ImageRight Desktop Migration

Levels of ImageRight

It is important to understand the ImageRight file structure so you can find what you need.

- Location
  - Drawer
    - File
      - Folder
        - Document
          - Page

Open File

You can open files without leaving your desk, and multiple people can open the same file at the same time.

1. Click the Open File icon – .
2. Enter the file number, file name, search by wildcard (%), or click the Recent Files tab.

File Tree Navigation

Navigating the file tree in ImageRight helps you quickly find the documents and pages you are looking for.

Move up/down	↑ or ↓
Previous page	Ctrl+ Page Up
Next page	Ctrl+ Page Down
Expand folder in file tree	Double-click or →
Collapse folder in file tree	Double-click or ←
Top of file tree	Home Key
Bottom of file tree	End Key

Image Viewer

You can manipulate the image viewer to help you see the image.

Zoom in		Ctrl+I or mouse
Zoom out		Ctrl+O
Reset the image		Ctrl+R or double-click
View the image full screen		Ctrl+M
Rotate the image 90°		Ctrl+S
Flip the image 180°		Ctrl+F
Rotate the image 270°		Ctrl+G
View the Negative		Ctrl+N
Move image to the right		Ctrl+L
Move image to the bottom		Ctrl+T

View in New Window

This option is useful if you need to compare two images.

1. On the Annotation toolbar, click View in New Window.

Annotations

Annotations work the same, and new annotations are available.

Print Into a File

Most electronic documentation that needs to be added to the file can be printed directly into ImageRight.

1. In a program external to ImageRight, click the Print command.
2. Choose ImageRight Document Writer and click OK.
3. To exclude pages, select the pages and click Reject.
4. Click the Import Into tab and choose the appropriate filing options.
5. Click Import when the selections are correct.

E-Mail

1. Select the level to send via e-mail, for example, documents or pages.
2. On the File menu, point at Send To, and click Mail Recipient.
3. Select the options on the Preview tab.
4. Click the Message tab and complete the message. The options are similar to other e-mail programs.
5. Type your message, and then click Send.
6. Select the filing options for the e-mail.

Fax

1. Select the level to fax, for example, document or page.
2. On the File menu, point at Send to, and click Fax Recipient.
3. Select the options on the Preview tab including Cover Page.
4. Click the Recipients tab. To enter a fax recipient you can select a number from the address book by clicking To or type in the fax number and add it to the recipients.
5. Click the Message tab, and then complete the recipients' information (fax number, etc.), subject, and select the cover page.
6. Check the fax status.
   – On the File menu, point to Send To, and click Fax Status.

Cut, Copy Paste

The cut and copy functions are very similar to those in 3.*x*. However, the Paste Into function has been replaced by Paste Special.

1. Copy or cut the pages or documents.
2. Select your destination.
3. On the Edit menu, point to Paste, and then click Paste Special.
4. Click Change Document Type, and then select the new type, if you want to change the document type

Information Update

The Display Record Update and Page Descriptions functionality has been replaced by Information Update and Properties.

1. Select the level you want to Update.
2. On the Edit menu, click Information Update or press F2.
3. Type the new description and press Enter.

Refresh

Refresh is helpful to get the most recent copy of the file.

1. On the View menu, click Refresh File Tree

To Do List

You can find your work in the to do list, a list of tasks ready to be processed.

1. Click the To Do List tab, or click To Do List on the Workflow menu.
2. Choose the workflow, step, and user.
3. Click the Fetch button.

Each row displayed in the list is a task. With the list displayed, you can:

- Click the Browse Image button to view the first page of the task.
- Scroll to see all columns.
- See the total number of tasks at the bottom.
- View tasks as they are sorted or manually sort the list by clicking on the column headings. The header of the column you sort by is marked with △ (ascending) or ▽(descending).

Auto Process

Auto Processing has replaced the Data Entry function. If the task is in an Indexing step, the Document Indexing dialog box will be opened.

1. Click the To Do List tab.
2. Select the workflow, step, and user.
3. Click Auto Process.
4. Process and release the task presented.
5. To skip a task, click Next Task on the Workflow menu.
6. To retrieve a previously skipped task, click Previous Task on the Workflow menu.
7. To end automatic processing, close the file.

Set Task Attributes

Set Task Attributes was formerly known as Set Criteria. You can set attributes using the same methods you used in 3.*x* to set criteria.

Manual Routing

The Manual Route dialog box has been redesigned. There are some new options; however, all the options serve the same functionality as those in 3.*x*. You can now add a task note when manually routing a task.

Reschedule

The layout of the Reschedule dialog box is the same as the Manual Route dialog box. You can now reschedule tasks for multiple workflows without changing the current workflow.

You can locate rescheduled tasks before the future date is reached.

1. View the to do list, point at Include on the Workflow menu, and then click Future Items.
2. Click Fetch to refresh the list.

Change Task Description

The task description can be updated to provide processing instructions for the next step. The task description will remain throughout the workflow until changed again.

1. Lock and open a task.
2. Update the task description in the navigation pane.

Create New Workflow Task

You can create a task on a page when printing into the ImageRight system.

1. Print the document using the ImageRight Document Writer as you normally would and select the appropriate filing options.
2. On the Task tab check the Create Task box.
3. Select the appropriate workflow, step, user, and priority. You can schedule the task.
4. Type a task description.
5. Click Import/Task.

Diary

The diary functionality is similar. The option to add a diary is New Diary Item on the Workflow Menu, and you can now add a task note at the same time. In the to do list, you can select Include Diary items or (view) Diary Items only from the Workflow Menu.

Help

Additional help is available by selecting ImageRight Help on the Help menu or by pressing F1.