



Perceptive Experience – Workflow Quick-start Guide



What is Perceptive Experience?

Perceptive Experience is an HTML5-based version of Perceptive Content (formally ImageNow). You can use any browser to access Perceptive Experience. You can use Perceptive Experience in place of the Perceptive Content Client for most features. If you scan, use the ImageNow Printer, or link documents using Application Plans, you will need to use the Perceptive Content Client. Contact your workstation support team if you need the Client installed.

Access & Log in:

1. Browse to imagenowexp.ku.edu
2. Log in using your KU Online ID and password.
3. Select the **Workflow** icon to begin working with existing workflows.

Search for workflows:

1. Select the **Workflow** icon.
2. Select a workflow from the list of Workflow Processes.
3. Click into the **Search** window.
4. Select one of the **field parameters**.
5. Select an **operator**.
6. Type or select a search parameter.
7. Select **Add** to add the constraint.
8. Select **Search**.

Notes:

- Constraints outlined with a dashed border have not run
- To edit, select the constraint.
- You can create multiple constraints to search.

View/open a document:

1. Search for document criteria.
2. Select the document you want to open from the displayed list.

Document views & panels:



1. Show/Hide page thumbnails
2. Show/Hide Related Documents.
3. Show/Hide Related Tasks.
4. Show/Hide Forms.
5. Show/Hide Properties.

Working with documents:



1. Download document
2. Export to PDF
3. Print document.
4. Email document
5. Version control. *Note: This option will be greyed out in most cases.*
6. Remove from Workflow
7. Apply Workflow Hold
8. Route Back
9. Route Forward

Notes:

- Settings and options will vary depending on your access.
- This toolbar is only visible after selecting a file(s) from your search using one of the methods above.

Additional resources & help:

howto.ku.edu/perceptive-experience | workflows.ku.edu | In Experience:



Email: imagenow_sn@ku.edu



Working with pages:



1. Back to Documents list	5. Add a page	10. Remove from Workflow
2. Save document	6. Download document.	11. Apply workflow hold
3. Create a task	7. Export to PDF	12. Route back
4. Annotate page (<i>will only show for tiff files</i>)	8. Print	13. Route forward
	9. Send in email	

Note: Settings and options will vary depending on your access.

Add a page:

1. Search for document criteria.
2. Select the document you want to open from the list.
3. Select **Add Page**. 
4. Choose the new page's **location**.
5. Choose the **capture source**.
6. Select **Done**.
7. **Browse** to and select a file (if applicable).
8. Select **Done**.
9. Select **Save**. 
10. Select the **Delete**  icon to delete the page.

Send in email:

1. Select the page or document.
2. Select **Send Email** 
3. Enter the recipient's email address.

Notes:

- *This can be done at the page or document level.*
- *When selecting an item from the document list, select the check box that appears next to the item name.*

Route a workflow queue item:

1. Open the workflow queue item.
2. Complete one of the following actions:
 - Route Forward  sends the document or folder to the next queue in the workflow process.
 - If more than one queue is available, select the route icon next to Route Forward and choose the desired option.
 - Route Back  sends the document or folder back to the previous queue
 - To send back to any queue, select the route icon  next to Route Back then choose the desired option.
 - To send to any queue in the workflow process, select the route icon next to Route Forward and then select Route Anywhere. Choose the desired workflow queue.

Annotations:

1. Select the annotation icon. 
2. Select **Create Annotations** (*tiff files only*).
3. Click on the place on the page where you want to place the annotation.
4. Choose an **annotation type**.
5. Choose an **annotation template**.

Place a workflow queue item on hold:

1. Open the workflow queue.
2. Select the **Hold** icon. 
3. Enter or select a date.
4. Select a reason for placing the queue item on hold (*optional*).
5. Enter the reason you're apply a hold (*optional*).
6. Select **OK**.

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