Vertafore

WorkSmart Quick Start

Help

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

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

Add Annotations

Annotations are similar to highlighters and sticky notes. All annotations except the sticky note are permanent.

1. Click the annotation tool you want to use on the annotation toolbar, for example, .
2. Point your mouse to the area of the image where you want to place the annotation.
3. Drag to draw the annotation.

Edit Sticky Notes

1. Select the sticky note (a blue border appears), and then double-click inside the note.
2. When the insertion point appears, edit the text of the note.
3. Click outside the sticky note when changes are complete.

You can delete Sticky Notes at any time.

1. Select the sticky note you want to delete.
2. Right-click the sticky note and click Delete.

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 Printer and click OK. To exclude pages, select the pages and click Reject.
3. Click the Import Into tab and choose the filing options.
4. Click Import when the selections are correct.

Add File Notes

File Notes keep a running log of activity on the file.

1. Open the file to which you want to add the note.
2. On the Edit menu, point to Notes, and then click Insert File Note.
3. Type your note in the Add File Note dialog box.
4. Click OK or Apply when the note is complete.

Email

1. Select the level to send, for example, documents or pages.
2. On the File menu, point to 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 email programs.
5. Type your message, and then click Send.
6. Select the filing options for the email message.

Change Page Order

You can rearrange pages if they get out of order.

1. Select the page you want to move. If you want to move more than one page, select the first page, hold the Ctrl key, and then click each page.
2. On the Edit menu, click Cut.
3. Select the place where pages should be placed.
4. On the Edit menu, click one of the following:
   - Paste Insert to paste before the selected page.
   - Paste Append to paste after the selected page.
   - Paste Into to create a new document.

Refresh

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

1. On the View menu, click Refresh File Tree

Workflow Concepts

- **Workflow** – the path work takes through your office to help it get processed
- **Step** – where tasks stop within the workflow to be processed
- **Task** – notification of work to be done
- **Unassigned task** – not designated for a specific person, visible by all
- **Assigned task** – designated for a specific person, not visible by all
- **Priority** – level of importance (0-9) assigned to a task
- **Release** – allows a task to leave the current step and move to the next

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 Printer as you normally would and select the appropriate filing options.
2. On the Task tab, select the Create Task option.
3. Select the appropriate workflow, step, user, and priority. You can schedule the task.
4. Type a task description.
5. Click Import/Task.

To Do List

You can find your work in the ImageRight 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. Now, 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 △ (ascending) or ▽(descending).

Lock a Task

Locking a task is like taking it out of your inbox so that you can work on it. No one else can work a task that you have locked.

1. Select a task in the To Do List.
2. Right-click and click Lock and Open or simply double-click the task.

Properties of a Locked Task

- Header color is green.
- In the navigation pane:
  - The task icon has a padlock – .
  - The description of the task is below the file tree. Click ⊞ or ⊟ to expand and collapse the description.

Close the file to unlock the task and return it to the To Do List.

1. Display the To Do List, and lock and open a task.
2. Review the task description for additional information.
3. Do your work to process the task.
4. On the Task menu, click Release to move the task to next step in the workflow and close the file.
5. For verification, on the File menu, point to Recent Files and select the file to open it.
6. Review the task description in the Navigation pane and determine what step the task is in now.
7. Close the file.

Work a Locked Task

You can close the file to unlock the task and return it to the To Do List.

1. Display the To Do List and lock and open a task.
2. Review the task description for additional processing information and do your work to process the task.
3. On the Task menu, click Set Task Attributes. Select options to move the task to the next step in the workflow and close the file.
4. What is next
   - Send to the next step and assign it to someone.
   - Manually route.
   - Send to the End step – finish.
5. On the Task menu, click Release to move the task to next step, unassigned, and close the file.

Set Task Attributes

If task attributes are required, the attributes you enter will determine the path the task follows when it is released.

1. Lock and open a task that has related attributes.
2. On the Task menu, click Set Task Attributes.
3. Enter the attributes.

Revised 10.9.2014

4. Select Release on Apply if the task should be moved to the next step.

Auto Process

When you start Auto Process, tasks will be continuously locked and opened as each one is completed. If the task is in an Indexing step, the Indexing Information 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.

Manual Routing

Manual routing is used to move a task to another person or another step in the workflow that is not the typical route.

1. Lock and open a task.
2. On the Task menu, click Manual Routing.
3. Choose the workflow, step, assignment (Assign to *user*), and priority.
4. Enter a description.

Reschedule

If you reschedule a task, it will return to you on the specified date. It will not continue to the next step in the workflow.

1. Lock and open the task to be rescheduled.
2. On the Task menu, click Reschedule.
3. Select the reschedule date and other properties to be applied to the task (time, workflow, step, priority, etc.)
4. Enter an easily understandable description to explain why the task was rescheduled. Include words like: Rescheduled because/for.

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

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

Advanced File Retrieval

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.

Advanced Annotations

- To repeat an annotation, for example, to draw multiple lines, press and hold the Shift key as you select the annotation. You can use the Clear Selection Arrow ( ) to unselect a drawing tool.
- Would you like to know who added an annotation to an image? You can right-click the annotation and click Annotation History on the menu.
- Would you like to view an image without the annotations? You can click to hide annotations. Click the icon again to show annotations.

Change Page Descriptions

Page Descriptions can help you identify a page in a large document.

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

Mark Pages

Marked pages are similar to flagging a page so you quickly find it.

1. Select the page you want to mark.
2. On the Edit menu, point to Page Marks, and then click the desired color.

Attach Files

Attaching files is useful for color photos or working copies of files.

1. On the Edit menu, point to Attach, and then click Files.
2. In the Open dialog box, locate the file to be attached.
3. Select the file and click Open (open the Import dialog box).
4. To exclude files from the attach process, select the files and click Reject.
5. On the Import Into tab, choose the appropriate filing options.
6. Click Import when the selections are correct.

Bookmarks

Bookmarks are similar to your Internet favorites

1. Open the file you wish to bookmark.
2. On the Bookmark menu, click Add and click OK.

Advanced Workflow

Lock a Task through Open File

You can lock a task anytime a file is open, if you have the proper security rights.

1. Open a file that has a task.
2. In the Navigation pane, right-click the task, identified by , to be locked, and then click Lock Tasks.

Change Priority

You can change the priority of a task to indicate increased or decreased importance and help you organize your work.

1. Lock and open a task.
2. On the Task menu, click Change Priority.
3. Select the new priority.
4. You may enter a description and note as needed.

Change Task Description

The task description can be updated to provide processing instructions for the next step.

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

Task Notes

Task notes provide an activity record related to the task, similar to file notes for the file. Your organization may choose to use task notes to facilitate communication while processing tasks

1. Select the task in the navigation pane.
2. On the Task menu, click Task Note.
3. Type your note and click Apply.

Diary

By creating a diary, you set a reminder for a task or file The original task continues in the workflow. You can create a diary on any level at any time.

1. Select the level where you would like to create the diary.
2. On the Workflow menu, click New Diary Item.
3. Enter the properties: description, notes, number of days, time, etc., in the Diary dialog box.
4. View the diary item in the Navigation pane.
5. Release the diary.

You can also view diary items in the To Do List.

1. View the To Do List.
2. On the workflow menu, point at Include and click either Diary Items or Diary Items Only.
3. Click Fetch to refresh the list.