflow/View area for the workflow.</p> <p>Refer to the following topics for more information.</p> <ul style="list-style-type: none"> <li>• <a href="#">Using Nolij Web With Nolij Web Workflows on page 31.</a></li> <li>• <a href="#">Working With ImageNow Workflows on page 93.</a></li> <li>• <a href="#">Working With ImageNow Views on page 99.</a></li> </ul> |

## Accessing the Context Menu for Mobile and Touch Devices

The  appears in certain Nolij Web panes when you are using a mobile or touch device. When you select an item, you can access the context menu for the selected item.

For example, if you want view document properties in the Folder Objects pane, select the document, click

, and select **Properties** from the menu that appears.

## Customizing the Nolij Web Display

You can modify the Nolij Web display in a number of ways, such as resizing panes and moving fields in the Query and Workflow Areas.

When you log out of the application, the Nolij Web layout that is configured becomes the default layout. When you log in again, this layout is used.

You can also change how tables of information show information for Nolij Web dialog boxes that contain tables.


Refer to these topics for more information:


- [Customizing Dialog Box Displays on page 23.](#)
- [Resizing Panes on page 24](#)
- [Collapsing and Expanding Panes on page 24.](#)
- [Moving Fields in the Nolij Web Workflow Area on page 24.](#)
- [Changing Themes on page 24.](#)
- [Configuring Preferences on page 24.](#)

## Customizing Dialog Box Displays



For Nolij Web dialog boxes that contain tables of information, you can choose the columns of information you want to view or hide, sort information alphabetically, and resize the width of columns.

To select the columns that are displayed and to sort columns:

1. In the dialog box, point your mouse to the edge of a column and click .
2. Click **Sort Ascending** to sort information alphabetically in a high to low sequence (A to Z).
3. Click **Sort Descending** to sort information alphabetically in a low to high sequence (Z to A).
4. Click **Columns**.
5. Check the checkbox for the column you want to display.

To resize the width of a column, point your mouse over the edge of a column until the mouse pointer changes to ; then, drag and drop your mouse to the desired location to resize the column.


## Resizing Panes

To resize a pane, place your mouse on the edge of a pane. When the mouse pointer changes to  (to horizontally resize a pane) or  (to vertically resize a pane), click your mouse to select the pane; then, drag and drop the pane to the desired location to resize it.

## Collapsing and Expanding Panes

You can collapse and expand several Nolij Web panes. Click  to collapse a pane; click  to restore it.

## Moving Fields in the Nolij Web Workflow Area

You can move fields for Nolij Web workflows only. To do so, place your mouse over a field. When the mouse pointer changes to , you can select the field and drag and drop it to the desired location.

## Changing Themes

You can change the colors used in the Nolij Web interface.

1. Select **Tools > Themes**.
2. From the popup menu, click the color scheme you want to use. The theme that you are using is dimmed and unavailable. You can select from the following options:
  - Blue Theme
  - Gray Theme
  - Slate Theme
  - Access Theme

A dialog box appears.

**Note** Do not click **Yes** if you have unsaved work that you would like to save before you change the color scheme. If you click **Yes**, Nolij Web refreshes, and you lose your work.

3. To change the color scheme, click **Yes**.  
The application refreshes, and the new color scheme is applied.

## Configuring Preferences

### Hiding Bookmarks

To hide bookmarks in the Document Viewer, select **Tools > Preferences > Hide Bookmarks**.



### Collapsing Inboxes and Queues in Drop-Down Boxes

You can specify that Nolij Web display inboxes in Nolij Web workflows and queues in ImageNow workflows in a drop-down box from which you can select the inbox or queue to display. If you do not set this preference, the last configuration of inboxes and queues is displayed when you open a workflow.

To collapse inboxes and queues by default, select **Tools > Preferences > Inboxes/Queues in dropdown by default**.

Figure 2: Nolij Web Expanded Inboxes

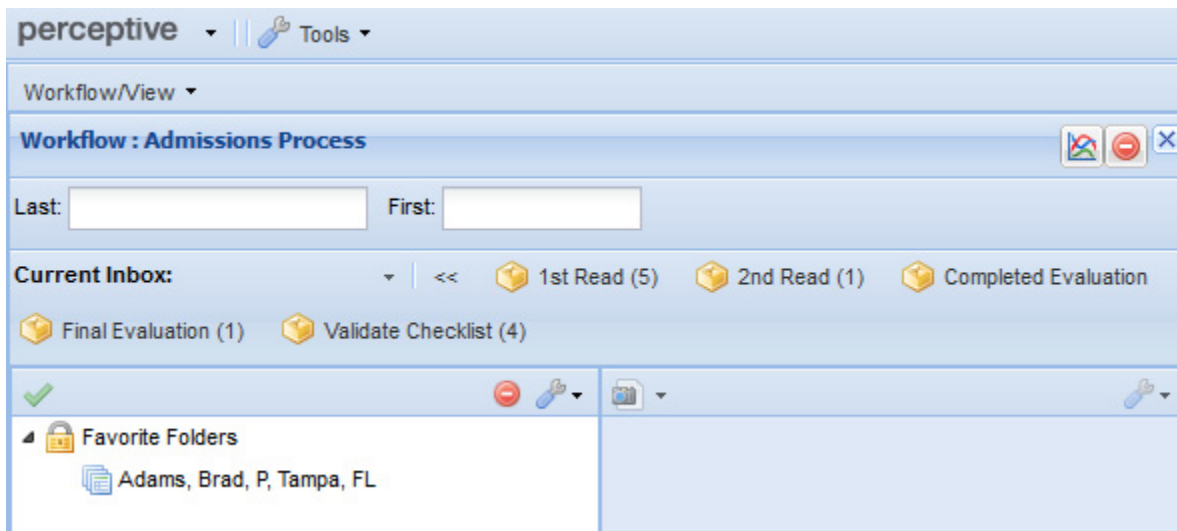


Figure 3: Nolij Web Collapsed Inboxes

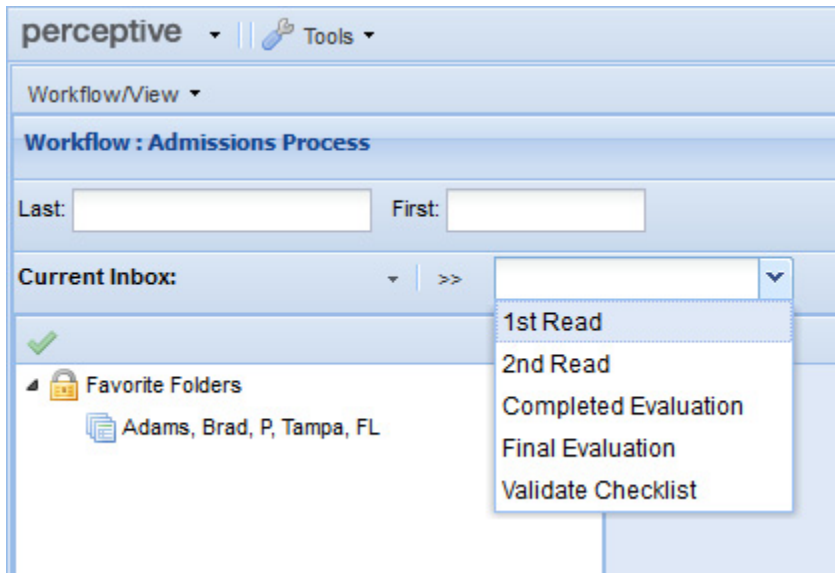


Figure 4: ImageNow Collapsed Queues

perceptive | Tools

Workflow/View

Workflow: Admissions Workflow

>> First Read

Workflow item status is equal to Any

| Time In Queue           | Item Type | Status | Type            | Name                 | Drawer        | Field1 |
|-------------------------|-----------|--------|-----------------|----------------------|---------------|--------|
| 11 days 1 hours 29 m... |           | IDLE   | PDT Application | 321YX82_0007ET06T... | DataTransfer6 | 1726   |
| 11 days 50 minutes 2... |           | IDLE   | PDT Application | 321YX82_0007EZ06...  | DataTransfer6 | 1723   |
| 7 days 21 hours 37 m... |           | IDLE   | PDT Application | 321YX85_0007EY06...  | DataTransfer6 | 3289   |
| 7 days 21 hours 25 m... |           | IDLE   | PDT Application | 321YX85_0007EZ06...  | DataTransfer6 | 4249   |
| 5 days 22 hours 57 m... |           | IDLE   | PDT Application | 321YX87_0007ES06...  | DataTransfer6 | 1690   |
| 5 days 20 hours 41 m... |           | IDLE   | PDT Application | 321YX87_0007ES06...  | DataTransfer6 | 4189   |
| 5 days 20 hours 40 m... |           | IDLE   | PDT Application | 321YX87_0007EY06...  | DataTransfer6 | 4252   |

Figure 5: ImageNow Expanded Queues

| Time In Queue           | Item Type | Status | Type            | Name                 | Drawer        | Field1 |
|-------------------------|-----------|--------|-----------------|----------------------|---------------|--------|
| 11 days 1 hours 29 m... |           | IDLE   | PDT Application | 321YX82_0007ET06T... | DataTransfer6 | 1726   |
| 11 days 50 minutes 2... |           | IDLE   | PDT Application | 321YX82_0007EZ06...  | DataTransfer6 | 1723   |
| 7 days 21 hours 37 m... |           | IDLE   | PDT Application | 321YX85_0007EY06...  | DataTransfer6 | 3289   |
| 7 days 21 hours 25 m... |           | IDLE   | PDT Application | 321YX85_0007EZ06...  | DataTransfer6 | 4249   |
| 5 days 22 hours 57 m... |           | IDLE   | PDT Application | 321YX87_0007ES06...  | DataTransfer6 | 1690   |
| 5 days 20 hours 41 m... |           | IDLE   | PDT Application | 321YX87_0007ES06...  | DataTransfer6 | 4189   |
| 5 days 20 hours 40 m... |           | IDLE   | PDT Application | 321YX87_0007EY06...  | DataTransfer6 | 4252   |

If inboxes or queues are collapsed, you can expand them by clicking the button; if they are expanded, you can collapse them by clicking the button.

**Resetting Preferences**

**Note** When you reset preferences, you are logged out of Nolij Web.

To reset your preferences, select **Tools > Preferences > Reset Preferences**.

Your preferences are reset to default preferences, and you are logged out of the application.

## Changing Your Role

To change your user role, do the following.

1. Select the role in which you want to work from the Role drop-down box in the toolbar. The drop-down box contains all of the roles to which you belong.
2. Depending on your configuration, a usage disclaimer dialog box may appear; the usage text is configured by the administrator at the department level. It may appear only one time when you log in and when you change roles, or it may appear every time you log in or change roles.

**Note** Each user role must accept the disclaimer separately, even if the roles are in the same department.

3. To accept the disclaimer text, check the **I accept** checkbox and click **OK**. If you do not accept the disclaimer, you must click **Logout**; you cannot log in to Nolij Web.
4. If the disclaimer is configured to allow you to choose if you want to display the dialog box to appear only once when you log in or change roles, the **Do not show this again** checkbox appears; check this checkbox if you do not want it to be displayed again when you log in or change roles.

The application refreshes, and the user interface for the role in which you are working appears.

For more information about user roles, see [Understanding Nolij Web User Roles and Privileges on page 29](#).


## Understanding Nolij Web Workflow

*Workflow* is the automatic process by which the electronic information in Nolij Web is sent from one user to another. An example Nolij Web workflow might involve the following tasks:

1. Applications are received by a clerk, who verifies that all required documents are present.
2. When Step 1 is complete, applications are sent to an assistant who reads the documents.
3. When Step 2 is complete, applications are sent to a director for final approval.

Nolij Web represents this information as virtual folders, which contain the documents associated with records of information.

Folders are routed to inboxes in the Workflow area. You can route a folder manually, or a folder can be routed automatically, based on the Nolij Web configuration for your institution.

In an automatic workflow, when you click  in the Query Results pane or select **Work Complete** from the folder's right-click menu in the Query Results pane, the workflow process starts, and Nolij Web routes the folder to the appropriate inbox when the proper conditions are met.

For example, a workflow may require that a folder contain an essay, transcript, and application before it can be routed to the next inbox. If a folder contains all documents, it is passed to the next inbox; however, if the folder does not have all required documents, it will not be passed along in the workflow.

You can override the automatic workflow process for a folder for which you have the appropriate privileges by selecting, from the drop-down box that contains all the inboxes to which you can route folders, the inbox to which the folder is routed next.

Nolij Web does not send information along in the workflow if any conditions are not satisfied, and it alerts you if this is the case.

See the appropriate ImageNow documentation for information about ImageNow workflow processes when you are using ImageNow workflows and views.

## Understanding Nolij Web User Roles and Privileges

When you log into Nolij Web, you are logged in to the application with your default role. What you can do with Nolij Web is dependent upon your user role, to which a collection of privileges is assigned. These privileges determine the features you can access and the tasks that you can perform.

The following list describes the tasks that you can perform when you have the appropriate privileges when you work in Nolij Web workflows.

- Search for documents using keywords.
- View reports.
- View and use forms.
- Collaborate with other users.
- View and use specific inboxes.
- Override the workflow process by manually routing folders to any inbox you can access.
- View specific documents in a query folder (including the types of files you can view).
- Edit, annotate, and scan documents.
- Drag and drop files from the Nolij Web File Explorer into a query folder.
- Delete and rename documents in query folders.
- Recover deleted documents.
- Index documents (including selecting and viewing the indexes you can use).
- Print and email documents.
- Open a document in the application that is designated to open the particular type of file (for example, an HTML file opens in Microsoft Internet Explorer, if Internet Explorer is specified as the application that opens HTML files).
- Lock query results.
- Remove folders from the workflow.
- View and use stamps.
- Set custom statuses.
- Create a copy of a template document.
- Create versions of documents.
- Automatically index documents.

In addition, your Nolij Web privileges and your ImageNow permissions for ImageNow workflows and views determine if you can work within ImageNow workflows and views.

## Using Nolij Web

The features you can use depend on whether you are working in Nolij Web workflows, ImageNow workflows, or ImageNow views. Your administrator can configure Nolij Web to allow you to access ImageNow workflows and views through the Nolij Web interface. You must have the appropriate permissions for these workflows and views in ImageNow to work with them in Nolij Web. All work you perform in ImageNow workflows and views occurs in ImageNow; Nolij Web only serves as the method by which you can access them.

**Note** You can set preferences to collapse Nolij Web workflow inboxes or ImageNow workflow queues; refer to [Collapsing Inboxes and Queues in Drop-Down Boxes on page 25](#) for more information.

Refer to these topics for information.

- [Using Nolij Web With Nolij Web Workflows on page 31](#) for information about what you can do in Nolij Web workflows only.
- [Working With ImageNow Workflows on page 93](#) for information about what you can do in ImageNow workflows only.
- [Working With ImageNow Views on page 99](#) for information about what you can do in ImageNow views only.
- [Working with Documents in the Document Viewer on page 103](#) for information about what you can do in the Document Viewer. You can use the Document Viewer for Nolij Web workflows, ImageNow views, and ImageNow workflows; however, not all features (such as annotations) are available when you work in ImageNow views or workflows.
- [Working With Forms on page 119](#) for information about working with forms. Forms can be configured for Nolij Web workflows, ImageNow views, and ImageNow workflows.
- [Working with Reports on page 123](#) for information about working with reports. Reports can be configured for Nolij Web workflows, ImageNow views, and ImageNow workflows.
- [Working with the Communication Window on page 126](#) for more information about communicating with Nolij Web users. The Communication Window is available for all users in Nolij Web.

## Using Nolij Web With Nolij Web Workflows

Refer to the following topics for more information about what you can do when you work with Nolij Web workflows. You cannot use these features if you are working in ImageNow views or workflows.

- [Understanding the Nolij Web Workflow Pane on page 33](#).
- [Performing Nolij Web Queries on page 38](#).
- [Searching All Documents for Specified Text on page 44](#).
- [Configuring How Query Results are Displayed on page 46](#).
- [Clearing Query Results on page 47](#).
- [Locking Query Results on page 47](#).

- [Locking Query Folders on page 47.](#)
- [Locking Documents on page 48.](#)
- [Adding Favorite Folders on page 48.](#)
- [Viewing the Folder History on page 48.](#)
- [Setting Custom Statuses for Folders on page 49.](#)
- [Uploading Files to Folders on page 50.](#)
- [Viewing the Folder Objects Pane on page 50.](#)
- [Opening Documents in the Folder Objects Pane on page 52.](#)
- [Scanning Documents on page 53.](#)
- [Creating Document Versions on page 58.](#)
- [Indexing Documents on page 59.](#)
- [Viewing Document Properties on page 62.](#)
- [Viewing and Configuring Custom Document Properties on page 64.](#)
- [Viewing Version Properties on page 67.](#)
- [Viewing ImageNow Document Keys on page 67.](#)
- [Renaming Documents on page 68.](#)
- [Deleting Documents on page 69.](#)
- [Recovering Deleted Documents on page 69.](#)
- [Duplicating Documents on page 69.](#)
- [Merging Documents on page 70.](#)
- [Moving Documents into Query Folders on page 70.](#)
- [Moving Documents into Subfolders on page 71.](#)
- [Emailing Documents on page 71.](#)
- [Searching for Documents in the Folder Objects Pane on page 73.](#)
- [Adding Template Documents on page 75.](#)
- [Adding and Emailing Template Documents on page 75.](#)
- [Importing Emails into the Folder Objects Pane on page 81.](#)
- [Moving Folders in a Nolij Web Workflow on page 86.](#)
- [Viewing the Graphical Workflow for Nolij Web Workflows on page 88.](#)
- [Viewing the Workflow Summary on page 93.](#)



## Understanding the Nolij Web Workflow Pane

The Nolij Web workflow pane contains the inboxes that contain the folders with which you can perform work.

This pane also contains fields in which you perform a query. Type the information that you want to find in the appropriate fields. For more information about performing queries, refer to [Performing Nolij Web Queries on page 38](#).

From the Workflow/View drop-down box, select the Nolij Web workflow in which you want to work. The


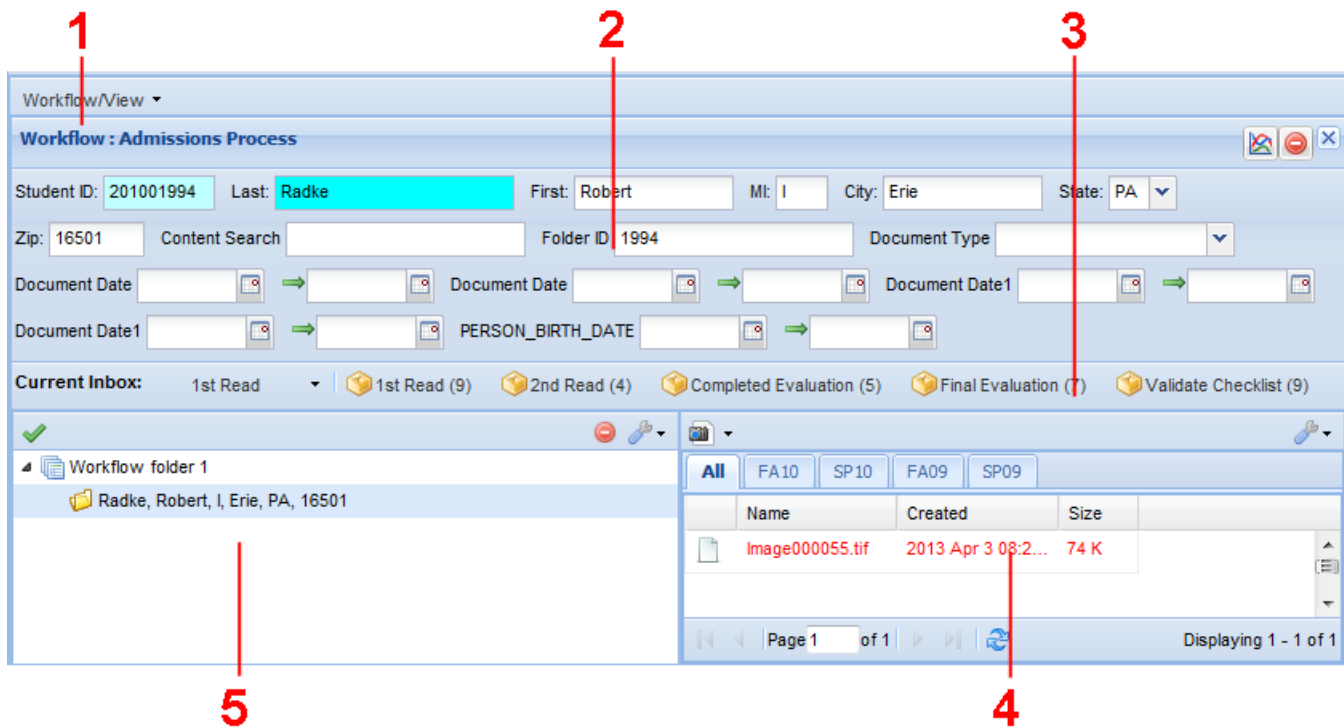


 : icon next to the name of the menu option in the Workflow/View pane denotes that the option is a Nolij Web workflow.

Figure 6: Nolij Web Workflow Elements



**Table 2: Nolij Web Workflow/View Pane Elements and Descriptions**

| Callout No. | Element             | Description   |
|-------------|---------------------|---|
| 1           | Workflow toolbar    | <p>Contains the name of the Nolij Web workflow in which you are working. In the preceding figure, Admissions Process is the name of the workflow.</p> <p>It also provides buttons to allow you to view the graphical workflow and to clear query fields. Refer to</p>   |
| 2           | Query fields        | Query fields that you can use to search for records of information.   |
| 3           | Inboxes             | <p>Inboxes that you own. Refer to <a href="#">Working With Nolij Web Inboxes on page 34</a> for more information.</p> <p><b>Note</b> Inboxes can be expanded or collapsed, depending on your preferences. Refer to <a href="#">Collapsing Inboxes and Queues in Drop-Down Boxes on page 25</a> for more information.</p>  |
| 4           | Folder Objects pane | <p>Displays the objects contained in a Nolij Web query folder. Its contents are displayed after you click the containing folder in the Query Results pane.</p> <p>You can do the following.</p> <ul style="list-style-type: none"> <li>• View documents in a query folder.</li> <li>• Index documents.</li> <li>• Delete and rename documents in a query folder.</li> <li>• Email documents.</li> <li>• Search documents for specified text.</li> <li>• Add template documents.</li> <li>• View and configure document properties.</li> </ul> <p>This pane does not appear for ImageNow views or workflows.</p> |
| 5           | Query Results pane  | <p>Query Results pane: This pane contains the results of your Nolij Web query.</p> <p>Click  to collapse the results; click  to expand the results. This pane is displayed for Nolij Web workflows only; it does not appear for ImageNow views or workflows.</p> <p>In the toolbar, you can also access features to specify that work is complete on a folder, clear query results, and configure how query results are displayed.</p>    |

## Working With Nolij Web Inboxes

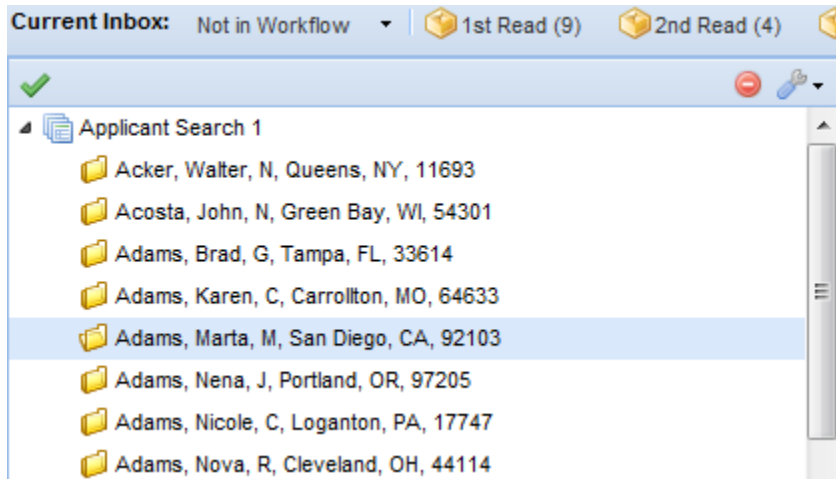
The Nolij Web Workflow/View displays inboxes that you own; they contain the folders of documents with which you can perform work, such as renaming and annotating documents. The number of folders in each inbox appears in parentheses ( ) next to each inbox name.

In the preceding figure, *1st Read*, *2nd Read*, *Completed Evaluation*, *Final Evaluation*, and *Validate Checklist* are the inboxes you own.

When you click a folder in the Query Results pane, the inbox that contains the folder appears next to the Current Inbox label. In the preceding figure, *Radke, Robert, I, Erie, PA, 16501* is contained in the *1st Read* inbox; when you click the folder, *1st Read* appears next to the Current Inbox label.

If you click a folder that is not in your workflow or any other workflow, *Not in Workflow* appears next to the Current Inbox label.

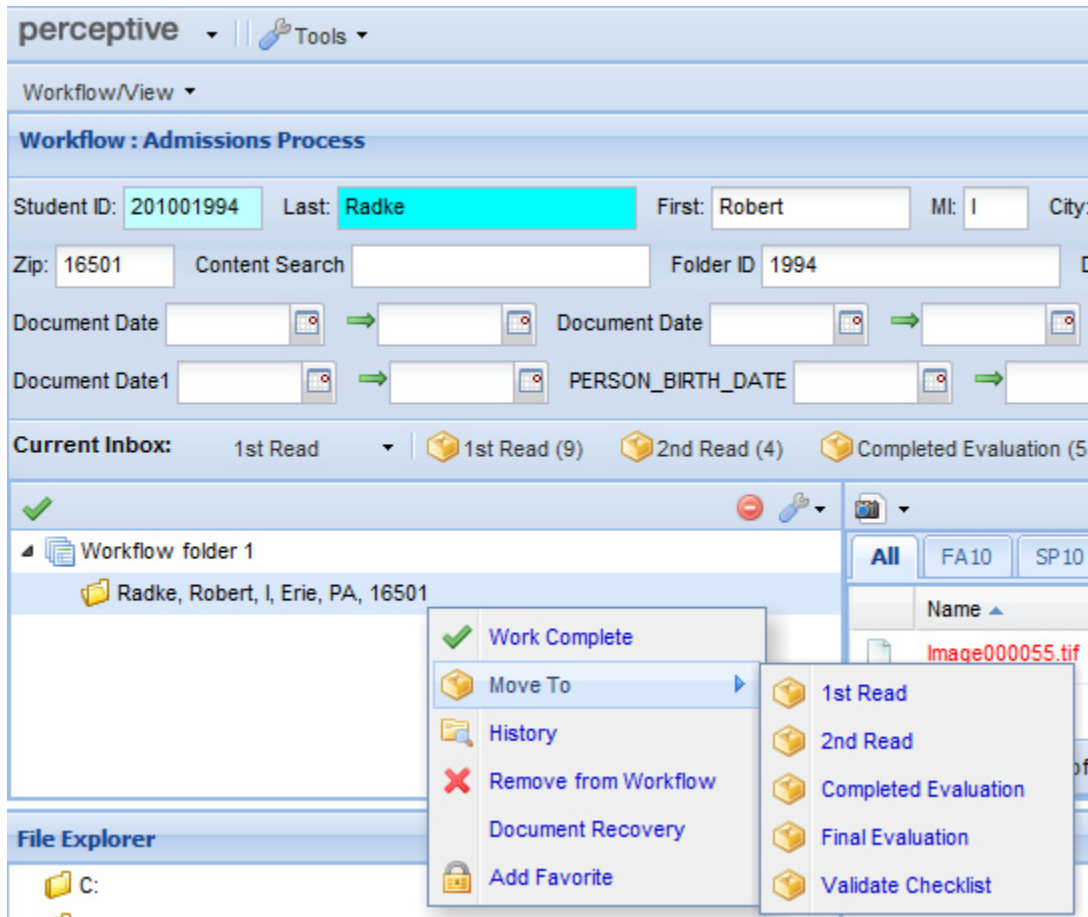
**Figure 7: Folder Not in Workflow**



If you have permission to move folders to another inbox, you can click the drop-down arrow for the inbox that contains the folder you selected in the Query Results pane. When you select **Move To**, the inboxes to which you can send folders (if you are permitted to do so in Noli Web), appear in the drop-down box. If you do not have the appropriate privileges, the **Move To** option is dimmed and unavailable.

In the following figure, you can move folders from the *1st Read* inbox to the *1st Read*, *2nd Read*, *Completed Evaluation*, *Final Evaluation*, and *Validate Checklist* inboxes.

Figure 8: Move To Drop-Down Box




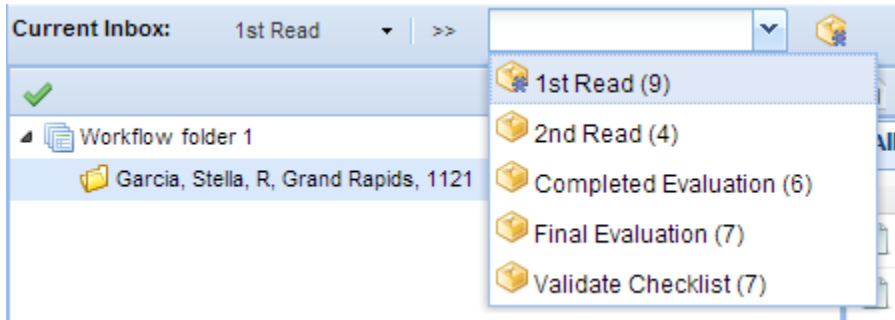
When inboxes are collapsed and a folder moves into a new inbox, the  icon appears next to the inbox to indicate that there are changes that have not been seen to the inboxes in the drop-down box. When you click the inbox drop-down box, the icon appears next to the inbox into which the folder was moved.

Figure 9: Folder Moved to Inbox—Collapsed Inboxes




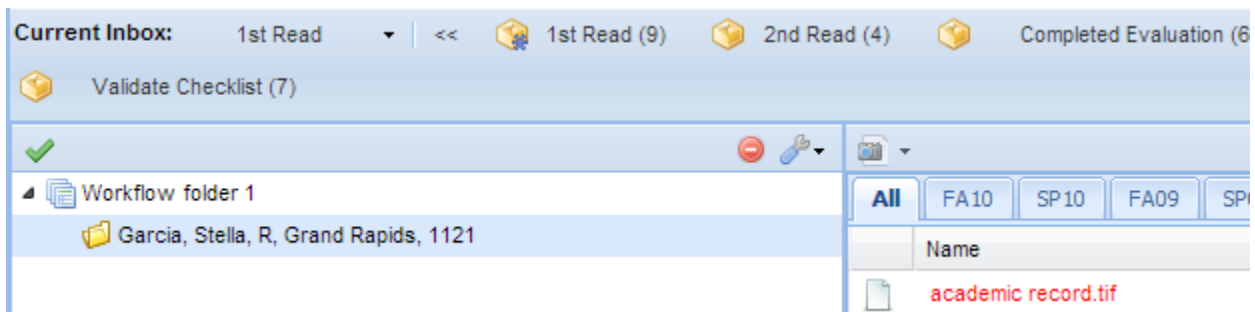
When a folder is moved into an inbox and changes have not yet been viewed when inboxes are expanded, the  icon appears next to the inbox.

Figure 10: Folder Moved to Inbox—Expanded Inboxes



After you have viewed changes to the inbox, the icon no longer appears next to the inbox.

Click an inbox to view information about the folders in the Inbox Detail dialog box.

Inboxes display the Folder and Date columns. Depending on your configuration, the query fields used to find the folders are also displayed. The Custom Status column is displayed if you have permission to set custom statuses for folders in your inbox.

**Note** The Inbox Detail dialog box may not display all folders in an inbox, depending on your configuration. For example, if you run a query to retrieve student records, but the query is configured to return records for students' whose last names begin with A through M only, then records for students' last names begin with N - Z are not displayed. However, the number of folders in each inbox that appears in parentheses ( ) next to each inbox name indicates the total number of folders in the inbox, including *all* records from A - Z.

In the Inbox Detail dialog box, you can do the following:

- Open a folder by doing one of the following:
  - Right-clicking the folder and selecting **Open** from the popup menu.
  - Selecting the folder and clicking **Open**.
  - Double-clicking the folder.

The folder is displayed in the Query Results pane.

- Move a folder to the next inbox. Refer to [Moving Folders in a Nolij Web Workflow on page 86](#).
- View folder history details. Refer to [Viewing the Folder History on page 48](#).
- Remove a folder from your workflow. Refer to [Removing Folders from the Workflow on page 88](#).
- Set a custom status for the folder. Refer to [Setting Custom Statuses for Folders on page 49](#).

Folders in inboxes are sorted by the date on which they were added, with the most recently added folder appearing at the top of the list. In the Inbox Detail dialog drop-down box, you can type the name or portion of the name of the folder with which you want to work; folder results are filtered in the dialog box.

**Note** The Inbox Detail dialog box displays a specified number (determined by your Nolij Web administrator) of folders at one time. If there are more than the specified number of folders, the list is separated into multiple pages, with each page containing up to the specified number of folders. Use the arrows at the bottom of a page to navigate to the first, last, previous, or next page.

**Note** For inboxes that also display query fields, you cannot sort information if results are displayed on more than one page in the Inbox Detail dialog box.

## Performing Nolij Web Queries

Use Nolij Web to query records to access electronic content, such as scanned images and other types of digital content, from your Nolij Web repository. You can search for information based on criteria, such as date of birth, name, and address. Nolij Web displays the information retrieved from a query as folders, which contain all documents associated with the record of information.

**Note** Depending on your Nolij Web configuration, a legal hold may be placed on a folder, and you may not be permitted to view contents of the folder. A dialog box may appear with text containing information about the legal hold when you click a folder on which the hold is configured.

To perform a query, do the following:

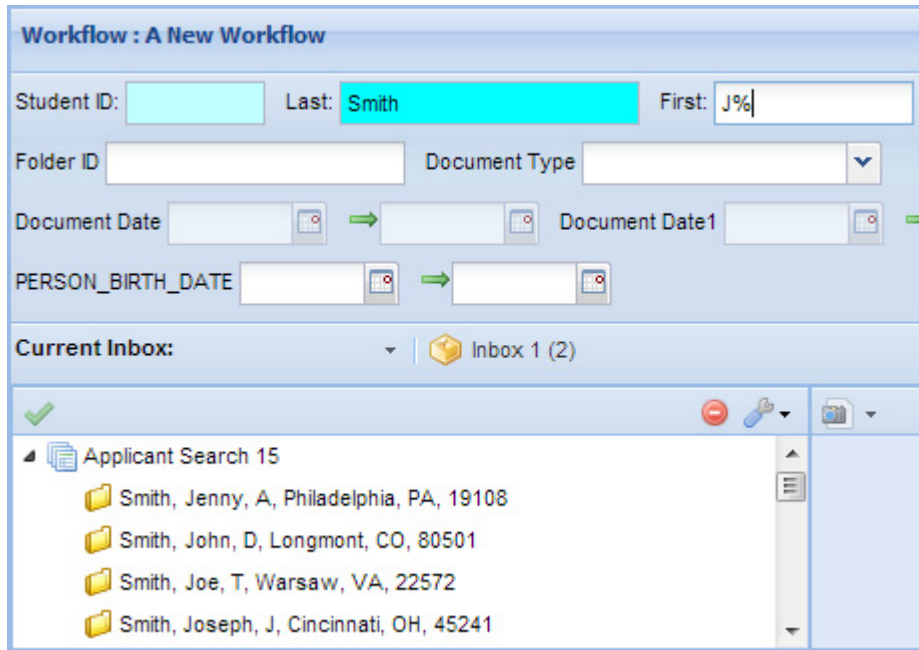
1. From the Workflow/View drop-down box, select the Nolij Web workflow in which you want to work. The Workflow pane appears for the Nolij Web workflow below.
2. In the search fields, set the appropriate values, or part of the value, for the data that you want to find.

In text fields, you can use the % sign as a wildcard to broaden searches if you do not have all of the required information. Use this value in a search term to represent one or more other characters.

For example, you may not know if the applicant Joe Smith used the name Joseph, Joey, or Joe as the name on his application. To query his record, you can type `smith` in the Last Name text field and `J%` in

the First Name text field. The results of the query show all applicants with the last name Smith and the first letter J (for example, Joe, Joseph, Jane, and Jon).



**Figure 11: Example of Query Results Using a Wildcard Search**



For information on searching for documents containing specified text, refer to [Searching All Documents for Specified Text on page 44](#).

**Note** If you have multiple queries, the fields for a query that is not in use are dimmed.

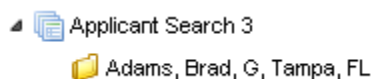
3. After setting the search criteria, press **Enter** on your keyboard.

The results are displayed as virtual folders in the Query Results pane. Click  to collapse the results; click  to expand them.

When you perform a query to find a folder, the name of your query, configured by your Nolij Web administrator, appears and contains all the folders found by the query in the Query Results pane.

In addition, a number is appended to the name of the query, which denotes the order of the searches performed. For example, for the first query you perform, 1 is appended, for the second query, 2 is appended, and so on.

**Figure 12: Folder Found by Query**



**Note** The Query Results pane displays 100 results at a time. If the query returns more than 100 results, the first 100 are displayed.

You can open folders in an inbox and display them by doing the following:

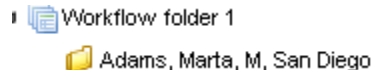
1. Click an inbox. The Inbox Detail dialog box appears.
2. Open a folder by doing one of the following:
  - o Right-clicking the folder and selecting **Open** from the popup menu.
  - o Selecting the folder and clicking **Open**.
  - o Double-clicking the folder.

The folder is displayed in the Query Results pane.

When you open a folder that is in an inbox in your workflow, Workflow folder appears and contains the folder found by the query in the Query Results pane.

In addition, a number is appended to Workflow folder, which denotes the order of the searches performed. For example, for the first batch query you perform, 1 is appended, for the second query, 2 is appended, and so on.

**Figure 13: Workflow Folder**



### Performing Subindex Queries

In a typical Nolij Web query, documents are associated with a primary value, such as a name, and are associated with a single folder. However, subindexed documents are associated with a secondary value. Examples of subindexed documents could include gifts received from donors and invoices received from purchase orders.

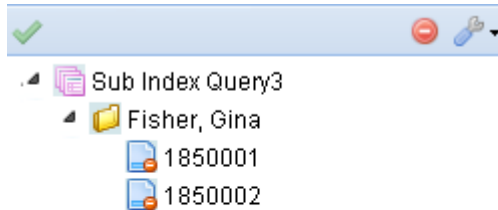
For instance, for a query that displays all gifts associated with a donor, the folder represents the primary value to which a gift is associated, such as the name of the donor. The subindex represents the secondary value to which a gift is associated, such as the gift number.

When you perform a subindex query to find a folder, the name of your query, configured by your Nolij Web administrator, appears and contains all the folders found by the query in the Query Results pane.

In addition, a number is appended to the name of the query, which denotes the order of the searches performed. For example, for the first subindex query you perform, 1 is appended, for the second query, 2 is appended, and so on.



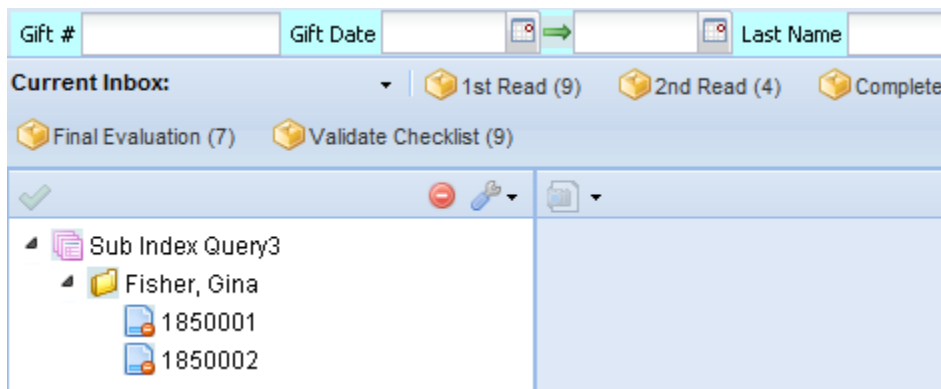
**Figure 14: Subindex Query Results Example**




In subindex queries, the first query field that is displayed in the Query area is used as the subindex—the secondary value to which a document is associated—for which you search. This field is used as the label for the subindex in the Query Results pane.

For example, in the following figure, Gift # is the subindex field. Gift # is used as the label for the subindex within a folder. For instance, for the subindex 1850001, 1850001 is a Gift #.

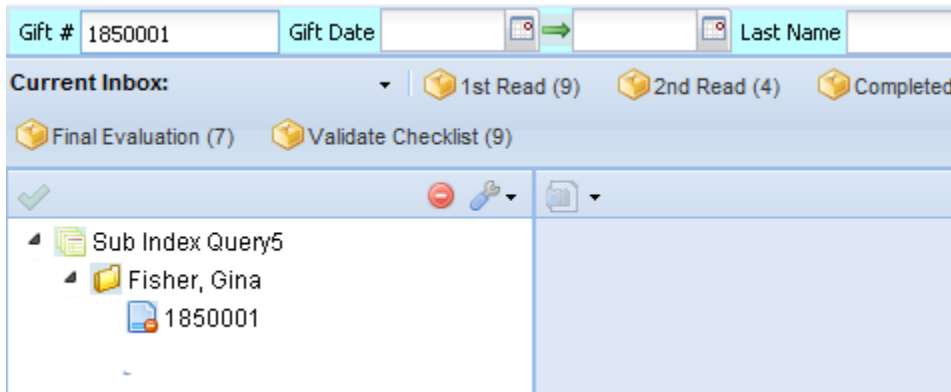
**Figure 15: Subindex Field Example**




If you use only the first query field to perform a subindex query, a  icon appears next to the query results in the Query Results pane. The query returns results for only the subindex that matches the value entered into the first query field.

For example, if you type 1850001 in the Gift # field, results are returned for only the 1850001 subindex.

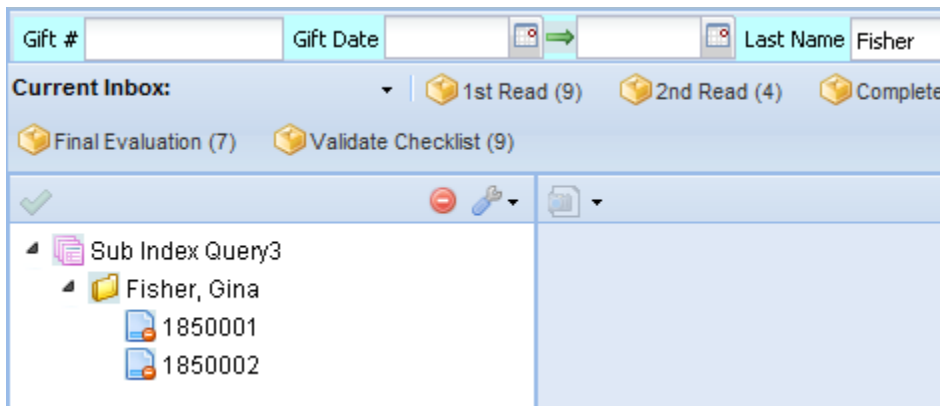
Figure 16: Subindex Query Results Using First Query Field





If you use any other query field to perform subindex query, a  icon appears next to the query results in the Query Results pane. All of the subindexes and documents associated with the folder are displayed.

For example, if you type `Fisher` into the Last Name field, all results associated with the folder are displayed.

Figure 17: Subindex Query Results Using Other Query Fields



If a document is associated with the subindex, the Query Results pane displays the subindex with the  icon. If no documents are associated with the subindex, it is displayed with the  icon.

In a subindex document query, when you add a document to a subindex, the document is automatically associated with the subindex, and its document type changes accordingly.

For example, if you add the document `Donation.pdf` to the subindex `1850001`, `Donation.pdf` is automatically assigned the document type `Gift`, which is the value of the `1850001` subindex. Additionally,

the document is renamed to 1850001 Gift (for more information about renaming documents, refer to [Renaming Documents on page 68](#)).

## Performing Batch Queries

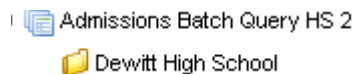
Batch folders are used to store documents that are not associated with any particular record, such as batches of scanned documents or miscellaneous documents. If your institution has batch queries configured, you can search for a batch folder using the appropriate field.

Typically, batch folders are not associated with workflows, and folders cannot be routed to other inboxes—they are static folders.

To search for a batch folder, select the batch folder from the batch query drop-down box. The results are displayed in the Query Results pane. When you perform a batch query to find a folder, the name of your batch, configured by your Nolij Web administrator, appears and contains all the folders found by the query in the Query Results pane.

In addition, a number is appended to the name of the query, which denotes the order of the searches performed. For example, for the first batch query you perform, 1 is appended, for the second query, 2 is appended, and so on.

**Figure 18: Folder Found by Batch Query**



## Creating New Batch Folders

To create a new batch folder, do the following:

1. From the Workflow/View drop-down box, select the Nolij Web workflow in which you want to work. The Workflow pane appears for the Nolij Web workflow below.
2. In the batch query field, type the name of the batch folder you want to create. The Create New Record dialog box appears.
3. To create a new batch folder, click **Yes**.
4. Press Enter on your keyboard.

The batch folder is created and is displayed in the Query Results pane.

After you have created a batch folder, you can add documents to the folder by doing any of the following:

- Uploading system objects to the batch folder. Refer to [Uploading Files to Folders on page 50](#).
- Moving folder objects from a folder to the batch folder. Refer to [Moving Documents into Query Folders on page 70](#).
- Scanning documents and adding them to the batch folder. [Scanning Documents Into Query Folders or Subfolders on page 53](#).

## Renaming Batch Folders

To rename a batch folder, do the following:


1. Right-click the batch query folder.
2. Select **Rename** from the popup menu.  
The Rename dialog box appears.
3. Type a name for the batch folder and click OK.  
The batch folder is renamed and appears in the Query Results pane.

## Deleting Batch Folders

To delete a batch folder, in the Query Results pane, right-click the batch folder and click **Delete Batch Folder**. The folder is deleted and is removed from the Query Results pane.

**Note** You cannot delete a batch folder if there are documents in it. You must first delete all documents and then delete the batch folder.

## Clearing Queries

To clear query information in the query fields of the Nolij Web workflow, click  in the toolbar of the Workflow pane.

## Searching All Documents for Specified Text

You can search all documents in Nolij Web for specified text (context search), if Nolij Web is configured to perform OCR on specified documents.

**Note** This procedure discusses how to search for all documents in Nolij Web using specified text. To perform a search for only those documents located in the Folder Objects pane for a specific folder, refer to [Searching for Documents in the Folder Objects Pane on page 73](#).

**Note** When you add a document to a folder, and Nolij Web is configured to perform OCR on the document type, Nolij Web automatically performs OCR on the document; you can then search for the document using the text contained in it.

To search for documents containing specific text, do the following:

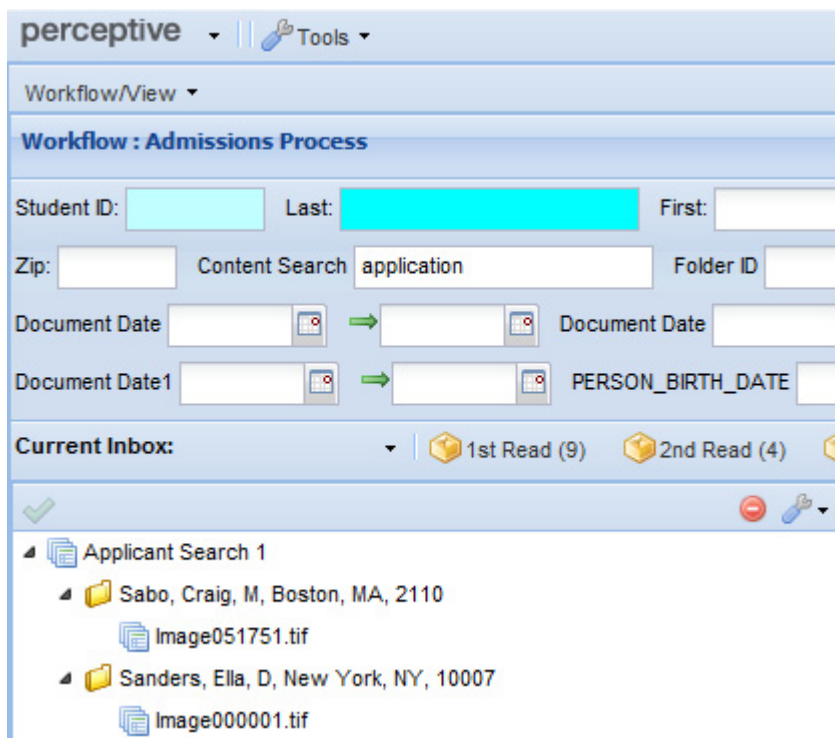
1. In the document search field in the Query area of the toolbar, type the specified text. Optionally, you can set other search criteria, such as name or address.
2. Press **Enter** on your keyboard.

Nolij Web searches all documents, in the folders that match your search criteria, that contain the specified text. The Query Results pane displays the results of the search. It shows the folders that contain the documents having the specified text, and it displays the documents (up to 5 at one time) that contain the text as subentries in each folder.

For example, if you search for the word *application*, the Query Results pane displays the folders that contain the documents with the word application; the specific documents that contain application are shown as subentries under the corresponding folders.

For example, in the following figure, the documents *Image501751.tif* and *Image000001.tif* appear as subentries in their corresponding folders. These documents contain the text—application—specified in the text search.

**Figure 19: Example Text Search in Folder Objects Pane**

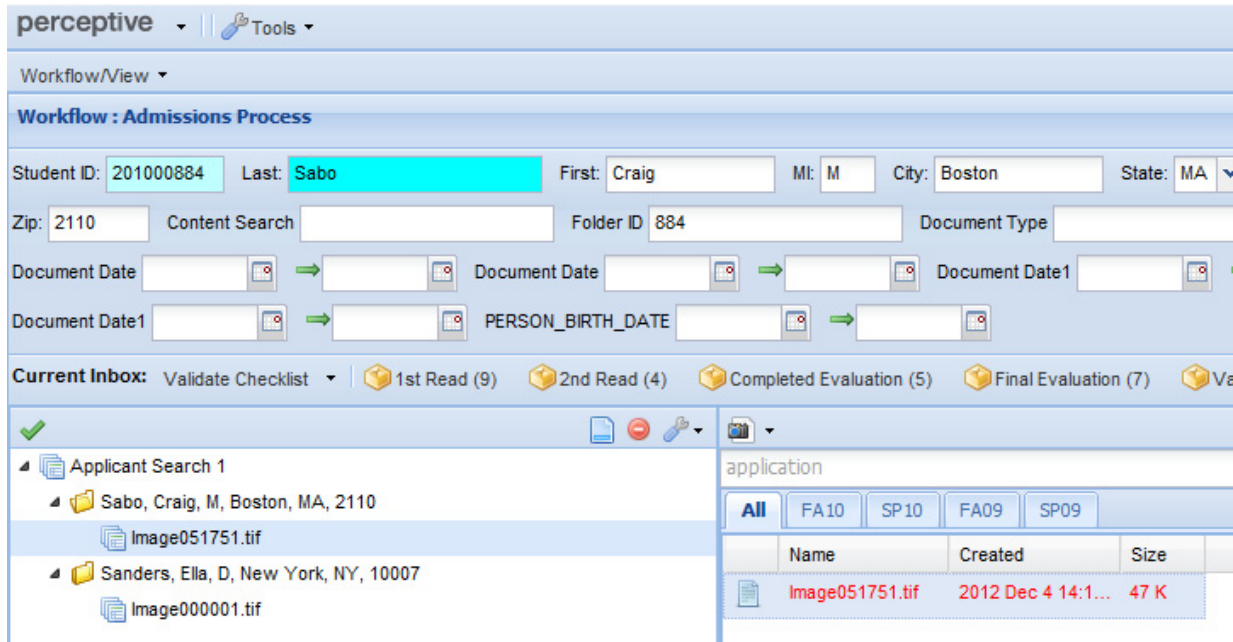


The results in the Query Results pane display only the documents that contain the text for which you searched. When you click a folder, the Folder Objects pane displays only the documents that contain the text for which you searched; it does not display all documents in a folder.


If you click a document, containing the text for which you searched, in the Query Results pane, you see only documents that contain the searched text in the Folder Objects pane.

For example, if you click *Image051751.tif*, only that document is shown in the Folder Objects pane. The pane displays only documents containing the text you searched for (application), and only *Image051751* was returned as a search result.

Figure 20: Only Documents Containing Specified Search Text in Folder Objects Pane



Note that the search field in the Folder Objects pane is dimmed, showing the text used in the search.

When you click a query result, folder, or document, the  icon appears in the toolbar in the Query Results pane. Click the icon to open the Ranked Results dialog box, which displays the following information for all results returned by the search:

- Name: Name of the document.
- Rank: The ranking of the search result based on its relevance.
- Folder: Folder containing the document.

To show ranked results, click  and check the **Display Ranked Results** checkbox.

**Note** You can click a document in the dialog box to display it in the Folder Objects pane and view it in the Document Viewer.

Click **Close** to close the dialog box.


## Configuring How Query Results are Displayed

In the Query Results pane, click  to open a popup menu that allows you to configure certain display options. Refer to the following table for more information.

**Table 3: Query Results Pane Options**

| Click This...                       | To Do This...  |
|-------------------------------------|--|
| Clear All Results Before Each Query | Clear all query results from the Query Results pane each time before a new query is performed. |
| Expand All                          | Expand the results in the Query Results pane.  |
| Collapse All                        | Collapse the results in the Query Results pane.  |
| Clear All                           | Clear all query results in the Query Results pane.   |

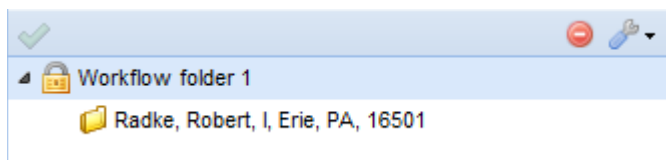
## Clearing Query Results


Click  in the Query Results pane to clear results for queries that are not locked and are not favorite folders.

## Locking Query Results

To lock query results, right-click the query results and click **Lock Query Results**. A lock icon appears next to the query results to indicate that it is locked.

**Figure 21: Locked Query Results**



Locking query results prevents the Query Results pane from being cleared completely when you click  or when you run another query with the Clear All Results Before Each Query option enabled.

To unlock query results, right-click the query results and click **Unlock Query Results**.

## Locking Query Folders

Your user role determines if you can lock query folders. For more information, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

When you select a folder that is not locked by another user, you lock the folder for your own use. Other users can see folder contents but cannot make any changes. If you select a folder locked by another user, Nolij Web displays a message stating that the folder is locked and changes cannot be made.

## Locking Documents

Your user role determines if you can lock documents. For more information, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

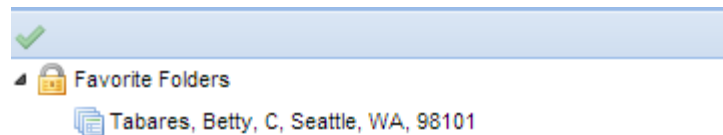
When you select a document in a folder that is not locked by another user, you lock the document for your own use. Other users can see the document but cannot make any changes. If you select a document locked by another user, Nolij Web displays a message stating that the document is locked and changes cannot be made. If a query folder has other documents, other users can modify those documents.


## Adding Favorite Folders

To set a folder as a favorite folder in the Query Results pane, right-click the folder and select **Add Favorite**.

A Favorite Folders label and lock icon appear at the top of the Query Results pane.

**Figure 22: Favorite Folder in the Query Results Pane**



Favorite folders are locked, preventing the Query Results pane from being cleared when you click  in the Query Results pane or when you run another query with the Clear All Results Before Each Query option enabled.

To remove a favorite folder, right-click the folder and select **Remove Favorite**. The folder is removed from Favorite Folders.

## Viewing the Folder History

To view folder history information, which provides information about the movement of a folder through your workflow, do one of the following:

- Right-click the folder in the Query Results pane; then, select **History** from the popup menu.
- Click an inbox in the Workflow area; then, right-click the folder in the Inbox Detail dialog box and select **History** from the popup menu.

The Folder History dialog box appears and displays the following information about the folder.

- User: Username of the user who sent the folder to the destination inbox.
- Source Inbox: Inbox from which the folder was sent.
- Destination Inbox: Inbox to which the folder was next sent.



- In: Time and date on which the folder was received in the inbox.
- Out: Time and date on which the folder was sent from the inbox.

History is not displayed for folders not in your workflow or any other workflow.

## Setting Custom Statuses for Folders

You can set a custom status, which consists of a label and color, to a folder. The statuses you can set for a folder depend on your Nolij Web configuration.

For example, custom statuses can be used to set reminders for tasks you need to complete for a folder.

**Figure 23: Custom Status**

| Folder                       | Custom Status    | Date             | Student ID: |
|------------------------------|------------------|------------------|-------------|
| Smith, Damien, D, Newark, NJ | Review by Friday | 9/29/10 12:42 PM | 201001124   |

Your user role determines if you can set custom statuses on folders. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

1. Click an inbox in the Workflow pane.  
The Inbox Detail dialog box appears.
2. Right-click the folder in the dialog box and select **Custom Status** from the popup menu. To select multiple folders:
  - Click a folder and press and hold the **Ctrl** key as you click each folder with your mouse.
  - Click a file and press and hold the **Shift** key as you click another folder to select contiguous folders.
3. Select the status from the popup menu.  
The status is applied to the folder, and the Custom Status column refreshes to display the color and label for the status.

To remove a custom status, right-click the folder (or select multiple folders and right-click them) and select **None** from the popup menu.

## Uploading Files to Folders

Your user role determines if you can upload system files to a folder and the types of files you can upload. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

You can upload files of various types—for instance, word processing, text, audio, and video—to a folder by doing the following:


1. In the Query Results pane, click the folder to which you want to upload a file.
2. Click the file you want to add in the File Explorer pane. To select multiple files:
  - Click a file and press and hold the **Ctrl** key as you click each file with your mouse.
  - Click a file and press and hold the **Shift** key as you click another file to select contiguous files.
3. With your mouse, drag and drop the file into either the Folder Objects pane or the Query Results pane. You do not need to select a folder in the Query Results pane if you want to upload a file to it.

The file is uploaded into the folder.

## Viewing the Folder Objects Pane

Documents are displayed in the Folder Objects pane in a table that contains the following columns:

- **Type:** Displays the appropriate icon for the type of file (for example, JPEG or PDF).
- **Name:** Name of the file. For more information about filenames, refer to [Renaming Documents on page 68](#).
- **Created:** Date that the document was created.
- **Created by:** Username of the user who created the document.
- **Modified:** Date that the document was modified.
- **Modified by:** Username of the user who modified the document.
- **Size:** Size of the document.
- **Version:** For documents with versioning enabled, the latest version of the document.
- **Custom Property:** If custom properties are set, custom property of the document.

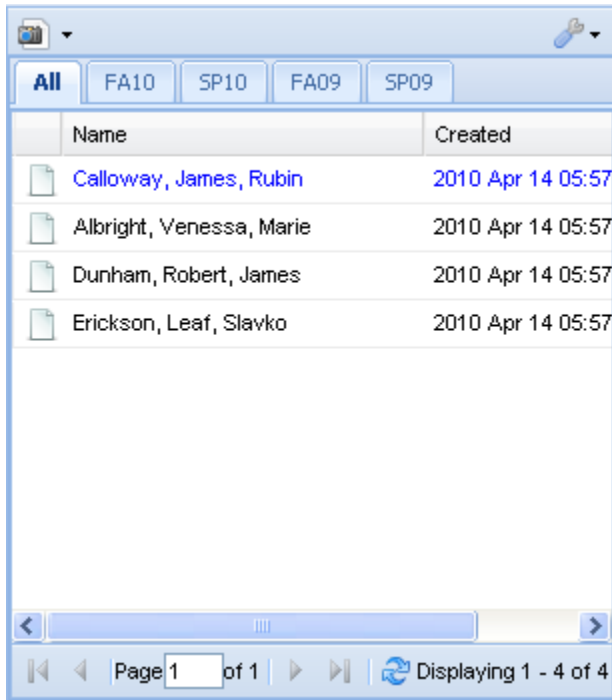
You can refresh the pane to view the most current information by clicking .

**Note** When you sort information in columns or resize the width of columns, these settings are saved as preferences and are applied the next time you log in to Nolij Web.

If subfolders are configured, and your privileges allow you to view them, the pane contains a tab for each subfolder. Click a tab to display the contents of the subfolder. The All tab displays all documents in the folder, and documents that belong to a subfolder are labeled in blue.

For example, in the following figure, *Calloway, James, Rubin* is a document that is in a subfolder; all other documents are not in a subfolder.

Figure 24: Subfolders in the Folder Objects Pane



Global documents are labeled in bold red for departments that did not create them; they are labeled in **bold** text when viewed by roles that created them. For more information about global documents, refer to [Setting Global Documents on page 61](#).

Figure 25: Global Department Created by Other Department



Figure 26: Global Department Created by Own Department



Shared documents are labeled in red for departments that did not create them. For more information about shared documents, refer to [Setting Shared Documents on page 61](#).

Figure 27: Shared Document Created by Other Department














**Note** The Folder Objects pane displays only 500 documents at one time. If there are more than 500 documents, the list is separated into multiple pages, each containing up to 500 documents. Use the

arrow buttons at the bottom of a page to navigate to the first, last, previous, or next page.

Icons appear next to documents and indicate document status, as described in the following table.

**Table 4: Document Icons and Descriptions**

| Icon  | Description   |
|---|---|
|    | OCR is not configured on the document; the document is not indexed.   |
|    | OCR is pending on the document; the document is not indexed.  |
|    | The document is indexed, and OCR is pending on the document.  |
|    | OCR has completed on the document; the document is not indexed.   |
|   | OCR has completed on the document but did not meet OCR success requirements; the percentage of recognized words does not meet the percentage of words, defined by your Nolij Web administrator, that OCR must recognize on a document for OCR to be successful. |
|  | The document is indexed.  |
|  | The document is indexed; OCR did not meet success requirements.   |
|  | The document could not be auto-indexed.   |
|  | The document could not be auto-indexed, and OCR did not meet success requirements.  |
|  | The document is auto-indexed and moved to the appropriate folder.   |
|  | The document is auto-indexed and moved to the appropriate folder; OCR did not meet success requirements.  |

## Opening Documents in the Folder Objects Pane

Click a document in the Folder Objects pane to display the document in the Document Viewer, where you can annotate it (refer to [Working with Documents in the Document Viewer on page 103](#) for more information).

You can view the following types of files:

- GIF

- TIFF
- JPEG
- HTML
- DOC (Microsoft Word)
- RTF (rich text file)
- PPT (Microsoft PowerPoint)
- XLS (Microsoft Excel)
- TXT
- BMP

To open all other types of files, double-click the file in the Folder Objects pane. The file is opened in the application designated to open the particular file type (referred to as *application activation*). For example, an MP3 file opens in Apple iTunes if iTunes is specified as the application that opens MP3 files).

**Note** You cannot see annotations if you open a file in an application other than Nolij Web.

## Scanning Documents

Refer to these topics for more information”

- [Scanning Documents Into Query Folders or Subfolders on page 53.](#)
- [Rescanning Pages on page 56.](#)
- [Adding Scanned Pages to Documents on page 57.](#)

### Scanning Documents Into Query Folders or Subfolders

After you have performed a query, you can scan documents into the folder.

**Note** To scan paper documents into Nolij Web, you must have a TWAIN-compliant scanner attached to your machine and the appropriate TWAIN drivers installed.

Refer to these topics for more information:


- [Scanning Single-Page Documents on page 53.](#)
- [Scanning Multipage Documents on page 54.](#)
- [Scanning Using Blank Page Detection on page 55.](#)

### Scanning Single-Page Documents

To scan a single page, do the following:

1. In the Query Results pane, click the folder into which you want to add a scanned document.
2. To scan a document into a subfolder, click the subfolder in the Folder Objects pane.

3. In the Folder Objects pane, click  .

- The first time you click  after you log in to Nolij Web, Nolij Web prompts you to select the default scanner to use for this login session only. The scanner is not saved as the default scanner to use after you log out; the next time you log in, you must select the default scanner for that particular session.
- If a default scanner is configured for your login session, the document is scanned immediately by the default scanner. If you do not have a default scanner configured, Nolij Web prompts you to configure one.


You can change the default scanner; for more information, refer to [Changing the Default Scanner on page 58](#).


When scanning starts, a progress bar appears and indicates the time that elapses during the scanning process. You cannot perform any other Nolij Web activity while the progress bar is displayed.


The document is scanned into the folder and is stored on the file server. After scanning completes, Nolij Web displays a popup message, which displays the number of pages scanned, in the lower rightmost corner of the application.

### Scanning Multipage Documents

You can scan multipage TIFF images and save them as a single document.

1. In the Query Results pane, click the folder into which you want to add a scanned document.
2. If you want to scan a document into a subfolder, click the subfolder in the Folder Objects pane.
3. In the toolbar, click the drop-down portion of the  button and check the Multi Page checkbox.
4. To enable Nolij Web to detect blank pages, which function as document breaks and creates merged, multipage documents, refer to [Scanning Using Blank Page Detection on page 55](#).

5. Press  . One of the following occurs:

- The first time you press  after you log in to Nolij Web, Nolij Web prompts you to select the default scanner to use for this login session only. The scanner is not saved as the default scanner to use after you log out; the next time you log in, you must select the default scanner for that particular session.
- If a default scanner is configured for your login session, the document is scanned immediately by the default scanner. If you do not have a default scanner configured, Nolij Web prompts you to configure one.

You can change the default scanner; for more information, refer to [Changing the Default Scanner on page 58](#).

When scanning starts, a progress bar appears and indicates the time that elapses during the scanning process. You cannot perform any other Nolij Web activity while the progress bar is displayed.

The document is scanned into the folder and is stored on the file server. After scanning completes, Nolij Web displays a popup message, which displays the number of pages scanned, in the lower rightmost corner of the application.

### Scanning Using Blank Page Detection




You can enable Nolij Web to detect blank pages, which function as document breaks. You can scan a stack of documents with blank pages separating the documents; when Nolij Web detects blank pages, it creates separate scanned documents, with each document split based on blank pages. Blank pages are not kept as part of any document.

For example, if you place six pages on a scanner, and page 3 is a blank page, the scan process produces two documents. The first document consists of pages 1 and 2, and the second document consists of pages 4, 5, and 6.

**Note** You do not need to provide blank pages for the first or last pages in the scanned documents.

**Note** For double-sided documents, Nolij Web does not use blank pages on the back sides of the pages you scan as page separators. They are considered regular pages and are added to the document.

To detect blank pages:

1. In the Query Results pane, click the folder into which you want to add a scanned document.
2. If you want to scan a document into a subfolder, click the subfolder in the Folder Objects pane.
3. In the toolbar, click the drop-down portion of the  button and check the **Multi Page** checkbox.
4. In the toolbar, click the drop-down portion of the  button and check the **Enable Blank Page Detection** checkbox.
5. In the toolbar, click the drop-down portion of the  button, select **Enable Blank Page Detection**, and select **Set Threshold**.


The Blank Page Threshold dialog box appears.


6. Set the threshold that Nolij Web uses to determine if a page is blank. Even blank pages may have dots in the background that you do not want to scan; set the threshold, which is the ratio of white to non-white pixels (noise) that a page can have, so that Nolij Web can detect which pages you scan are blank or not blank.

The values on the slider continuum range from 0 (zero) to 100. Set the value clicking the slider and dragging and dropping it to the desired location or by clicking the location to which to move the slider.

Move the slider left to decrease the threshold; move the slider right to increase the threshold. You should use lower values for newer, cleaner scanners that are capable of removing noise; an appropriate setting for high-quality scanners ranges from 40 to 50. You should use higher values for older scanners with reduced capability for removing noise.

7. Click **OK**.

8. Press  . One of the following occurs:

- The first time you press  after you log in to Nolij Web, Nolij Web prompts you to select the default scanner to use for this login session only. The scanner is not saved as the default scanner to use after you log out; the next time you log in, you must select the default scanner for that particular session.
- If a default scanner is configured for your login session, the document is scanned immediately by the default scanner. If you do not have a default scanner configured, Nolij Web prompts you to configure one.

You can change the default scanner; for more information, refer to [Changing the Default Scanner on page 58](#).

When scanning starts, a progress bar appears and indicates the time that elapses during the scanning process. You cannot perform any other Nolij Web activity while the progress bar is displayed.

The document is scanned into the folder and is stored on the file server. After scanning completes, Nolij Web displays a popup message, which displays the number of pages scanned, in the lower rightmost corner of the application.

## Rescanning Pages


Your user role determines if you can rescan pages. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

You can rescan a page and replace the page in a Nolij Web document with the rescanned page. The document must be in TIFF format.

1. In the Folder Objects pane, select the document that you want to replace.
2. In the Document Viewer, navigate to the page that you want to replace with the rescanned page.



3. Right-click anywhere in the Document Viewer and select Rescan Page from the popup menu.

- The first time you press  after you log in to Nolij Web, Nolij Web prompts you to select the default scanner to use for this login session only. The scanner is not saved as the default scanner to use after you log out; the next time you log in, you must select the default scanner for that particular session.
- If a default scanner is configured for your login session, the document is scanned immediately by the default scanner. If you do not have a default scanner configured, Nolij Web prompts you to configure one.

You can change the default scanner; for more information, refer to [Changing the Default Scanner on page 58](#).

When scanning starts, a progress bar appears and indicates the time that elapses during the scanning process. You cannot perform any other Nolij Web activity while the progress bar is displayed.

Note the following:


- If you are rescanning one page, the selected page in the Document Viewer is replaced with that page, and all other pages in the document remain unchanged.
- If you are rescanning more than one page, the first page that you rescan replaces the selected page in the Nolij Web document; any additional pages are inserted into the document, but they do not replace any other pages.

For example, if you select page four of a ten-page document, and you rescan three pages, the first rescanned page replaces page four. The second and third rescanned pages are inserted into the Nolij Web document as pages five and six—they are added as new pages and do not replace any other existing pages. The page total of the document is 12.

## Adding Scanned Pages to Documents

Your user role determines if you can add a page to a document. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

You can add a scanned page to a Nolij Web document that is in TIFF format.

1. In the Folder Objects pane, select the document to which you want to add pages.
2. Right-click anywhere in the Document Viewer and select Scan Append from the popup menu.
  - The first time you press  after you log in to Nolij Web, Nolij Web prompts you to select the default scanner to use for this login session only. The scanner is not saved as the default scanner to use after you log out; the next time you log in, you must select the default scanner for that particular session.
  - If a default scanner is configured for your login session, the document is scanned immediately by the default scanner. If you do not have a default scanner configured, Nolij Web prompts you to configure one.



You can change the default scanner; for more information, refer to [Changing the Default Scanner on page 58](#).

When scanning starts, a progress bar appears and indicates the time that elapses during the scanning process. You cannot perform any other Nolij Web activity while the progress bar is displayed.

After Nolij Web adds the pages, a message appears and displays the number of pages that were added to the document.

## Changing the Default Scanner

You can change the default scanner that Nolij Web uses to immediately scan documents by doing the following:

1. In the toolbar, click drop-down arrow portion of the  button.
2. Select Reset Default Scanner from the popup menu.  
The default scanner is no longer set as the default scanner.
3. The next time you press the  button, Nolij Web prompts you to select the scanner to use as the default scanner.
4. From the drop-down list, select the scanner you want to use as the default scanner.
5. Click **OK** to close the dialog box and apply your changes.

## Creating Document Versions

If versioning is enabled and you have the appropriate permissions, you can manage changes made to Microsoft Office and Openoffice.org documents. You can open such documents in Microsoft Office on your computer, make changes, and save changes to Nolij Web. When you make changes and save documents, new versions are created and saved to Nolij Web.

When you modify a document and create a new version of it, the document is checked out—that is, the document is locked, and no other users can make changes to it. However, if you keep a document checked out and your Nolij Web session expires because of inactivity, the document is no longer checked out.

**Note** You must be using Microsoft Office XP or later or OpenOffice.org versions that support WebDAV. You can edit documents in formats of earlier versions. You must also use Microsoft Internet Explorer 7.

### Creating Document Versions in Internet Explorer 7

1. In the Folder Objects pane, right-click the document that you want to edit.
2. Click **Edit Document** from the popup menu.  
You may receive a dialog box that prompts you to confirm that you want to open the document.
3. To proceed, click **OK**.

The appropriate Microsoft Office or OpenOffice.org program opens and displays the document.

4. Edit the document, and then click **Save**.

The Versioning Document dialog box appears.

5. The Next Version displays the number of the next version of the document that will be created. You cannot modify this field.
6. The URL field displays the URL where the document is located. You cannot modify this field.
7. In the comment field, optionally type descriptive information.
8. Click **OK** in the Versioning Document dialog box.

The modified document is saved in Nolij Web.

You can view version properties, view document versions in the Document viewer, edit a version of the document, and discard changes made to a document version. Refer to [Viewing Version Properties on page 67](#).

## Indexing Documents

You can index, or assign a document type to, a document in the Folder Objects pane. These indexes, configured in Nolij Web according to your specifications, indicate the most commonly used types of documents that your institution manages. For instance, indexes could be *W-2*, *Application*, *Transcript*, or *Photograph*.

Your user role determines if you can index documents. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

To index a document, do the following:

1. In the Folder Objects pane, right-click the document you want to index. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.
2. From the popup menu, click the index you want to use.

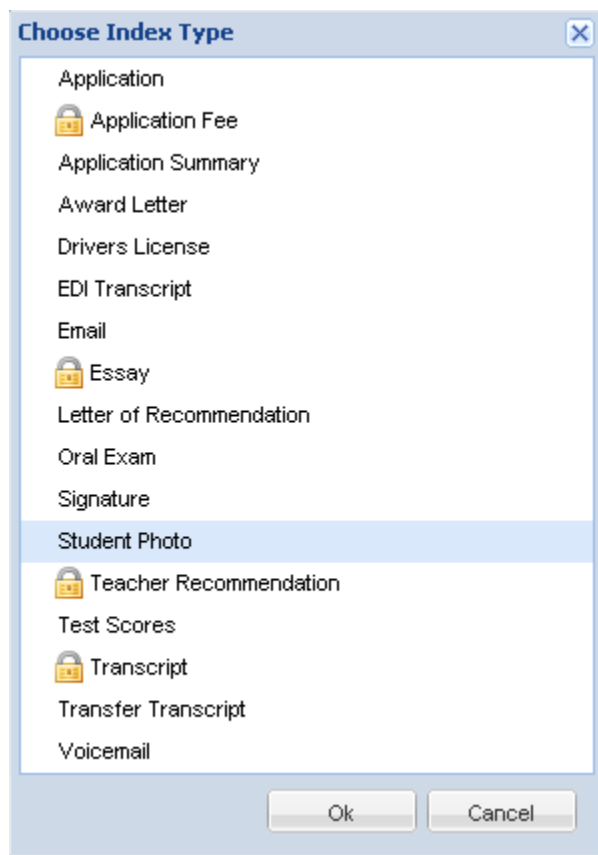
The index list contains up to 10 index types, which are either locked or are the most recently used indexes. You can lock indexes to always display them in the index list. If you have permission to index documents to more than 10 index types:

- If you have not selected any indexes yet, **Choose Index Types** appears in the popup menu.
- If you have selected an index, **More Index Types...** appears in the popup menu.

Depending on your Nolij Web configuration, you may be able to index a document as a *Global Document* or a *Shared Document*. For information about global documents, refer to [Setting Global Documents on page 61](#). For information about shared documents, refer to [Setting Shared Documents on page 61](#).

3. If you select **More Index Types...**, the Choose Index Type dialog box appears, which displays the index types you have permission to view and use.
4. To lock an index type, right-click it and select **Lock**; to unlock a locked index type, right-click it and select **Unlock**.

**Figure 28: Locked and Unlocked Index Types in the Choose Index Type Dialog Box.**



Locked index types appear in the right-click menu for a document in the Folder Objects pane.

5. In the Choose Index Type dialog box, select the index to use.
6. Click **OK**.

The document is indexed, and the information is refreshed in the Folder Objects pane.

In addition, the document is renamed to the same name as its index. For example, a filename changes to *Application* if the index *Application* has been associated with it. You can change the filename of the document; refer to [Renaming Documents on page 68](#) for more information.

You can also index a document by giving it the same name as that of the index. For more information about renaming documents, refer to [Renaming Documents on page 68](#).

## Setting Global Documents

If Nolij Web is appropriately configured, and you have the necessary privileges, you can set a document as a global document. Global documents are those that are created by a specific department, and all other departments can view them.

To index a document a global document, do the following:

1. In the Folder Objects pane, right-click the document you want to index as a global document. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.
2. From the popup menu, select the index you want to use.

The document is renamed and indexed, and the information is refreshed in the Folder Objects pane. If the index you selected set the document as a global document, the document is labeled in **bold**, and all other departments can view it.

In the Folder Objects pane, global documents are labeled in bold red if departments other than your own created the global documents.

**Note** Use caution when setting global documents. After you index a document as a global one, it cannot be indexed to any other index. Also, you can only email, delete, and duplicate them (this information applies to all roles—both those that can create global documents and those who cannot).

## Setting Shared Documents

If Nolij Web is appropriately configured, and you have the necessary privileges, you can set a document as a shared document. Shared documents are those that are created by a specific role and are viewable by other particular roles (specified in your Nolij Web configuration).

To index a document as a shared document, do the following:

1. In the Folder Objects pane, right-click the document you want to set as a shared document. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.
2. From the popup menu, select the index you want to use.

The document is renamed and indexed, and the information is refreshed in the Folder Objects pane. If the index you selected set the document as a shared document, any other departments that have permissions to view the shared document can view it.

In the Folder Objects pane, shared documents are labeled in red if departments other than your own created the shared documents.

Departments that cannot create shared documents can only delete, email, or duplicate shared documents.

3. From the popup menu, check the appropriate option to set the document as a shared document.

## Viewing Document Properties

You can view document properties, such as document size and creation date by doing the following:

1. In the Folder Objects pane, right-click the document for which you want to view properties.
2. Click **Properties** from the popup menu.

The Document Properties dialog box appears.

Figure 29: Document Properties Dialog Box



3. Click the **Properties** tab to view the following information:
  - Name: Name of the document.
  - ID: Numeric identifier, assigned by Nolij Web, of the document.
  - Created By: Username of the user who created the document.
  - Created On: Date on which the document was created.
  - Modified By: Username of the user who last modified the document.


- **Modified On:** Date on which the document was modified.
- **Size:** Size, in kilobytes, of the document.
- **Version:** If versioning is enabled, the version number of the document.

## Viewing and Configuring Custom Document Properties

For information about document properties, refer to [Viewing Document Properties on page 62](#).

Depending on your Nolij Web configuration, you can configure custom document properties for a specific document type. For example, custom document properties can be names of document authors, subject information, and categories; you can associate this information on a document type (configured by your Nolij Web administrator).

To apply a custom property to a document type on which custom properties can be configured, do the following:

1. In the Folder Objects pane, right-click the document for which you want to view and configure properties.
2. Click **Custom Properties** from the popup menu.  
A dialog box appears in which you can view and configure custom document properties.
3. For property that can be a value selected from a possible list of values, a drop-down box appears from which you can select the property.
4. For property that can be any text you type, a field is provided for the attribute into which you can type the value.
5. For a property for which you can select a date, click the  icon to open a calendar from which you can select the appropriate date.
6. For a property for which you can select a True or False option, click the corresponding radio button.
7. For a property for which you can select a user, select the appropriate user from the drop-down box.
8. For composite properties, which consist of multiple properties that you can apply to the document, you can add, modify, or delete properties.
  - To add a composite property, click **Add** to open the Custom Property Editor, and then specify the appropriate information in the fields provided. Click **OK** to close the dialog box and save your changes. The new property appears in the Custom Properties dialog box.
  - To modify a property, select the property and click **Edit** to open the Custom Property Editor. Specify the appropriate information and click **OK** to save your changes and close the dialog box.
  - To delete a property, select the property and click **Delete**.
9. Click **OK** to save your changes and close the dialog box.
10. Click **Save** to save your changes.



## Viewing OCR Properties

You can view Optical Character Recognition (OCR) information, such as whether OCR was performed on a document and whether words were recognized or excluded.

**Note** A minimum resolution of 200 dpi is required for OCR; 240 dpi is recommended.

When Nolij Web performs an OCR on a document, Nolij Web checks the words in a document against the Nolij Web dictionary. Nolij Web recognizes words that the Nolij Web dictionary contains. If Nolij Web does not recognize a word, the word is not associated with the document for a keyword search (you cannot use this word to search for the document), and Nolij Web excludes this word.

You can add excluded words to the Nolij Web dictionary; later, when an OCR is performed, Nolij Web recognizes the words you added to the dictionary.

1. In the Folder Objects pane, right-click the document for which you want to view properties.
2. Click **Properties** from the popup menu.

The Document Properties dialog box appears.

3. Click the **OCR Stats** tab to view the following OCR information:
  - **OCR Status:** Status of OCR. Values can be:
    - None: No OCR was performed or is pending on the document.
    - Completed: OCR was successfully completed on the document.
    - Pending: OCR is pending for this document.
    - In Queue: OCR is being performed on this document.
    - To Rescan: A change on this document has occurred, and it is scheduled to be rescanned.
    - Error: A problem occurred with the OCR process, and it did not complete.
  - **Words Found:** Number of words recognized by OCR when the OCR process was most recently performed on the document.
  - **Words Not Recognized:** Number of words that were not recognized by OCR when the OCR process was most recently performed on the document. These words appear in the Exception pane.
  - **% Words Recognized:** Percentage of words in the document that the OCR process recognized when the OCR process was most recently performed.

Your Nolij Web administrator configures the percentage of words that OCR must recognize on a document for OCR to be successful.

The Words Found, Words Not Recognized, and % Words Recognized values reflect the most recent OCR process for the document. These values also reflect multiple occurrences of each word—if a word appears twice in the document, it is counted as two occurrences, not one. However, the OCR process only stores one occurrence of a word that appears multiple times.

For example, for the text `is an asdf sentence an asdf sentence`:

- Seven words are found (*is, an, asdf, sentence, an, asdf, and sentence*).

- Five words are recognized (*is, an, sentence, an, sentence*).
- Two words are not recognized (*asdf* and *asdf*).
- Five out of seven (78%) of words are recognized.

The OCR process only stores one occurrence of *an* and *sentence*, even though they appear twice in the text. Also, the OCR process only excludes one occurrence of the unrecognized word *asdf*, even though it appears twice, and *asdf* appears only once in the Words Not Recognized pane.

You can fix words, add them to the dictionary, or reject words; however, Words Found, Words Not Found, and % Words Recognized values are not updated. Values are updated only after an OCR is next performed.

You can remove the status message and highlight by clicking the **Remove OCR Status Warning** button. The document icon in the Folder Objects pane is updated.

4. To correct an unrecognized word, do the following:
  1. Select the word in the Unrecognized Words pane and click **Fix**.

The Enter the corrected word dialog box appears.

2. Type the appropriate word in the dialog box.
3. Click **OK**.

The word is removed from the Unrecognized Words pane.

The word is corrected, and the corrected word is recognized by OCR for this document only; it is not added to the Nolij Web dictionary, so it is not recognized on subsequent OCR performances. The word is also associated with this document, and you can use it as a keyword to search for the document.

5. To allow an excluded word to be added to OCR for the document, select it in the Unrecognized Words pane and click **Accept**.

The word is removed from the Unrecognized Words pane.

The word is recognized by OCR for this document only; it is not added to the Nolij Web dictionary, so it is not recognized on subsequent OCR performances. The word is also associated with this document, and you can use it as a keyword to search for the document.

6. To add an unrecognized word to the Nolij Web dictionary, select it in the Exception pane and click **Add to Dictionary**.

The word is removed from the Unrecognized Words pane.

The OCR process will recognize this word the next time an OCR is performed, and the word is associated with this document so you can use it as a keyword to search for the document.

Additionally, this word is no longer excluded and is associated with any other document that contains this word (and for which the word is excluded).

7. To reject an excluded word, click it in the Unrecognized Words pane and click **Reject**.

The word is removed from the Unrecognized Words pane and is not associated with the document.

## Viewing Version Properties

If document versioning is enabled, you can view version properties, view a version of the document, edit a version of the document, and discard changes made to a document version.

1. In the Folder Objects pane, right-click the document for which you want to view properties.
2. Click **Properties** from the popup menu.

The Document Properties dialog box appears.

3. Click the **Version** tab to view the following information:
  - **User:** Username of the user who last modified the document.
  - **Version:** Version number of the document.
  - **Date:** Date and time on which the document was checked out.
  - **Comments:** Comments, if any, provided by the user who checked out the file or by Nolij Web.
    - For the first version of a document, the Comments column displays Original Version.
    - For documents to which previous document versions were reverted, the Comments column displays *Rollback to version x*, where *x* is the document version to which the new document was reverted.

4. To view a version of the document, select the version and click **View**.

The version of the document is displayed in the document viewer.

5. To edit a version of the document, select the version and click **Edit**.

When you edit the selected version, you create the latest version of the document. The Versioning Document dialog box appears. Refer to [Creating Document Versions on page 58](#).

6. To revert to the previous version of the document and discard changes made in successive versions, select the document version to which to revert and click **Rollback**.

Changes made to the version of the document are discarded, and the latest version of the document is created. The latest version of the document is updated in the Version tab, and the Comments column displays *Rollback to version x*, where *x* is the document version to which the new document was reverted.

## Viewing ImageNow Document Keys

If you are working in a Nolij Web workflow and using ImageNow as your document storage repository, you can view document keys for ImageNow documents by right-clicking the document for which you want to view document keys and select **Document Keys**. The Document Keys dialog box appears and displays document key information for the document.

## Renaming Documents

You can rename a document or restore the system-generated name.

Note the following:

- The filename must include the name of the index that you want associated with the document. For example, if you want a document indexed as an *Application*, the filename *must* include the word *Application*. If the index name is not included in the filename, the document is not associated with any index.

For example, a document with the filename *College Application* is indexed as an *Application*; a document with the filename *College App* is not.

- When you restore a document's system-generated name, the document is no longer associated with any index. If you want a document indexed, you must set the index after resetting the filename. The document becomes a *system document type*, which are documents that are authored in computer applications and are stored on any computer. Microsoft Office Word, PDF, HTML, and JPEG files are examples of system document types.
- If you type a name for a document that is also a index, the document is then associated with that index. For example, if you name a document *Email*, and *Email* is an index that can be assigned to the document, the index of the document becomes an *Email*.

For more information about indexing documents, refer to [Indexing Documents on page 59](#).

To rename a document:

1. In the Folder Objects pane, right-click the document you want to rename.
2. Click **Rename** from the popup menu.  
The Rename File dialog box appears.
3. Type the new filename and click **OK**.

The Folder Objects pane refreshes, and the filename is updated.

To restore the system-generated name:

1. In the Folder Objects pane, right-click the document you want to rename. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.
2. In the popup menu, click **Reset Name**.

The Folder Objects pane refreshes, and the filename is restored to the system-generated name.

## Deleting Documents

To delete a document:

1. In the Folder Objects pane, right-click the document you want to delete. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.
2. Click **Delete** from the popup menu.

A dialog box appears, asking you to confirm that you want to delete the document.
3. To delete the document, click **Yes**.

The document is deleted and is removed from the pane.

## Recovering Deleted Documents

To recover deleted documents:

1. Right-click on the folder, which contains the deleted document you want to recover, in the Query Results pane.
2. From the popup menu, select **Recover Files in Folder**.

The Document Recovery dialog box appears.
3. Do one of the following:
  - To recover one document, select the document you want to recover and click **Recover Document**.
  - To recover all documents, click **Recover All**.

Recovered documents appear in the Folder Objects pane.

## Duplicating Documents

You can make a duplicate of a document by doing the following:

1. In the Folder Objects pane, right-click the document you want to duplicate. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.
2. Click **Duplicate** from the popup menu.

The document is copied, and the duplicate document is displayed in the pane. Annotations are also copied and preserved in the duplicate document.

## Merging Documents

You can merge multiple documents into one document by doing the following:

1. In the Folder Objects pane, select the documents you want to merge. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.

The order in which you select documents effects the properties and page order of the merged document. The first document that you select for merging is the document into which other documents are incorporated. The first document is modified and contains any other documents merged into it; all other documents are removed.

In addition, the merged document has the same properties as the first document you selected, such as name and index type. Pages are added to the merged document according to the order in which the individual documents were selected.

For example, if you first select the document *Transcript*, then select *Application*, and finally select *Essay* to be merged into one document, *Transcript* is the document into which *Application* and *Essay* are merged. In the merged document, pages are ordered by first pages in the *Transcript* document, then *Application*, and finally *Essay* pages.

2. Right-click the documents and select **Merge Selected** from the popup menu.

## Moving Documents into Query Folders

Your user role determines if you can move documents into a folder. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

You can move documents from one folder to another by doing the following:

1. In the Folder Objects pane, click the documents you want to move. To select multiple documents, click a document and hold the Ctrl key as you select each document with your mouse.
2. With your mouse, drag and drop the document into the appropriate folder or subfolder in the Query Results pane.

**Note** In a subindex query, when you add a document to a subindex, the document is automatically associated to the subindex, and its subindex changes accordingly. For more information about subindex queries, refer to [Performing Subindex Queries on page 40](#).

The document is moved to the folder.

## Moving Documents into Subfolders

If subfolders are configured, and your privileges allow you to view them, the pane contains a tab for each subfolder.

You can move documents to another subfolder by doing the following:

1. In the Folder Objects pane, click the document you want to move. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.
2. Do one of the following:
  - *(Recommended)*: Drag and drop the document to the subfolder tab.
  - Right-click the document and click **Subfolder**. Then, from the popup menu, click the subfolder to which you want to move the document.

The document is moved to the subfolder.

## Emailing Documents

If you have the appropriate privileges, you can:

- Send an email with a link to the location from which to download a document with or without annotations.

**Note** Your Nolij Web administrator may configure that links to documents expire after a certain amount of days after the email was sent, that links expire after a certain amount of hours after the link was first clicked, or that links expire after a certain number of times they are clicked.

- Send a document, with or without annotations, as an attachment in an email message.

**Note** A copy of the email you send is sent to your email address. If you have privileges to do so, you can change your email address.

**Note** Depending on your Nolij Web privileges, you either send the document with annotations (if there are any) or without annotations.

1. In the Folder Objects pane, right-click the document you want to email. To select multiple documents:
  - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
  - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.

2. Do one of the following:

- To send an email with a link from which to download the document, select **Email Document Download Link** from the popup menu.
- To send an email with the documents an attachment, select **Email as Attachment** from the popup menu.

The Email Document dialog box appears.

Figure 30: Email Document Dialog Box

The screenshot shows a dialog box titled "Email Document". It has a standard Windows-style title bar with a close button (X) in the top right corner. The dialog contains the following elements:

- From:** A text input field that is dimmed (disabled). Below it is a "Change Email" button.
- To:** A text input field.
- CC:** A text input field.
- Subject:** A text input field containing the text "Smith, Damien, D, Newark, NJ; Application".
- Document:** Two radio buttons: "Original" (unselected) and "Image" (selected).
- Message:** A large text area containing the text "Smith, Damien, D, Newark, NJ; Application".
- Buttons:** "Ok" and "Cancel" buttons at the bottom center.

3. The From field is dimmed and unavailable; the email is sent from your email address, which is configured by your Nolij Web administrator. If you have permission to do so, you can change your email address by doing the following:

1. Click the **Change Email** button

The Change Email dialog box appears.

2. Type your new email address. Use the format `username@domain_name.com`, where the *username* is the email username and *domain\_name* is the domain name of the email address.



3. Click **OK** in the Change Email dialog box.

A confirmation message is sent to the new email address.

4. You *must* first confirm the new email address. Open the confirmation email and click the link provided; you *must* open the link in the browser you are using to run Nolij Web.
5. Click **OK** in the Change Email dialog box.
4. In the To field, type the email address of the recipient. Use the format `username@domain_name.com`, where the *username* is the email username and *domain\_name* is the domain name of the email address. You can send the email to multiple recipients by separating each email address with a comma ( , ) or semicolon ( ; ).
5. In the CC field, type the email address of the recipient to which to send a copy of the message. Use the format `username@domain_name.com`, where the *username* is the email username and *domain\_name* is the domain name of the email address. You can send the email copy to multiple recipients by separating each email address with a comma ( , ) or semicolon ( ; ).
6. The Subject field is preconfigured to display the folder name followed by the name of the document or (if you are attaching a or sending a link to a single document) or *Multiple Documents* (if you are attaching or sending the link to more than one document). You can modify the subject text by typing the appropriate text in the Subject field.
7. Do one of the following:
  - Click the **Original** button to send the original document as an attachment; annotations, if any, are not included on the document.
  - Click the **Image** radio button to send the current document as an attachment; any annotations, if any, are included on the document.
8. The Message field is preconfigured to display the folder name followed by the name of the document or (if you are attaching a or sending a link to a single document) or *Multiple Documents* (if you are attaching or sending the link to more than one document). You can change the message text by typing the appropriate text in the Message field.
9. Click **OK** to send the email.
 

The email is sent to the recipient

## Searching for Documents in the Folder Objects Pane

You can search for documents, in the Folder Objects pane, that contain specified text, if Nolij Web is configured to perform Optical Character Recognition (OCR) on specified documents, such as TIFF or text documents. When Nolij Web performs OCR, it captures words from documents and stores them in a searchable format. You can use the text in a document to search for the document.

You can also search for documents according to their document index and filter documents based on custom property type.



Your role determines if you can search for text. For more information, refer to [Searching All Documents for Specified Text on page 44](#).

**Note** When you use the search function in the Folder Objects pane, Nolij Web searches for documents in the Folder Objects pane only. To search for all documents in Nolij Web, perform a search as specified in [Searching All Documents for Specified Text on page 44](#).


**Note** When you add a document to a folder, and Nolij Web is configured to perform OCR on the document type, Nolij Web automatically performs OCR on the document; you can then perform a search for the document using text contained in it.

### Filtering Documents by Text

To filter documents by text, do the following.



1. In the Folder Objects pane, click  .
2. From the popup menu, click **Filter On**.
3. Click **Document Text** to search for documents using key words.
4. In the text field that appears above the Folder Objects pane, type the appropriate text. If you are searching by index type, you can also select the index type from the drop-down box.
5. Press **Enter** to begin the search.
6. Click  to begin the search.

Nolij Web searches through documents in only the Folder Objects pane for the specified text. Documents that contain the text for which you searched are displayed in the Folder Objects pane.

7. Click  to close the search field.

### Filtering Documents by Index



To filter documents by index type, do the following.

1. In the Folder Objects pane, click  .
2. From the popup menu, click **Filter On**.
3. Click **Index** to search for documents by index type.
4. From the drop-down box that appears above the Folder Objects pane, select the index type by which you want to filter documents. Only documents of that index type are displayed in the table.
5. Click  to close the search field.

### Filtering Documents by Custom Property

**Note** You cannot filter documents by custom property if you are using ImageNow as your document storage repository.

To filter documents by custom property, do the following.

1. In the Folder Objects pane, click  .
2. From the popup menu, click **Filter On**.
3. Click **Custom Property**, and then select the custom property from the menu.
4. From the drop-down box that appears above the Folder Objects pane, select the custom property by which you want to filter documents. Only documents with the selected custom property are displayed in the table.
5. Click  to close the search field.

## Adding Template Documents

You can add a document from a preconfigured template. A copy of the document is created from a template and saved to a folder of information.

Do one of the following:

- To add a template document to all folders returned by a query result, right-click the query result in the Query Results pane and select **Add Template Doc**; then, select the template document that you want to add.

The template document is added to all folders contained by the query result.

- To add a template document to a folder in the Folder Objects pane, click  ; then, select **Add Template Doc** and select the template document you want to add.


The template document is added to the folder.

**Note** Depending on your Nolij Web configuration, some of the information in a template document can be automatically replaced by information taken from the folder. For example, a current date or student name may be taken from a student's record of information and automatically inserted into the template document.

## Adding and Emailing Template Documents

Depending on your Nolij Web configuration and permissions, when you add a template document you can also send an email with a copy of a template document to the email address specified by your Nolij Web administrator.

1. Do one of the following:
  - To add a template document to all folders returned by a query result and send an email to the specified recipient, right-click the query result in the Query Results pane and select **Add Template Doc**.

- To add a template document to a folder in the Folder Objects pane and send an email to the specified recipient, click  ; then, select **Add Template Doc** and select the template document you want to add.
2. Do one of the following:
    - If you only want to add the template document but do not want to send an email, select **Create**.
    - If you want to create the template document and send an email, select **Create and Email**.  
A dialog box appears from which you can send the email with the template document as an attachment.
  3. The From field is dimmed and unavailable; the email is sent from your email address, which is configured by your Nolij Web administrator. If you have permission to do so, you can change your email address by doing the following:
    1. Click the **Change Email** button  
  
The Change Email dialog box appears.
    2. Type your new email address. Use the format `username@domain_name.com`, where the *username* is the email username and *domain\_name* is the domain name of the email address.
    3. Click **OK** in the Change Email dialog box.  
  
A confirmation message is sent to the new email address.
    4. You *must* first confirm the new email address. Open the confirmation email and click the link provided; you *must* open the link in the browser you are using to run Nolij Web.
    5. Click **OK** in the Change Email dialog box.
  4. The Subject field is preconfigured to display a message stating that the template document is attached. You can modify the subject text by typing the appropriate text in the Subject field.
  5. The Message field is preconfigured to display text stating that the specified template document is attached. You can change the message text by typing the appropriate text in the Message field.
  6. Click **OK** to send the email.  
  
The email is sent to the recipient

## Automatically Indexing Documents

Depending on your Nolij Web configuration, you can automatically index documents to specific custom document types. You can automatically index documents on which OCR processing has been configured and completed.

### Understanding Automatic Indexing

Documents on which OCR is configured can be automatically indexed to their associated document types. A document must contain specific OCR keywords, defined by your Nolij Web administrator, so that

Nolij Web can automatically index the document type. OCR keywords are unique for each document type.

After Nolij Web finds matches for the OCR keywords, Nolij Web attempts to find specific words in a specified location, defined as an *Item of Interest (IOI)* on the document. Nolij Web uses the item of interest to automatically index a document to a document type and folder. Nolij Web can search in a fixed location or in a specified zone in a document, depending on your configuration.

Documents can be automatically indexed by one or more of the following methods:

- **Zonal recognition:** Nolij Web searches for an *Item of Interest (IOI)*, which is data that Nolij Web extracts from the document, in a specified zone in the document. Nolij Web can search for the IOI around a specific word (*zonal keyword*), by searching for a regular expression, or both.

Your Nolij Web administrator configures all information for zonal recognition. However, if Nolij Web does not recognize an IOI for which zonal recognition is configured, you can set the appropriate word as the IOI in the Nolij Web user interface.

Multiple IOIs, each configured with a zonal keyword, expression, or both, can be used to index the document.

- **Layout pattern recognition:** Nolij Web searches for an IOI in a document. An *identifier* (for example, one or more words in a specific location in the document) is used to ensure that the proper template is used.

Your Nolij Web administrator configures the IOI; administrators or users set a word as the identifier in the Nolij Web user interface. If Nolij Web does not recognize an identifier or IOI, you can set words as identifiers and IOIs in Nolij Web.

Multiple identifiers and IOIs can be used to index the document.

- **Manual recognition:** If Nolij Web cannot find the appropriate information using either template or recognition and therefore cannot index a document, you can manually provide this information.

Nolij Web first scans the document for OCR keywords; if it does not contain the OCR keywords, Nolij Web does not further process the document. If it does recognize keywords, Nolij Web attempts layout pattern recognition (if configured); if it does not find matches for identifiers or IOIs, Nolij Web attempts zonal recognition (if configured). After Nolij Web finds the configured IOIs, it applies a custom name to the document (if configured by your Nolij Web administrator); after it applies a custom name, it moves the document to a specified folder (if configured by your administrator).

When Nolij Web can automatically index a document, the document is indexed to the appropriate document type, and it is displayed as the document type in the Folder Objects pane. You can inspect the document to ensure that it is indexed appropriately and then approve the indexing.


If Nolij Web cannot automatically index a document—for example, it could not locate the IOI on a document—you can manually configure the document so that it can be automatically indexed.

## Setting Documents to be Auto-Indexed

**Note** If you move an auto-indexed document into another folder, the document is moved to the new folder. However, it remains displayed in the Folder Objects pane in the previous folder. The document remains displayed in the pane as a reference, and its label changes to blue bold font until you approve the document indexing. Refer to [Approving Auto-indexed Documents on page 78](#).

1. In the Query Results pane, click the appropriate folder.
2. Do one of the following:
  - Select the document you want to automatically index. To select multiple documents:
    - Click a document and press and hold the **Ctrl** key as you click each document with your mouse.
    - Click a document and press and hold the **Shift** key as you click another document to select contiguous documents.

Then, right-click the document and select **Auto Index**.

- To automatically index all documents in the folder, in the Folder Objects pane, click  . Then, select **Auto Index**.


One of the following occurs:

- If Nolij Web recognized the OCR keywords and IOIs, the document is automatically indexed to the document type. Depending on your Nolij Web configuration, a custom document name may be assigned to the document. Also, depending on your configuration, the document may be moved to a designated folder.
- If Nolij Web did not recognize OCR keywords or IOIs, the document is not indexed.

After Nolij Web completes auto-indexing of documents, a popup message is displayed, indicating the number of documents that were successfully auto-indexed.

## Approving Auto-indexed Documents

You must approve indexing on an auto-indexed document if you move it to another folder. Do one of the following:

- To approve a document, right-click the document in the folder objects pane and select **Approve Indexing**.
- To approve all documents in the folder, in the Folder Objects pane, click  . Then, select **Approve Indexing**.

## Defining IOIs

For layout pattern recognition, Nolij Web searches for an identifier on a document. If an identifier is not configured, or if Nolij Web does not recognize the identifier, you set a word as the identifier on the document (refer to [Setting Identifiers on page 80](#)).


For zonal recognition, Nolij Web searches for IOIs in relation to a zonal keyword, a regular expression, or both. Zonal recognition is configured by your Nolij Web administrator. If Nolij Web does not recognize an IOI, you can set a word as the IOI on the document.

1. In the Folder Objects pane, right-click the document and select the appropriate document type to which to index the document.

The document is indexed to the appropriate document type.

2. Right-click the document and select **Train**.

Words recognized by the OCR process are highlighted in the document in the Document Viewer. Any IOIs recognized by Nolij Web are highlighted in purple.

You can click  to show and hide highlighting.

3. To set a word as the IOI that is configured in Nolij Web, right-click the word and select the appropriate identifier from the popup menu.

The word is highlighted in purple.

To clear an IOI, right-click it and select **Clear**.

4. To define a regular expression for the IOI, do the following:

1. Right-click the keyword identifier and select Regular Expression from the popup menu.


The Regular Expression dialog box appears.

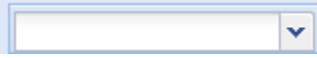
2. Type the expression in the dialog box.


The regular expression you define searches for other information in the document around the area of the identifier. Regular expressions are optional; you may want to define a regular expression to ensure that the appropriate information is found or if the area containing the IOI is obscured with other information.


You should have programming knowledge to write regular expressions.


3. Click **OK**.

5. To save the item, in the toolbar, in the drop-down box,  type the name of the item.

You can select any number and combination of identifiers and IOIs and save them as an item in the document; you can select the item from the drop-down box  and view the identifiers and IOIs configured for the item.

6. Click  to save the item.

You can clear an item by selecting it from the drop-down box and clicking  in the toolbar.

7. When you are done defining IOIs, click  in the toolbar.

For layout pattern recognition, if configured, Nolij Web searches for the identifier. For zonal recognition, if configured, Nolij Web searches for the IOI in a specific area of the document; zonal recognition is configured by your Nolij Web administrator.

### Setting Identifiers

Nolij Web searches for identifiers, which are specified words, to associate a document to a layout pattern. If Nolij Web finds a match, it searches for IOIs in fixed locations and searches around the IOIs for a value.


To set a word as an identifier, do the following:

1. In the Folder Objects pane, right-click the document and select the appropriate document type to which to index the document.

The document is indexed to the appropriate document type.

2. Right-click the document and select **Train**.

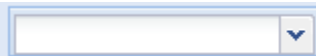
Words recognized by the OCR process are highlighted in the document in the Document Viewer. Any IOIs recognized by Nolij Web are highlighted in purple.

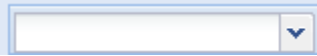
You can click  to show and hide highlighting.


3. To set a word as an identifier, right-click the word and select **Identifier** from the popup menu.


The identifier is highlighted in blue.

To remove an identifier, right-click the word and select **Remove**.

4. To save the item, in the toolbar, in the drop-down box,  type the name of the item.

You can select any number and combination of identifiers and IOIs and save them as an item in the document; you can select the item from the drop-down box  and view the identifiers and IOIs configured for the item.

5. Click  to save the item.

You can clear an item by selecting it from the drop-down box and clicking  in the toolbar.

6. When you are done setting identifiers, click  in the toolbar.



## Resolving Indexes

You can resolve an index when OCR is successful on a document but neither template nor zonal recognition found the appropriate information on the document. You can manually provide this information by doing the following:

1. In the Folder Objects pane, right-click the document whose IOI you want to resolve and select **Resolve**.  
The Index Resolution dialog box appears and displays all IOIs defined on the document.
2. In the field for the IOI, type the appropriate value of the IOI.
3. Click **OK**.

## Importing Emails into the Folder Objects Pane

Depending on your Nolij Web configuration, you can import email messages and attachments from your email server into Nolij Web folders. You can manually import emails or define rules for email import.


You must have the appropriate permissions to import documents of certain document types. If you try to import an email and do not have the permissions to do so for the document type, Nolij Web places an email in the folder containing the email that cannot be imported. If your Nolij Web administrator later gives you the appropriate permissions, delete the notification email message; Nolij Web automatically verifies that permissions have been provided. If you have the appropriate privileges, emails are imported.

Refer to the following topics for more information:

- [Configuring Email Server Settings on page 81.](#)
- [Manually Importing Emails on page 82.](#)
- [Adding Email Import Rules on page 84.](#)
- [Modifying Email Import Rules on page 85.](#)
- [Deleting Email Import Rules on page 85.](#)
- [Running Manual Import Rules on page 86.](#)

## Configuring Email Server Settings

Your Nolij Web administrator may have configured your email server settings; if your settings are not configured, you can configure the email server from which you import emails by doing the following:

1. In the Folder Objects pane, click  .
2. Select **Email Import**.

One of the following occurs.

- If you have not already configured email settings, the Account Settings dialog box appears.
- To modify your settings, click the **Account Settings** button. The Account Settings dialog box appears.

- In the Server field, type the name of the email server. Use one of the following formats, where *servername* is the name of the email server, *port\_number* is the port number, and *encryption\_method* is the method used for encryption.

**Note** If you do not provide a port number, the default value of 143 is used, and SSL is *not* used as the encryption method. For SSL encryption, use 993 as the port number.

- servername:port\_number:encryption\_method*. For example:

```
mail.myuniversity.edu:993:ssl
```

- servername:port\_number*. For example:

```
mail.myuniversity.edu:993
```

- servername*. For example:

```
mail.myuniversity.edu
```

You *cannot* use the format *servername:encryption\_method*. For example:

```
mail.myuniversity.edu:ssl
```

- In the Username field, type the username of the mailbox from which you want to retrieve emails.
- In the Password field, type the password of the mailbox from which you want to retrieve emails.
- Click the **Test** button to test and save your configuration.

Nolij Web tests your email server configuration; one of the following occurs:

- If the configuration does not work, a message appears and states that the connection does not work.
- If the connection is successful, a message appears and states that the connection works, and your settings are saved. Click **OK** to close the dialog box.

Your email folders appear in the Email Folders pane. You can manually import emails, or you can create import rules for emails; refer to [Manually Importing Emails on page 82](#) and [Adding Email Import Rules on page 84](#) for more information.


- Click **Save** to save your changes.

## Manually Importing Emails

To manually import emails into Nolij Web folders, do the following:

- In the Query Results pane, click the folder into which you want to import an email.

**Note** If you do not run a query and select a folder, you cannot manually import emails, and you cannot create import rules. However, any on-demand rules that are configured are run.

2. In the Folder Objects pane, click  .
3. Select **Email Import**.  
The Email Import dialog box appears.  
The Email Folders pane displays the email folders on the server and displays the following information:
  - Name: Name of the email folder.
  - Import Folder: Name of the folder into which you import emails.
4. You create additional email folders on your mail server by doing the following:
  1. Right-click the folder to which you want to add a folder and select **Create Folder**.  
The Email Import dialog box appears.
  2. Type the name of the folder and click **OK**.  
The folder is created on your email server; the Email Folders pane refreshes and displays the new folder.
5. In the Email Folders pane, right-click the email folder that contains the email and select **View Messages**.  
Email messages in the folder are displayed in the Messages pane, which displays the following information:
  - Attn: Name of the person for whom the email is designated.
  - From: Name of the person who sent the email.
  - Received: Date and time on which the email was received.
  - Subject: Subject of the email.
6. In the Messages pane, right-click the message that you want to import, select **Import**, and select one of the following options:
  - Email: Imports the email without attachments. Select one of the following:
    - As HTML document: Converts the email to HTML format.
    - As plaintext document: Converts the email to plain text format.
  - Attachment: Imports an attachment. Select *All* to import all email attachments, or select the specified email attachment. This option is dimmed and unavailable if the email contains no attachments.
  - Both: Imports both the email and attachments. Select one of the following:
    - Email as HTML document: Converts the email to HTML format.
    - Email as plaintext document: Converts the email to plain text format.

If the email import is successful, the Folder Objects pane refreshes and displays the email and attachments as new documents within the query folder.

## Adding Email Import Rules

You can create rules that Nolij Web uses to automatically imports emails into specified folders, or you can create rules that you run manually. You can create one rule per folder. To create email import rules, do the following:

1. In the Query Results pane, click the folder into which you want to import an email.

**Note** If you do not run a query and select a folder, you cannot manually import emails, and you cannot create import rules. However, any on-demand rules that are configured are run.

2. In the Folder Objects pane, click  .

3. Select **Email Import**.

The Email Import dialog box appears.

The Email Folders pane displays the email folders on the server and displays the following information:

- Name: Name of the folder.
- Import Folder: Name of the folder, selected in the Query Results pane, into which you import emails.

4. In the Email Folders pane, select the email folder for which you want to create a rule and either right-click it and select **Create Rule** or click Create Rule.

A dialog box appears. The Folder field displays the name and folder ID of the selected Nolij Web folder into which you import emails; the Email Folder Path field displays the location of the email folder on your email server from which you import emails. These fields cannot be modified.

5. Check the **Automatic** checkbox if you want Nolij Web to automatically apply the rule.

If you check this checkbox, after you create and save a rule, the rule is immediately run, and Nolij Web processes any emails in the email folder. Nolij Web runs the rule whenever an email enters the folder.

If you do not check this checkbox, you must run the rule manually. Refer to [Running Manual Import Rules on page 86](#).

6. From the Message Import Type drop-down box, select how you want to import the email message. Options are:

- HTML: The email is imported in HTML format.
- PLAINTEXT: The email is imported as plain text.
- NONE: The email message will not be imported into the folder.

7. Optionally, from the Index message as drop-down box, select the index to associate with the email. These indexes are configured by your Nolij Web administrator.


8. Check the **Include Attachments** checkbox if you want to import attachments from the email message.
9. From the Index attachments as drop-down box, optionally, select the index to associate with the attachment. These indexes are configured by your Nolij Web administrator.
10. If you checked the Include Attachments checkbox, you can uncheck the **Ignore Image Attachments** checkbox if you want to import JPEG, GIF, and PNG attachments. These attachments are usually embedded images, such as signature images, and are not external attachments.
11. Click **Save** to create the rule.

The Email Folders dialog box refreshes and displays the Nolij Web folder, in the NW Import Folder column, from which emails are imported.

Automatic rules are run on emails already in the folder and are run again whenever an email enters the folder.


### Modifying Email Import Rules

To modify an email import rule, do the following:

1. In the Folder Objects pane, click  .
2. Select **Email Import**.  
The Email Import dialog box appears.
3. In the Email Folders pane, select the email folder for which you want to modify a rule and either right-click it and select **Edit Rule** or click Edit Rule.  
A dialog box appears and displays information about the rule.
4. Modify the rule, as appropriate. Refer to [Adding Email Import Rules on page 84](#).

### Deleting Email Import Rules


To delete a rule, do the following:

1. In the Folder Objects pane, click  .
2. Select **Email Import**.  
The Email Import dialog box appears.

3. In the Email Folders pane, select the email folder for which you want to delete a rule and do one of the following:
  - Either right-click it and select **Delete Rule** or click the Delete Rule button.  
The rule is deleted; the Email Folders pane refreshes, and the Nolij Web import folder is removed from the NW Import Folder column.
  - Either right-click it and select **Edit Rule** or click the Edit Rule button.  
A dialog box appears and displays information about the rule. Then, select **Delete** to delete the rule.

### Running Manual Import Rules

To run a manual rule, do the following:

1. In the Folder Objects pane, click  .
2. Select **Email Import**.  
The Email Import dialog box appears.  
The Email Folders pane displays the email folders on the server and displays the following information:
  - Name: Name of the email folder.
  - Import Folder: Name of the Nolij Web folder into which you import emails.
3. Do one of the following:
  - To run a rule on a specific folder, in the Email Folders pane, select the email folder that contains the email you want to import and either right-click it and select **Process Rule** or click the Process Rule button.
  - To run all rules, click the Process All button.

After Nolij Web runs the rule, a message appears and indicates whether the rule was successful. The Folder Objects pane refreshes and displays imported emails and attachments as documents in the Nolij Web folder.

If no rules are configured, a message appears and states that no rules are configured for email import.

### Moving Folders in a Nolij Web Workflow

After you have finished performing your work, you can manually send the folder to the next inbox in the workflow, or Nolij Web can automatically route the documents to the next inbox, depending on your Nolij Web configuration.

When documents are submitted, the entire folder containing all associated documents is sent to the next inbox.


## Moving Folders Manually


You can override the automatic workflow process for a folder for which you have the appropriate privileges doing one of the following:

- Right-clicking a folder in the Query Results pane, selecting **Move to**, and selecting the inbox to which to send the folder.
- Right-clicking the query result in the Query Results pane, selecting **Move to**, and selecting the inbox to which to send all folders in the query result.
- Clicking an inbox in the Workflow area; then, right-clicking the folder from the Inbox Detail dialog box, selecting **Move to**, and selecting the inbox to which to send the folder.
- Clicking a folder in the Query Results pane; then, selecting the inbox drop-down box in the Workflow area, selecting **Move to**, and selecting the inbox to which to send the folder.


The Move To option is dimmed and unavailable if you do not have permission to move the folder.

## Moving Folders in an Automatic Workflow

In an automatic workflow, when you click  in the Query Results pane toolbar or when you select **Work Complete** from the folder's right-click menu in the Query Results pane, the workflow process starts, and Nolij Web routes the folder to the appropriate inbox when the proper conditions are met.

**Note**  is dimmed and unavailable if a folder is at the end of a workflow and cannot move to another inbox, if you have not selected a folder, or if you do not have privileges to move the folder.

To automatically route the folder:

- Click the folder in the Query Results pane, then click  in the toolbar.
- Right-click the folder in the Query Results pane and select **Work Complete** from the popup menu.

One of the following occurs:


- The Workflow Step dialog box appears if the folder cannot be submitted, and it indicates the reason that the process could not be completed.


The folder is not routed.

- The Workflow Step Completed dialog box appears if the document was successfully routed.

**Note** You cannot route a folder that is not associated with a workflow. For example, batch folders are typically not associated with a workflow and cannot be routed.

When a folder is moved into an inbox and changes have not yet been viewed when inboxes are

expanded, the  icon appears next to the inbox.

When inboxes are collapsed and a folder moves into a new inbox, the  icon appears next to the inbox to indicate that there are changes that have not been seen to the inboxes in the drop-down box.

When you click the inbox drop-down box, the icon appears next to the inbox into which the folder was moved.

You can also remove folders from the workflow, if you have the appropriate privileges. Refer to [Removing Folders from the Workflow on page 88](#).

### Removing Folders from the Workflow

If you have the appropriate privileges, you can remove a folder from your workflow.

- Right-click a folder in the Query Results pane and select **Remove from Workflow** from the popup menu.

The folder is removed from the workflow; however, the folder remains displayed in the Query Results pane.

- Select the inbox in the Workflow area to open the Inbox Detail dialog box; then, right-click a folder in the Inbox Detail dialog box and select **Remove from Workflow** from the popup menu.

The folder is removed from the workflow and is also removed from the Inbox Detail dialog box.

If you remove a folder from the workflow, or if a folder is not in a workflow, when you click a folder in the Query Results pane, Not in Workflow appears next to the Current Inbox label.




### Viewing the Graphical Workflow for Nolij Web Workflows

You can view a graphical representation of the Nolij Web workflow process in the Graphical Workflow dialog box. The workflow defines the path through which folders of information are routed in your institution based upon the criteria defined for your Nolij Web setup.

You can view the graphical workflow only for Nolij Web workflows, not for ImageNow views or workflows.

The following table provides descriptions of the icons in this dialog box.

**Table 5: Graphical Workflow Icons and Descriptions**

| Icon  | Description   |
|---|---|
|  | Workflow name.  |
|  | Inbox to which a folder of information is routed. You can work with documents in a folder when a folder is in an inbox you own.   |
|  | Complete Step action, which is associated with an inbox. It represents that work on the folders in the inbox has been completed and that folders can be sent to the next inbox in the workflow. |



**Table 5: Graphical Workflow Icons and Descriptions (Continued)**





| Icon  | Description  |
|---|--|
|    | <p>Condition, which sends a folder to only one of two possible workflow paths (Yes or No). Frequently, conditions appear in the form of a question. Conditions are configured by your Nolij Web administrator. For example, a condition may be named <i>Is this a domestic application?</i> for the following scenario:</p> <ul style="list-style-type: none"> <li>• Applications with U.S. mailing addresses are sent to an assistant responsible for reviewing domestic applications.</li> <li>• Applications with non-U.S. mailing addresses are sent to a different assistant who is responsible for reviewing non-U.S. applications.</li> </ul> <p>Applications with U.S. mailing addresses satisfy Yes and move to the appropriate workflow path; applications with non-U.S. mailing addresses satisfy No and move to the appropriate workflow path. Refer to <a href="#">Figure 31 on page 90</a> for an example of the graphical workflow for this scenario.</p>   |
|    | <p>Yes condition; when this criteria is met, a folder is routed to this workflow branch.</p>   |
|    | <p>No condition; when this criteria is met, a folder is routed to this workflow branch.</p>  |
|  | <p>Rule, which sends a folder to a workflow path, depending on the criteria defined. Rules route folders through one out of two or more workflow paths, while conditions route folders through one of only two possible workflow paths. Rules are configured by your Nolij Web administrator.</p> <p>For example, a rule may be named <i>Route by last name</i> for the following scenario: Applications are sent to five different assistants to review, and assistants are responsible for reviewing applications based on the first letter of the student’s last name. Folders are routed to the appropriate assistant by the following:</p> <ul style="list-style-type: none"> <li>• Last names beginning with A through E</li> <li>• Last names beginning with F through J</li> <li>• Last names beginning with K through O</li> <li>• Last names beginning with P through T</li> <li>• Last names beginning with U through Z</li> </ul> <p>In this scenario, folders are routed through one of five possible workflow paths. Refer to <a href="#">Figure 32 on page 91</a> for an example of the graphical workflow for this scenario.</p> |

Figure 31: Condition Example

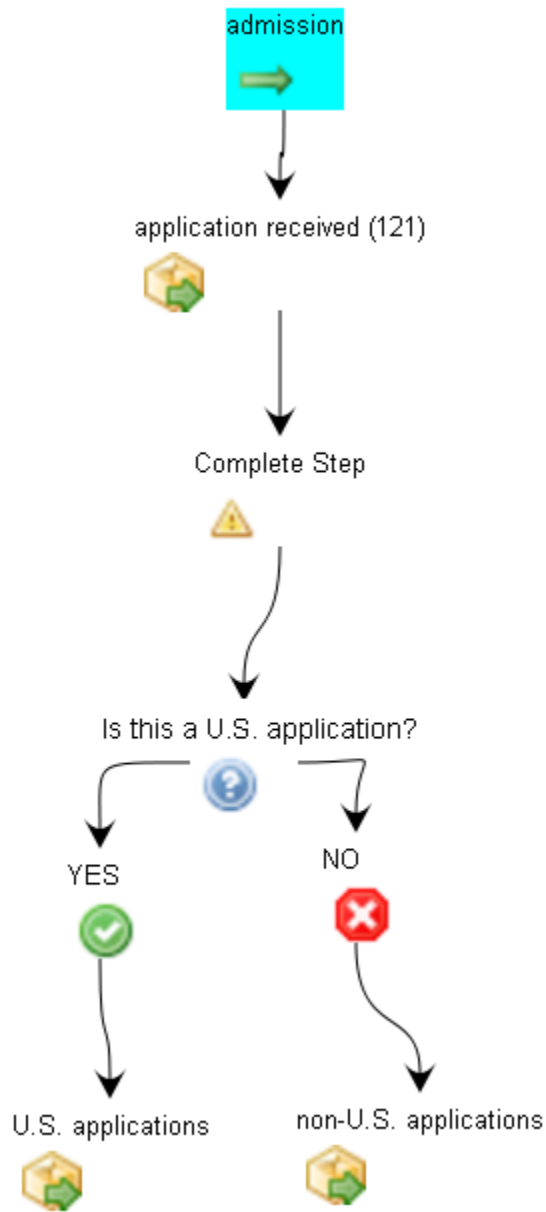
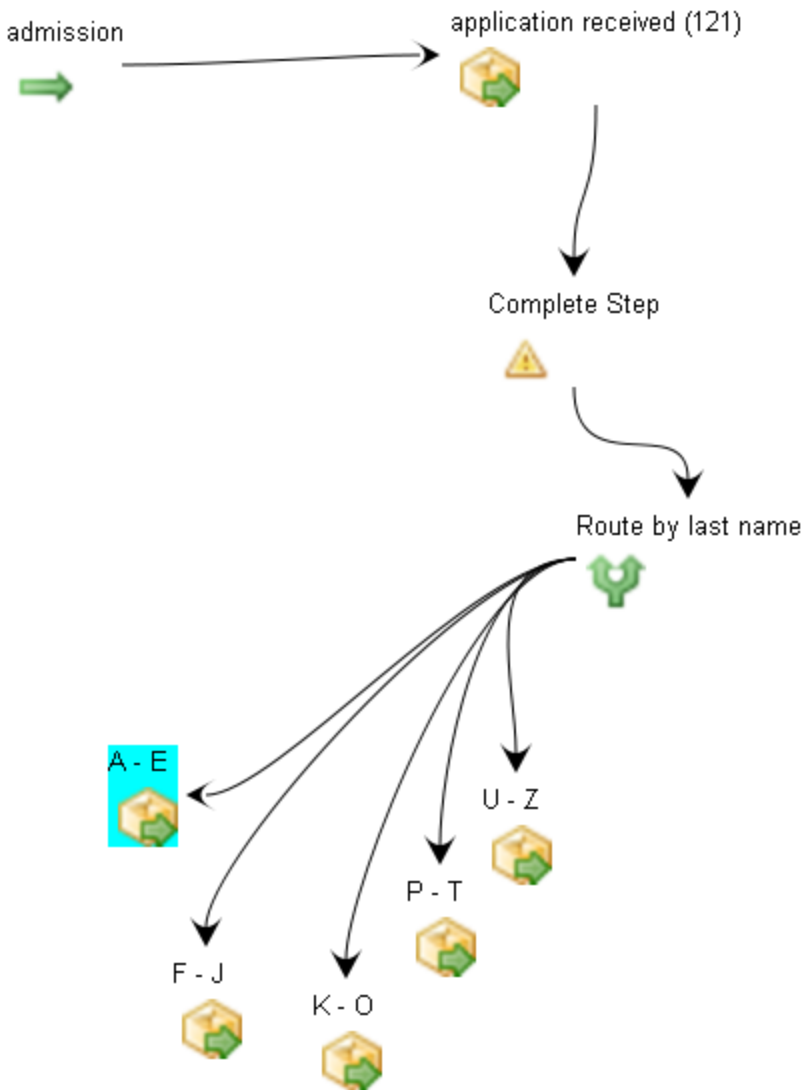



Figure 32: Rule Example

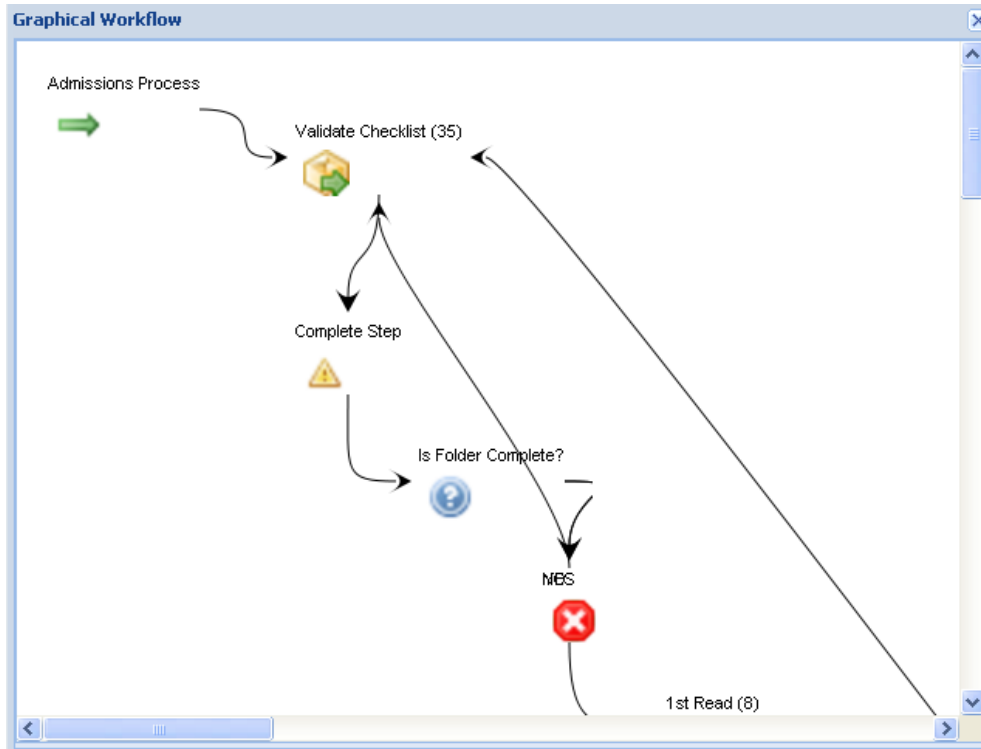


To view the graphical workflow, select the workflow or view in which you want to work from the Workflow/View area; then, do one of the following.


- From the Workflow/View drop-down box, select the Nolij Web workflow and then click  .
- Right-click an inbox Nolij Web Workflow/View area and select **Graphical Workflow** from the popup menu.





The Graphical Workflow pane appears.

Figure 33: Graphical Workflow Pane



Click an icon and drag and drop it to move it.

You can move the dialog box by clicking on it; when the mouse pointer changes to , press down on your mouse and move the window to the appropriate location.

To resize the dialog box, place your mouse on the edge of the form until the mouse pointer changes to  (to resize horizontally),  (to resize vertically), or to  or  (to resize both horizontally and vertically).

You can close the dialog box by clicking  .

**Note** If you click the Work Complete button to route a folder, and the folder can be routed to the next inbox, the inboxes to and from which the folder is routed are highlighted in the Graphical Workflow dialog box, and the folder moves to the appropriate inbox.

## Viewing the Workflow Summary

You can view the number of folders in each of your inboxes associated with the workflows for all your Nolij Web roles by doing the following:

1. Select **Tools > Workflow Summary**.


The Workflow Status dialog box appears and displays the following information.

- Role: Name of the role to which you belong.
- Workflow: Name of the workflow associated with the role.
- Inbox: The inbox, associated with the workflow, to which you have access.
- Count: Number of folders in the inbox.

2. Click **OK** to close the dialog box.

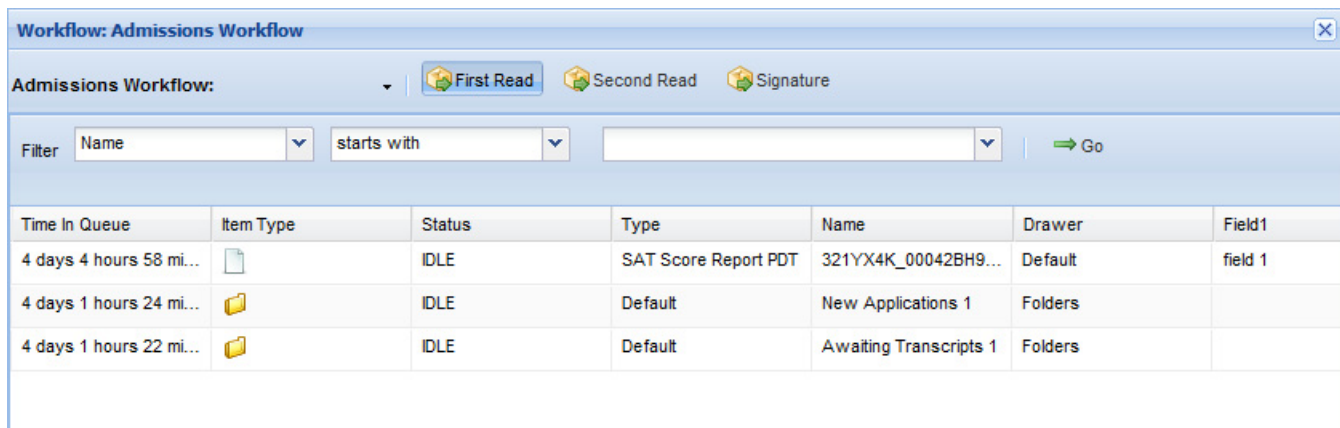
## Working With ImageNow Workflows




You can use Nolij Web to work with ImageNow workflows. You must have the appropriate permissions in ImageNow to view ImageNow workflows.

You can view ImageNow workflows by selecting the ImageNow workflow from the Workflow/View drop-down box. The  icon next to the menu option name denotes that the option in the Workflow/View drop-down box is an ImageNow workflow.

The Workflow pane for the ImageNow workflow appears below and displays information about the selected ImageNow Workflow.

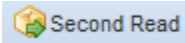
Figure 34: ImageNow Workflow Pane for an ImageNow Workflow



| Time In Queue           | Item Type   | Status | Type                 | Name                   | Drawer  | Field1  |
|-------------------------|---|--------|----------------------|------------------------|---------|---------|
| 4 days 4 hours 58 mi... |  | IDLE   | SAT Score Report PDT | 321YX4K_00042BH9...    | Default | field 1 |
| 4 days 1 hours 24 mi... |  | IDLE   | Default              | New Applications 1     | Folders |         |
| 4 days 1 hours 22 mi... |  | IDLE   | Default              | Awaiting Transcripts 1 | Folders |         |

The name of the view appears in the title caption of the pane. In the preceding figure, *Admissions Workflow* is the name of the ImageNow view.

Below the title caption, the ImageNow queues in which you can work appear (for example,



). The name of the ImageNow workflow appears to the left of the queues. In the preceding figure, *Admissions Workflow* is the name of the ImageNow workflow, and *First Read*, *Second Read*, and *Signature* are the queues in the ImageNow workflow.

**Note** Inboxes can be expanded or collapsed, depending on your preferences. Refer to [Collapsing Inboxes and Queues in Drop-Down Boxes on page 25](#) for more information.

Click a queue to view the items in the workflow queue.

If you are working in an ImageNow workflow that has an associated ImageNow view on which the Related Document feature is enabled (configured in ImageNow by your administrator), when you click a document in the ImageNow workflow, the ImageNow view appears in Nolij Web, if it is not already open; it displays the documents related to the selected document.

Refer to the following topics for more information about what you can do when you work in ImageNow workflows.

- [Filtering Documents and Folders in ImageNow Workflows on page 94.](#)
- [Opening Folders in ImageNow Workflows on page 97.](#)
- [Opening Documents in Associated Applications on page 97.](#)
- [Modifying ImageNow Document Keys on page 97.](#)
- [Configuring ImageNow Custom Properties on page 98.](#)
- [Deleting Items from ImageNow Workflows on page 98.](#)
- [Removing Items from ImageNow Workflows on page 99.](#)
- [Setting Item Status on page 99.](#)
- [Routing Items in ImageNow Workflows on page 99.](#)

## Filtering Documents and Folders in ImageNow Workflows

You can filter information displayed in the table by specifying the appropriate filter information in the Filter drop-down boxes and then by clicking the **Go** button. The pane refreshes and displays the information you chose to filter. Refer to the following table for descriptions of filter options.

**Table 1: ImageNow Workflow Filter Options and Descriptions**

| Filter Option   | Filter Operators  | Search Field  |
|---|---|---|
| Workflow item status  | is equal to<br>is not equal to  | Select one of the following options. <ul style="list-style-type: none"> <li>Any</li> <li>Idle</li> <li>Working</li> <li>On Hold</li> <li>Pending</li> <li>Waiting for sibling</li> <li>Waiting for routing</li> <li>Waiting for inbound Action</li> </ul> |
| Workflow item type  | is equal to<br>is not equal to  | Select one of the following options. <ul style="list-style-type: none"> <li>Document</li> <li>Folder</li> </ul>   |
| Name  | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type the value for which to search.   |
| Drawer  | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type or select the value for which to search.   |
| <i>ImageNow Field 1-5</i><br><br><b>Note</b> The labels for these fields are configurable and are reflected both in the filter drop-down box and the table columns. | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type the value for which to search.   |




**Table 1: ImageNow Workflow Filter Options and Descriptions (Continued)**

| Filter Option      | Filter Operators  | Search Field   |
|--------------------|---|--|
| Document Type      | <ul style="list-style-type: none"> <li>is equal to</li> <li>is not equal to</li> <li>is less than</li> <li>is greater than</li> <li>is less than or equal to</li> <li>is greater than or equal to</li> <li>starts with</li> </ul> | Type or select the value for which to search.  |
| Folder type        | <ul style="list-style-type: none"> <li>is equal to</li> <li>is not equal to</li> <li>is less than</li> <li>is greater than</li> <li>is less than or equal to</li> <li>is greater than or equal to</li> <li>starts with</li> </ul> | Type or select the value for which to search.  |
| Folder status      | <ul style="list-style-type: none"> <li>is equal to</li> <li>is not equal to</li> </ul>  | <p>Select the folder status from the drop-down box. Options are:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Inactive</li> </ul>  |
| Any Document Key   | <ul style="list-style-type: none"> <li>is equal to</li> <li>is not equal to</li> <li>is less than</li> <li>is greater than</li> <li>is less than or equal to</li> <li>is greater than or equal to</li> <li>starts with</li> </ul> | <p>Type the value for which to search. Document keys can be the value of one of the following.</p> <ul style="list-style-type: none"> <li>• Drawer</li> <li>• Name</li> <li>• Field <i>x</i></li> <li>• Document type</li> </ul>   |
| Custom Property... | The operators available depend on the custom property you select.   | <p>When you select a custom property filter, the Custom Properties dialog box appears. Select a property for which to search and click <b>OK</b>. Next, specify the filter information, which depends on the custom property you selected,</p> <p>The custom property also appears as a filter option in the filter drop-down box for the duration of your Nolij Web session, and you can use this filter option for subsequent filters.</p> |



## Opening Folders in ImageNow Workflows

To open a folder, right-click it and select **Open Folder**. The Folder dialog box appears and displays the items in the folder, which can be one of the following.

-  Document
-  Document shortcut
-  Folder

In the Folder dialog box, you can do the following.

- View a document in the Document Viewer by selecting the document or document shortcut.
- Open a folder by right-clicking the folder and selecting **Open Folder**. You can display multiple Folder dialog boxes, close Folder dialog boxes, and reposition them.
- View document keys by right-clicking a document or document shortcut and selecting **Document Keys**.
- Configure custom properties by right-clicking a document or document shortcut and selecting **Custom Properties**. For more information about configuring custom properties, refer to [Configuring ImageNow Custom Properties on page 98](#).

## Opening Documents in Associated Applications

You can open documents in ImageNow workflows and views in the application designated to open the particular file type. For example, a PDF file opens in Adobe Acrobat if Acrobat is specified as the application that opens PDF files.

Right-click the document you want to open and select **View in Associated Application**. The associated application opens and displays the document. If the document contains more than one page, a dialog box appears, and you can select the page you want to open in the application.

## Modifying ImageNow Document Keys

You can view and modify ImageNow document keys by doing the following.

1. Right-click the document you want to modify and select **Document Keys**. The Document Keys dialog box appears.
2. From the Drawer drop-down box, select the ImageNow drawer into which to place the document.
3. The Name field displays the document name and cannot be modified.
4. The following five fields are ImageNow fields that display associated information about the document. This document information is metadata that can be used to search for the document (for example, if you type *Application* for Field 2, you can search for any document that has a value of *Application* for Field 2). Type the value for each field in the corresponding field.

Your ImageNow configuration determines how the fields are labeled. If labels do not appear for fields, the fields are named, by default, the field number as configured in ImageNow.

5. From the Type drop-down box, select the ImageNow document type for the document.
6. Click **OK** to save your changes and close the dialog box.


The ImageNow view refreshes and displays the saved changes. If the view was filtered, the View pane may not display the modified document (for example, if you filtered on a drawer and then changed the drawer, the document is removed when the view is refreshed).

## Configuring ImageNow Custom Properties

You can view and configure custom properties for ImageNow documents by doing the following.

1. Right-click the document for which you want to configure custom properties and select **Custom Properties**.

The Custom Properties dialog box appears.

2. For a property that can be a value selected from a possible list of values, a drop-down box appears from which you can select the property.
3. For a property that can be any text you type, a field is provided for the attribute into which you can type the value.
4. For a property for which you can select a date, click the  icon to open a calendar from which you can select the appropriate date.
5. For a property for which you can select a True or False option, click the corresponding radio button.
6. For a property for which you can select a user, select the appropriate user from the drop-down box.
7. For composite properties, which consist of multiple properties that you can apply to the document, you can add, modify, or delete properties.
  - To add a composite property, click **Add** to open the Custom Property Editor, and then specify the appropriate information in the fields provided. Click **OK** to close the dialog box and save your changes. The new property appears in the Custom Properties dialog box.
  - To modify a property, select the property and click Edit to open the Custom Property Editor. Specify the appropriate information and click **OK** to save your changes and close the dialog box.
  - To delete a property, select the property and click **Delete**.
8. Click **OK** to save your changes and close the dialog box.

## Deleting Items from ImageNow Workflows

To permanently delete an item from an ImageNow workflow, right-click the item you want to delete and select **Delete**.

## Removing Items from ImageNow Workflows

Removing an item from an ImageNow workflow does not permanently delete it. Refer to [Deleting Items from ImageNow Workflows on page 98](#) for information on how to permanently delete an item from a workflow.

To remove an item from an ImageNow workflow, in the Workflow pane, right-click the item you want to remove from the workflow and select **Remove from workflow**. The item is removed from the workflow and is no longer displayed in the Workflow pane.

## Setting Item Status

To set the status of an item in the ImageNow workflow, in the workflow pane, right-click the item for which you want to configure status and select the appropriate status from the popup menu.

- Mark Item as Idle
- Mark Item as On Hold
- Mark Item as Pending

## Routing Items in ImageNow Workflows

To route an item in the ImageNow workflow, in the workflow pane, right-click the item you want to move and select Route Anywhere to move the item to a queue that you select. If you can route the item to multiple queues, the queues appear as menu options in the popup menu. You can also route documents to a selected queue by dragging and dropping the document to the appropriate queue.

## Working With ImageNow Views

Your administrator can configure Nolij Web to allow you to work with ImageNow views. You must have the appropriate permissions in ImageNow to work with ImageNow views.

In Nolij Web, the ImageNow view contains only the documents with which you need to work. You can open ImageNow views by selecting the view from the Workflow/View drop-down box.


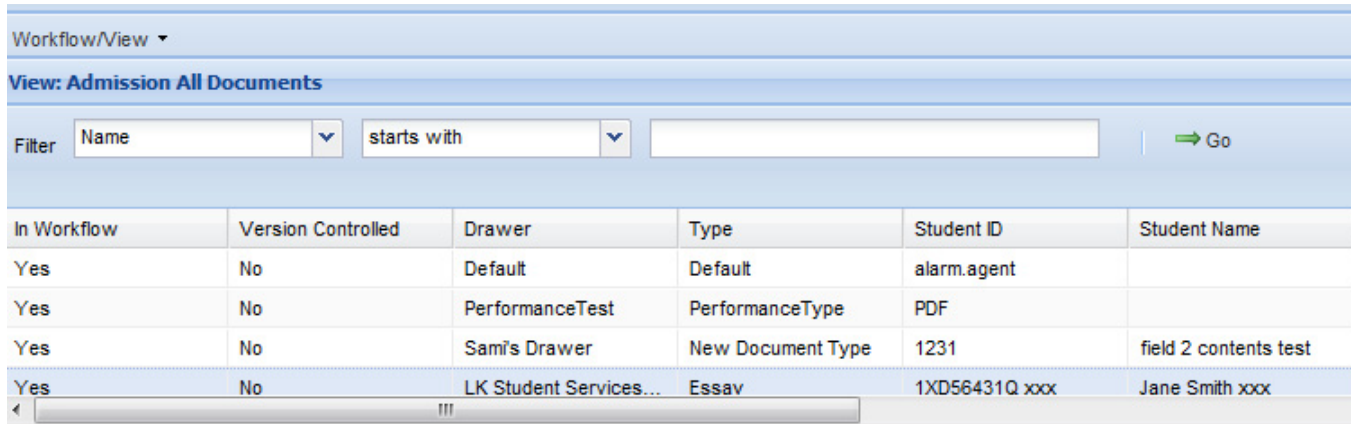
The  that appears next to the menu option name in the Workflow/View drop-down box denotes that the option is an ImageNow view.

Figure 35: ImageNow View Pane for an ImageNow View



The name of the view appears in the title caption of the pane. In the preceding figure, *Admission All Documents* is the name of the ImageNow view.

Refer to the following topics for more information about the tasks you can perform with ImageNow views.

- [Modifying ImageNow Document Keys on page 97.](#)
- [Configuring ImageNow Custom Properties on page 98.](#)
- [Filtering Documents and Folders in ImageNow Views on page 100.](#)
- [Opening Documents in Associated Applications on page 97.](#)
- [Adding ImageNow Files to ImageNow Workflows on page 102.](#)
- [Deleting ImageNow Files from ImageNow Views on page 103.](#)

### Filtering Documents and Folders in ImageNow Views

You can filter information displayed in the table by specifying the appropriate filter information in the Filter drop-down boxes and then by clicking the **Go** button. The pane refreshes and displays the information you chose to filter. Refer to the following table for descriptions of filter elements.

**Table 2: ImageNow View Filter Options and Descriptions**

| Filter Option  | Filter Operators  | Search Field                                  |
|--|---|---|
| Name   | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type the value for which to search.           |
| Drawer   | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type or select the value for which to search. |
| <i>ImageNow Field 1 - 5</i><br><br><b>Note</b> The labels for these fields are configurable and are reflected both in the filter drop-down box and the table columns | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type the value for which to search.           |

**Table 2: ImageNow View Filter Options and Descriptions (Continued)**

| Filter Option      | Filter Operators  | Search Field   |
|--------------------|---|--|
| Type               | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type or select the value for the document type which to search.  |
| Any Document Key   | is equal to<br>is not equal to<br>is less than<br>is greater than<br>is less than or equal to<br>is greater than or equal to<br>starts with | Type the value for which to search. Document keys can be the value of one of the following. <ul style="list-style-type: none"> <li>• Drawer</li> <li>• Name</li> <li>• Field x</li> <li>• Document type</li> </ul>   |
| Custom Property... | The operators available depend on the custom property you select.   | When you select a custom property filter, the Custom Properties dialog box appears. Select a property for which to search and click <b>OK</b> . Next, specify the filter information, which depends on the custom property you selected,<br><br>The custom property also appears as a filter option in the filter drop-down box for the duration of your Nolij Web session, and you can use this filter option for subsequent filters. |

## Adding ImageNow Files to ImageNow Workflows

You can add files from ImageNow views to ImageNow workflows by doing the following.

1. Select the ImageNow view from which you want to add files from the Workflow/View drop-down box.
2. Select the ImageNow workflow to which you want to add files from the Workflow/View drop-down box.
3. Do one of the following.

- Select the queue to which you want to add the file in the Workflow pane. Next, select the file from the View pane, click it, and drag and drop it into the table in the Workflow pane.

The Workflow pane refreshes and displays the file you added.

- Select the file you want to add in the View pane and then drag and drop it into the appropriate ImageNow queue in the Workflow pane.

If you are viewing the queue into which you added the file, the Workflow pane refreshes and displays the file you added. Otherwise, to view the file you added, select the queue to which you added the file.

- Right-click a file in the View pane, select **Add to workflow**, and then select the Workflow and workflow queue to which you want to add the file.

The Workflow pane does not automatically refresh. To refresh the information in the pane and display documents you added, click the **Go** button in the Workflow pane.

Files that you add from ImageNow views are not removed from ImageNow views and therefore remain displayed in the View pane.

## Deleting ImageNow Files from ImageNow Views

To delete a file from ImageNow views, in the View pane, right-click the file you want to delete and click **Delete**. The file is deleted and is removed from the View pane.

## Working with Documents in the Document Viewer

In the Document Viewer, you can view documents for Nolij Web workflows, ImageNow views, or ImageNow workflows. To display documents in the Document Viewer, do one of the following.

- To view documents in Nolij Web workflows, select the Nolij Web workflow from the Workflow/View drop-down box. Find the document you want to view and then click it to display it in the Folder Objects pane.
- To view documents in ImageNow workflows, select the ImageNow workflow from the Workflow/View drop-down box. Click the ImageNow queue that contains the document you want to open, and then double-click the document in the Workflow pane.
- To view documents in ImageNow views, select the ImageNow view from the Workflow/View drop-down box. In the View pane, double-click the document to display it in the Document Viewer.

**Note** If you open a document in an application other than Nolij Web, any document annotations that you created are no longer visible.

**Note** You cannot annotate documents in ImageNow views or workflows.

The following topics provide more information about the Document Viewer:

- [Supported File Types on page 104.](#)
- [Document Viewer Toolbar and Right-Click Menu Options on page 107.](#)
- [Annotating and Redacting Documents on page 112.](#)
- [Resizing Annotations and Redactions on page 116.](#)
- [Moving Annotations and Redactions on page 116.](#)
- [Modifying Annotation and Redaction Colors on page 117.](#)
- [Modifying Annotation Text on page 118.](#)
- [Modifying Font Sizes on page 118.](#)
- [Deleting Annotations and Redactions on page 116.](#)
- [Resizing Documents in the Document Viewer on page 111.](#)

- [Resizing the Document Viewer on page 111.](#)
- [Rotating Documents on page 111.](#)
- [Zooming in and Out on page 111.](#)

## Supported File Types

You can view the documents with file types of the following:

Nolij Web supports the following file types.

### Word Processor Formats ¶

- ODF Text Document (\*.odt)
- ODF Text Document Template (\*.ott)
- OpenOffice.org 1.0 Text Document (\*.swx)
- OpenOffice.org 1.0 Text Document Template (\*.swx)
- Microsoft Word 97, 2000, XP (\*.doc)
- Microsoft Word 97, 2000, XP Template (\*.dot)
- Microsoft Word 6.0, 95 (\*.doc)
- Microsoft Word 95 Template (\*.dot)
- Rich Text Format (\*.rtf)
- StarWriter 3.0 to 5.0 (\*.sdw)
- StarWriter 3.0 to 5.0 Templates (\*.vor)
- Text (\*.txt)
- Text Encoded (\*.txt)
- HTML Document (\*.html; \*.htm)
- AportisDoc (Palm) (\*.pdb)
- DocBook (\*.xml)
- Microsoft WinWord 5 (\*.doc)
- Microsoft Word 2003 XML (\*.xml)
- Microsoft Word 2007 XML (\*.docx; \*.docm)
- Microsoft Word 2007 XML Template (\*.dotx; \*.dotm)
- Pocket Word (\*.psw)
- StarWriter 1.0 (\*.sdw)
- StarWriter 2.0 (\*.sdw)
- StarWriter DOS (\*.txt)



- T602 Document (\*.602; \*.txt)
- Unified Office Format Text (\*.uot; \*.uof)
- Corel WordPerfect Document (\*.wpd)
- Hangul WP 97 (\*.hwp)

#### **Spreadsheets ¶**

- ODF Spreadsheet (\*.ods)
- ODF Spreadsheet Template (\*.ots)
- OpenOffice.org 1.0 Spreadsheet (\*.sxc)
- OpenOffice.org 1.0 Spreadsheet Template (\*.stc)
- Data Interchange Format (\*.dif)
- dBASE (\*.dbf)
- Microsoft Excel 97, 2000, XP (\*.xls; \*.xlc; \*.xlm; \*.xlw)
- Microsoft Excel 97, 2000, XP Template (\*.xlt)
- Microsoft Excel 4.x to 5.0, 95 (\*.xls; \*.xlc; \*.xlm; \*.xlw)
- Microsoft Excel 4.x to 5.0, 95 Templates (\*.xlt)
- Rich Text Format (OpenOffice.org Calc) (\*.rtf)
- StarCalc 3.0 to 5.0 (\*.sdc)
- StarCalc 3.0 to 5.0 Templates (\*.vor)
- StarCalc 1.0 (\*.sdc)
- SYLK (\*.slk)
- Text CSV (\*.csv; \*.txt; \*.xls)
- Microsoft Excel 2007 Binary (\*.xlsb)
- Microsoft Excel 2007 XML (\*.xlsm; \*.xlsx)
- Microsoft Excel 2007 XML Template (\*.xltm, \*.xltx)
- IBM Lotus 1-2-3 (\*.wk1; \*.wks; \*.123)
- Microsoft Excel 2003 XML (\*.xml)
- Pocket XML (\*.pxl)
- Unified Office Format spreadsheet (\*.uos; \*.uof)

#### **Presentation Formats ¶**

- ODF Presentation (\*.odp)
- ODF Presentation Template (\*.otp)
- OpenOffice.org 1.0 Presentation (\*.sxi)

- OpenOffice.org 1.0 Presentation Template (\*.sti)
- Microsoft PowerPoint 97, 200, XP (\*.ppt; \*.pps)
- Microsoft PowerPoint 97, 2000, XP Template (\*.pot)
- OpenOffice.org 1.0 Drawing (OpenOffice.org Impress) (.sxd)
- StarDraw 3.0, 5.0 (StarImpress) (\*.sda; \*.sdd)
- StarImpress 4.0, 5.0 (\*.sdd; \*.sdp)
- StarImpress 4.0, 5.0 (\*.vor)
- CGM - Computer Graphics Metafile (\*.cgm)
- Microsoft PowerPoint 2007 XML (\*.pptm; \*.pptx)
- Microsoft PowerPoint 2007 XML Template (\*.potm; \*.potx)
- Unified Office Format presentation (\*.uop; \*.uof)
- ODF Drawing (Impress) (\*.odg)

#### **Drawing/Image Formats ¶**

- ODF Drawing (\*.odg)
- ODF Drawing Template (\*.otg)
- OpenOffice.org 1.0 Drawing (\*.sxd)
- OpenOffice.org 1.0 Drawing Template (\*.std)
- StarDraw 3.0, 5.0 Templates (\*.vor)
- PDF - Portable Document Format (\*.pdf)
- SVM - StarView Metafile (\*.svm)
- WMF - Windows Metafile (\*.wmf)
- BMP - Windows Bitmap (\*.bmp)
- GIF - Graphics Interchange Format (\*.gif)
- JPEG - Joint Photographic Experts Group (\*.jpg; \*.jpeg; \*.jif; \*.jpe)
- PBM - Portable Bitmap (\*.pbm)
- PCX - Zsoft Paintbrush (\*.pcx)
- PGM - Portable Greymap (\*.pgm)
- PNG - Portable Network Graphic (\*.png)
- PPM - Portable Pixelmap (\*.ppm)
- PSD - Adobe Photoshop (\*.psd)
- RAS - Sun Raster Image (\*.ras)
- TGA - Truevision Targa (\*.tga)

- TIFF - Tagged Image File Format (\*.tif; \*.tiff)
- XBM - X Bitmap (\*.xbm)
- XPM - X PixMap (\*.xpm)
- PCD - Kodak Photo CD (768x512)(\*.pcd)
- PCD - Kodak Photo CD (192x128)(\*.pcd)
- PCD - Kodak Photo CD (384x256)(\*.pcd)

#### **Mail Messages ¶**

- MSG Microsoft Exchange Message Format (\*.msg)
- TXT Encoded text mail message (\*.eml; \*.txt)

#### **Web Pages ¶**

- MHT Microsoft Archived Web Format (\*.mht)
- HTML - Hypertext Markup Language (\*.html; \*.htm)






#### **Mathematical Notation ¶**

- ODF Formula (\*.odf)
- OpenOffice.org 1.0 Formula (\*.sxm)
- StarMath 2.0 to 5.0 (\*.smf)
- MathML 1.01 (\*.mml)

## **Document Viewer Toolbar and Right-Click Menu Options**

The following table describes the icons in the Document Viewer toolbar and what you can do with them. You can also access many of these features and additional features when you right-click anywhere in the Document Viewer and open a popup menu of options.








**Table 6: Document Viewer Toolbar Icons, Right-Click Menu Options, and Descriptions**

| Icon  | Description       | Right-Click Menu Option                   | Function  | Available for Nolij Web Workflows | Available for Imagenow Views or Workflows |
|---|-------------------|---|---|-----------------------------------|---|
| N/A   | Add scanned pages | Scan Append                               | Adds scanned pages from a scanner to the Nolij Web document. Refer to <a href="#">Adding Scanned Pages to Documents on page 57</a> .  | Yes                               | No  |
| N/A   | Rescan page       | Rescan Page                               | Rescans a page and replaces the selected page in the Document Viewer with the scanned page. Refer to <a href="#">Rescanning Pages on page 56</a> .  | Yes                               | No  |
|    | Hand Mode         | N/A                                       | Allows you to select the document and move it with your pointer. The Document Viewer displays documents in sections. When you hover your mouse over the document in Hand Mode, the pointer changes to  . Then, click a document to select it; you can move the document in any direction, to view the desired portion of the document. | Yes                               | Yes                                       |
|  | Select            | N/A                                       | Allows you to select an annotation for editing.   | Yes                               | No  |
|  | Print             | N/A                                       | Prints a document. Refer to <a href="#">Printing Documents on page 110</a> .  | Yes                               | Yes                                       |
|  | Extract           | Extract Current Page<br>Extract All Pages | Extracts a selected page or all pages from the document. Refer to <a href="#">Extracting Pages From Documents on page 112</a> .   | Yes                               | No  |

**Table 6: Document Viewer Toolbar Icons, Right-Click Menu Options, and Descriptions (Continued)**

| Icon  | Description             | Right-Click Menu Option | Function  | Available for Nolij Web Workflows | Available for Imagenow Views or Workflows |
|---|-------------------------|-------------------------|---|-----------------------------------|---|
|    | Annotations Tools       |                         |   | Yes                               | No  |
|    |                         | Highlight               | Highlights a document. Refer to <a href="#">Highlighting Documents on page 113</a> .  | Yes                               | No  |
|    |                         | Redaction               | Redacts (obscures) an area of the document. Refer to <a href="#">Redacting Documents on page 113</a> .  | Yes                               | No  |
|    |                         | Stamp                   | Provides options for stamping a document with a graphic or text stamp. Refer to <a href="#">Stamping Documents on page 114</a> .<br>This option appears only if you have privileges to view and use stamps. | Yes                               | No  |
|  |                         | Circle                  | Draws a circle on the document. Refer to <a href="#">Drawing Circles on page 114</a> .  | Yes                               | No  |
|  |                         | Free Text               | Adds free text on the document. Refer to <a href="#">Adding Free Text on page 115</a> .   | Yes                               | No  |
|  |                         | Line                    | Draws a line on the document. Refer to  | Yes                               | No  |
|  |                         | Square                  | Draws a square on the document. Refer to <a href="#">Drawing Squares on page 115</a> .  | Yes                               | No  |
|  |                         | Sticky Note             | Adds a sticky note to the document. Refer to <a href="#">Adding Sticky Notes on page 115</a> .  | Yes                               | No  |
|   | Hide                    | Hide                    | Shows or hides document annotations. Refer to <a href="#">Showing and Hiding Annotations on page 112</a> .  | Yes                               | No  |
|  | Rotate clockwise        | N/A                     | Rotates the document clockwise. Refer to <a href="#">Rotating Documents on page 111</a> .   | Yes                               | Yes                                       |
|  | Rotate counterclockwise | N/A                     | Rotates the document counterclockwise. Refer to <a href="#">Rotating Documents on page 111</a> .  | Yes                               | Yes                                       |


**Table 6: Document Viewer Toolbar Icons, Right-Click Menu Options, and Descriptions (Continued)**

| Icon  | Description | Right-Click Menu Option | Function   | Available for Nolij Web Workflows | Available for Imagenow Views or Workflows |
|---|-------------|-------------------------|--|-----------------------------------|---|
|    | Zoom In     | Zoom In                 | Zooms in on the document. Refer to <a href="#">Zooming in and Out on page 111</a> .  | Yes                               | Yes                                       |
|    | Zoom Out    | Zoom Out                | Zooms out of the document. Refer to <a href="#">Zooming in and Out on page 111</a> .   | Yes                               | Yes                                       |
|    | Fit Width   | Fit Width               | Resizes the document to fit it into the width of the Document Viewer. Refer to <a href="#">Resizing Documents in the Document Viewer on page 111</a> . | Yes                               | Yes                                       |
|    | Fit Page    | Fit Page                | Resizes the document to fit it into the entire Document viewer. Refer to <a href="#">Resizing Documents in the Document Viewer on page 111</a> .       | Yes                               | Yes                                       |
|  | Maximize    | N/A                     | Resizes the Document Viewer so that it fits into the entire browser window. Refer to <a href="#">Resizing the Document Viewer on page 111</a> .        | Yes                               | Yes                                       |
|  | Restore     | N/A                     | Restores the Document Viewer to its original size, after you maximize or vertically maximize it.   | Yes                               | Yes                                       |
|  | Save        | N/A                     | Saves annotations to the document.   | Yes                               | No  |

If a document is too large to be fully displayed in the Document Viewer, scrollbars appear; you can use the scrollbars to navigate to portions of the document that are not displayed. If you use a mouse with a mouse wheel, you can vertically scroll through a document.



## Printing Documents

To print a document, do the following:

1. In the Document Viewer toolbar, click  .  
The Print dialog box for the browser appears.
2. Set the appropriate print settings and print the document.  
Any document annotations are printed.

## Rotating Documents


Do one of the following:

- To rotate a document counterclockwise, click  in the Document Viewer toolbar.
- To rotate a document clockwise, click  in the Document Viewer toolbar.


Any annotations are also rotated.

## Zooming in and Out

To magnify (zoom in) the size of a document, do one of the following:

- Click  in the Document Viewer toolbar.
- Right-click anywhere in the Document Viewer and select **Zoom In** from the popup menu.

To reduce (zoom out) the size of a document, do one of the following:


- Click  in the Document Viewer toolbar.
- Right-click anywhere in the Document Viewer and select **Zoom Out** from the popup menu.

You cannot zoom out of a document that fits the entire area of the Document Viewer.


## Resizing Documents in the Document Viewer

Do one of the following:

To resize a document to fit the width of the Document Viewer, do one of the following:


- Click  in the Document Viewer toolbar.
- Right-click anywhere in the Document Viewer and select **Fit Width** from the popup menu.


To resize a document to fit in the entire area of the Document Viewer, do one of the following:

- Click  in the Document Viewer toolbar.
- Right-click anywhere in the Document Viewer and select **Fit Page** from the popup menu.

You cannot zoom out of a document that fits in the entire area of the Document Viewer.


## Resizing the Document Viewer

To resize the Document Viewer to fit into the entire width of the browser window, click  in the Document Viewer toolbar. All other panes, excluding the main toolbar and the Form pane (if it is

configured), are collapsed to the left of the Document Viewer. To restore the Document Viewer to its original size and to restore the excluded panes, click .

## Extracting Pages From Documents

To extract a page or all pages from a document, do the following:

1. In the Document Viewer, navigate to the page of the document that you want to extract.
2. In the Document Viewer toolbar, click .
3. Do one of the following.
  - To extract the page you are currently viewing, select **Extract Current Page**. The Extract Page dialog box appears, asking if you want to delete the extracted page from the document. If you want to delete the extracted page, click **Yes**. If you do not want the page deleted, click **No**. The page is extracted from the document, and it appears in the Folder Objects pane, which refreshes to display the extracted page as a new document.
  - To extract all pages, select **Extract All Pages**. A dialog box appears, prompting you to confirm that you want to extract all pages, creating a new document for each extracted page. Click **Yes** to confirm. The pages are extracted from the document and appear in the Folder Objects pane, which refreshes to display all the extracted pages as new documents.



## Showing and Hiding Annotations

To show or hide annotations in a document, click , then select **Hide** from the popup menu.

## Annotating and Redacting Documents

Your user role determines if you can annotate and redact documents. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

You can annotate a document in a number of ways, such as highlighting information, adding text, and inserting sticky notes. You can also redact (obscure) information.

**Note** When you add an annotation, you can continue to add annotations of the same type until you click  or .

**Note** The annotation size, font size, and background color you use are saved as preferences for that annotation type. The next time you add annotations of a particular annotation type, these preferences are applied.






**Note** Refer to these topics for detailed information:

- [Highlighting Documents on page 113.](#)
- [Redacting Documents on page 113.](#)
- [Stamping Documents on page 114.](#)
- [Drawing Circles on page 114.](#)
- [Drawing Lines on page 114.](#)
- [Adding Free Text on page 115.](#)
- [Drawing Squares on page 115.](#)
- [Adding Sticky Notes on page 115.](#)

**Note** You cannot see annotations if you open a document in an application outside Nolij Web.




## Highlighting Documents

To highlight a document, do the following:

1. Do one of the following:
  - Click  , then click  in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Highlight** from the popup menu.
2. Click the document and drag your mouse across the area you want the highlight to appear.
3. Click  to save your changes.

## Redacting Documents




To obscure an area of a document, do the following:

1. Do one of the following:
  - Click  , then click  in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Redaction** from the popup menu.
2. Click the document in the area you want to obscure and drag your mouse across the area you want the redaction to appear.
3. Click  to save your changes.

## Stamping Documents




Your user role determines if you can stamp documents. For more information about roles, refer to [Understanding Nolij Web User Roles and Privileges on page 29](#).

To place a rubber stamp on a document, do the following:

1. Do one of the following:
  - Click , then click  in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Stamp** from the popup menu.
2. To add a custom image or text stamp, which are configured by your administrator, select the appropriate stamp from popup menu.
3. Click the document in the area you want to stamp and drag your mouse across it.
4. Click  to save your changes.




## Drawing Circles

To draw a circle on a document, do the following:

1. Do one of the following:
  - Click , then click  in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Circle** from the popup menu.
2. Click the document and drag your mouse across the area you want the circle to appear.
3. Click  to save your changes.



## Drawing Lines

To draw a circle on a document, do the following:

1. Do one of the following:
  - Click , then click  in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Line** from the popup menu.
2. Click the document and drag your mouse across the area you want the line to appear.
3. Click  to save your changes.




## Adding Free Text

To place a text box on a document, do the following:

1. Do one of the following:
  - Click , then click **Ab** in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Free Text** from the popup menu.
2. Click the document and drag your mouse across the area you want the text box to appear.
3. Click  to save your changes.



## Drawing Squares

To draw a square on a document, do the following:

1. Do one of the following:
  - Click , then click  in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Square** from the popup menu.
2. Click the document and drag your mouse across the area you want the square to appear.
3. Click  to save your changes.







## Adding Sticky Notes

To add a sticky note to a document, do the following:



1. Do one of the following:
  - Click , then click **Ab** in the Document Viewer toolbar.
  - Right-click anywhere in the Document Viewer and select **Annotation Tools > Sticky Note** from the popup menu.
2. Click the document drag your mouse across the area you want the sticky note to appear.
3. Click  to save your changes.

## Resizing Annotations and Redactions

To resize an annotation or redaction:



1. In the Document Viewer toolbar, click .
2. In the Document Viewer, place your mouse on the edge of an annotation or redaction until the mouse pointer changes to  (to resize horizontally), to  (to resize vertically), or to  or  (to resize both horizontally and vertically).
3. Click the annotation or redaction and drag and drop it to the desired location to resize it.
4. Click  to save your changes.

## Moving Annotations and Redactions

1. In the Document Viewer toolbar, click .
2. In the Document Viewer, click the annotation or redaction you want to move.
3. Drag and drop it to the location in which you want it to appear.
4. Click  to save your changes.


## Deleting Annotations and Redactions

To delete an annotation or redaction:


1. In the Document Viewer toolbar, click .
2. In the Document Viewer, right-click the annotation or redaction you want to delete.
3. From the popup menu, select **Delete Annotation**.  
The annotation or redaction is deleted.
4. Click  to save your changes.

## Modifying Annotation and Redaction Colors

You can modify the background color of annotations (except free text) and redactions, and you can modify the font color of free text and sticky note annotations. The colors you select for an annotation or redaction are saved as preferences for the annotation type.


1. In the Document Viewer toolbar, click .
2. In the Document Viewer, right-click the annotation or redaction for which you want to modify colors and select **Color** from the popup menu.
3. You can select a color from the color pallet that appears in the popup menu, or you can set a custom color by selecting **Color Chooser**. Proceed to the next step if you are setting a custom color.
4. Set the color of the annotation or redaction by doing any of the following:

- Use the color selector or color slider.

In the color selector area, select  and move it to the desired color, or click the color slider and move it to the desired color.



- Set a color by providing the appropriate values in the H, S, and V text fields to configure the hue, saturation, and value.
  1. Click the H radio button and type a number in the H text field or use the color slider to set the hue. Hue is expressed as an angle from 0 to 360 degrees corresponding to a location on the color wheel.
  2. Set the saturation and value. Click the S or V radio button and set the value using the color selector area or the color slider, or type numbers in the S or V fields. Saturation and value are expressed as percentages.
- Set a color by providing the appropriate values in the R, G, and B fields by configuring the value of red, green, and blue components of a color. Do one of the following:
  - Click the R, G, or B radio button and type numbers in the R, G, and B text fields. Valid values range from 0 to 255, where 0 is no color, and 255 is pure color.
  - Click the R, G, or B radio button and set the color using the color selector area or the color slider.
- Set a color by providing its hexadecimal value, which is the six-digit number that defines the red, green, and blue components of a color. Each digit ranges in value from 0 to f.

In the # text field, type the hexadecimal value. For instance, type `ffffff` for white or `ff0000` for pure red.

5. Click **Save** to save your changes and close the dialog box.
6. Click  to save your changes.



## Modifying Annotation Text

You can modify the text in free text and sticky note annotations by doing the following:

1. In the Document Viewer toolbar, click .
2. In the Document Viewer, right-click the annotation for which you want to modify text.
3. From the popup menu, select **Edit Text**.
4. Add, modify, and delete text as appropriate.
5. Click  to save your changes.

## Modifying Font Sizes

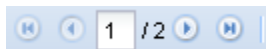
You can modify the font size of the text in free text and sticky note annotations by doing the following:

1. In the Document Viewer toolbar, click .
2. In the Document Viewer, right-click the annotation for which you want to modify the font size.
3. From the popup menu, select **Font Size**.  
The Font Size dialog box appears.
4. Type the font size that you want to use; values can be 1 through 50. The higher the value, the larger the font size.
5. Click **OK** to close the dialog box and apply your changes.
6. Click  to save your changes.

## Bookmarking Documents in Nolij Web Workflows

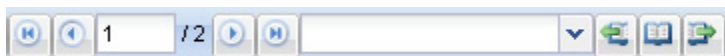
When you view documents in Nolij Web workflows only, when a multipage document is open, elements for multipage navigation appear. These allow you to navigate to different pages in a document. The bookmark elements also appear.

**Figure 36: Multipage Navigation Elements**



In addition, if you have a mouse with a mouse wheel, you can use it to navigate to the next or previous page. When you are at the top of a document page and scroll up on the mouse wheel, you navigate to the previous page; when you are at the bottom of a page and scroll down, you navigate to the next page.

**Figure 37: Bookmark Elements**




For documents in Nolij Web workflows only, you can add bookmarks to pages in multipage documents, which you can use to navigate to a specific page.



Refer to these topics for more information:

- [Adding Bookmarks on page 119.](#)
- [Deleting Bookmarks on page 119.](#)

## Adding Bookmarks


To add bookmark to a page, do the following:

1. In the Document Viewer, navigate to the page you want to bookmark.
2. In the bookmark field in the toolbar, type the text you want to use for the bookmark.
3. Click .

The page is bookmarked. You can navigate to a bookmarked page by selecting the appropriate bookmark from the bookmark drop-down list or clicking the  or  buttons.

## Deleting Bookmarks

To delete a bookmark, do the following:

1. In the Document Viewer in the toolbar, select the bookmark that you want to delete in the bookmark field.
2. Click .

The bookmark is deleted.

## Working With Forms

**Note** You can only view and use forms when you have the appropriate privileges.

Forms display SIS information associated with a folder. Additionally, they can be used for collecting and adding information to the database directly. You can retrieve this information later, modify it, and resave it to the database.

You can detach a form from Nolij Web and move it within the browser. Refer to [Detaching and Attaching Forms in the Form Pane on page 121.](#)

To view and use a form, do the following:

1. Do one of the following.
  - For Nolij Web workflows, select the workflow in which to work from the Workflow/View drop-down box. Next, find the folder for which you want to view the form and click it in the Query Results pane.
  - For ImageNow workflows, select the workflow in which to work from the Workflow/View drop-down box. Find the folder for which you want to view the form and click it in the Workflow pane.
  - For ImageNow views, select the View in which you want to work from the Workflow/View drop-down box. Find the folder for which you want to view the form and click it in the View pane.

The form displays additional information associated with the folder.

2. A drop-down box appears in the Form pane and displays all forms you can use. From the drop-down box, select the form you want to use; the Form pane refreshes and displays the selected form.
3. If the form is configured appropriately, you can add, change, or delete information as needed. When you modify information, a red triangle icon appears in the upper left corner of the field.

**Figure 38: Modified Form Field**

|              |  |
|--------------|--|
| Name:        | <input type="text" value="Smith, Jane"/>   |
| City, State: | <input type="text" value="Cleveland, OH"/> |

Your Nolij Web administrator may have configured the form field to accept certain criteria; for example, the entry may need to have a certain amount of characters or may not contain empty spaces for the entry to be valid.


If the entry does not meet the specified criteria, the field is highlighted in red.



**Figure 39: Highlighted Form Field**

The screenshot shows a web form with a light blue border and a title bar that says "Form". Inside the form, there are three text input fields. The first field is labeled "First Name" and contains the text "Selma". The second field is labeled "Last Name" and contains the text "Gage". The third field is labeled "Middle Initial" and contains the text "LL". This third field is highlighted with a red border and has a small red circle with an exclamation mark next to it, indicating a validation error.

You can still save such information; Nolij Web displays a message indicating that the information is not valid and prompts you if you want to continue saving the information.

4. To save your changes, click .


Changes are saved to the database.

Depending on your Nolij Web configuration, a form may refresh when you click a different document or folder.

The Folder Objects pane is refreshed and displays updated information.

## Detaching and Attaching Forms in the Form Pane

To detach a form, which allows you to display the Form in a detachable window and which you can move within the browser, do the following:


- In the Form pane, click .





The form is displayed in a window detached from Nolij Web.


Figure 40: Detached Form Window

The screenshot shows a 'Form View' window with the following content:

- Name:** Berg, Sierra
- City, State:** Point Loma, CA
- SSN:** [Empty]
- County:** [Empty]
- HS:** [Empty]
- Counselor:** [Empty]
- Team:**
  - D: 0
  - F: 0
  - Misconduct: No
  - Convicted: No
  - SA1: 0
  - SA2: 0
  - SA3: 0
  - SA4: 0
  - SA5: 0
  - Commo: 013/043-Re
  - 015-Joint E
  - 042-English
  - 061-Passed
- Academically Competitive File Review**
- FINAL EVALUATION** (Superior, Excellent, Advanc)
- Academic progress and trends:**
  - GPA: 36.5
  - SAT-T: 1300
  - ACT-C: 40
  - Read one: [ ] [ ] [ ]
  - Read two: [ ] [ ] [ ]
- Intellectual curiosity and challenge:**
  - CurDif: X
  - AP/IB Courses: 5
  - Other: [ ]
  - Read one: [ ] [ ] [ ]
  - Read two: [ ] [ ] [ ]
- Writing, creativity and self-expression:**
  - Read one: [ ] [ ] [ ]
  - Read two: [ ] [ ] [ ]

You can move the form by clicking on it; when the mouse pointer changes to , press down on your mouse and move the window to the appropriate location.

To resize the form, place your mouse on the edge of the form until the mouse pointer changes to  (to resize horizontally),  (to resize vertically), or to  or  (to resize both horizontally and vertically).

You can reattach the form to Nolij Web by clicking  in the detached form. The form is reattached to Nolij Web in the Form pane.

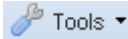
## Working with Reports

Depending on your Nolij Web configuration and your permissions, you can view reports and advanced reports. Reports are older formats of reports supported in Nolij Web; advanced reports are in a newer format.

Refer to the following topics for information about viewing and working with reports:










- [Report Viewer Toolbar on page 123.](#)
- [Viewing Reports on page 124.](#)
- [Exporting Reports on page 125.](#)
- [Viewing Advanced Reports on page 126.](#)
- [Exporting Advanced Reports on page 126.](#)
- [Printing Advanced Reports on page 126.](#)

### Report Viewer Toolbar

You can open reports by clicking  in the main toolbar and selecting **View Reports** from the popup menu. The View Reports window opens in a separate window and displays the reports you can view.

The View Reports toolbar contains the following buttons:

**Table 7: Report Viewer Toolbar Buttons and Descriptions**

| Button  | Description          | Function                                      |
|---|----------------------|---|
|    | Split Screen         | Divides the Report Viewer into two panes.     |
|    | Single Screen        | Merges a split screen into a single screen.   |
|    | Export to Text File  | Exports the report to a text file.            |
|    | Export to Excel File | Exports the report to a Microsoft Excel file. |
|    | Pie Chart            | Displays the report as a pie chart.           |
|    | Line Chart           | Displays the report as a line chart.          |
|  | Area Chart           | Displays the report as an area chart.         |
|  | Point Chart          | Displays the report as a point chart.         |
|  | Bar Chart            | Displays the report as a bar chart.           |

## Viewing Reports






**Note** You can view reports only when you have the appropriate privileges.


To view reports, do the following:

1. Select **Tools > View Reports**.

The View Reports window opens in a separate window.

2. Click the Report Type drop-down button and select the report you want to view.
3. You can select the format in which to view the report by selecting the appropriate option in the toolbar. You can select the following formats:

- Pie chart: Click the  button.
- Line chart: Click the  button.
- Area chart: Click the  button.
- Point chart: Click the  button.
- Bar chart: Click the  button.

Additionally, you can split the screen into two panes by clicking . Doing so enables you to view two reports—or one report in two different formats—at one time. Click  to merge the screens into a single screen.



## Exporting Reports

You can export a report as a text or Microsoft Excel file by doing the following:

1. Select **Tools > View Reports**.

The View Reports window opens in a separate window.

2. In the Report Viewer toolbar, do one of the following:

- Click  to export the report as a text file. The text file appears in a popup window in your browser.
- Click  to export the report as a Microsoft Excel file.


3. Set the location where you want to save the file and save it.

## Viewing Advanced Reports

1. Select **Tools > View Advanced Reports**.

The Reports window opens in a separate window.

2. From the drop-down box, select the report you want to view.


The report is displayed as a preview, and only the first page of the report is displayed. To view the entire report, click ; the report is displayed in a separate window.

## Exporting Advanced Reports

You can export a report as a CSV file (comma-separated values file; for example, Microsoft Excel) by doing the following:

3. Select **Tools > View Advanced Reports**.

The Reports window opens in a separate window.

4. Click  to export the report as a CSV file.

5. Set the location where you want to save the file and save it.

## Printing Advanced Reports

1. Select **Tools > View Advanced Reports**.

The Reports window opens in a separate window.

2. From the drop-down box, select the report you want to print.

3. Click .

## Working with the Communication Window

You can communicate with other Nolij Web users and view informational and debug messages in the Communication pane. Refer to these topics for more information:

- [Collaborating with Nolij Web Users on page 127.](#)
- [Viewing Console Messages on page 127.](#)
- [Viewing Debug Messages on page 128.](#)

## Collaborating with Nolij Web Users

**Note** You can communicate only with other users who have permission to use the collaboration tool.

To collaborate with other users, do the following:

1. Select **Tools > Communication Window**.

The Communication Window dialog box appears.

2. Click the **Collaboration** tab.

A list of Nolij Web users and their corresponding roles appears.

Initially, you can view only users who are online or who have been online since you logged in. To see all users in a role, both online and offline, double-click the role. The names of users who are offline appear in italics.

3. Double-click the user with whom you want to communicate.

A dialog box appears in which you type the desired text.

You can send messages to offline users. An offline user receives the message the next time he or she logs in. The message you send contains the time and date that you sent it.


**Note** You cannot see messages sent to you unless you are logged in using the role to which messages were sent.

4. Click Send to send the message to the user.

## Viewing Collaboration History

To view all previous messages you have sent to and received from another user, do the following:

1. Open a collaboration session with the user. Refer to [Collaborating with Nolij Web Users on page 127](#).

2. Click  in the collaboration dialog box.

3. Click **Show All History**.

All messages exchanged between you and the other user are displayed.

## Viewing Console Messages

In the Collaboration window, click the **Console** tab to view informational messages, such as the number of results returned from a query.

To clear messages, click  and click **Clear**.

## Viewing Debug Messages

If problems related to the user interface occur, the Debug tab appears in the Communication pane; click it to view debug messages.



## Appendix A: Troubleshooting Nolij Web

Refer to [Java Applet Errors on page 129](#) for information about troubleshooting Nolij Web.

### Java Applet Errors

When Nolij Web loads, it requests the browser to load an applet. The browser should either start Java Runtime Engine (JRE), if it is installed on the computer, or prompt you to download JRE.

However, you may receive messages in Nolij Web or from your browser about Java errors, such as problems communicating with Java Applets or RuntimeException errors. This could be caused by any of the following:

- You may have permanently rejected the prompt to download and install the appropriate version of JRE.
- The browser is configured to reject applets.
- An older version of JRE is installed on your computer, and it is incompatible with Nolij Web.

To work around this issue, check the version of Java running on your computer by going to <http://www.java.com/en/download/help/testvm.xml>. You can download the appropriate version of JRE from this website if necessary.

It is recommended that you use JRE 1.6.0\_13 or later.

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