



Document Imaging System

Quick Start Guide

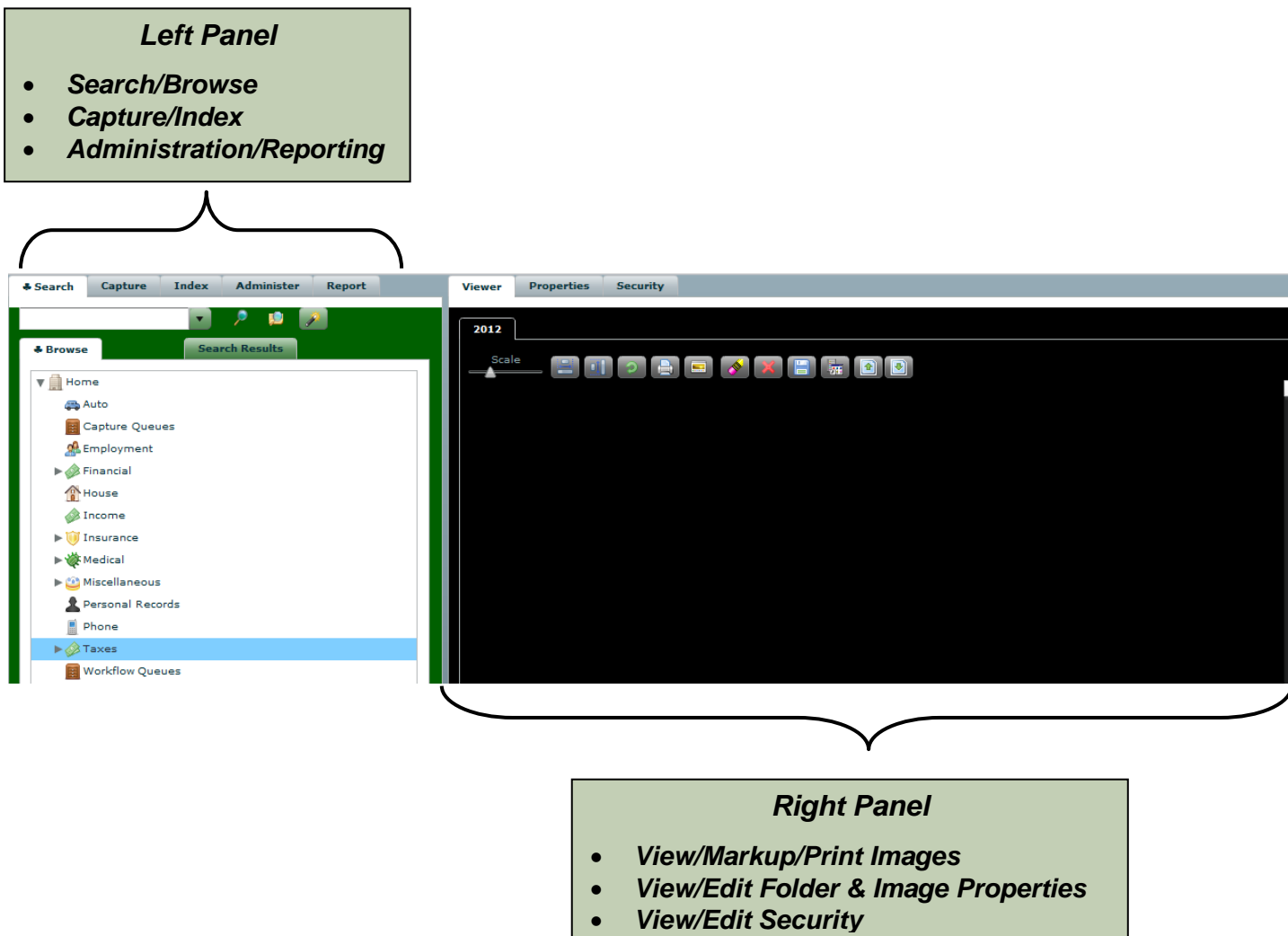
Using this Guide

This guide is meant to give you a sampling of the functionality within ES Imaging with a minimal investment of time. It contains a short list of ES Imaging functions, including *indexing*, *searching* and *marking up* an image(s). ***Let's get started! Not sure what to try? We will help you!***

Step 1 – Understanding the General Structure

ES Imaging uses a familiar tree structure and dual panels to provide an intuitive user interface and experience. Tabs and buttons are used to easily navigate from page to page.

- Click on the various tabs (Search, Index, Administer, Reports, Viewer, Properties, Security)
- Return to the “Search” tab and click on the triangle to expand the main folder
- Expand/Collapse folders to view sub-folder content
- Right click on folders to view available functions



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Step 2 – Importing an Image

Next, an image will be imported and subsequently indexed. Indexing is simply is the method to associate appropriate metadata to an image. This metadata is used later to easily search for images.

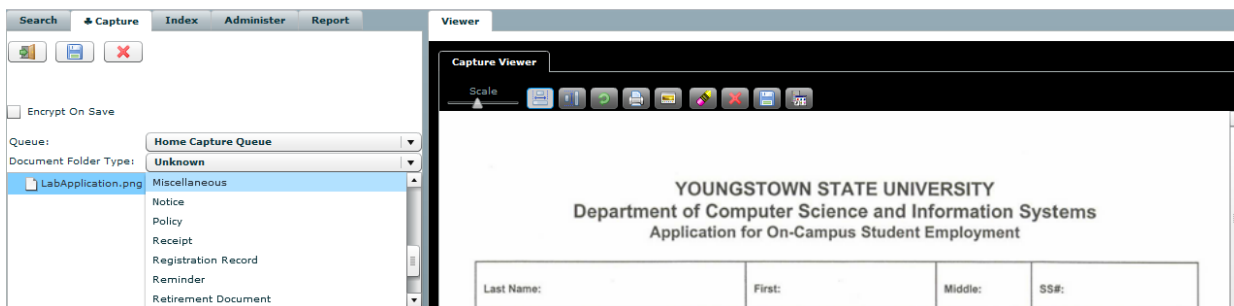
- Click on the “Capture” tab
- Click on “Import” button (leftmost icon - door with green arrow)



- Select an image to import (png, jpg, gif are best for the demo) and click “Open”
- Click on the image name and view the image on the right-hand “Viewer” panel



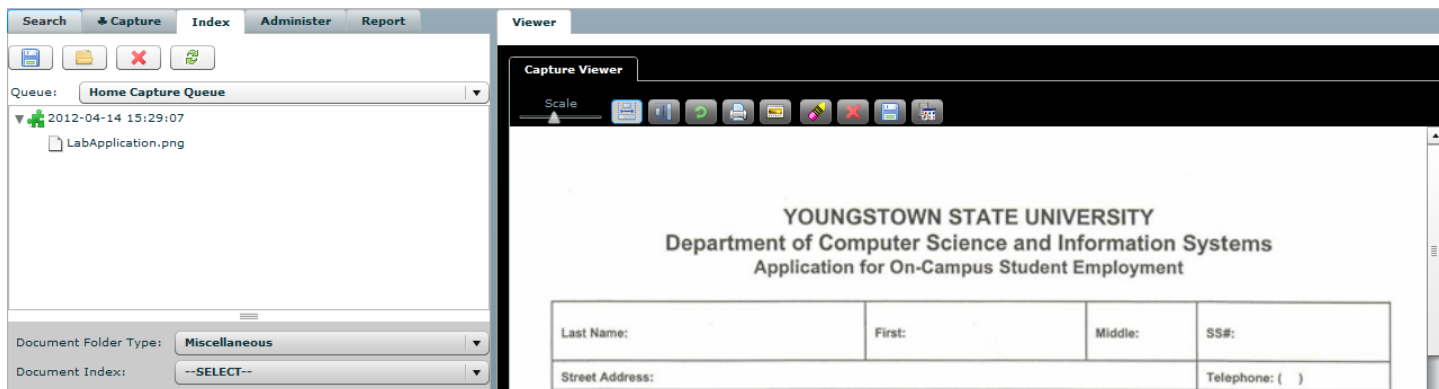
- Select “Capture Queue” from the “Queue” drop down list
- Select “Miscellaneous” from the “Document Folder Type” drop down list (Personal template only. For the Business template select “Taxes”)
- Click the “Save” button (middle icon – blue diskette)



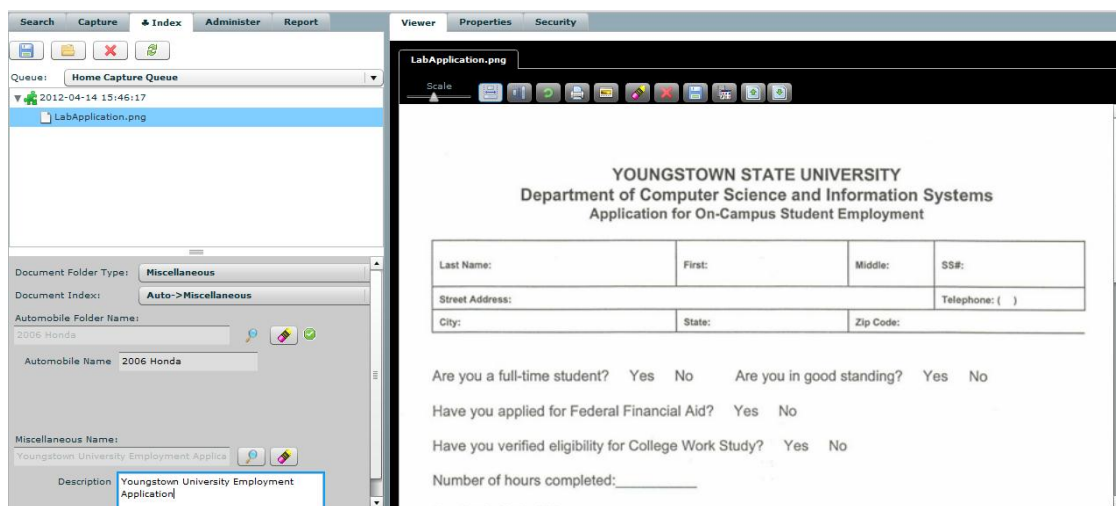
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Step 3 – Indexing an Image

- Within the “Index” tab (left panel), select “Capture Queue” from the “Queue” drop down list
- A folder with the date and time of the import is displayed
- Click on the folder to select it. This will automatically select “Miscellaneous” for the “Document Folder Type” drop down list (the Business template will select “Tax Record”).
- Click the triangle in front of the folder, to expand



- Select “Auto->Miscellaneous” within the “Document Index” drop down list (the Business template will select “Taxes”).
- If using the Personal template:
 - Type a descriptive term for an automobile (this will be the folder where the image is placed)
 - Type in a description and date (this can be used to search later)
- If using the Business template:
 - Fill in a year, organization, and description.
- Click the save button (icon on far left - blue diskette)



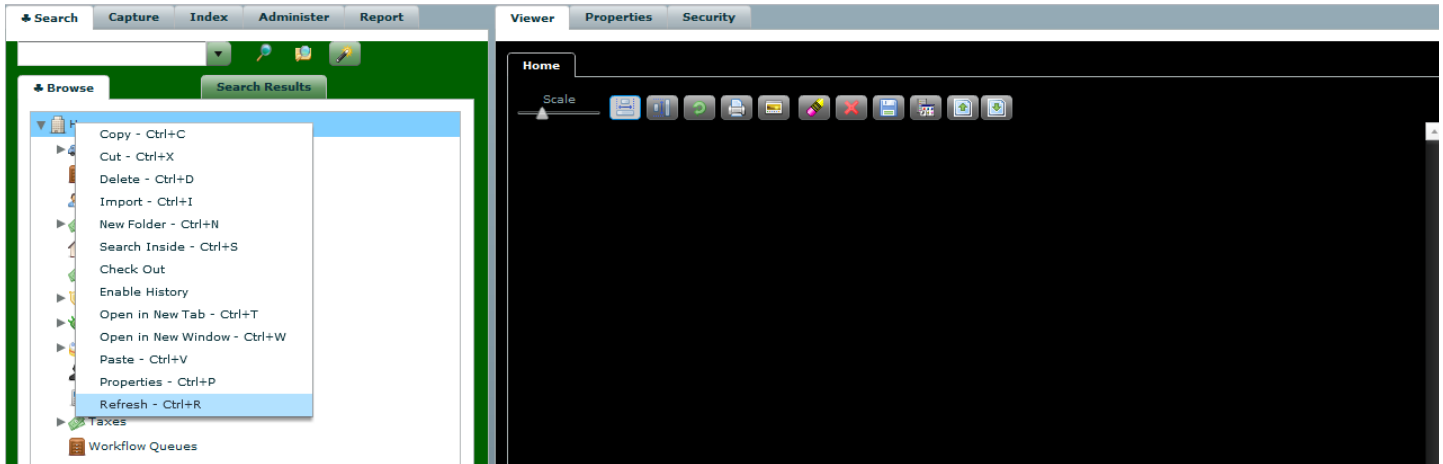
The image has been indexed and now we are ready to use the search function.

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Step 3 – Viewing Images

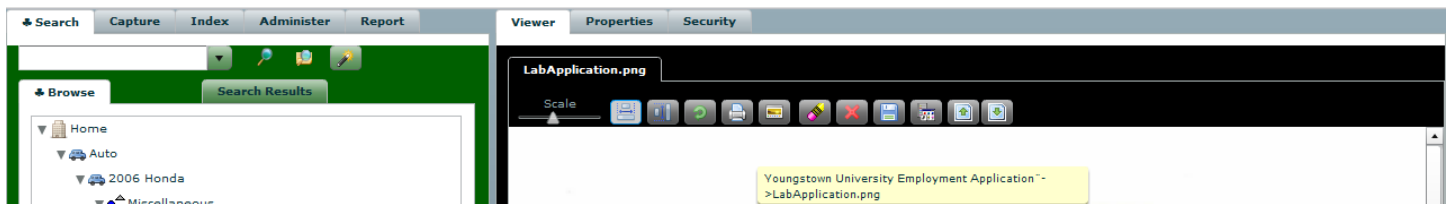
The common tree structure provides an intuitive navigation of folders and images.

- Click on the “Search” tab
- Click on the triangle to expand the main folder
- Right click on the triangle preceding the main folder
- Left click on “Refresh” to view the latest indexed images



The image viewer provides a variety of options.

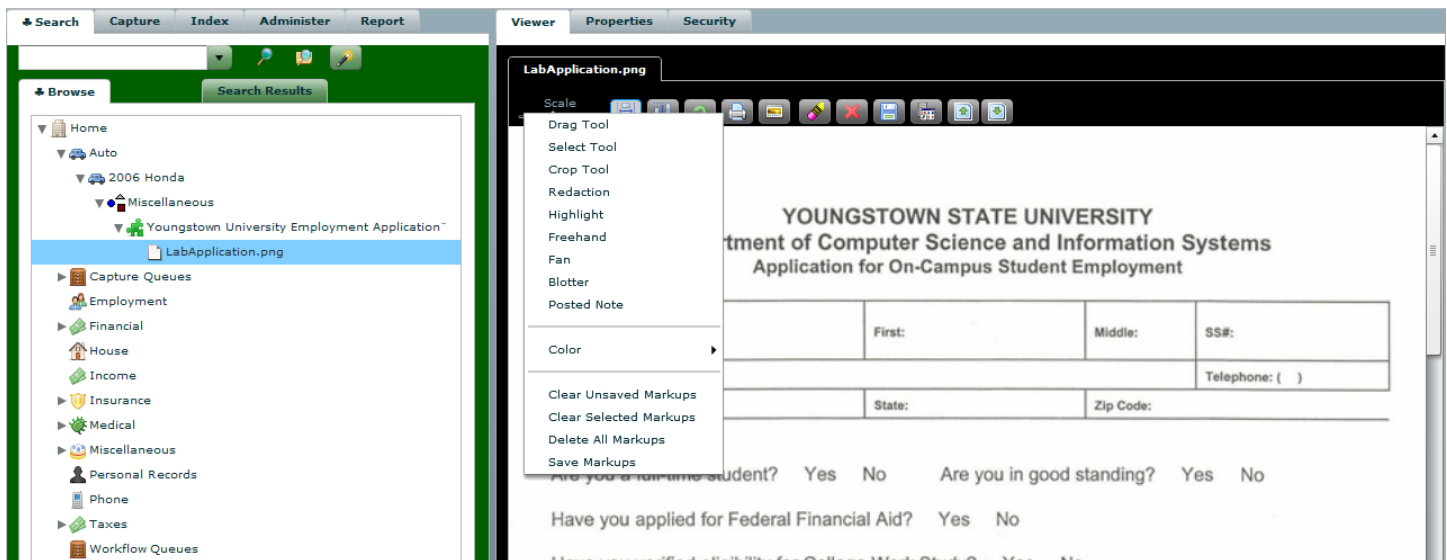
- Place the cursor over the icons in the “Viewer” panel to view each function
- Try dragging the “Scale Image” bar to increase/decrease image size
- Click on the “Scale to Height” and “Scale to Width” icons to scale the image to the panel size
- Click on the “Open in New Window” icon
- Click on the “Navigate up the Tree” and “Navigate down the Tree” icons to scroll



Step 4 – Marking Up Images

There are a variety of image markup features. Redaction is commonly used to protect confidential information, such as Social Security Number.

- Within the “Viewer” tab, ensure an image is displayed
- Click on the “Context Menu” icon
- Click on “Redaction”
- Click on the image and while holding down the left click, drag the cursor across and down the image

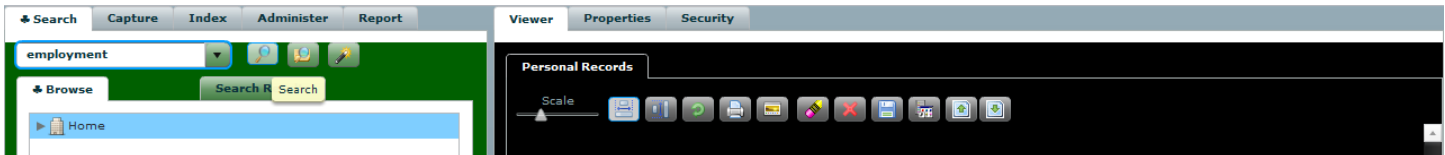


Many times it is helpful to add a note to an image, for later reference.

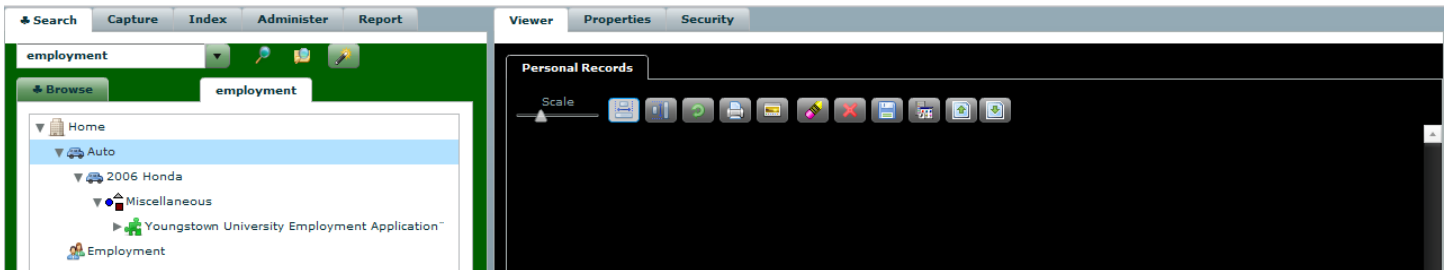
- Click on the “Context Menu” icon
- Click on “Posted Note”
- Click anywhere on the image to add a note
- Type in a note and click “Ok”
- Notice the paper and pencil icon placed on the image, signifying a note
- Click on the note (paper and pencil icon) to view the note
- Click on the “Save Markups” icon

Step 5 – Searching for an Image

- Click on the “Search” tab
- If using the Personal template:
 - Type in “miscellaneous” in the search area
- If using the Business template:
 - Type in “taxes” in the search area
- Press the “Search” icon (magnifying glass)



- All folders that match will be returned in a tab named after the search

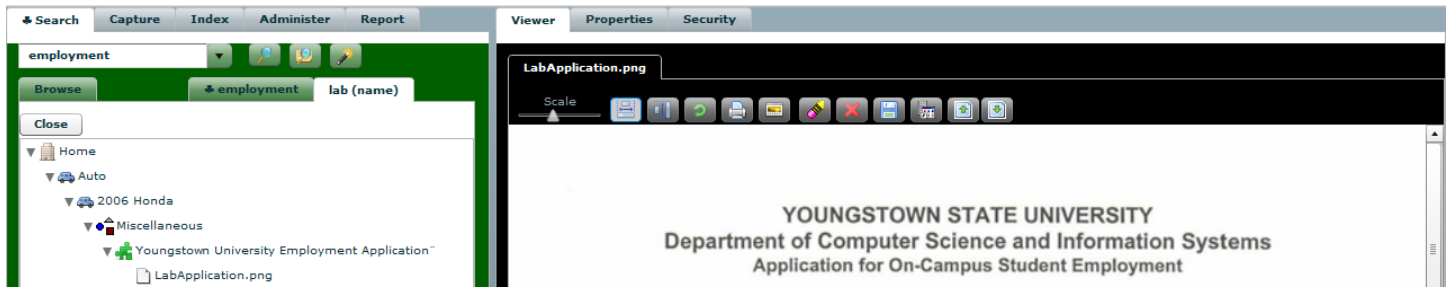


- Click on the “Advanced Search Dialog” icon (wand)
- Select “File” within the “Object Type” drop down list
- Select “Name” within the “Field” drop down list
- Type in a portion of the imported file name within “Value” and press “Search New Tab”



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- The earlier indexed image is displayed in a new tab



And now try importing other documents and using the variety of functions within ES Imaging.