



Document Imaging & Management System User Manual

Using this Manual.....	7
Designates a section	7
Designates a sub-section	7
ES Imaging Anatomy and Features	8
General Structure	8
Dual Adjustable Panels	9
Context-Specific Functions.....	9
Multiple Item Selection	11
Keyboard Shortcuts	12
Keyboard Equivalents to Mouse	13
Logging In/Out	14
Logging In.....	14
Resetting a Password.....	14
Logging into another ES Imaging Session.....	15
Logging Out.....	15
Other Settings/Options	16
Thumbnail Settings	16
ES Imaging Software Version	16
Left Navigation Tabs.....	17
Search	17
Capture	17
Index.....	18
Right Navigation Tabs.....	19
Viewer.....	19
Properties	20
Security.....	20
Browsing for Images/Files	21
Viewing Workflow Items	22
Searching for Images/Files/Folders	23
Using Quick Search	23

User Manual

Advanced Search	24
Advanced Search Basics	24
Using Advanced Search.....	26
Full-Text Search	27
Searching Posted Note Content.....	28
Special Advanced Search Techniques	29
Searching Inside.....	30
Custom Search	31
Saving a Custom Search	31
Accessing a Saved Custom Search.....	31
Changing or Cloning a Saved Custom Search	31
Deleting a Saved Custom Search.....	32
Search Shortcuts	33
Saving a Shortcut to a Saved Search	33
Using a Shortcut to Access a Saved Search	34
Viewing Images/Files.....	36
Scaling the Image.....	36
Sizing the Image.....	36
Rotating the Image	37
Printing the Image	37
Opening in Separate Window	38
Scrolling the Images.....	39
Adjusting View Panel Size	39
Viewing Notes Posted on Images/Files	40
Viewing Files within the External Viewer	41
Marking Up Images/Files	43
Using Image Markup Tools	43
Protecting Confidential Information	43
Highlighting Information.....	44
Notes	45

User Manual

Writing Notes.....	45
Typing Notes.....	46
Editing Typed Notes.....	46
Overlays.....	47
Adding a Text Overlay.....	47
Adding an Image Overlay.....	48
Using Special Effect Tools.....	50
Clearing Markups.....	51
Clearing Unsaved Markups.....	51
Clearing All Markups.....	51
Clearing Selected Markups.....	52
Saving a Flattened Image.....	53
Image/File Management.....	54
Copying/Pasting.....	54
Cutting/Pasting.....	55
Deleting.....	56
Importing Directly.....	57
Exporting.....	58
Save As.....	59
Save Shortcut.....	60
Moving Workflow Items.....	61
Check In/Out.....	62
Check Out.....	62
Check In.....	63
Checked Out By.....	63
Assign Check Out.....	64
Document History (Audit Trail).....	65
Enable History.....	65
View History.....	65

User Manual

Disable History	66
Encryption of Files/Images.....	67
Encrypting.....	67
Decrypting	68
Versioning.....	69
Creating New Version (via Launch with External Viewer)	69
Create a New Version (via Importing Existing File from network location).....	71
Replacing Selected Version (via Launch with External Viewer).....	72
Replacing a Selected Version (via Importing Existing File from network location)	73
Deleting a Previous Version	74
Viewing Properties.....	75
Download with Web Browser	76
Stream Launch with External Viewer	76
Refreshing.....	77
Scanning and Importing.....	78
Capturing Document Images into ES Imaging.....	78
Scanning Documents	79
Importing Electronic Files	81
Enhanced Importing Electronic Files using the ES Image Capture Application	82
Automatic Importing Electronic Files.....	85
Removing Documents/Files from Capture Queue	87
Indexing.....	88
Using Keywords to Index Documents	88
Preparing for Indexing	89
Existing Document Folder/Index.....	90
Existing Document Folder/Index (within alternate folder path)	92
New Document Folder/Index.....	94
Batch Indexing	95
Correcting OCR Document Text	96

Capturing Screen Shots and Printed Documents.....	97
Storing and Indexing Screen Shots and Printed Documents	97
Setting Screen Shot Destination	98
Saving Screen Shots	99
Setting Image Printer Driver Destination	101
Routing Printed Document	102

Using this Manual

This guide contains instructions for all ES Imaging functions, including *searching, marking up* and *scanning* an image(s). Before using ES Imaging, review the following section, "**ES Imaging Anatomy and Features**", to help with navigation and keyboard shortcuts.

Designates a section

Designates a sub-section

**ES Imaging
Terms**

Used for terms and notes which are specific to ES Imaging.

**Quick Tips and
Shortcuts**

Used for alternate methods to perform the designated function.

ES Imaging Anatomy and Features

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.

Left Panel

- **Search/Browse**
- **Workflow**
- **Capture/Index**
- **Administration**

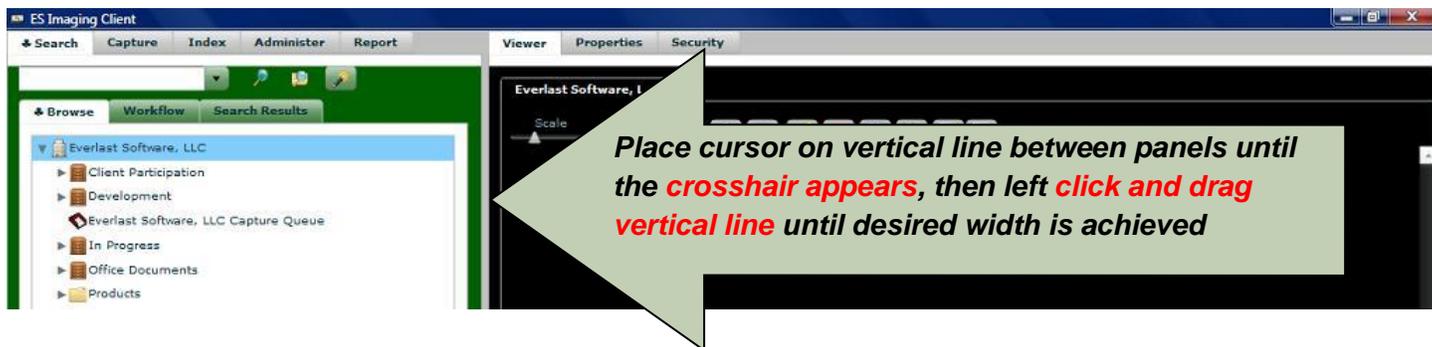


Right Panel

- **View/Markup/Print**
- **View/Edit Properties**
- **View/Edit Security**

Dual Adjustable Panels

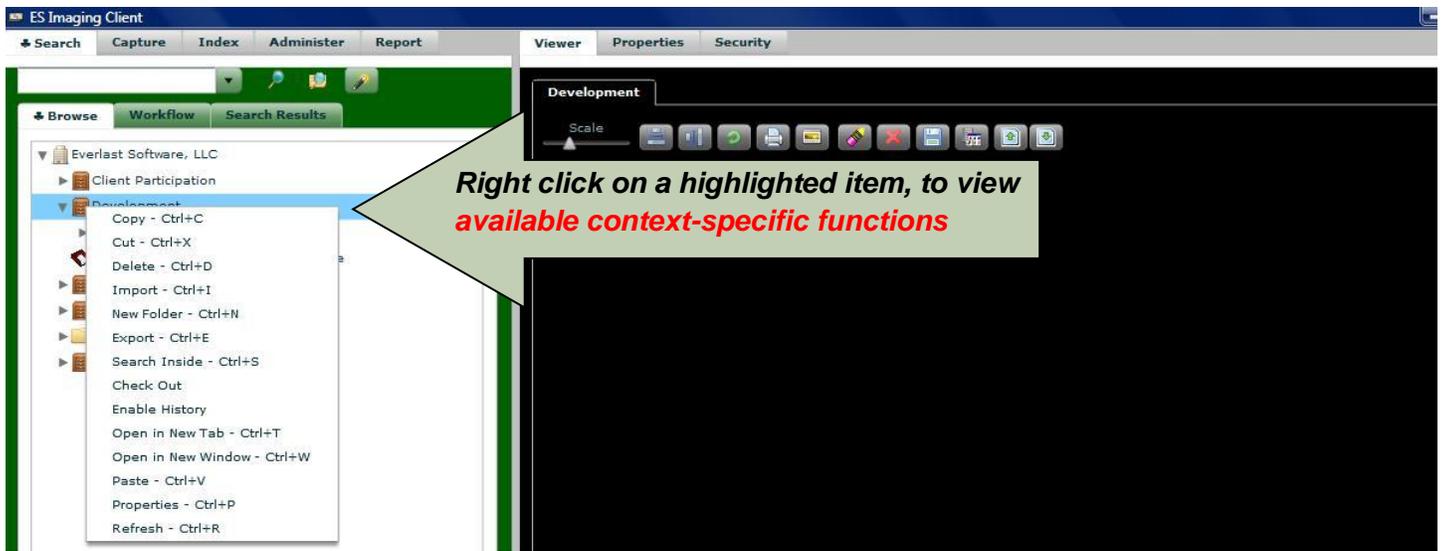
Screen real estate is maximized by using side by side panels. This provides simultaneous viewing of the folder tree and images. Panel width can be adjusted to accommodate specific viewing needs. Both the left and right panel has multiple tabs to view various information and/or functions. Users may not be able to see all tabs depending upon the security setting.



Context-Specific Functions

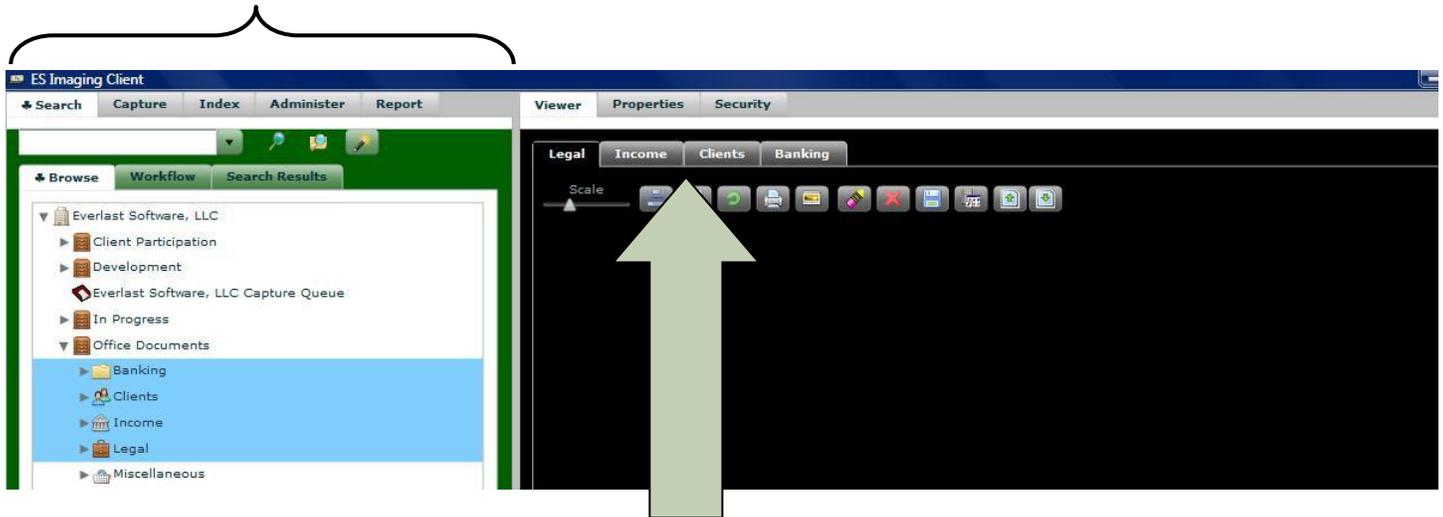
When highlighting folders or files within the tree structure, the available functions are listed when right clicking. An alternative for Mac users, is to click on the ES icon in the lower left corner and select "Context" to access these functions. Alternatively, see the "**Keyboard Shortcuts**" section to determine function shortcuts. The functions that can be viewed are controlled by the *system administrator*.

User Manual



Multiple Item Selection

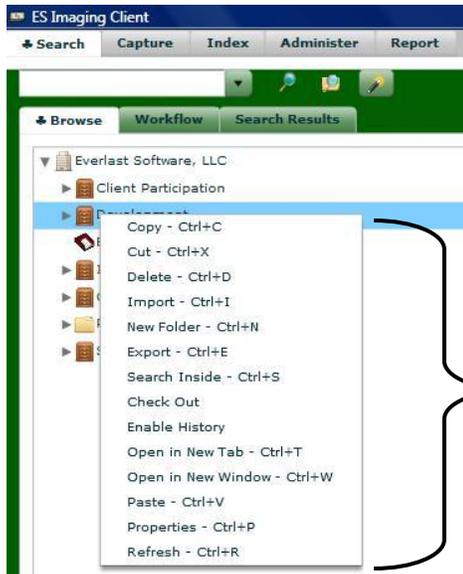
To select consecutive items: Hold **“Shift”** and **click on required items**.
To select non-consecutive items: Hold **“Ctrl”** and **click on required items**.



When selecting multiple items, the right portion of the screen will contain multiple tabs which are named with the selected items. This allows toggling back and forth from item to item. If changes are made to one of the items, a message is displayed prompting for saving or cancelling the changes.

Keyboard Shortcuts

Several functions have built-in keyboard shortcuts to eliminate extra keystrokes.



Copy – **'Ctrl + C'**
Cut – **'Ctrl + X'**
Delete – **'Ctrl + D'**
Import – **'Ctrl + I'**
New Folder – **'Ctrl + N'**
Export – **'Ctrl + E'**
Search Inside – **'Ctrl + S'**
Open in New Tab – **'Ctrl + T'**
Open in New Window – **'Ctrl + W'**
Paste – **'Ctrl + V'**
Properties – **'Ctrl + P'**
Refresh – **'Ctrl + R'**

Keyboard Equivalents to Mouse

Both functions and navigation within ES Imaging are accessible using the keyboard instead of the mouse. The keyboard up, down, left, right arrows and tab key are used as follows:

- Pressing the keyboard up and down arrow keys navigates from one folder/file/image to another within the tree structure.
- Pressing the right arrow key on the tree structure expands the selected folder.
- Pressing the left arrow key on the tree structure collapses the selected folder.
- Pressing the tab key moves the focus from one area and/or button within ES Imaging. Use the keyboard spacebar to fire the highlighted buttons or focus the highlighted tab.

Logging In/Out

Logging In

The screenshot shows a login form with the following fields and options:

- Login Id:** A text box containing the placeholder text "(domain name)\(login id)".
- Password:** A text box with a blue border.
- Server:** A checkbox labeled "Secure" which is checked, and a dropdown menu showing "www.esimaging.com:9443".
- Environment:** A dropdown menu showing "Production".
- Buttons:** "Login", "Reset Password", and "Cancel".

Type in **Domain Name, Login Id, Password** (using correct case), **Environment** (Production, Trial, Test, etc) then press **"Login"**

If you **cannot remember domain name, login id or password**, contact your **System Administrator**.

Resetting a Password

This is the same login form as above, but the "Reset Password" button is highlighted with a green arrow pointing to it.

Type in **Login Id, Password**, then press **"Reset Password"**

The screenshot shows a dialog box for password reset with the following fields and options:

- New Password:** A text box.
- Confirm New Password:** A text box.
- Buttons:** "Ok" and "Cancel".

Enter the new password in the **New Password** and **Confirm New Password** areas, then click **"OK"**

Logging into another ES Imaging Session



To **quickly toggle** from one **ES Imaging user account to another**, use this option.



Logging Out

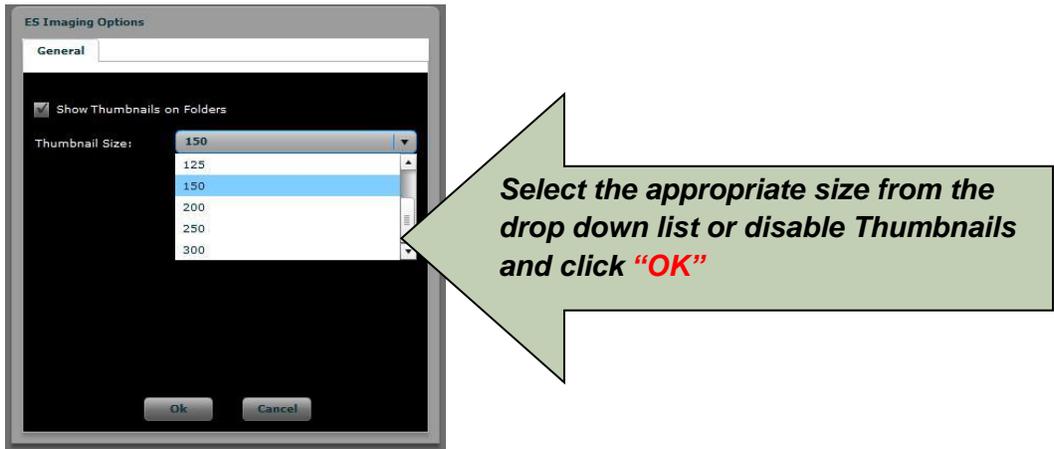


Other Settings/Options

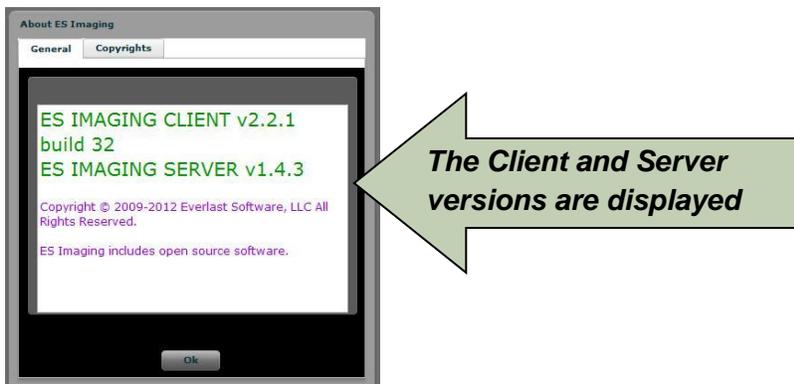
Thumbnail Settings



Only designated users are able to view this option



ES Imaging Software Version



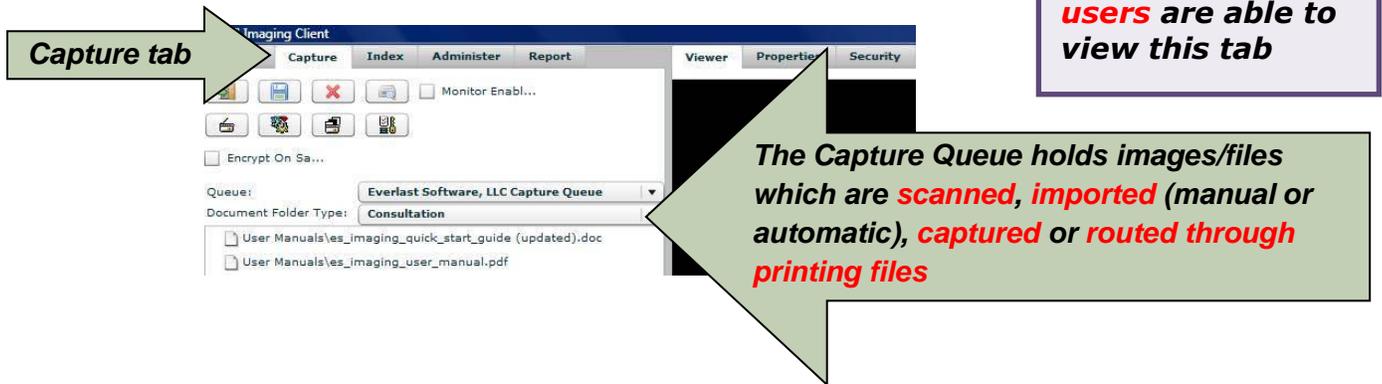
Left Navigation Tabs

One or more of the following tabs will be shown within ES Imaging, dependent upon the settings assigned by the *system administrator*. The main left navigation tabs are **“Search”**, **“Capture”**, **“Index”**, **“Administer”** and **“Report”**.

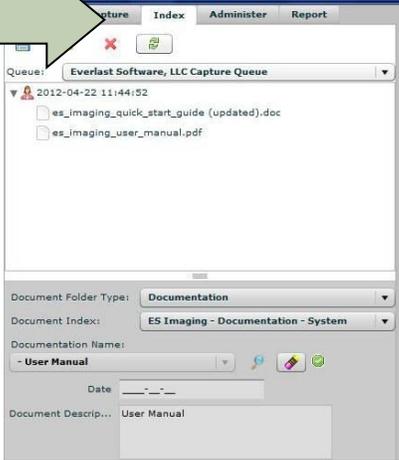
Search



Capture



Index



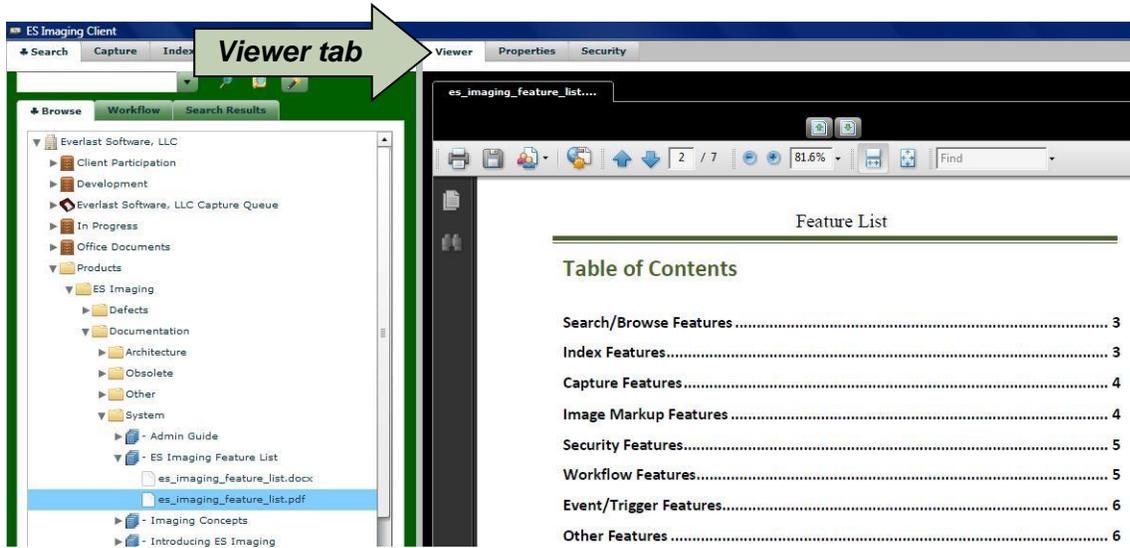
The screenshot shows a software interface with four tabs: 'Capture', 'Index', 'Administer', and 'Report'. The 'Index' tab is active and displays a queue of files. A green arrow points to the 'Index' tab with the text 'Index tab'. A purple box on the right contains the text 'Only designated users are able to view this tab'. A large green arrow points to the 'Document Folder Type' and 'Document Index' dropdown menus with the text 'Index images/files by selecting the Folder Type and Document Index'. The interface shows a queue for 'Everlast Software, LLC Capture Queue' with a timestamp of '2012-04-22 11:44:52' and two files: 'es_imaging_quick_start_guide (updated).doc' and 'es_imaging_user_manual.pdf'. Below the queue, there are dropdown menus for 'Document Folder Type' (set to 'Documentation') and 'Document Index' (set to 'ES Imaging - Documentation - System'). A 'Documentation Name' dropdown is set to '- User Manual', and a 'Date' field is empty. A 'Document Descrip...' field contains 'User Manual'.

For more information about the Administer and/or Report tabs, see the Administration Guide.

Right Navigation Tabs

One or more of the following tabs will be shown within ES Imaging, dependent upon the settings assigned by the *system administrator*. The main right navigation tabs are **“Viewer”**, **“Properties”** and **“Security”**.

Viewer



**Clear, delete, save
and apply markups**

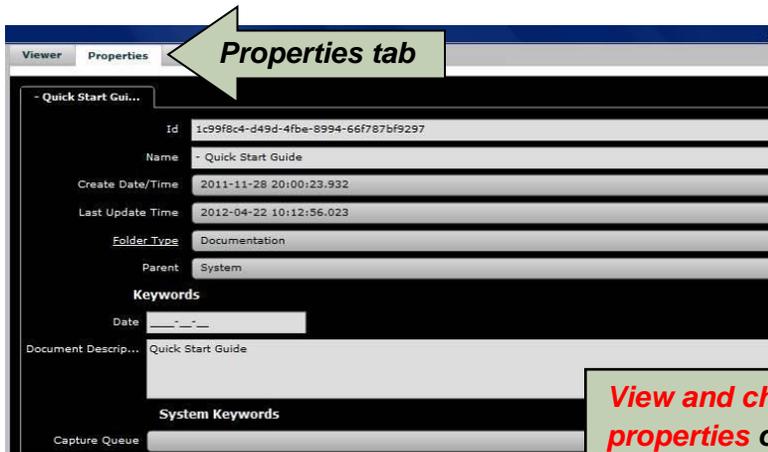
**Only designated
users are able to
view this tab**



**Scale, size
(horizontal/vertical),
rotate, print and
open in new window**

**Navigate
from page
to page**

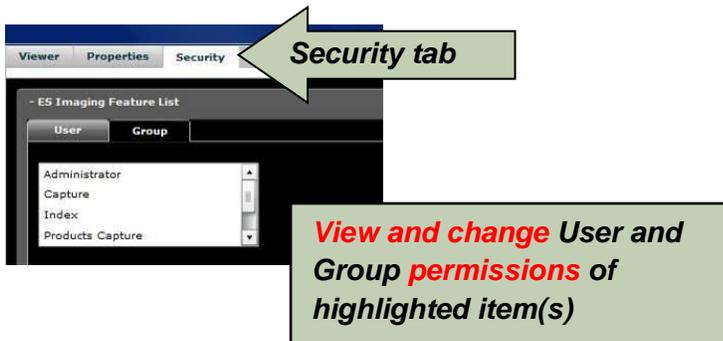
Properties



Only designated users are able to view this tab

View and change properties of highlighted item(s)

Security

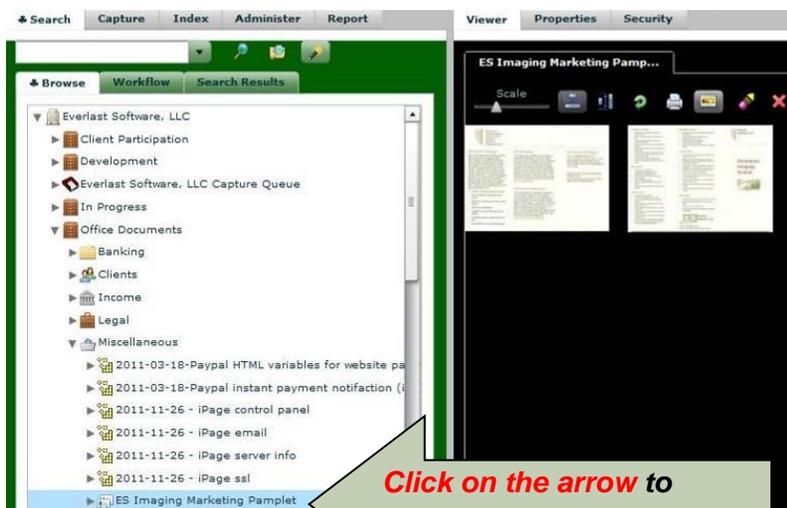


Only designated users are able to view this tab

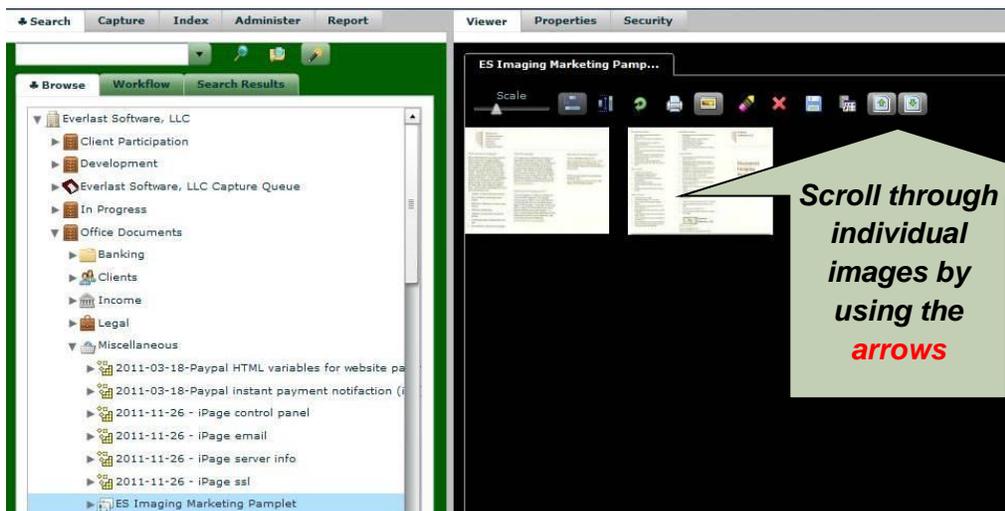
View and change User and Group permissions of highlighted item(s)

Browsing for Images/Files

When browsing after importing or capturing files, it is important to refresh the tree, to observe the latest changes. This can be accomplished by right clicking a folder and selecting **“Refresh”** (or use the shortcut, **‘Ctrl + R’**).



- **Thumbnails will appear on the right side of screen within the “Viewer” tab**
- **Click on the desired thumbnail image to view the image**



Viewing Workflow Items

Depending on the business needs of an organization, workflow queues might be established for those involved with **reviewing and approving certain documents/files**. The workflow queues can be thought of as an electronic “inbox”. Keywords will be associated to workflow items (by the *system administrator*) to manage reviews and approvals. Once an action is taken (such as a status change) within a workflow queue, the item will be automatically sent to the next person for review/approval (the workflow sequence is established by the *system administrator*). For exceptions to the review/approval process sequence, see **“Move Workflow Item”**.

Workflow tab

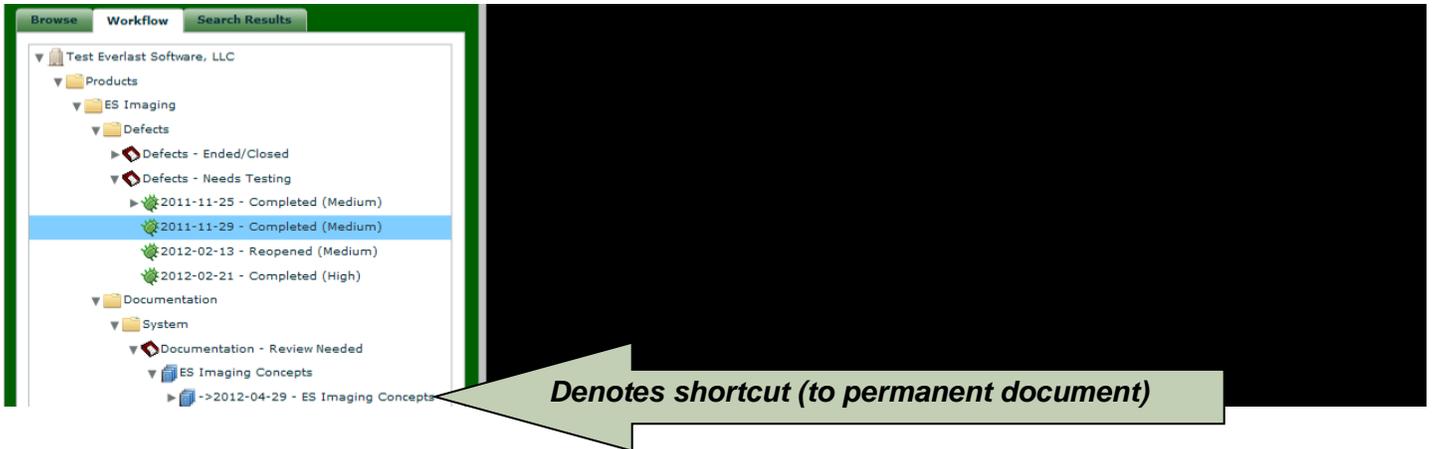
Only designated users are able to view this tab

Id	e89d8aef-5b0d-4f25-8a75-9e212e4d2a8a
Name	2012-04-27 - Created (Low)
Create Date/Time	2012-04-27 10:32:50.007
Last Update Time	2012-04-27 10:32:50.226
Folder Type	Defect
Parent	Defects->New/In Progress
Keywords	
Date	2012-04-27
Defect Severity	Low

When a folder is indexed into ES Imaging and subsequently sent through a workflow queue, a shortcut symbol is displayed prior to the name (shown below).

Other items that are considered supporting documentation can be imported during the workflow process. However, it is important to note that **if these documents are imported into the workflow item, they will not be retained permanently**. When the workflow item is completed, the supporting document will disappear as it is considered a temporary document.

User Manual



Searching for Images/Files/Folders

Using Quick Search

Use the *quick search*, when a **portion of the image, file or folder name** is known. Only exact matches of the entered text will be returned, however it can be a portion of the file or folder name. In other words, if “imaging” is entered in the below example, the “ES Imaging Market pamphlet” folder will be returned, along with any other files/folders containing the string “imaging”.

“Search New Tab” allows for toggling between search results

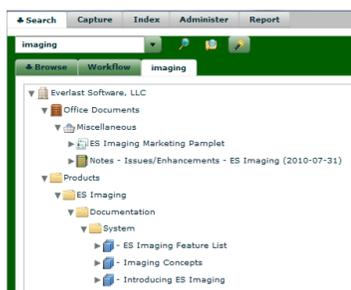
To search on *keywords* (attached during indexing) associated to an image, file or folder, see the **“Advanced Search Basics”** and **“Using Advanced Search”** sections.



- Enter **word or phrase** to search on
- Press either the **magnifying glass icon** (places results in search results tab) or the **magnifying glass/folder icon** (places results in a newly created tab which is useful to view multiple results simultaneously)

www.esimaging.com

- Image, file or folder names that meet the search criteria will be **placed in the Search Results tab** which is renamed after the search criteria
- Expand the folder until needed image is displayed within the viewer tab (right panel)



Advanced Search

Advanced Search Basics

The *advanced search* feature provides searching for criteria within all files or folders. The advanced search allows for multiple complex search criteria as well as allowing the search to be saved (see the **“Saving a Custom Search”** and **“Accessing a Custom Search”** sections). Additionally, multiple search results can be viewed simultaneously by using the **“Search New Tab”** button.

The following criteria can be used for searching:

- *keywords* (metadata assigned to a folder during indexing)
- *text* within documents that have full-text search setting (see **“Capturing Document Images into ES Imaging”** and **“Full-Text Search”** sections)
- *text* within *notes* on an image (see **“Typing Notes”** and **“Searching Posted Note Content”** sections)
- *system keywords* (for instance, “capture queue”, “create date/time”, “checked out by”, “parent name”, “encrypted”).

When using the advanced search, an *object type*, *field*, *operator* and *value* are all needed to perform the search. Additionally, when multiple criteria are needed a *conjunction* is needed as well. In order to better understand the advanced search, the below shows the criteria in sentence form:

Search all **folders** (object type) where **status** (field) is **=** (operator) to **pending** (value) **or** (conjunction) **status** (field) is **=** (operator) to **created** (value).

Object Type – whether to search *within a file or folder*

- **system administrator can select from more than files or folders**

Field – what conditions or criteria is used for the search

- keywords used to **index folders (documents)**
- system keywords, such as:
 - “text” (**locate text** in documents that have been **through OCR** processing)
 - “encrypted” (**locate files that have/haven’t been encrypted**)
 - “create date/time” (to search for a file/folder name **created on/before/after the date** provided)
 - “parent” (**locate files/folders** within a **specific parent’s folder**, used in combination with other criteria)
 - “hierarchy parent” (**locate files/folders** within a **specific parent’s folder, regardless of how many levels deep**, used in combination with other criteria)

Operator – how to evaluate the field being searched

- “=”, “not =”, “like”, “not like”, “begins with”, “ends with”, “>”, “<”
 - “=” or “not =” (use only when a **match of the entire contents** should be evaluated)
 - “like” or “not like” (searches for any *field/attribute* value that **contains/doesn’t contain the supplied search value**)
 - “begins with” (searches for any *field/attribute* value that starts with the supplied value)
 - “ends with” (searches for any *field/attribute* value that ends with the supplied value)
 - “>”, “<” (evaluates whether *field/attribute* is either **greater or less** than the supplied value)
- **Always use “like”** when *field/attribute* is “text” (OCR)
- **“like” or “not like” recommended for most searches**
- **“>”, “<” should be used for dates and integer fields/attributes, unless exact match** is needed

Value – what is the field/attribute being evaluated/compared against

- enter the **string that is being searched for** (for example, enter “smith”, “01/01/10”, “urgent”)
- **system tags**, such as %empty% (blank content), %date% (current date) – see **system administrator** for a comprehensive list of *system tags*

Conjunction – needed if searching is based on more than one evaluation

- “And” (**both conditions must be true** to return the object in the search results)
- “Or” (**either condition must be true** to return the object in the search results)
- An **unlimited number of evaluations** can be added for precise searching

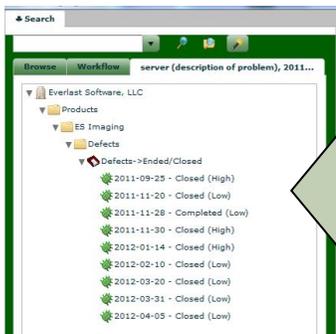
Using Advanced Search



Object Type: **FOLDER** Field: **Description of Problem**
Operator: **like** Value: **server** Conjunction: **AND**
Object Type: **FOLDER** Field: **Create Date/Time**
Operator: **>** Value: **2011-01-01 00:00:00** Conjunction: **AND**
Search Search New Tab Cancel Save...

Build your search criteria and click on **"Search"**, **"Search New Tab"** or **"Save"**

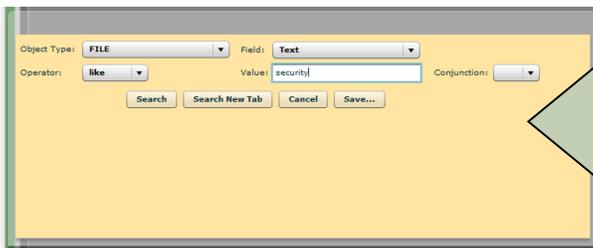
"Save" the search for later reuse. Saved Searches are preceded with an **'*'** and will appear in the Search drop down list (see **"Accessing a Saved Custom Search"**).



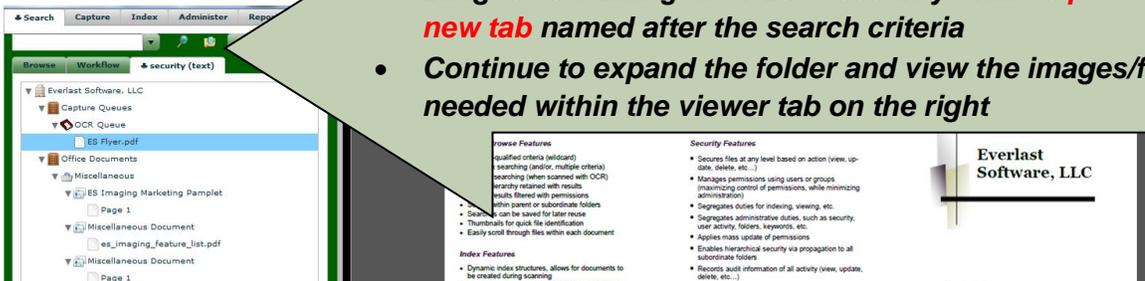
- Matching images will be **placed in a new tab** named after the search criteria
- Continue to expand the folder and view the images/files as needed within the viewer tab on the right

Full-Text Search

In order for entire contents of an image to be searched, the *system administrator* must establish the folder with OCR Queue set to “true” when an image is captured and indexed (see **“Capturing Document Images into ES Imaging”** section). If images are consistently clear, the full-text search will enable accurate searching across all documents that have been through OCR processing.



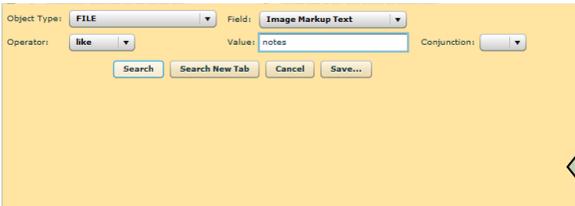
Select “File”, “Text” to search image content. Build your search criteria and click on “Search”, “Search New Tab” or “Save”



- Images containing the value “security” will be placed in a new tab named after the search criteria
- Continue to expand the folder and view the images/files as needed within the viewer tab on the right

Searching Posted Note Content

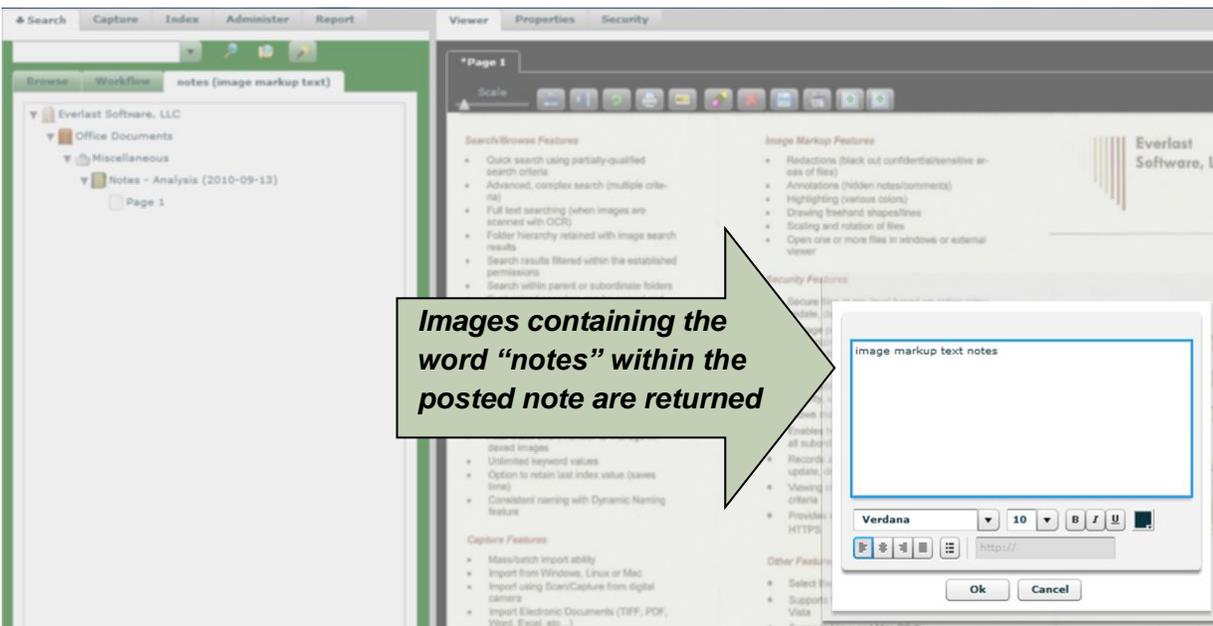
Sometimes images require a “posted note” to communicate or comment on a file/image. ES Imaging provides a feature to search for a specific word within all “posted notes”.



A screenshot of a search configuration dialog box. It has a yellow background and contains the following fields and buttons:

- Object Type: FILE (dropdown)
- Field: Image Markup Text (dropdown)
- Operator: like (dropdown)
- Value: notes (text input)
- Conjunction: (dropdown)
- Buttons: Search, Search New Tab, Cancel, Save...

- Select, **“File”**, **“Image Markup Text”** to search the posted note content.
- Use the **“like”** operator and enter the word(s) to search for.
- Select **“Search”**, **“Search New Tab”** or **“Save”**



A screenshot of the ES Imaging software interface. The left pane shows a file tree with 'Everlast Software, LLC' > 'Office Documents' > 'Miscellaneous' > 'Notes - Analysis (2010-09-13)' > 'Page 1'. The main pane shows a document viewer with a search box containing 'image markup text notes'. A text box with the text 'Images containing the word “notes” within the posted note are returned' has an arrow pointing to the search results area.

Special Advanced Search Techniques

There may be instances where folders need to be searched for a specific name or word. Use the “Parent Name” and “Hierarchy Parent Name” to accomplish this search. When selecting the “Parent Name” this returns children directly within the parent selected. If the “Hierarchy Parent Name” is selected it returns all subordinate children, whether within the first level or a lower level (another alternative, is the browse to the parent folder, right click and select “Search Inside”, which will lock in the parent folder within the search – see **“Searching Inside”**).



Build your search criteria and click on “Search”, “Search New Tab” or “Save”



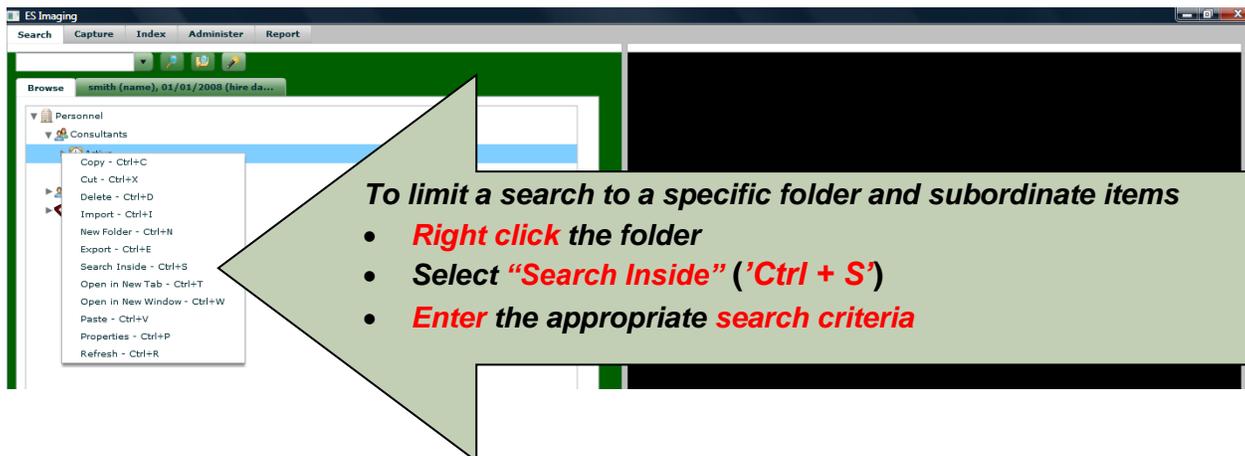
- **Matching Images will be placed in a new tab named after the search criteria**
- **Continue to expand the folder and view the images/files as needed within the viewer tab on the right**

To locate encrypted files, the following search should be used either alone (to search across entire domain) or in combination with additional search criteria (such as a parent) to limit the results.



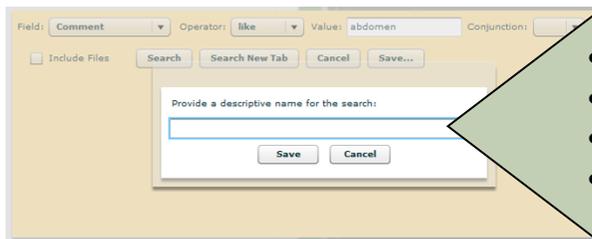
Select “File”, “Encrypted”, “like”, “true” to return all encrypted files.

Searching Inside



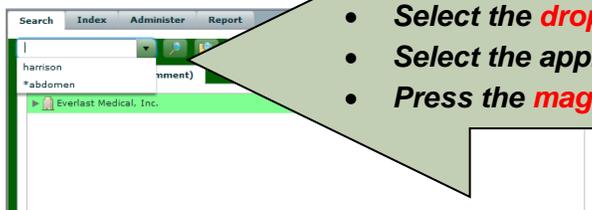
Custom Search

Saving a Custom Search



- See instructions within **“Advanced Search”**
- Press **“Save”**
- Enter a meaningful search description name
- Press **“Save”**, to save the custom search

Accessing a Saved Custom Search



- Select the **drop down arrow** in the Search box
- Select the appropriate saved custom search (preceded by *)
- Press the **magnifying glass button** to search

Changing or Cloning a Saved Custom Search

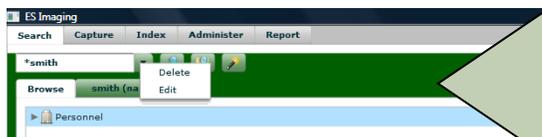


- Click the **drop down arrow** in the Search box
- Select the appropriate saved custom search (preceded by *)
- **Right click** on the down arrow, and select **“Edit”**



- **Refine** the search criteria
- Click **“Save”** to overlay the previous search description
- Or to create a new search type in a new search description and press **“Save”**

Deleting a Saved Custom Search

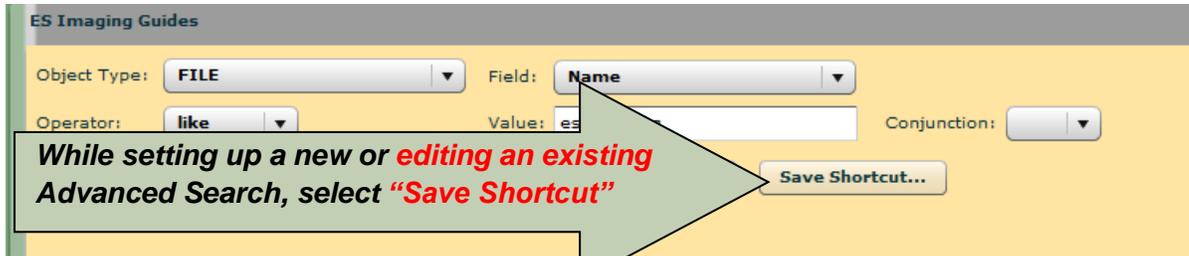


- Click the **drop down arrow** in the Search box
- Select the appropriate saved custom search (preceded by *)
- **Right click** on the down arrow, and select **"Delete"** or

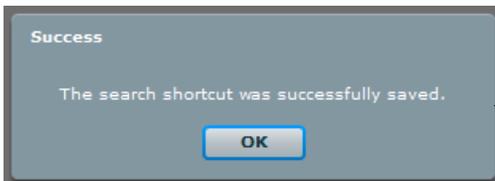
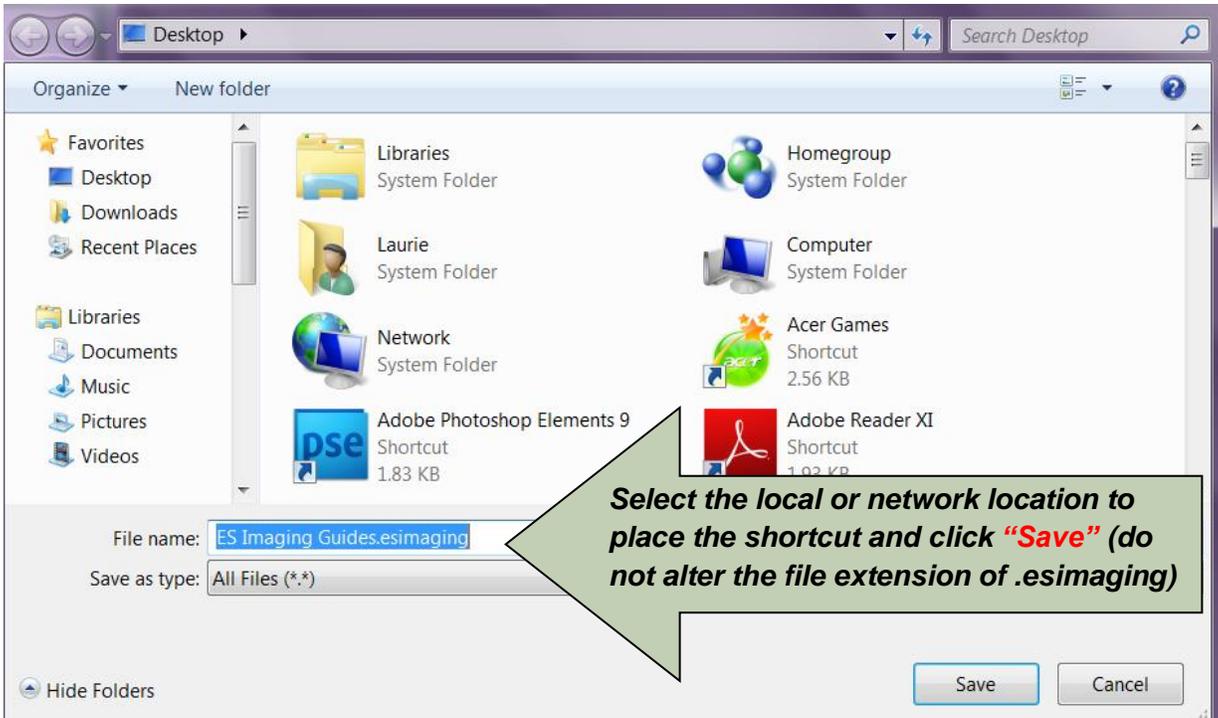
Search Shortcuts

Saving a Shortcut to a Saved Search

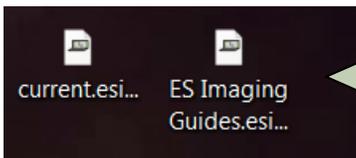
A shortcut for a saved advanced search can be created and placed on the desktop or any local or network accessible storage device. This enables you a direct link to the search results. See **“Changing or Cloning a Saved Custom Search”** (existing search) or **“Using Advanced Search”** (new search).



User Manual

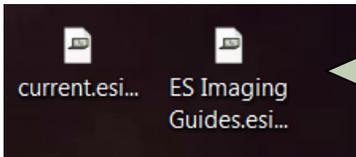


A message is displayed, if the save was successful



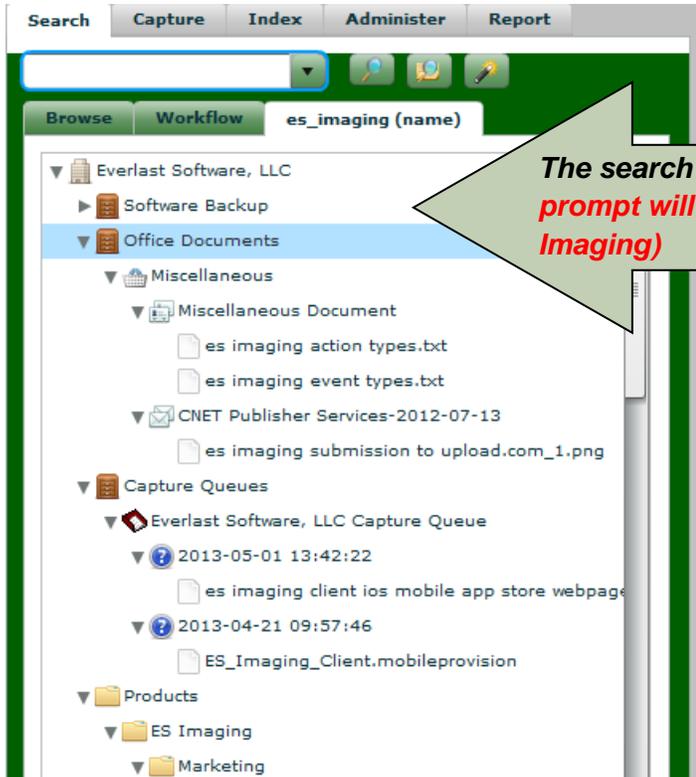
The new shortcut is now available, either locally (such as on desktop) or via a network share.

Using a Shortcut to Access a Saved Search



Locate and double-click on the shortcut to access the saved search

User Manual



The search results tab will be displayed (a logon prompt will display, if not already logged onto ES Imaging)

Viewing Images/Files

Scaling the Image

- **Place cursor on triangle**
- **Click and slide arrow to adjust size**

Sizing the Image

- **Click on the horizontal icon, to size the image to the panel width**
- **Click on the vertical icon to size the file to the panel height**

User Manual

Rotating the Image

Click on the **rotation icon** until the desired effect is achieved. This rotates the document 90 degrees each time clicked.

The screenshot shows a software interface with a left-hand navigation pane containing a tree view of folders and files. The main area displays a document titled 'Information Sheet' with various form fields. A toolbar at the top of the document viewer includes icons for zooming, rotating, and other document actions. A callout box with a green arrow points to the rotation icon.

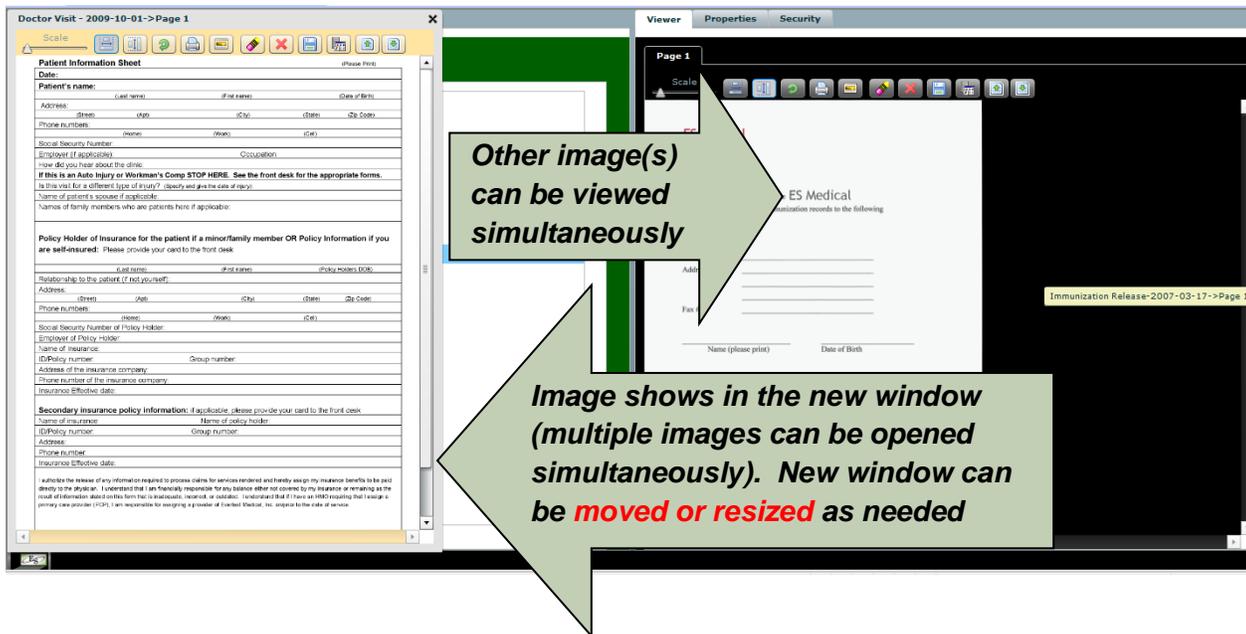
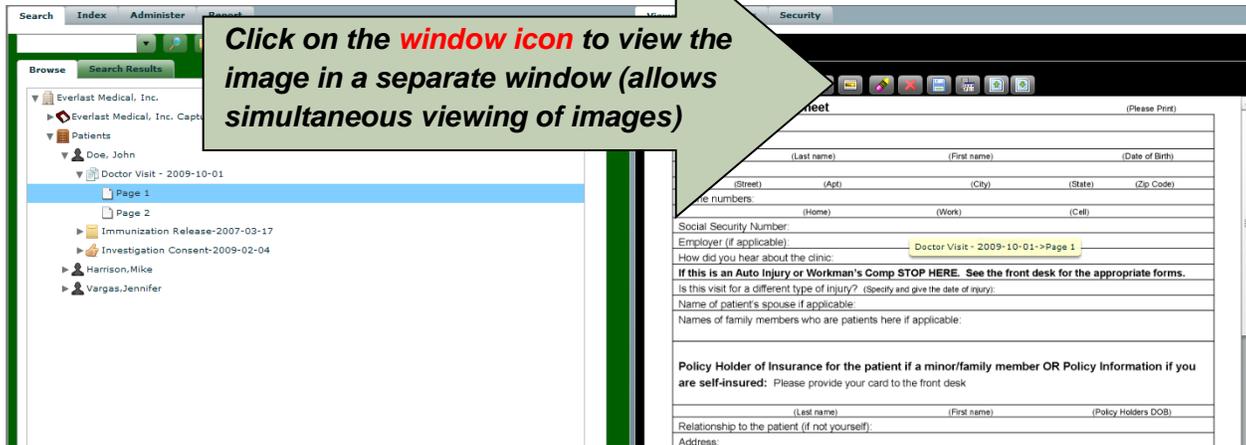
Printing the Image

Click on the **printer icon**, select the appropriate criteria and then press **"Print"**

The screenshot is identical to the one above, showing the 'Information Sheet' form in the document viewer. A callout box with a green arrow points to the printer icon in the toolbar.

User Manual

Opening in Separate Window



Scrolling the Images

Click on the *up or down icon* to scroll through the images

Use the *up/down arrows* on keyboard to scroll through the images

The screenshot shows a web-based interface with a navigation menu on the left and a main content area. The main content area displays a patient record for 'Doe, John' with a 'Doctor Visit - 2009-10-01' entry. Below this, there is a 'Patient Information Sheet' form with fields for name, address, phone numbers, social security number, and insurance information. Two callout boxes are overlaid on the image: one pointing to a small up/down icon in the top right corner of the patient record area, and another pointing to the left side of the patient record area.

Adjusting View Panel Size

Place cursor on *vertical line* between panels until the *crosshair* appears

Click and drag *vertical line* until desired width is achieved

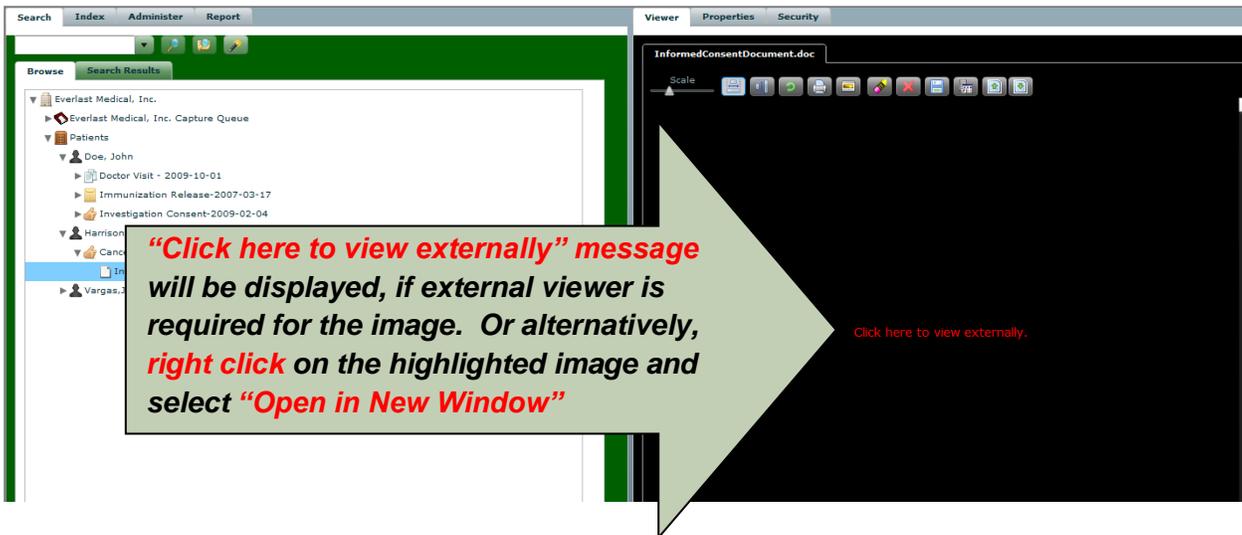
The screenshot shows the same web-based interface as above. A callout box is overlaid on the left side of the patient record area, pointing to a vertical line between the navigation menu and the main content area. The callout box contains two bullet points: 'Place cursor on vertical line between panels until the crosshair appears' and 'Click and drag vertical line until desired width is achieved'. The 'Patient Information Sheet' form is also visible on the right side of the screen.

Viewing Notes Posted on Images/Files

The screenshot displays the ES Imaging software interface. On the left is a file browser with a tree view showing folders like 'Office Documents', 'Products', 'ES Imaging', 'Defects', 'Documentation', 'Architecture', 'Obsolete', 'Other', and 'System'. Under 'System', there are sub-folders like 'Admin Guide', 'ES Imaging Feature List', 'Introducing ES Imaging', 'Quick Start Guide', and 'Obsolete'. A file named 'es imaging quick start guide_2.png' is highlighted in blue. On the right is a document viewer window titled '*es imaging quick start guide_2.png'. The document content includes a title 'Demo Guide', a section 'Using this Guide', and a section 'Step 1 - Understanding the General Structure'. A callout box with a pencil icon points to the file name in the browser, containing the text: 'Click on the **note icon (pencil)** to view the note'. The document viewer also shows a toolbar with various icons and a 'Scale' dropdown.

Viewing Files within the External Viewer

Some files are proprietary and can only be viewed within certain software. ES Imaging provides for opening these files in an external window (outside of ES Imaging) to accommodate this need. This feature works inconsistently based upon the browser used (Internet Explorer, Chrome, Firefox, etc). For best results, use this feature from the ES Imaging Air application (client version) instead of the browser-based version.



User Manual

Since this image was imported into ES Imaging as a .doc file, MS Word is opened when viewing externally

ES Medical, Inc.
Specialist Oncology Service
ES Oncology Centre

INFORMED CONSENT DOCUMENT FOR CANCER THERAPY

Diagnosis.....
.....(Name of patient or guardian / next of kin)
confirm that I have discussed the proposed treatment and the following topics described below. These discussions involved undersigned members of the clinical team involved in my care / the care of.....

PIC	SIGNED (by person who discussed with patient)	DATE
..... Treatment plan
..... Aims of therapy
..... Alternative forms of therapy that may be relevant:
..... Potential side effects
..... Options for further investigations
..... I have been given the following information sheets.....

In the light of these discussions, I agree to undergo the course of RADIOTHERAPY/CHEMOTHERAPY/HORMONE THERAPY/ RADIONUCLIDE THERAPY as discussed in the treatment plan.

SIGNED (patient/guardian*).....
Date.....

*OR THIS PATIENT HAS GIVEN CONSENT TO TREATMENT IN A CLINICAL TRIAL AND ALL OF THE

Marking Up Images/Files

Using Image Markup Tools

All *image markup* tools are available within the *viewer panel* by using two different options. Simply right click on the image and the markup tools are shown. There is also a **“Context Menu”** icon which provides a right-click alternative for Mac users.



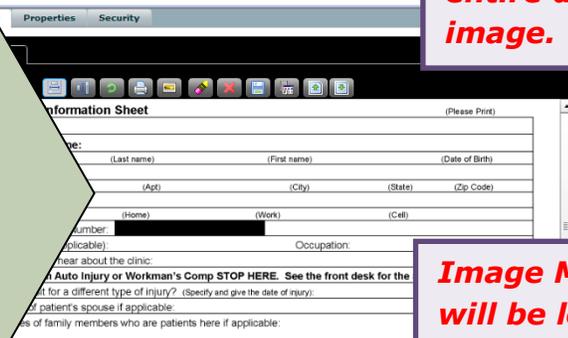
Image Markups are not exported with an exported image unless “Save Flattened Image” is selected (not available for posted notes).

To retain Image Markups, the image markups must be saved before navigating elsewhere.

Protecting Confidential Information

Search Index Administer Report

- Click on **Context Menu** or right click on image and select **“Redaction”**
- Left click in the upper left of the area to be hidden and continue to depress the left mouse button, while dragging the cursor to the lower right area
- Select **“Save Markups”** from the Context Menu (or by right clicking on the image)



See “Encrypting” to protect an entire document image.

Image Markups will be lost if “Save Markups” is not selected.

Highlighting Information

Click on *Context Menu* or right click on image and select *"Highlight"*

Left click in the upper left of the area to be hidden and continue to depress the left mouse button, while dragging the cursor to the lower right area

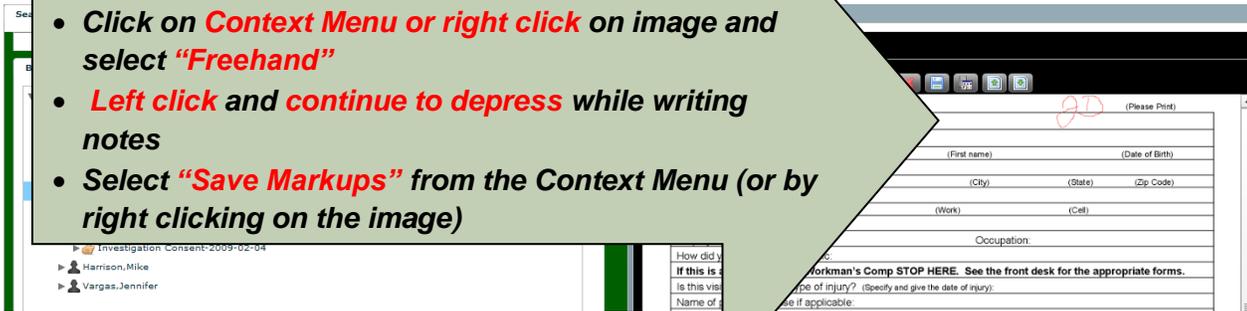
Select *"Save Markups"* from the Context Menu (or by right clicking on the image)

Image Markups will be lost if "Save Markups" is not selected.

Notes

Writing Notes

- Click on **Context Menu** or **right click** on image and select **"Freehand"**
- **Left click** and **continue to depress** while writing notes
- Select **"Save Markups"** from the **Context Menu** (or by **right clicking** on the image)



Typing Notes

- Click on **Context Menu** or **right click** on image and select **"Posted Note"**
- Type the note into the window's text box and click **"OK"**
- Select **"Save Markups"** from the Context Menu (or by right clicking on the image)

Image Markups will be lost if **"Save Markups"** is not selected.

"Posted Note" Content is searchable (see **"Search Posted Note Content"**).

Editing Typed Notes

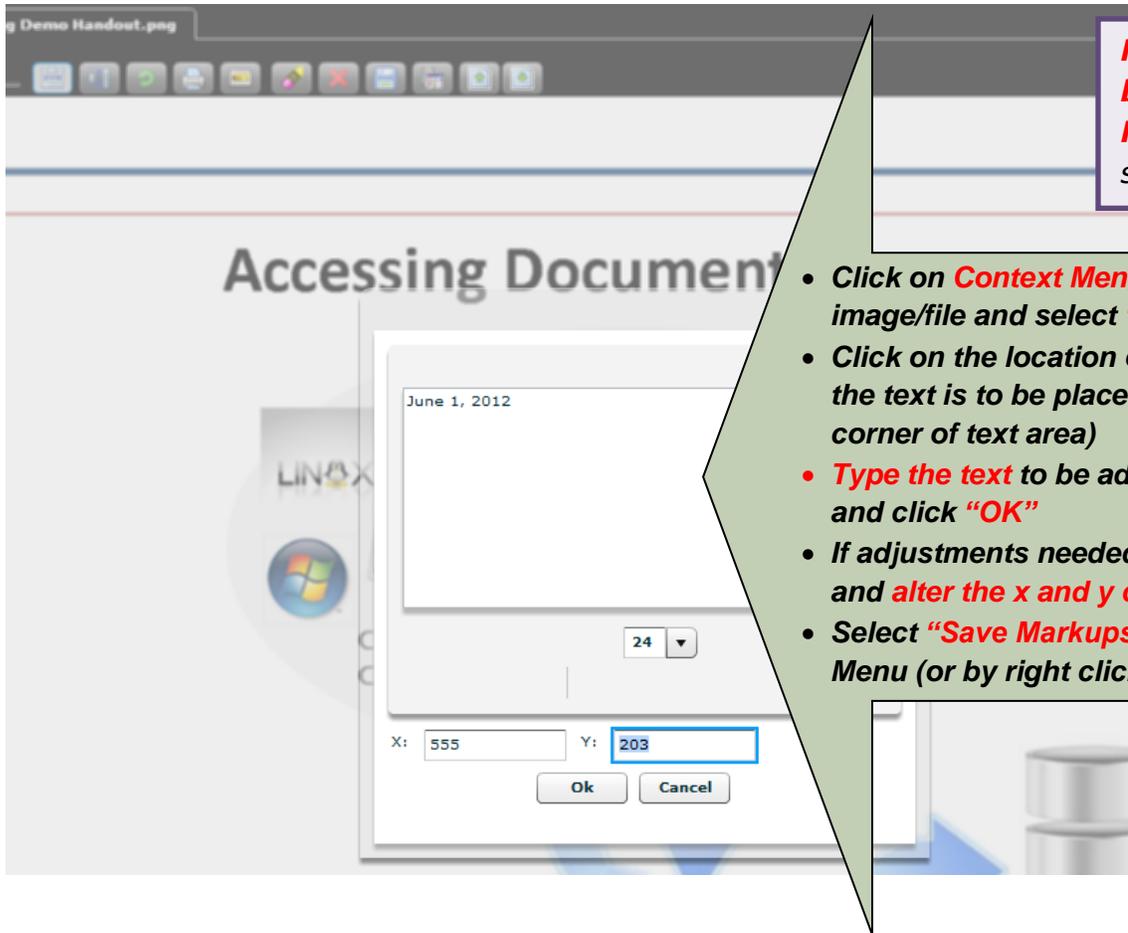
- Click on the **note icon (pencil)**
- The note will open and changes can be made
- If desired, the X and Y coordinates can be adjusted to reposition the posted note icon
- Select **"OK"** when complete
- Select **"Save Markups"** from the Context Menu (or by right clicking on the image)

Note changes will be lost if **"Save Markups"** is not selected.

Overlays

Adding a Text Overlay

A text overlay can be used to add textual content to a file/image. This addition can also be saved as a permanent part of the image/file, by using the **“Save Flattened Image”** function.

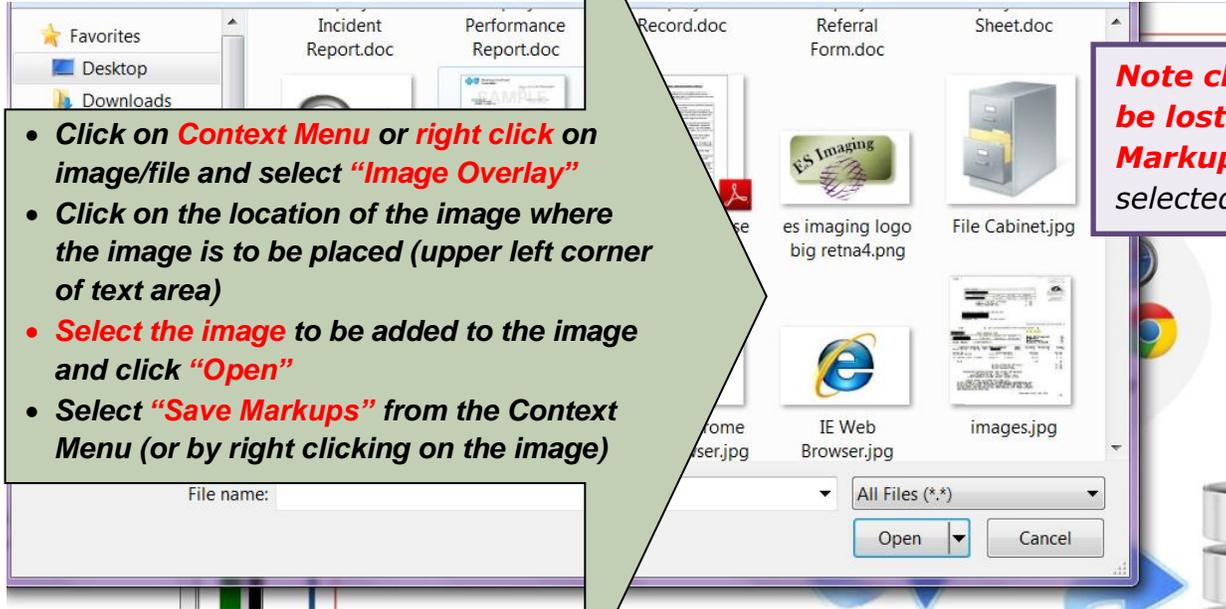


Note changes will be lost if “Save Markups” is not selected.

- Click on **Context Menu** or **right click** on image/file and select **“Text Overlay”**
- Click on the location of the image where the text is to be placed (upper left corner of text area)
- **Type the text** to be added to the image and click **“OK”**
- If adjustments needed, **click on the text** and **alter the x and y coordinates**
- Select **“Save Markups”** from the **Context Menu** (or by **right clicking** on the image)

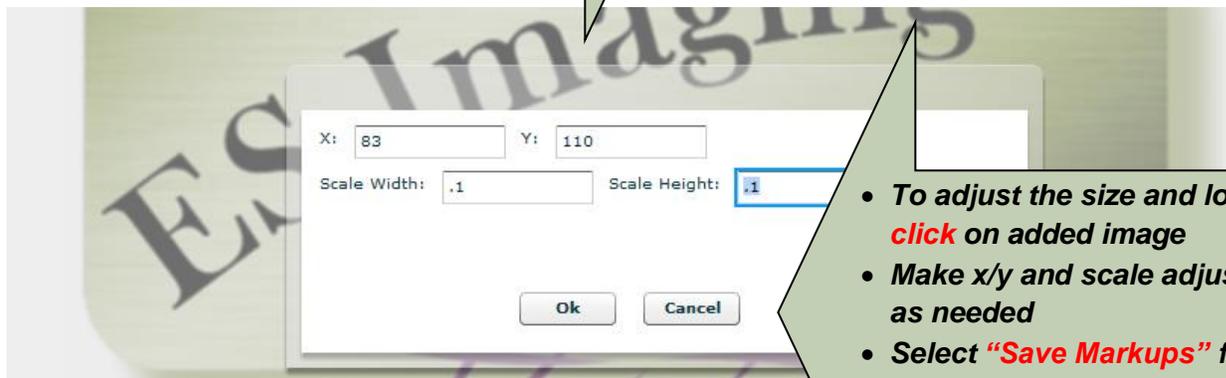
Adding an Image Overlay

Option 1 (importing a network image)

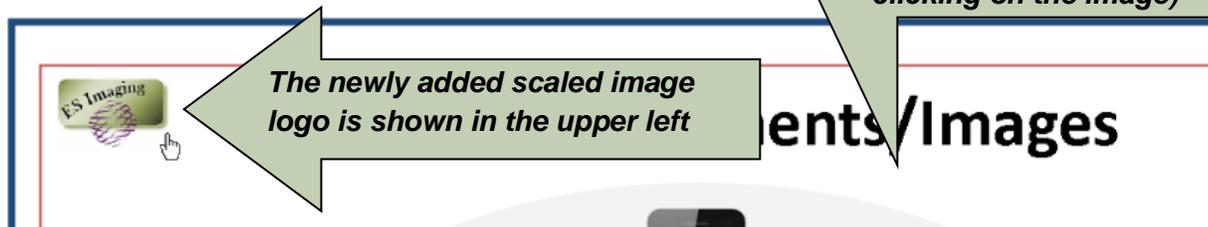


- Click on **Context Menu** or **right click** on image/file and select **"Image Overlay"**
- Click on the location of the image where the image is to be placed (upper left corner of text area)
- **Select the image** to be added to the image and click **"Open"**
- Select **"Save Markups"** from the Context Menu (or by right clicking on the image)

Note changes will be lost if "Save Markups" is not selected.



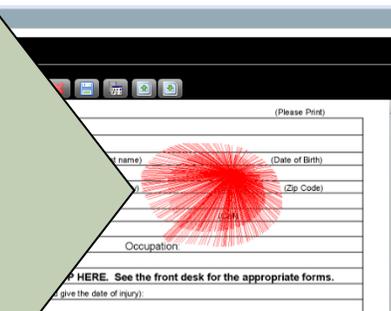
- To adjust the size and location **click** on added image
- Make x/y and scale adjustments as needed
- Select **"Save Markups"** from the Context Menu (or by right clicking on the image)



The newly added scaled image logo is shown in the upper left

Using Special Effect Tools

- Click on Context Menu or right click on image and select **"Fan" or "Blotter"**
- **Left click in the area** to begin the special effect
- **Continue to depress** the left mouse button, while **dragging the cursor** to the complete the effect
- Select **"Save Markups"** from the Context Menu (or by right clicking on the image)



Clearing Markups

Clearing Unsaved Markups

Click on the **eraser icon**, the Context menu or right click on image and select **"Clear Unsaved Markups"** to remove the latest unsaved markups



Clearing All Markups

Click on the **"X" icon** to remove all markups (whether previously saved or not)



If Image Markups have been flattened into the image, then they cannot be cleared.

Clearing Selected Markups

Click on Context Menu or right click on image and select "Select Tool"

PART A - Requesting Office
1. Actions Requested
Begin Employment
3. For Additional Information Call (Name and Telephone Number)
Joan Harris (231) [redacted]-8934
5. Action Requested By (Typed Name, Title, Signature, and Position)
Michael Lutz, CIO

PART B - For Preparation of SF 50 (Use only complete)
1. Name (Last, First, Middle)
Harper, Sarah A
FIRST ACTION

PERSONNEL ACTION
32, 33, 36, and 39.)
2. Request Number
1234
4. Proposed Effective Date
01/01/09
Authorized by (Typed Name, Title, Signature, and Concurrence Date)
beth Cochran, CEO
2-1. Show all dates in month-day-year order.)
Security Number
3. Date of Birth
4. Effective Date

If Image Markups have been flattened into the image, then they cannot be cleared.

- Click on **all markups that should be cleared** (selected markups will change color)
- Click on **Context Menu or right click on image**
- Select **"Clear Selected Markups"**
- Click on **Context Menu or right click on image**
- Select **"Save Markups"**

PART A - Requesting Office
1. Actions Requested
Begin Employment
3. For Additional Information Call (Name and Telephone Number)
Joan Harris (231) [redacted]-8934
5. Action Requested By (Typed Name, Title, Signature, and Position)
Michael Lutz, CIO

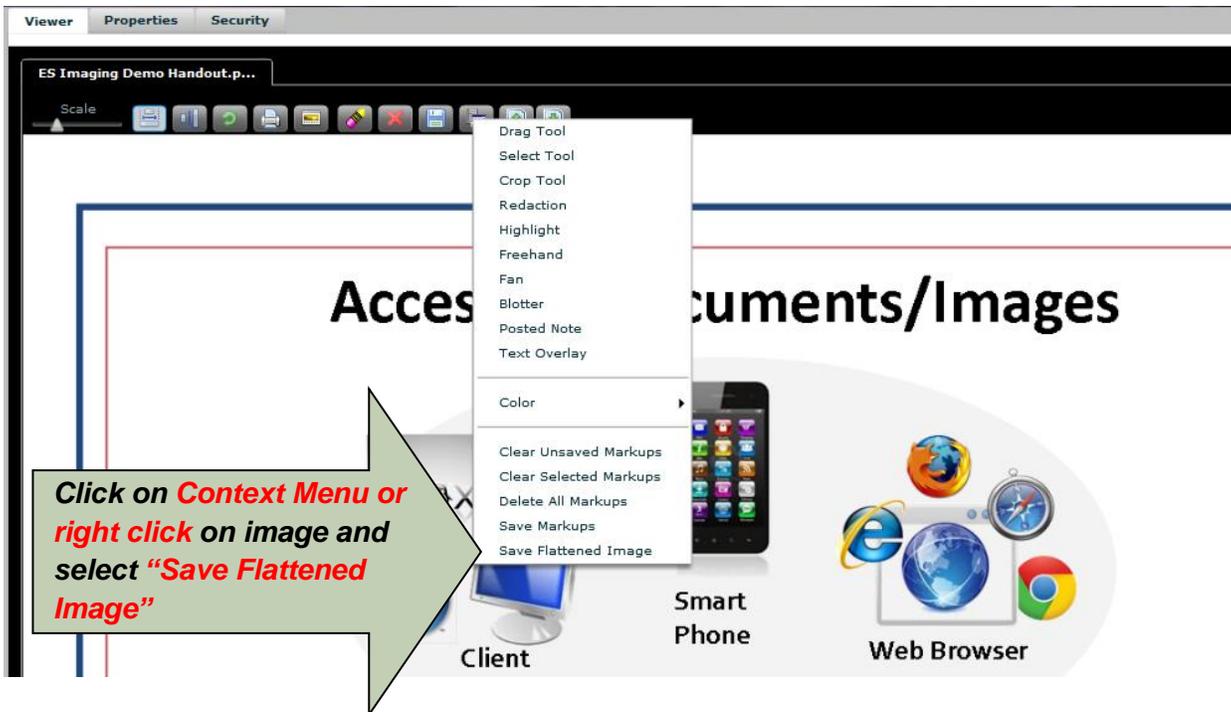
PART B - For Preparation of SF 50 (Use only complete)
1. Name (Last, First, Middle)
Harper, Sarah A
FIRST ACTION

PERSONNEL ACTION
32, 33, 36, and 39.)
2. Request Number
1234
4. Proposed Effective Date
01/01/09
Authorized by (Typed Name, Title, Signature, and Concurrence Date)
beth Cochran, CEO
2-1. Show all dates in month-day-year order.)
Security Number
3. Date of Birth
4. Effective Date

SECOND ACTION
6-A. Code 6-B. Nature of Action
6-C. Code 6-D. Legal Authority
6-E. Code 6-F. Legal Authority
15. TO: Position Title and Number

Saving a Flattened Image

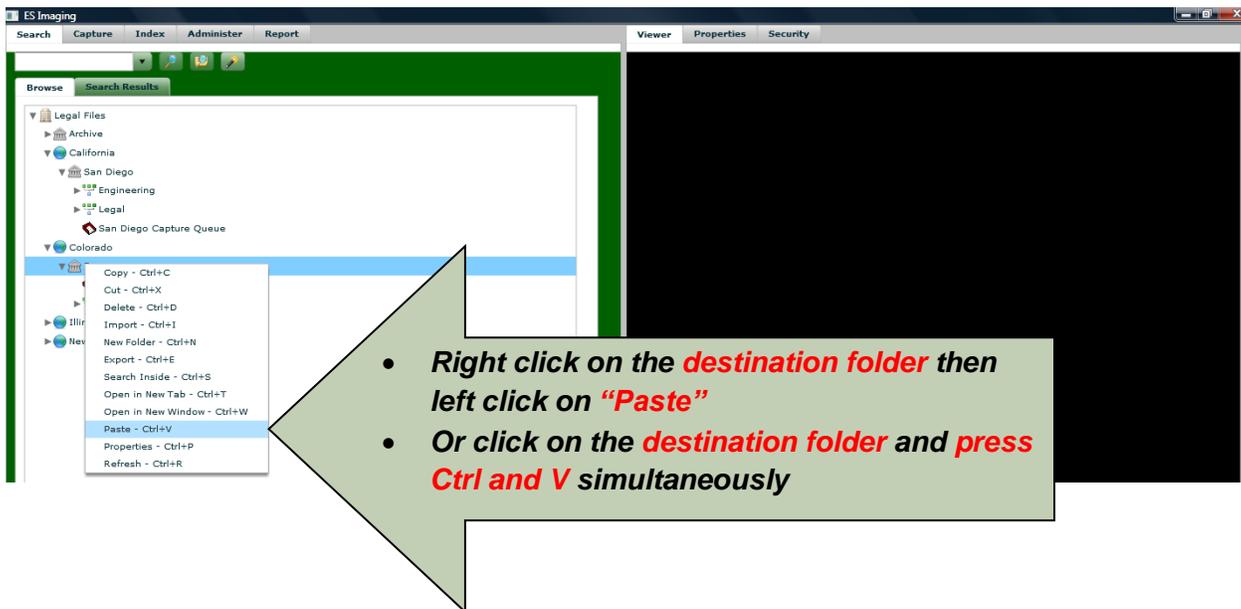
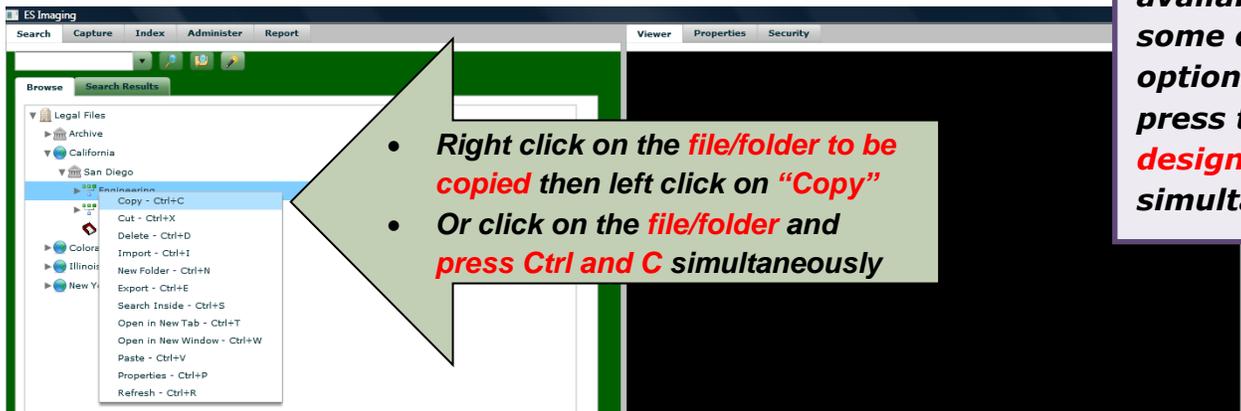
In order to make image markups a permanent part of the image, the “**Save Flattened Image**” function must be used. When exporting an image outside of ES Imaging, these markups can be viewed after using this function. Please note that all image markups except “**Posted Note**” can be flattened into an image.



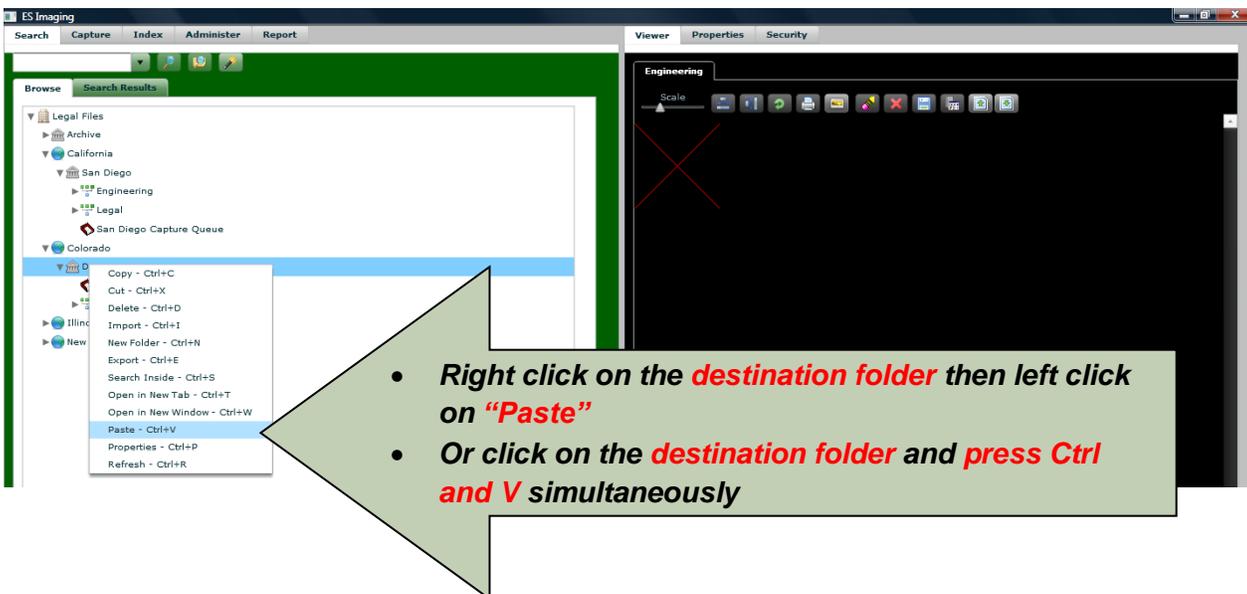
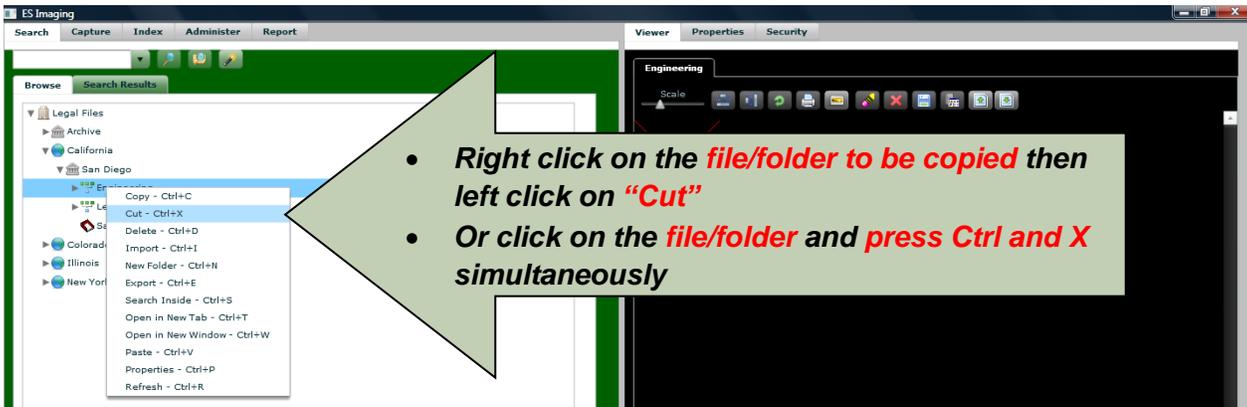
Image/File Management

Copying/Pasting

Shortcuts are available for some of these options. Simply press the **two designated keys simultaneously.**

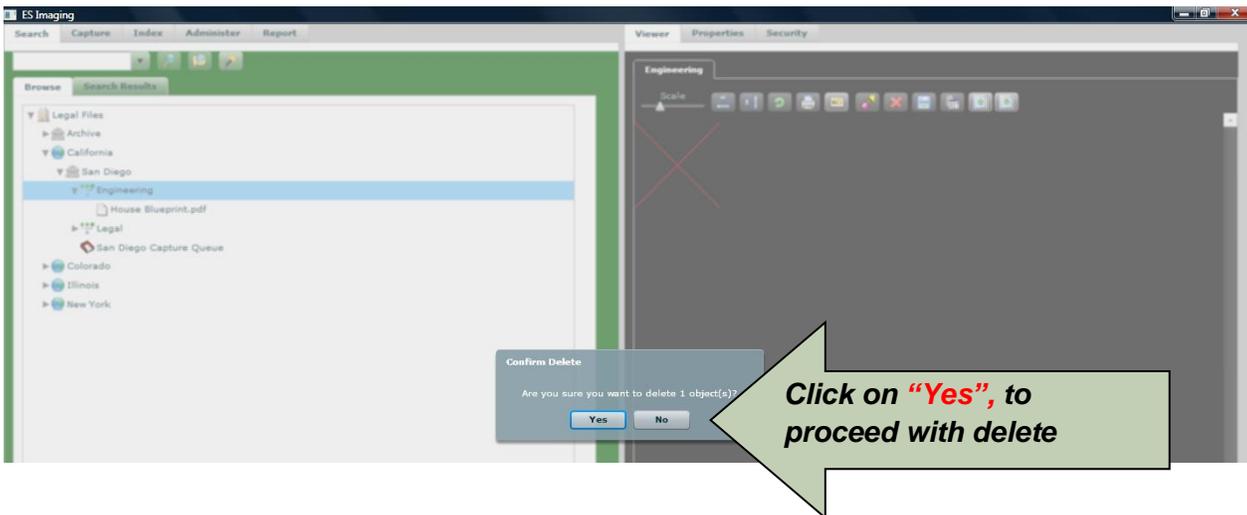
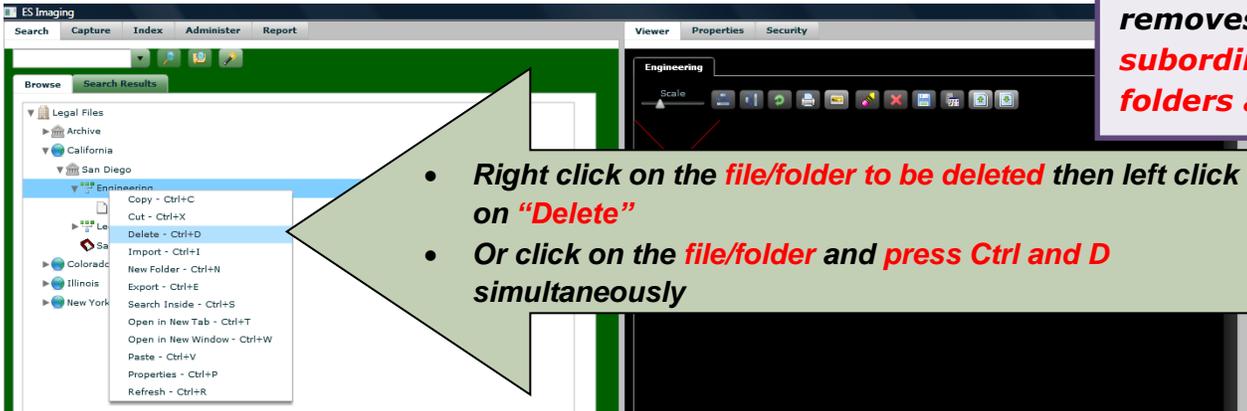


Cutting/Pasting

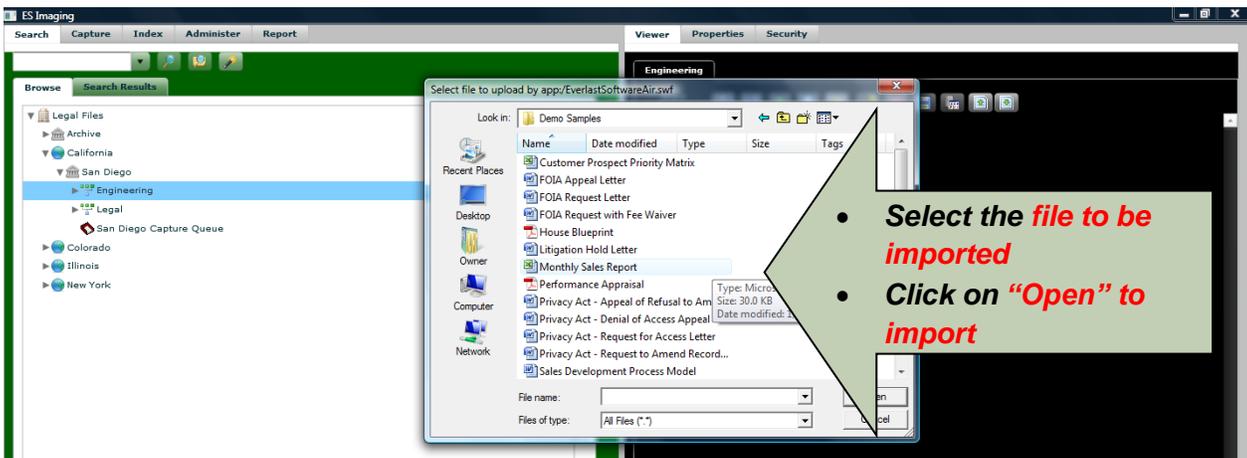
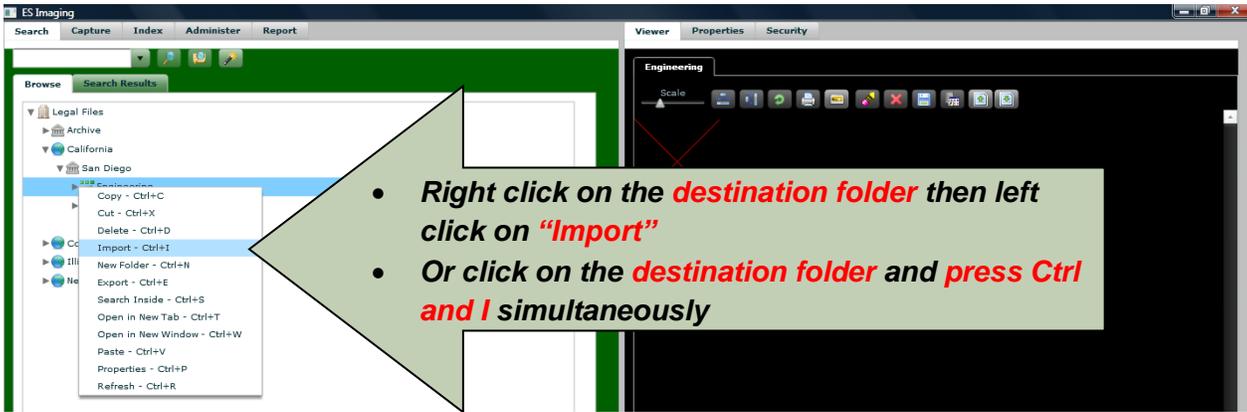


Deleting

WARNING!
Deleting a folder
permanently
removes **ALL**
subordinate files,
folders and

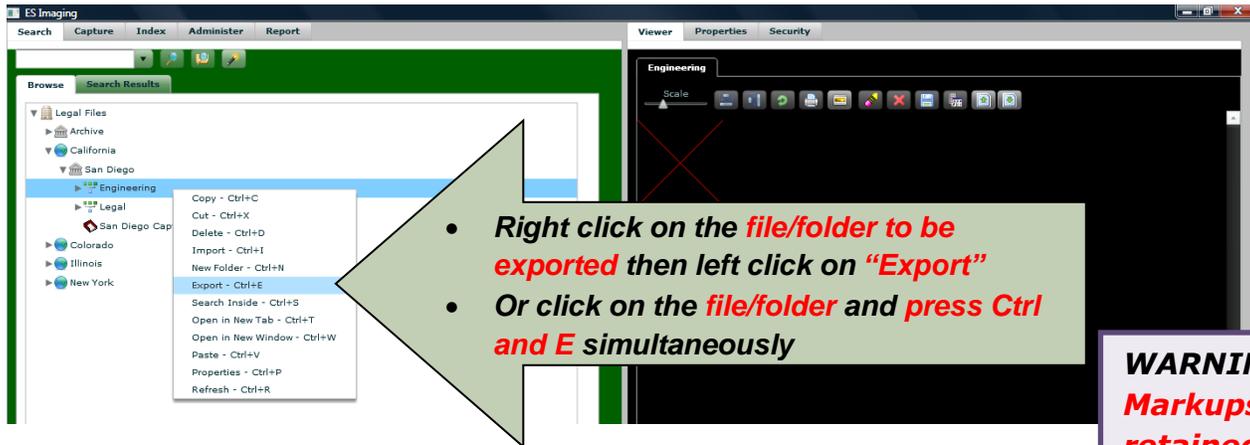


Importing Directly

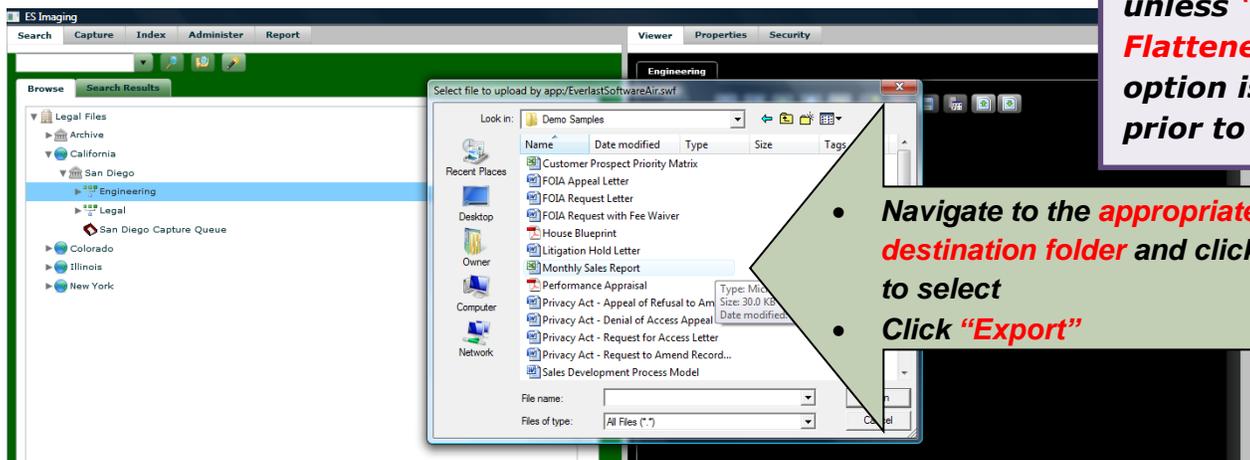


Exporting

To save a file/image to either a local or network location **with the folder hierarchy** within ES Imaging, the **“Export”** function can be used. If the folder hierarchy is not needed, see **“Save As”**.

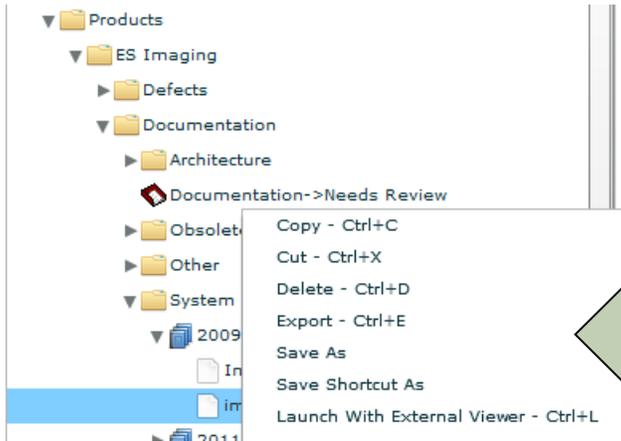


WARNING! Image Markups are not retained within exported images/files unless “Save Flattened Image” option is used prior to export.

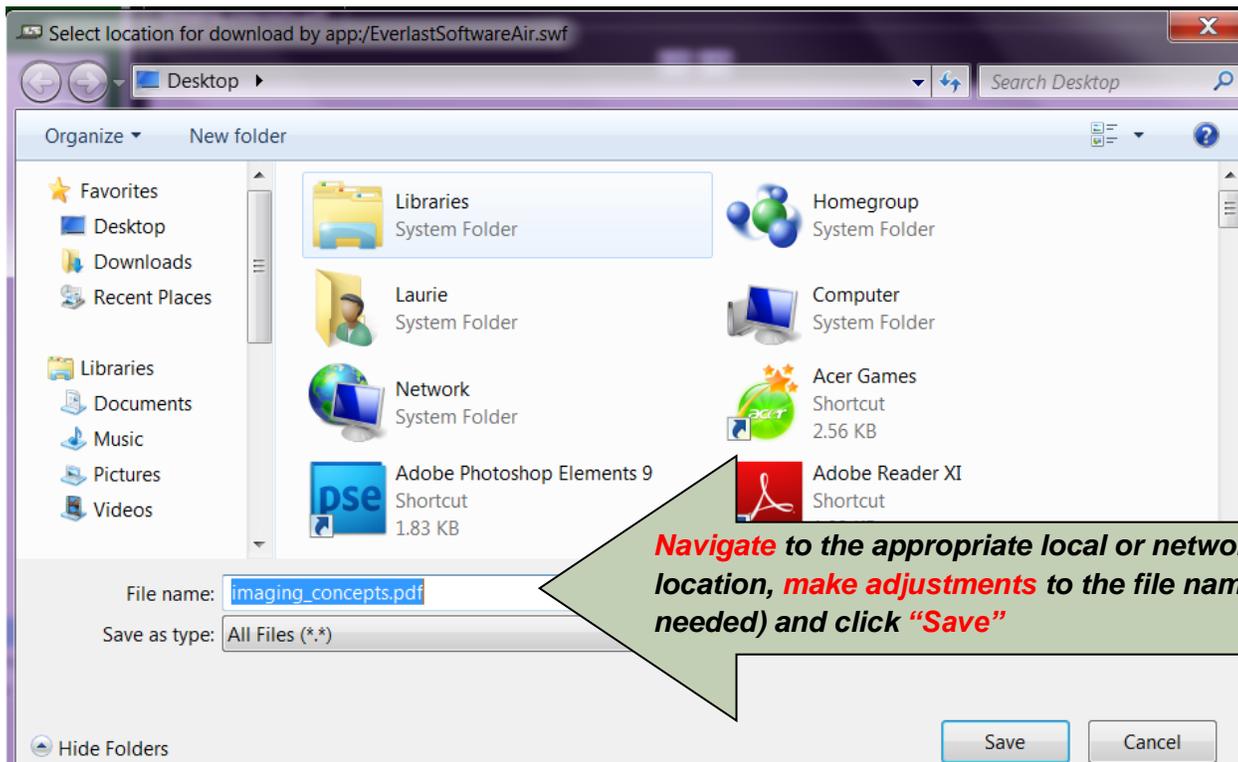


Save As

To save a file/image to either a local or network location *without the folder hierarchy* within ES Imaging, the **“Save As”** function can be used. See **“Export”** if the folder hierarchy is necessary.



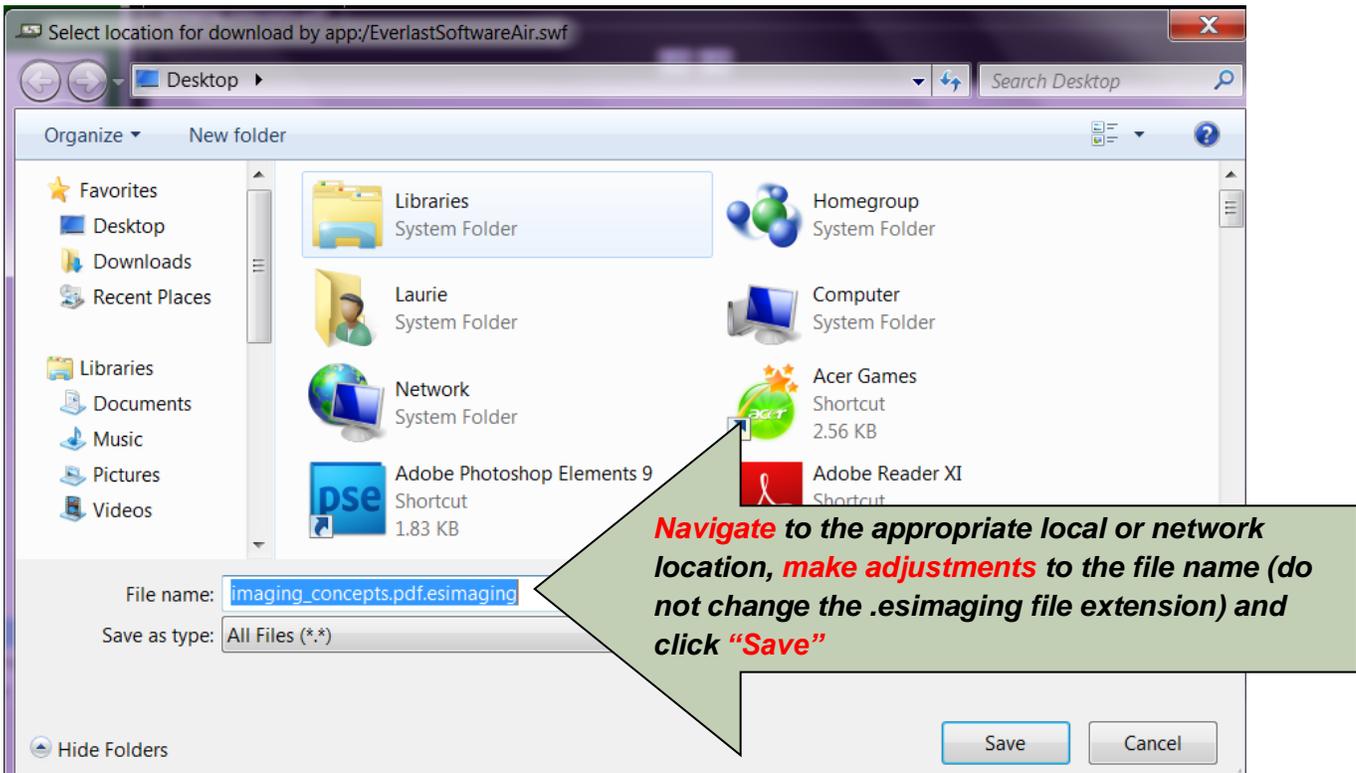
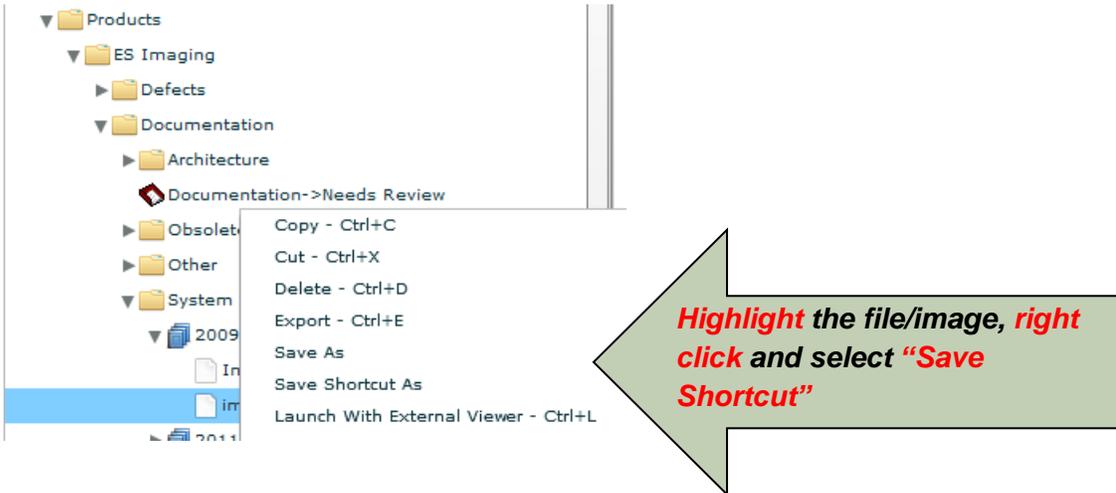
Highlight the file/image to be saved, **right click** and select **“Save As”**



Navigate to the appropriate local or network location, **make adjustments** to the file name (if needed) and click **“Save”**

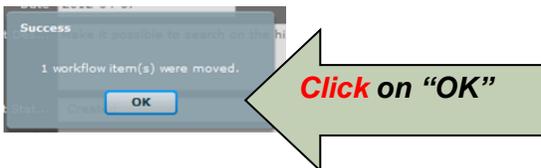
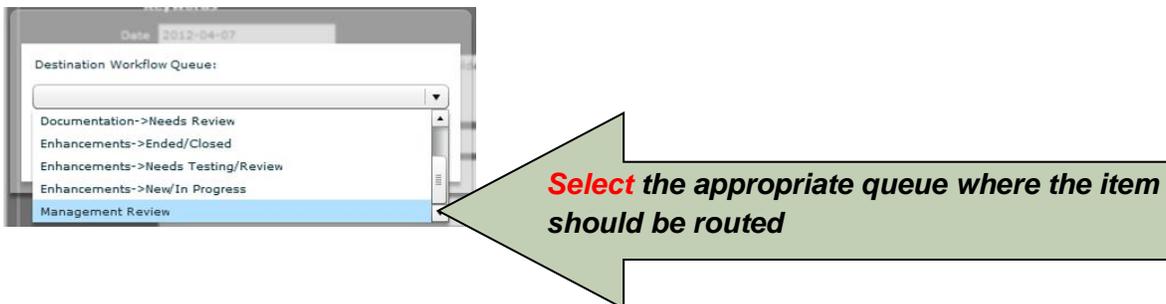
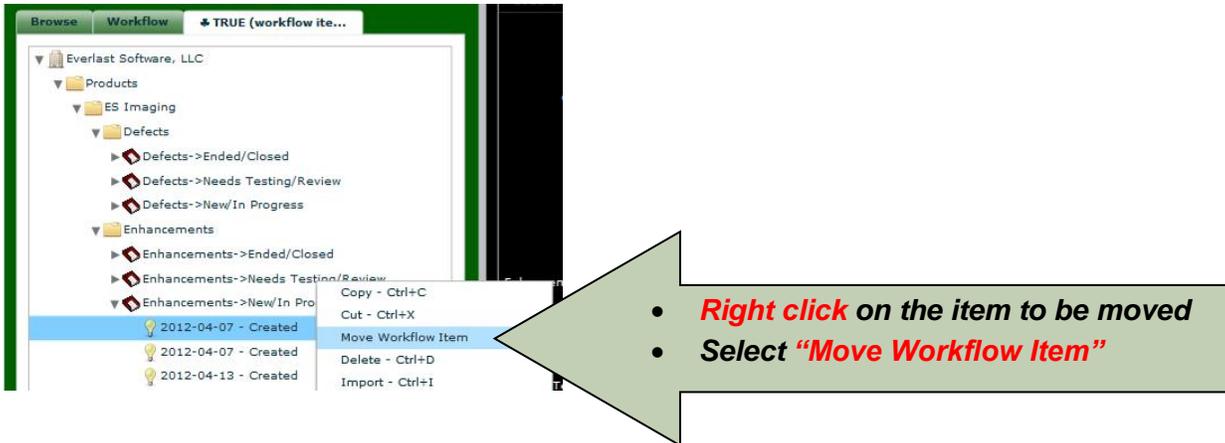
Save Shortcut

To create a direct link to a file or image from a local (for instance, the desktop) or network location, the **“Save Shortcut”** function can be used.



Moving Workflow Items

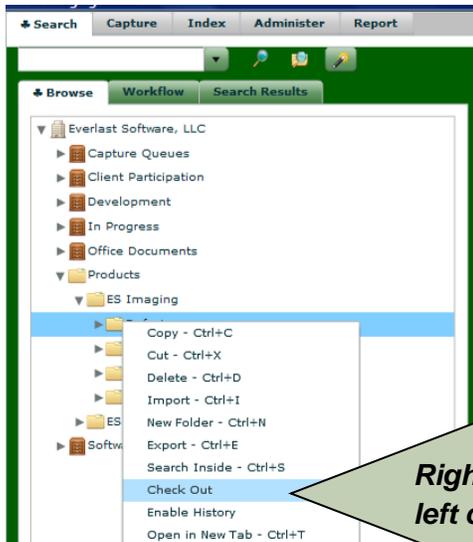
From time to time, an item in the workflow will not follow the normal process established by the *system administrator*. For instance, an extra review/approval step is required due to an unusual circumstance. In order to provide for this exception, the **“Move Workflow Item”** can be utilized to send the item to a pre-defined workflow queue that is outside of the normal approval sequence. This can be used in conjunction with **“Assign Check Out”**, if needed.



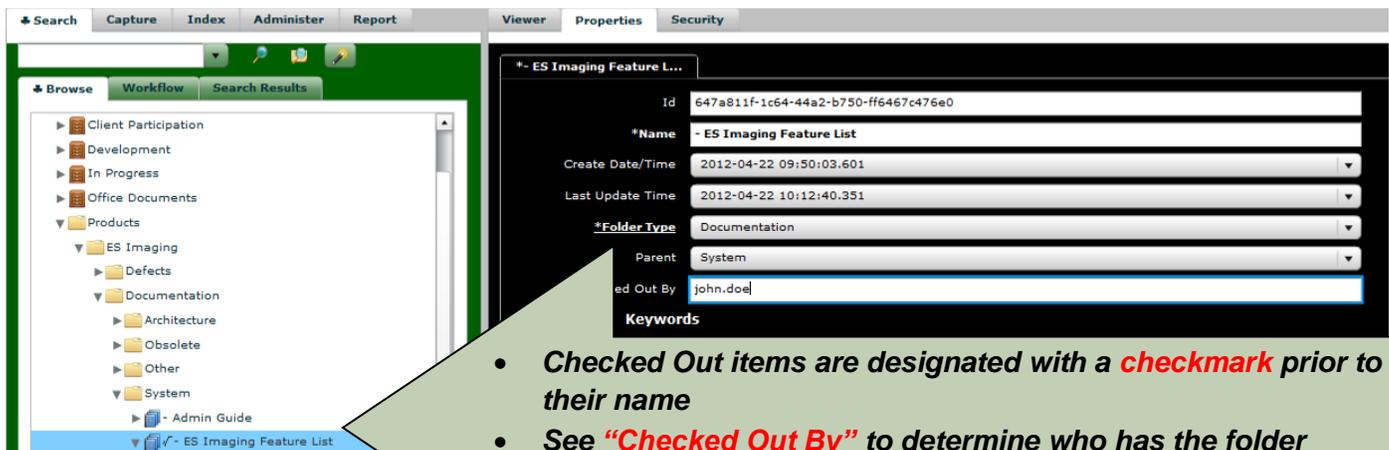
Check In/Out

Check Out

This feature can be used to ensure others do not edit properties while changes are in process, which prevents changes being inadvertently overlaid. However, the check out still allows others to view the file/folder (if authorized).



Right click on the **file/folder to be checked out** then left click on **“Check Out”**



- **Checked Out items** are designated with a **checkmark** prior to their name
- See **“Checked Out By”** to determine who has the folder currently checked out (see **Properties** tab, as shown above)

Check In

Right click on the file/folder to be checked in then left click on "Check In"

*- ES Imaging Feature List	
Id	647a811f-1c64-44a2-b750-ff6467c476e0
*Name	- ES Imaging Feature List
Create Date/Time	2012-04-22 09:50:03.601
Last Update Time	2012-04-28 18:40:28.702
*Folder Type	Documentation
Parent	System
Checked Out By	john.doe
Keywords	
Date	__-__-__
Document Descrip...	Feature List
System Keywords	
ure Queue	--SELECT--

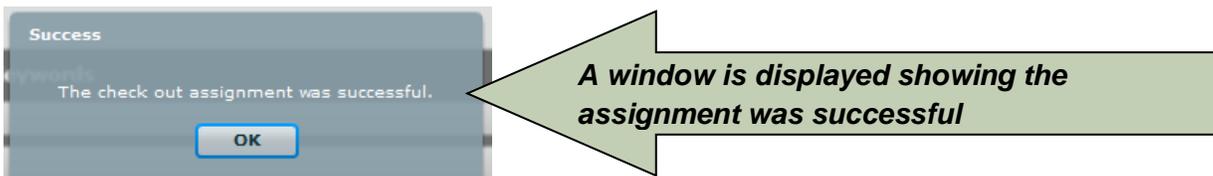
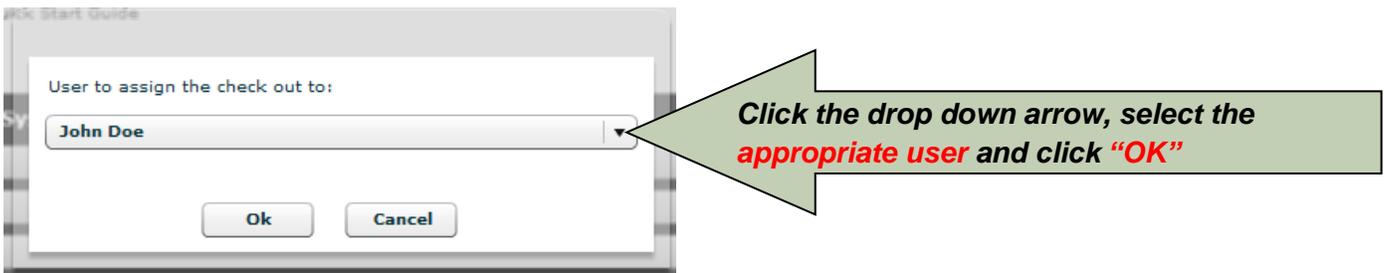
Checked Out By

Within the "Browse" tab, click on the file/folder that is checked out then select the "Properties" tab to view who has the file checked out and who assigned the check out also

2012-04-20 - Feature List	
Id	647a811f-1c64-44a2-b750-ff6467c476e0
Name	2012-04-20 - Feature List
Create Date/Time	2012-04-22 09:50:03
Last Update Time	2012-05-01 19:11:10
Folder Type	Documentation
Parent	System
Children	2 files, 0 folders
Checked Out By	john.doe
Assigned By	john.doe

Assign Check Out

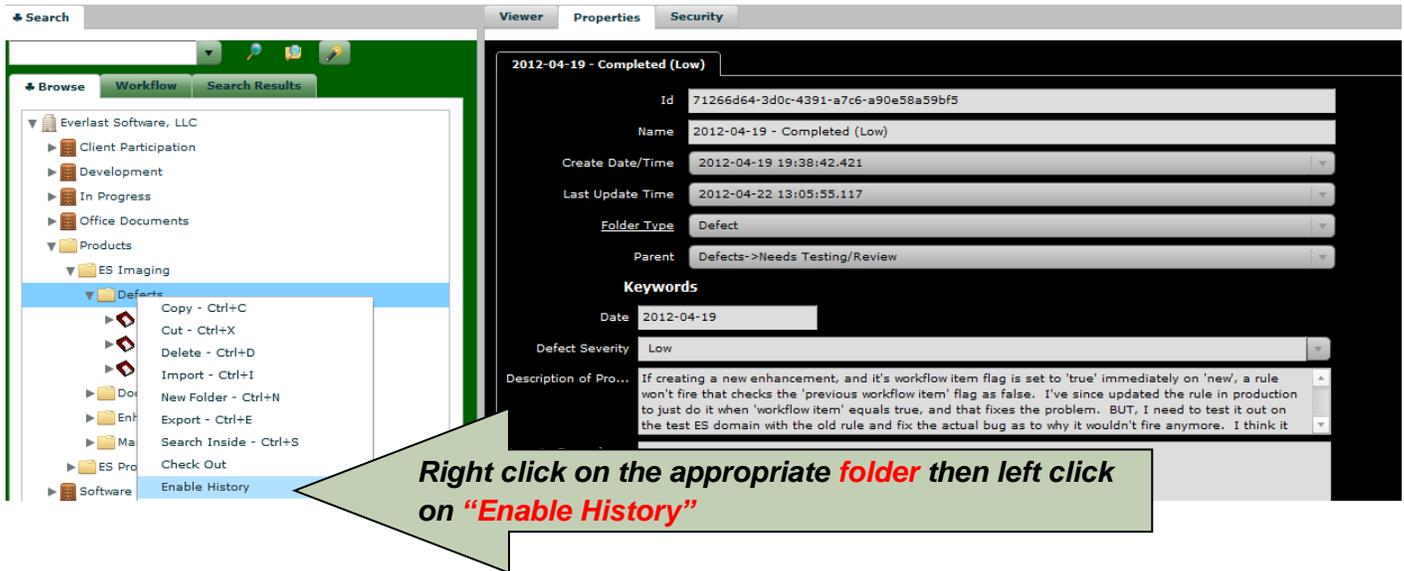
With appropriate permissions, a file/folder can be **checked out to another user**. This might be useful if the file/folder was checked out, but not currently available (for instance, employee is out sick or on vacation).



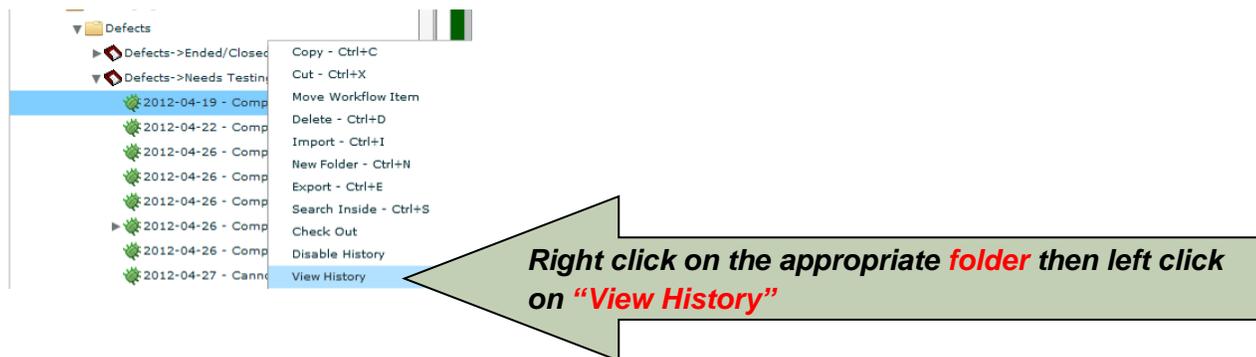
Document History (Audit Trail)

Enable History

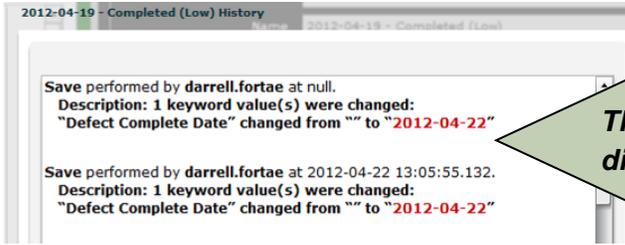
This option provides an **audit trail** of changes made to the **keywords** which is specifically helpful during **workflow approvals**. Additionally, property changes to a folder are also tracked with this feature. By setting the **“Enable History”** option, changes made to keywords can be viewed within the **“View History”** option (shown below).



View History

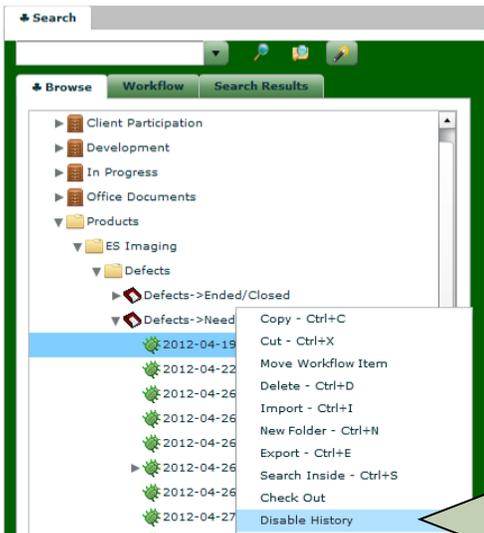


User Manual



The history of changes to keywords is displayed. Click "OK" to exit.

Disable History



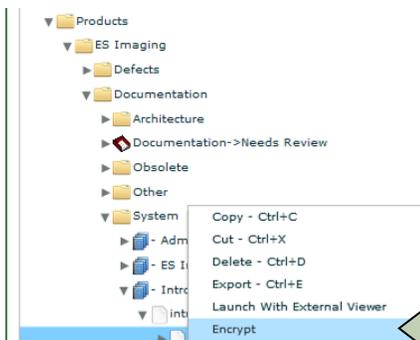
Right click on the appropriate folder then left click on "Disable History"

Encryption of Files/Images

Encrypting

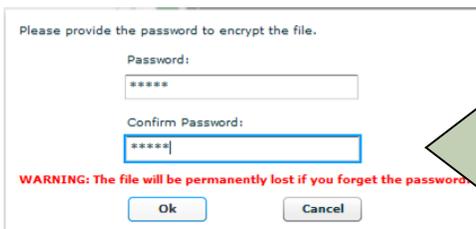
The only way to protect confidential information under every circumstance is the **“Encrypt”** feature. This feature allows the user to assign a password to an image(s). **Use extreme caution when assigning and entering the password**, since the image is not retrievable if the password is forgotten. *Please note that only files can be encrypted and this feature will not work for folders.*

Encryption can also be done when scanning into ES Imaging to ensure an extra level of security (see **“Scanning Documents”**).



- **Right click on the file/folder to be encrypted then left click on “Encrypt”**

WARNING!
Passwords for Encrypted images are unrecoverable. If forgotten, the image will not be retrievable.



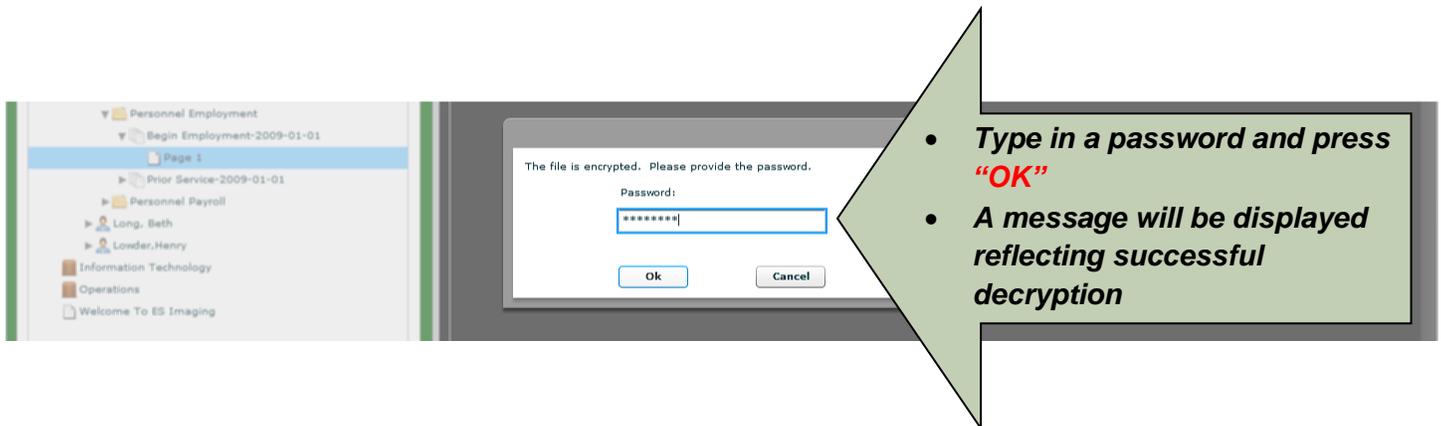
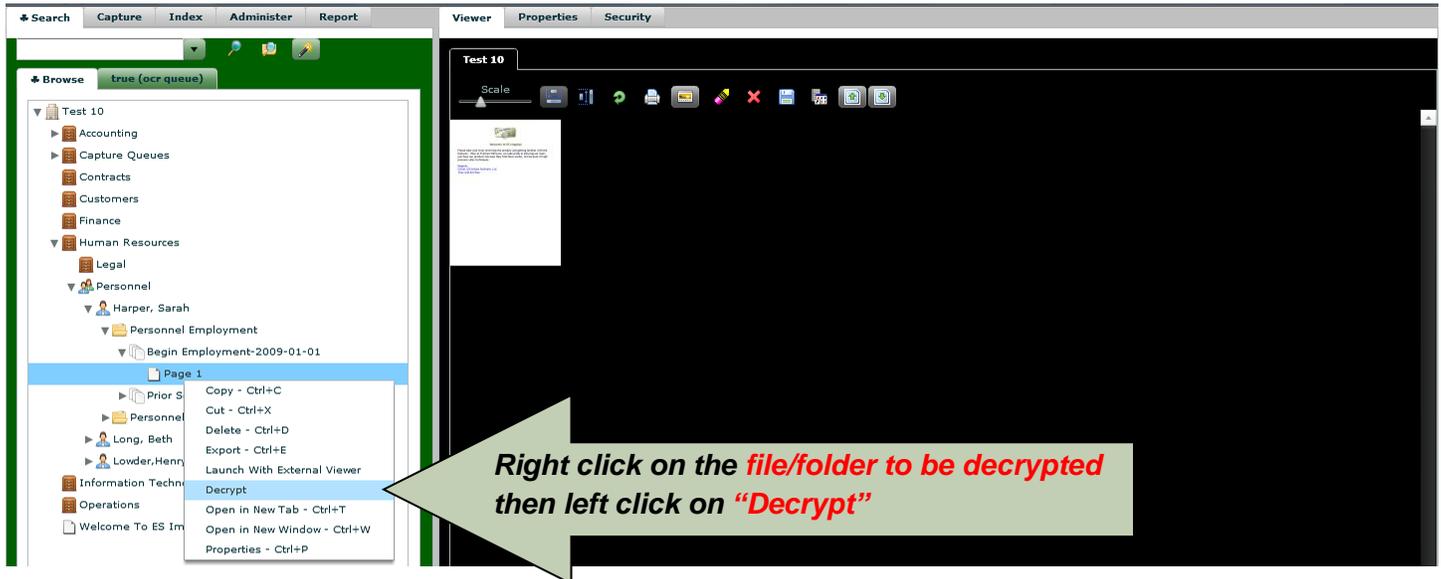
- **Type in a password and confirm password then press “OK”**
- **A message will be displayed reflecting the encryption**

See “Protecting Confidential Information” to redact portions of an image.

An image that has been encrypted cannot be viewed without entering the appropriate password. **However, if the same password is used for encrypted images, the password only needs to be provided one time per ES Imaging session.** Providing a password to view an image is temporary and is different from the **“Decrypt”** function, which permanently removes encryption.

Decrypting

Decrypting an image **permanently** removes the password protection of the image. It is basically an “undo” of encryption and a password will no longer be required to view the image.

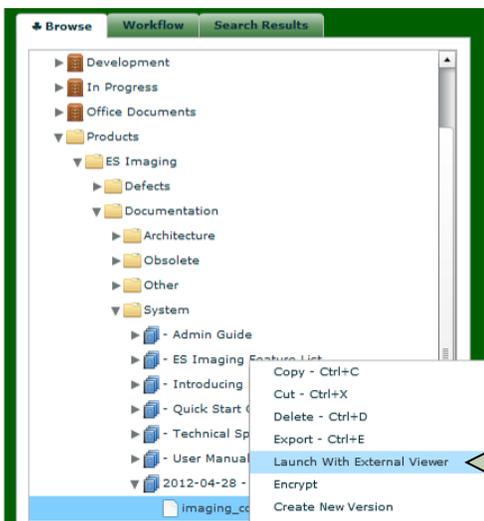


Versioning

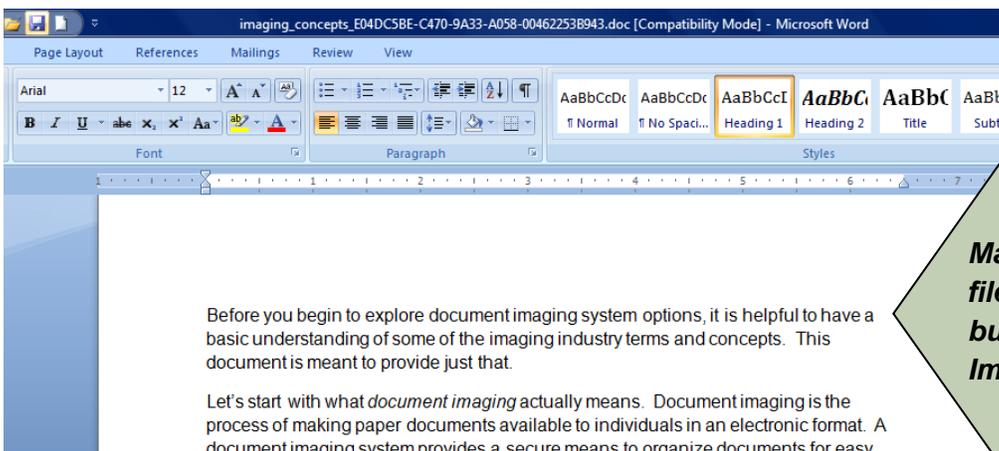
Creating New Version (via Launch with External Viewer)

When images and files require updates, sometimes it is necessary to retain the previous state of the image/file. The **“Create New Version”** provides this functionality. There are two methods to create a new version of an image/image as shown below.

The **First** Method to Create a New Version (updating a file via ES Imaging **“Launch With External Viewer”**)

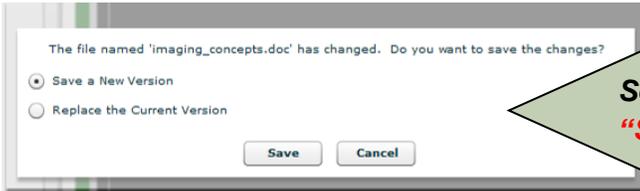


Right click on the file to be updated then left click on **“Launch with External Viewer”**

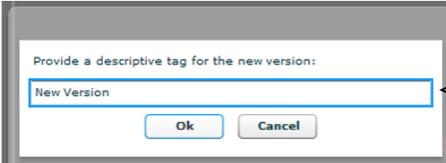


Make changes within the file and click the **“Save”** button. Return to ES Imaging.

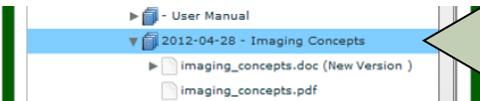
User Manual



Select **“Save a New Version”** and click **“Save”**



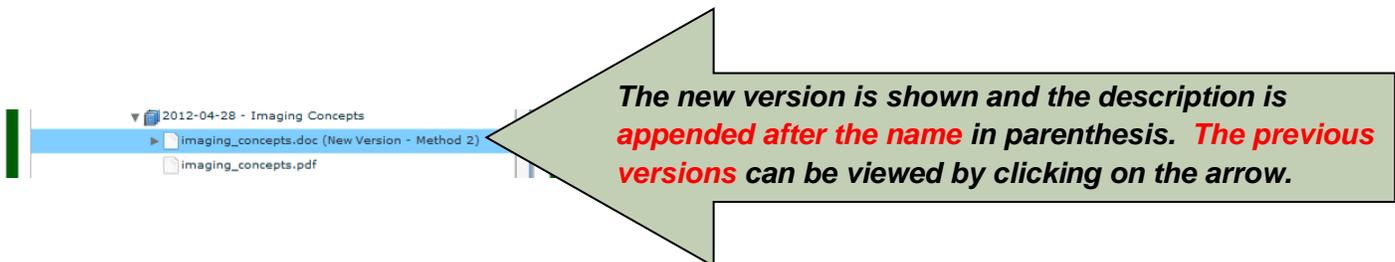
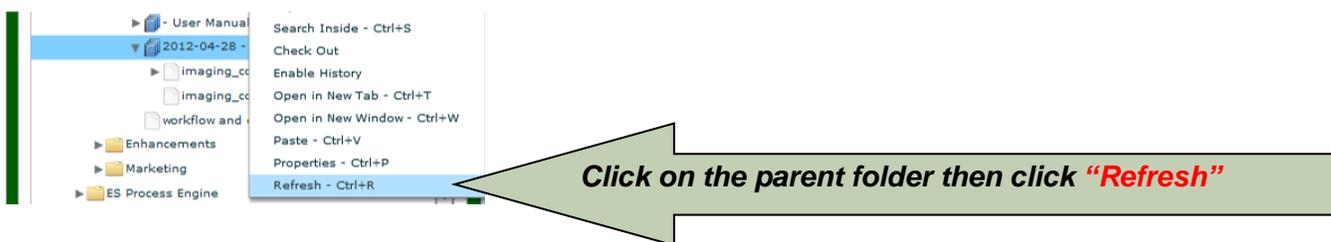
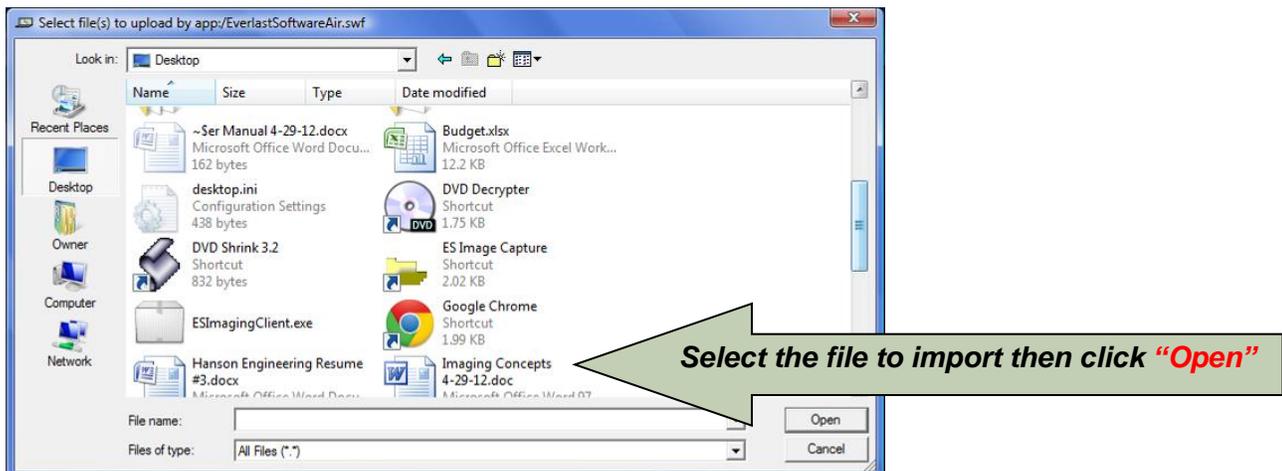
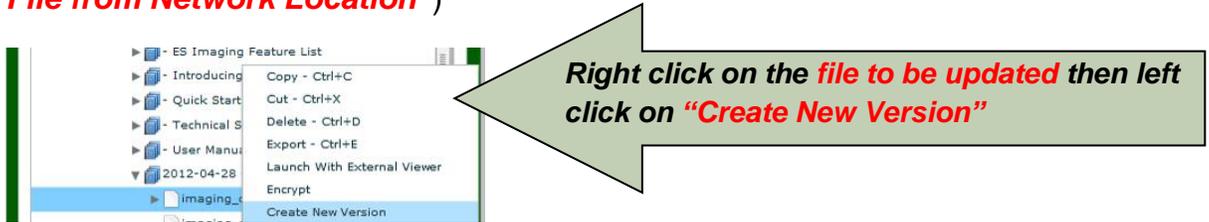
Type in a **meaningful description** of the updates and click **“OK”**



The new version is shown and the description is **appended after the name in parenthesis**. The **previous versions** can be viewed by clicking on the arrow.

Create a New Version (via Importing Existing File from network location)

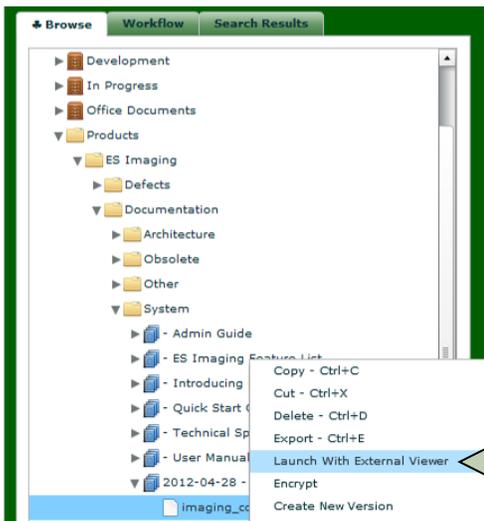
The **Second** Method to Create a New Version (updating a file via ES Imaging **“Importing Existing File from Network Location”**)



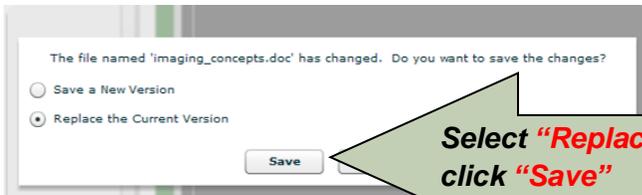
Replacing Selected Version (via Launch with External Viewer)

If it is not necessary to retain the previous state of the document/image, this feature can be used. Just like **“Creating a New Version”**, there are two methods to creating a new version of a document/image as previously shown. The process is the similar for replacing a new version of a file as shown below.

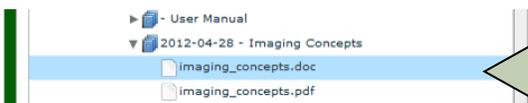
The **First** Method to Replacing a Selected Version (updating a file via ES Imaging **“Launch With External Viewer”**)



Right click on the **file to be updated** then left click on **“Launch with External Viewer”**



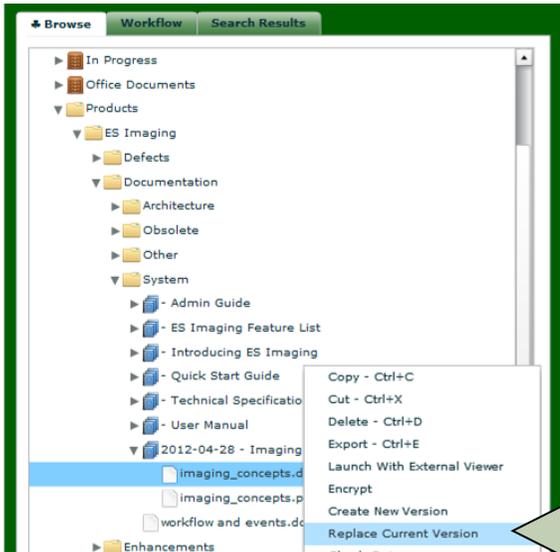
Select **“Replace the Opened Version”** and click **“Save”**



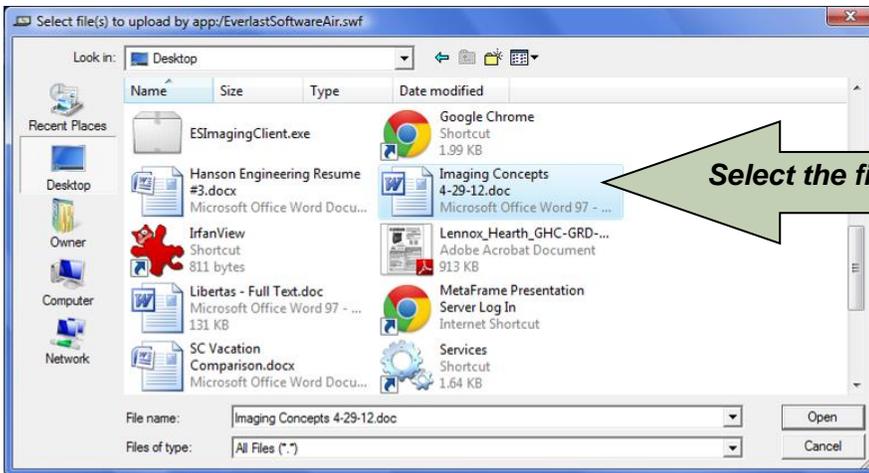
The newly updated version is shown and the file has been replaced. The properties tab will reflect the updated date/time of the replaced file.

Replacing a Selected Version (via Importing Existing File from network location)

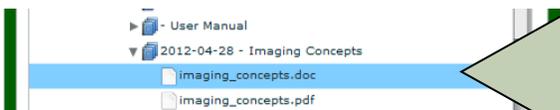
The **Second** Method to Replacing a Selected Version (updating a file via ES Imaging **“Importing Existing File from network location”**).



Right click on the **file to be updated** then left click on **“Replace Selected Version”**

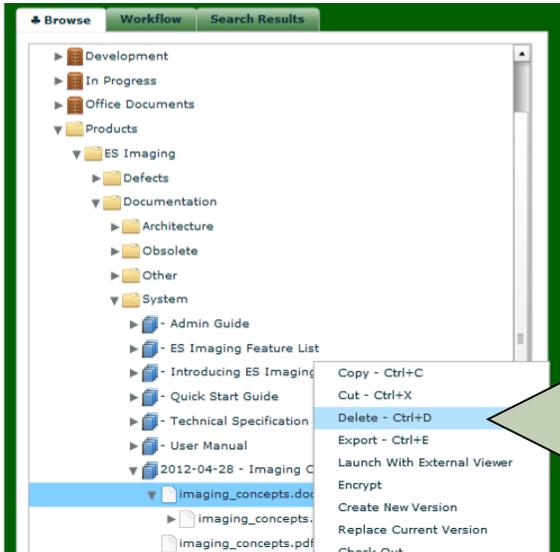


Select the file to import then click **“Open”**



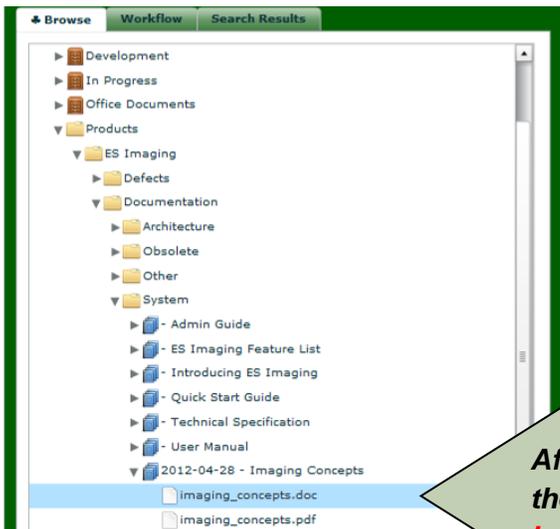
The newly updated version is shown and the file has been replaced. The properties tab will reflect the updated date/time of the replaced file.

Deleting a Previous Version



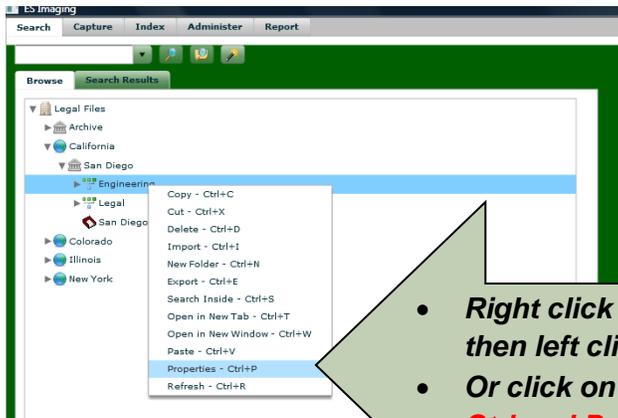
To view previous versions of an image/file expand the folder and click on the appropriate image/file.

Right click on the *version to be removed* then left click on *“Delete”*

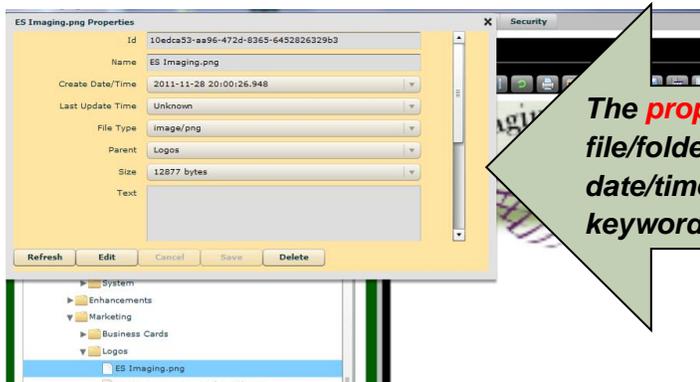


After selecting *“OK”* to the delete prompt, the version is removed and the *original file is displayed*

Viewing Properties



- **Right click on the desired file/folder then left click on "Properties"**
- **Or click on the file/folder and press Ctrl and P simultaneously**



The **properties** of the selected file/folder are displayed (Name, create date/time, last update date/time, type, keywords, etc.)

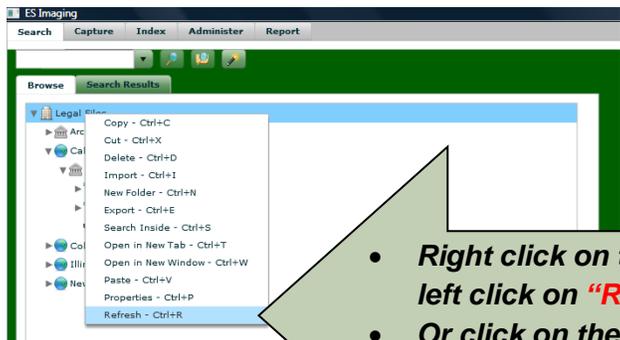
Download with Web Browser

This function can be used for a variety of purposes, dependent upon the browser's ability to support various file types. One use might be to locate the sound file, right click and select ***“Download with Web Browser”***.

Stream Launch with External Viewer

The “Stream Launch with External Viewer” function can be used to play sound or video files, such as .mp3 or .wmv files (a media player with streaming capabilities must be installed on the client machine to utilize this function). The sound or video file begins playing before the file is fully downloaded (preventing a delay in response). Simply, locate the sound or video file, right click and select ***“Stream Launch with External Viewer”***. See ***“Download with Web Browser”*** for a possible alternative method.

Refreshing



- Right click on the desired **file/folder** then left click on **“Refresh”**
- Or click on the **file/folder** and press **Ctrl and R** simultaneously

Refresh is needed at times when a change has been made, but is not yet reflected

Scanning and Importing

Capturing Document Images into ES Imaging

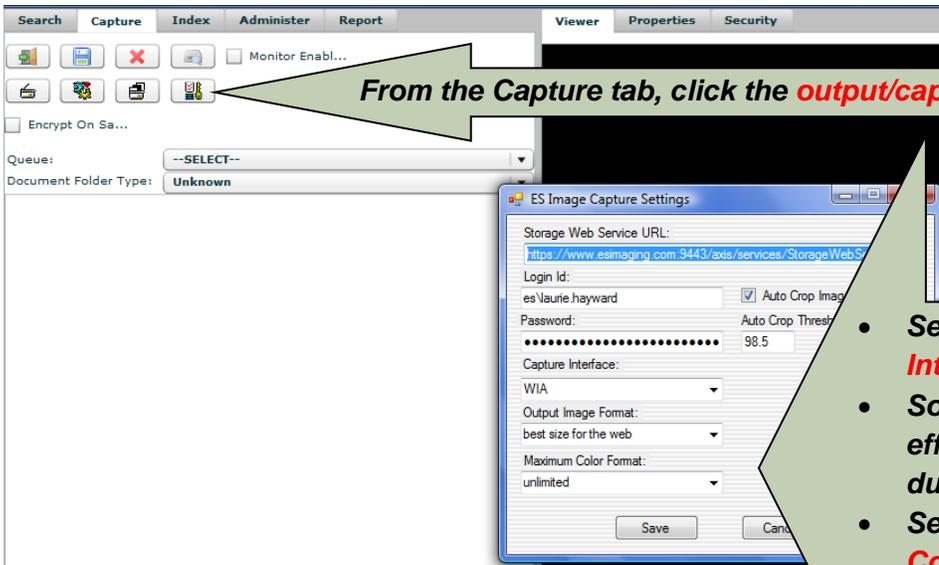
ES Imaging software supports a variety of ways to load document images that require indexing. Capturing a document can be achieved with three different methods;

- 1) Scanning an image (see ***“Scanning Documents”***)
- 2) Mass import (see ***“Automatic Import of Electronic Files”***)
- 3) Individual document import (see ***“Importing Electronic Files”*** and ***“Enhanced Importing Electronic Files”***)

Some document images require the ability to search on every word within the image. This functionality is known as full-text searching. The administrator will set this functionality (with OCR queue set to true) when creating the folder. Upon scanning/indexing any document or importing pdf documents, images that are indexed or placed within a folder set appropriately by the administrator, will automatically have the entire contents searchable (see ***“Full-Text Search”***).

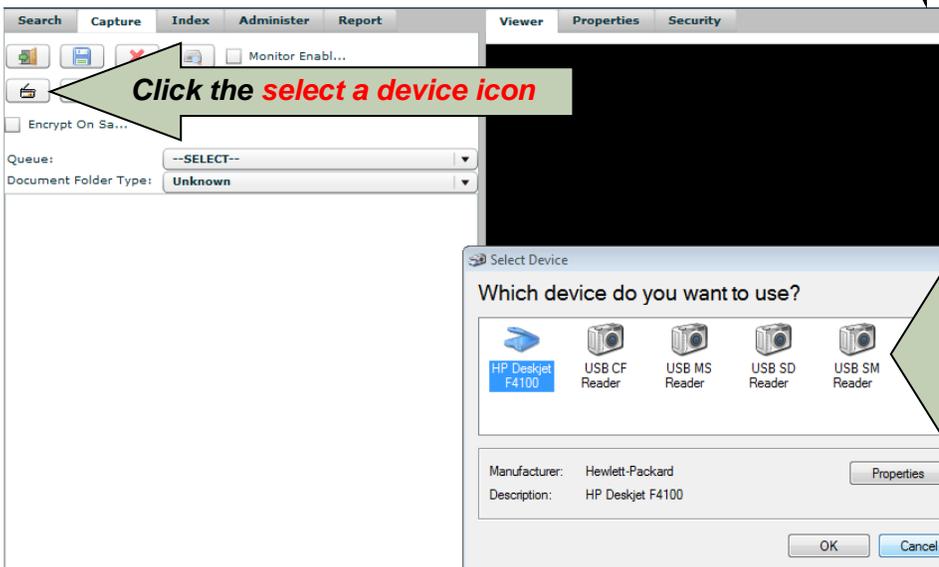
The following sections describe the necessary steps to accomplish all of the above methods.

Scanning Documents



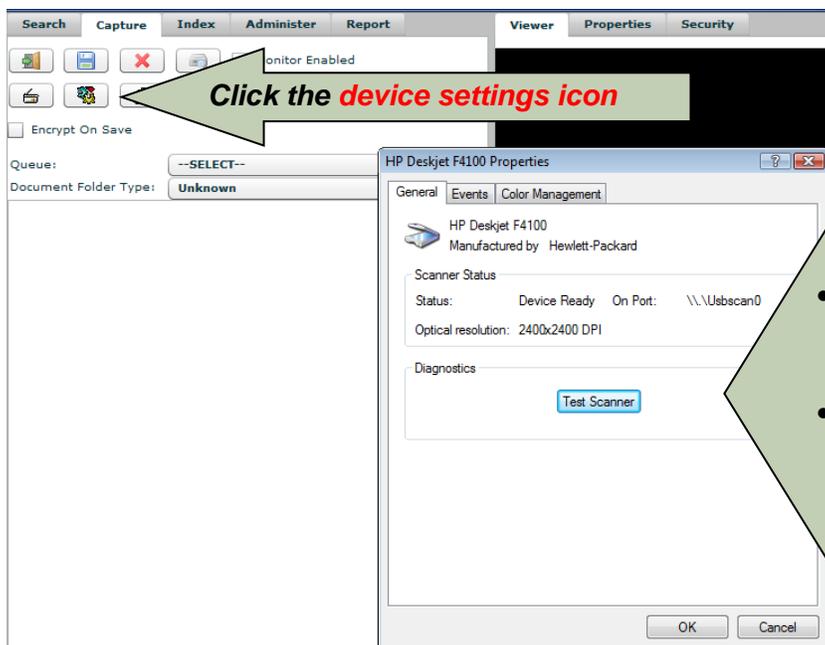
From the Capture tab, click the **output/capture settings icon**

- Select the appropriate **Capture Interface**
- Software will determine the most efficient **Output Image Format** during the capture process
- Select the appropriate **Maximum Color Format**
- Click **"Save"**



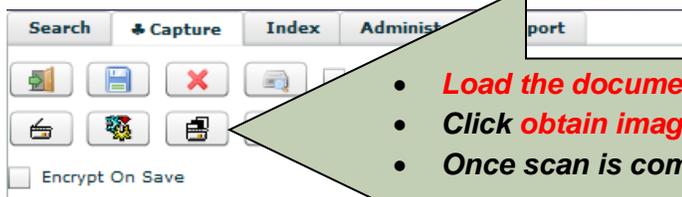
Click the **select a device icon**

- Choose the **"Device"** (see **"Select Device"** window above)
- Click on **"OK"** within the **"Select Device"** window

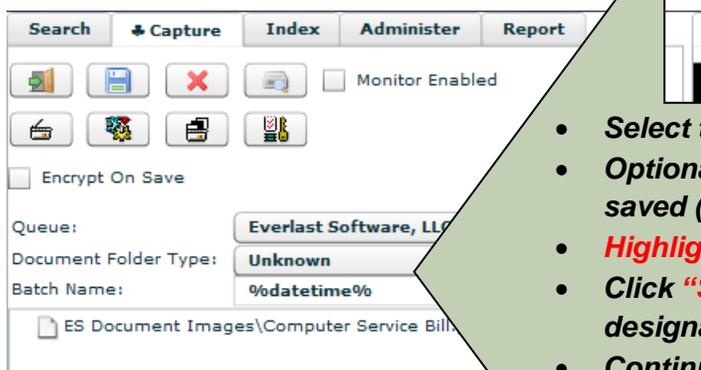


- The **scanner settings** window (see above) for the selected scanner will be displayed
- Make **necessary adjustments** to the settings (see the scanner's settings for instructions)

To encrypt the document(s) upon uploading to the server, click **"Encrypt on Save"**.

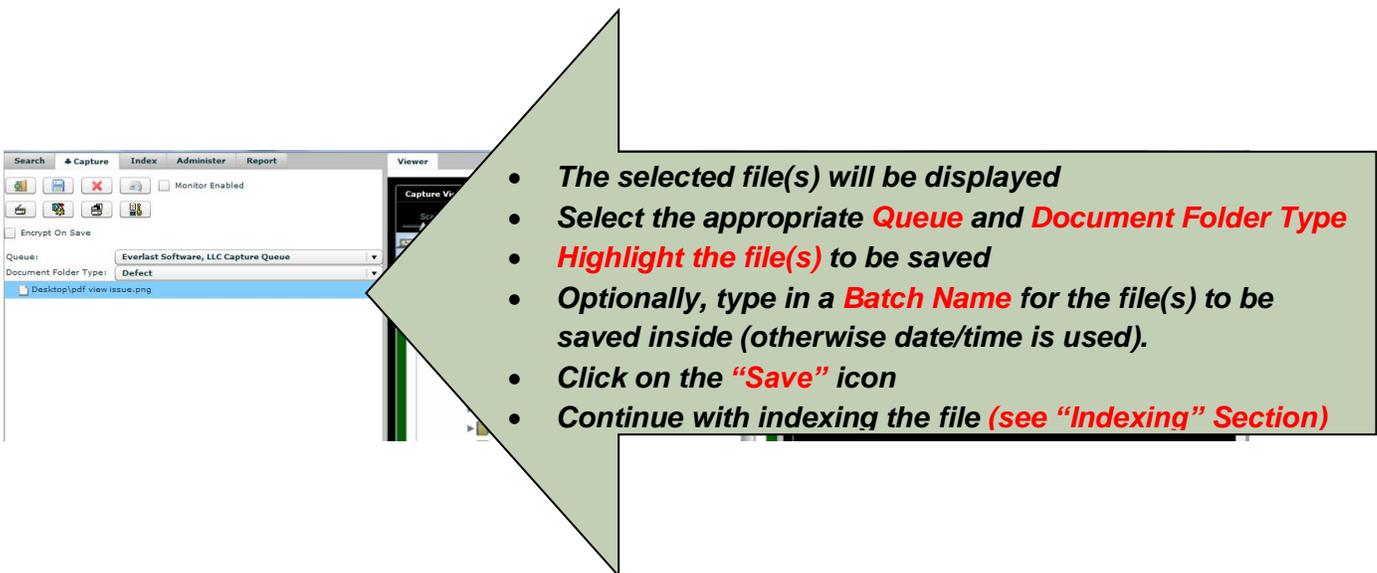
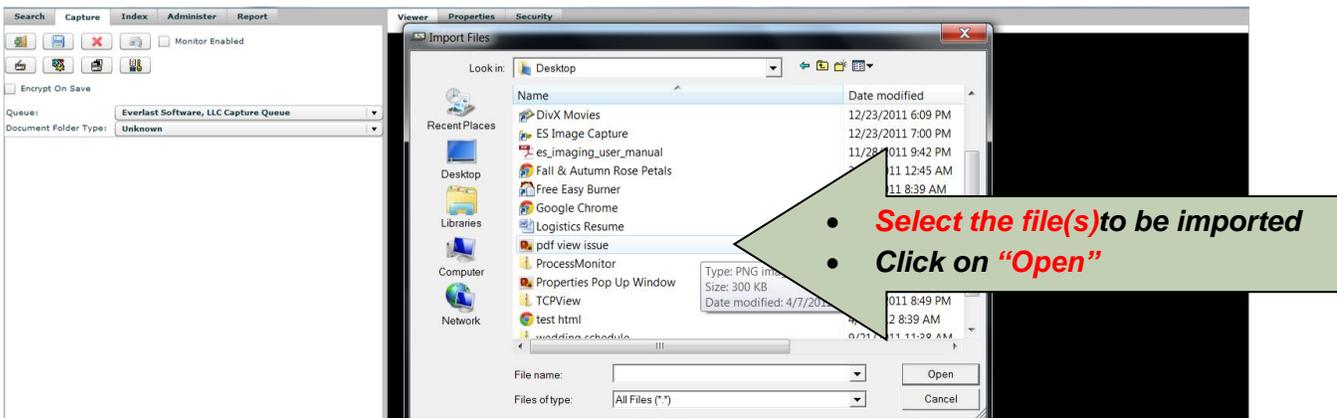


- Load the document(s) into the scanner
- Click **obtain images (scan) icon** (this begins the scanning process)
- Once scan is completed, it will be displayed in the capture window



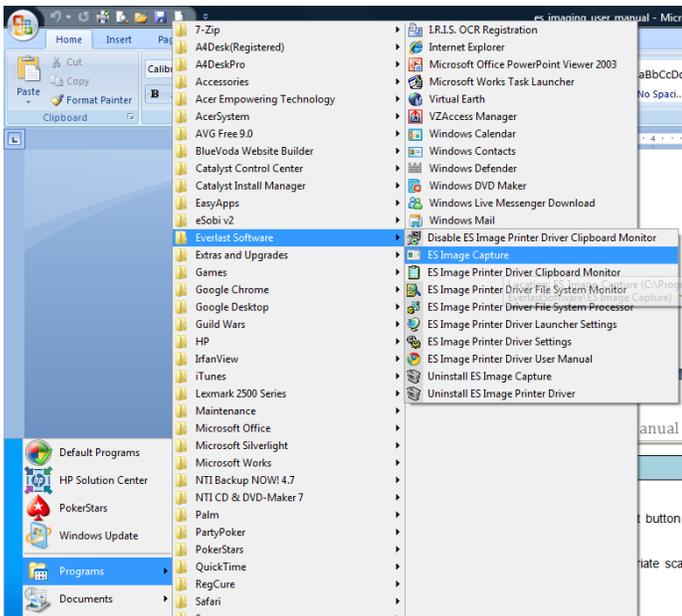
- Select the appropriate **Queue** and **Document Folder Type**
- Optionally, type in a **Batch Name** for the file(s) to be saved (otherwise date/time is used).
- **Highlight the document** to be captured into ES Imaging
- Click **"Save"** to upload the file(s)/image(s) to the designated **Queue**
- Continue with indexing the document (see **"Indexing"** section)

Importing Electronic Files

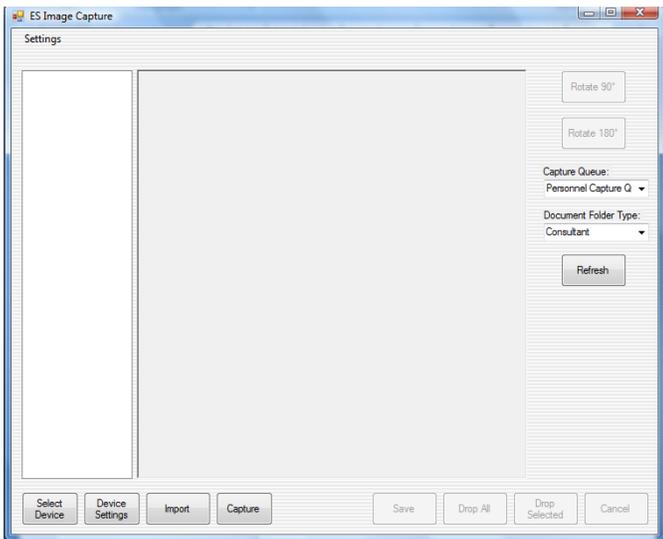


Enhanced Importing Electronic Files using the ES Image Capture Application

(Windows operating system only - Not available for Mac and Linux users)

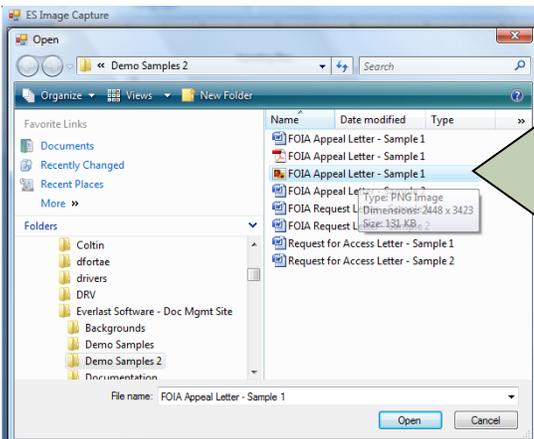


- Select **"All Programs"** from the Windows Start button
- Click **"Everlast Software"**
- Click **"ES Image Capture"**

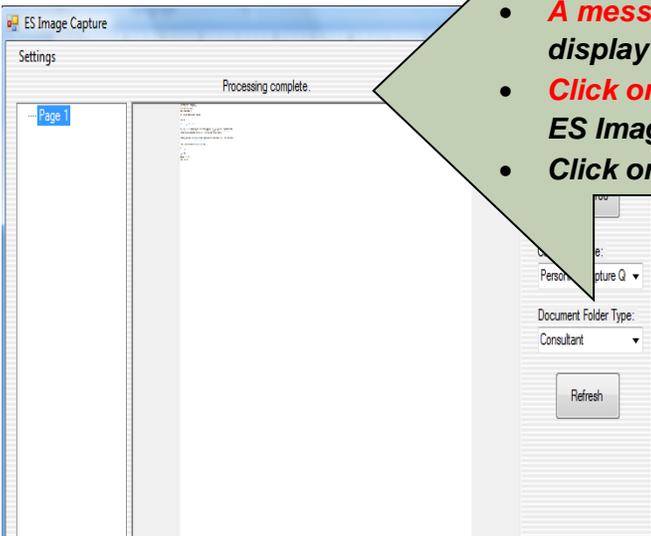


- Select the appropriate **Capture Queue** and **Document Folder Type**
- Click **"Import"**

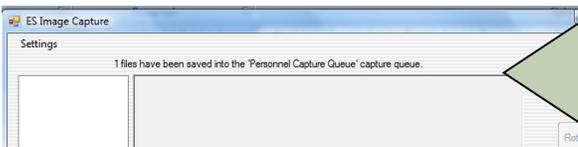
User Manual



- **Select the file(s) to be imported into ES Imaging**
- **Click on “Open”**

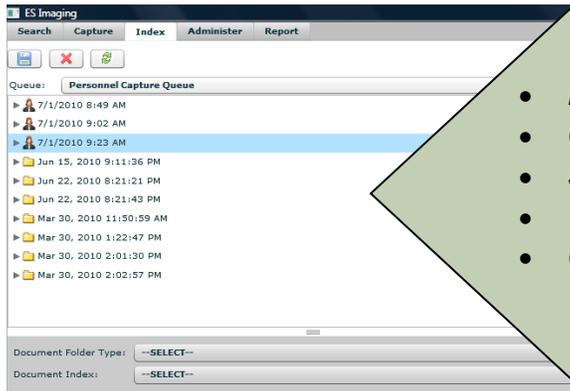


- **A message will display and the selected file will display in the window**
- **Click on the pages (left panel) to be imported into ES Imaging**
- **Click on “Save”**



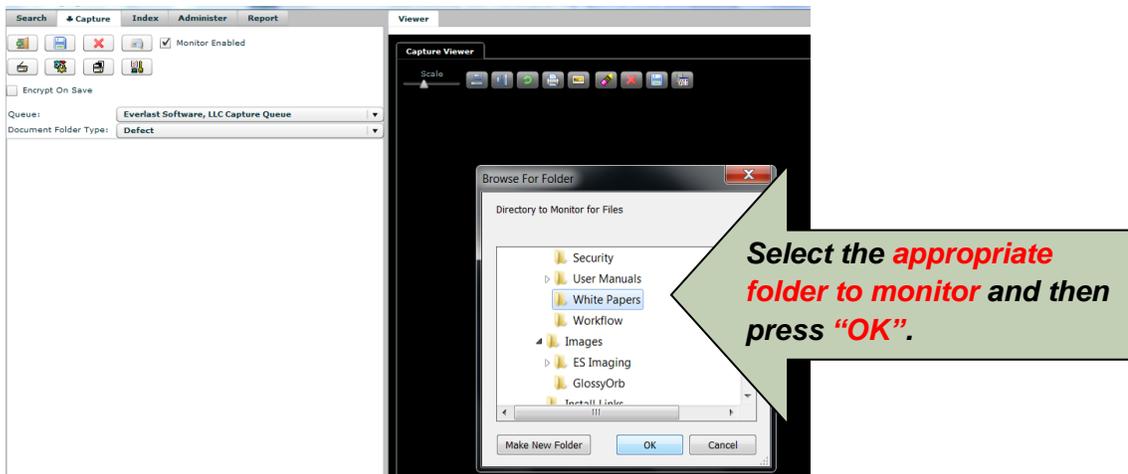
A message will display when the save is complete and the file is available within the selected Capture Queue

User Manual

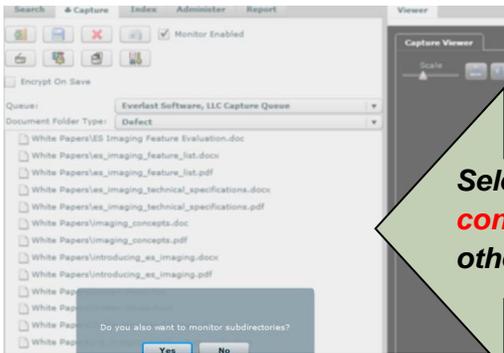


- Login to **“ES Imaging”**
- Click on the **“Index”** tab
- Select the appropriate **Queue**
- View the image within the **“Viewer”** tab on the right panel
- Continue with indexing the file (see **“Indexing”** Section)

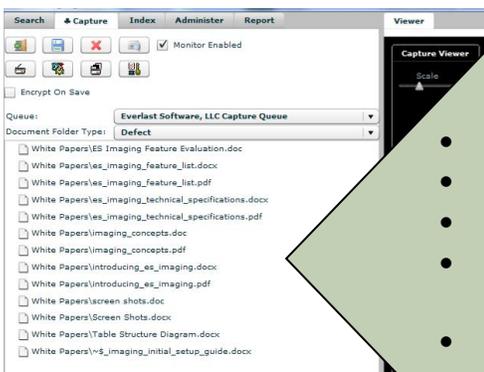
Automatic Importing Electronic Files



User Manual

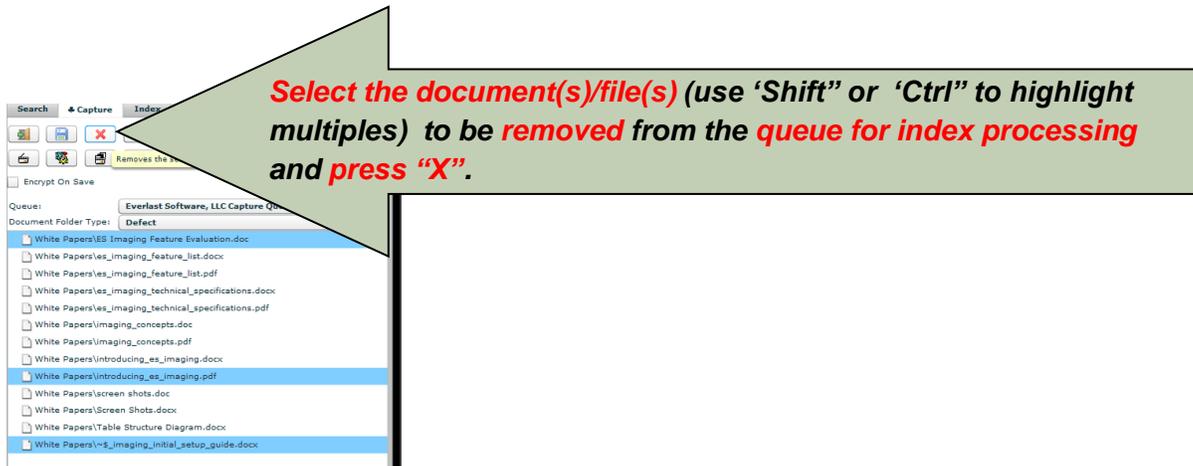


Select **“Yes”** if **subdirectory contents** should be imported, otherwise select **“No”**.



- **Contents of the selected directory will display**
- **Highlight the file(s) to import**
- **Select the appropriate Queue and Document Folder Type**
- **Optionally, type in a Batch Name for the file(s) to be saved inside (otherwise date/time is used).**
- **Press “Save”**
- **Continue with indexing the file(s) (see “Indexing” section)**

Removing Documents/Files from Capture Queue



Indexing

Using Keywords to Index Documents

In order to fully utilize the ES Imaging search features, *keywords* must be associated to documents. This provides for searching for a document with a variety of search criteria. The *system administrator* establishes the *keywords* necessary for each type of document based on the business needs. The *keywords* needed are determined by the *document folder type* selected.

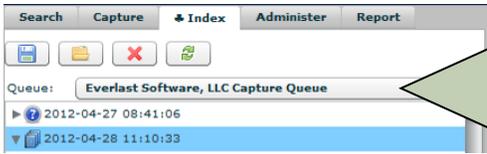
Some document folders are established by the *system administrator* with Optical Character Recognition (OCR), which allows full-text searching (see **“Full-Text Search”**). However, if the image quality is poor (such as handwritten documents) or a non-typical font is used, it is crucial to ensure that key text within the image is searchable. The contents of the “text” area can be corrected as needed (see **“Correcting OCR Document Text”**).

ES Imaging has built in efficiencies for indexing, such as:

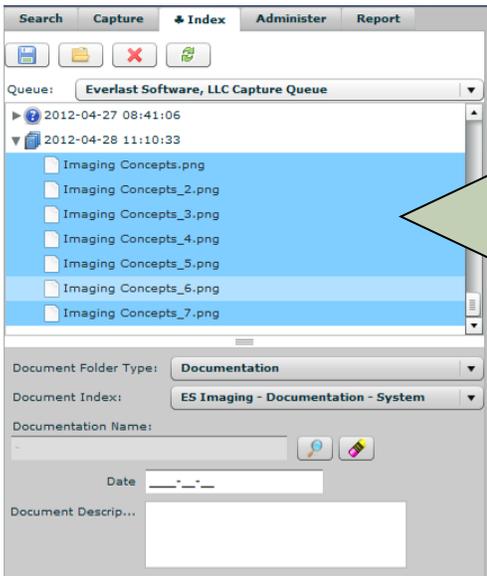
- Searching/recalling previous document *keyword values*, so that these are not repeatedly entered
- Sharing keywords across several folder hierarchies (set up by the *system administrator*)
- Drop down lists of previously entered *keyword values* are also available during indexing
- Multiple documents (batch indexing) can be indexed all at once

The following sections describe the necessary steps to index a document(s).

Preparing for Indexing



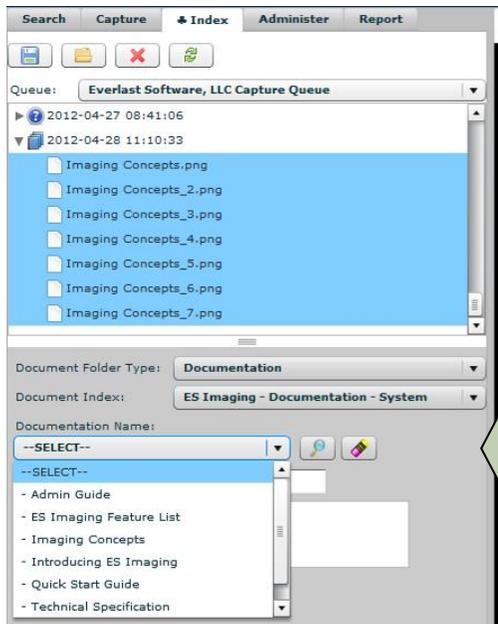
- Click on the **"Index"** tab
- Select the appropriate **Queue**



Select the folder/file(s) to be indexed into a single document

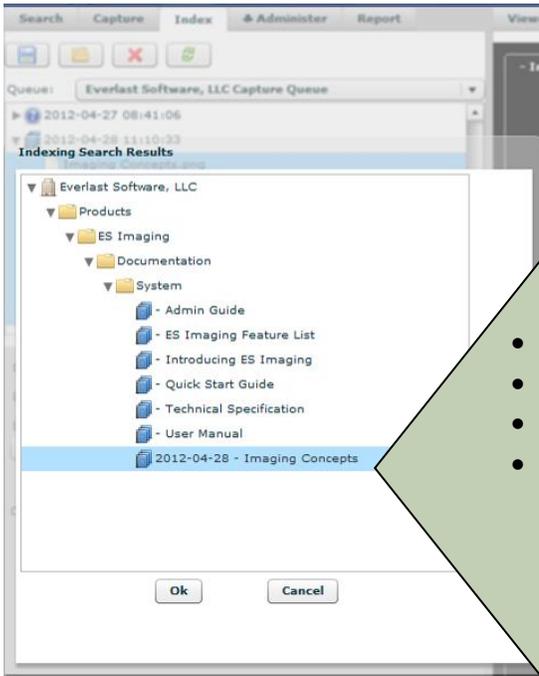
Existing Document Folder/Index

To eliminate redundant entry of *keywords* during indexing, ES Imaging allows for selecting a previous index (within the same folder path) and automatically extracts the associated *keywords*. This not only saves time, but it increases the accuracy of *keyword* values. Please see **“Existing Document Folder/Index (within alternate folder path)”** which covers another scenario.



- **Select the appropriate *Document Folder Type* and *Document Index***
- **Required *Index information* (known as *keywords*) necessary for the selected document folder type and index will be displayed**
- **Click on the drop down arrow to make a selection (as shown to left) or click on the *Magnifying Glass* icon (as shown below)**

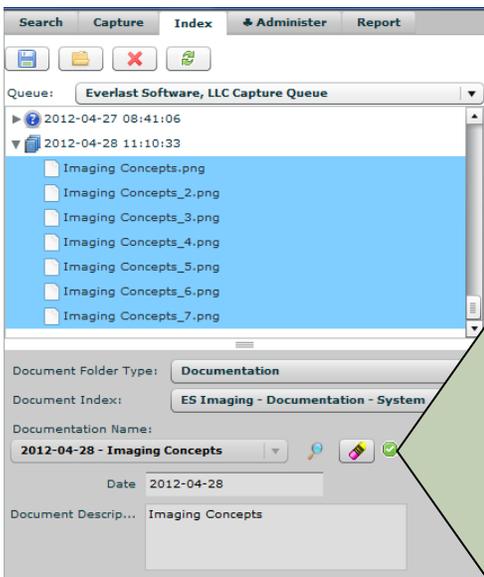




If only one indexed document currently exists, then the "Indexing Search Results" screen is not displayed

- Previously indexed documents will be displayed
- Select the **appropriate location** for the file/image
- Click on **"OK"**
- If appropriate folder/document is not found, use the  icon (may not be available) to view other folders that might be suitable for sharing keywords or see **"New Document/Folder Index"**

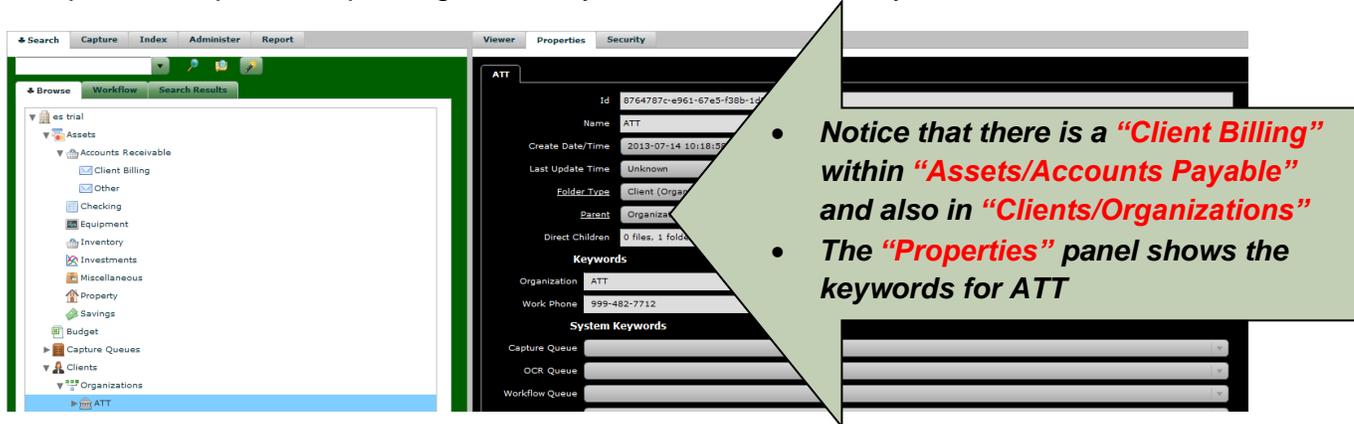
Use the Eraser icon to clear a mistaken selection (if multiple index levels the subordinate keywords clear as well)



- The **keyword(s)** are **automatically filled** with the correct index information
- A green checkmark is displayed signaling the keywords are locked in from the selected folder/document
- Click **"Save"** to complete indexing
- A message that the **"Save was successful"** will display across the bottom of the screen
- The document can now be searched (see **"Using Advanced Search" section**) using these keywords

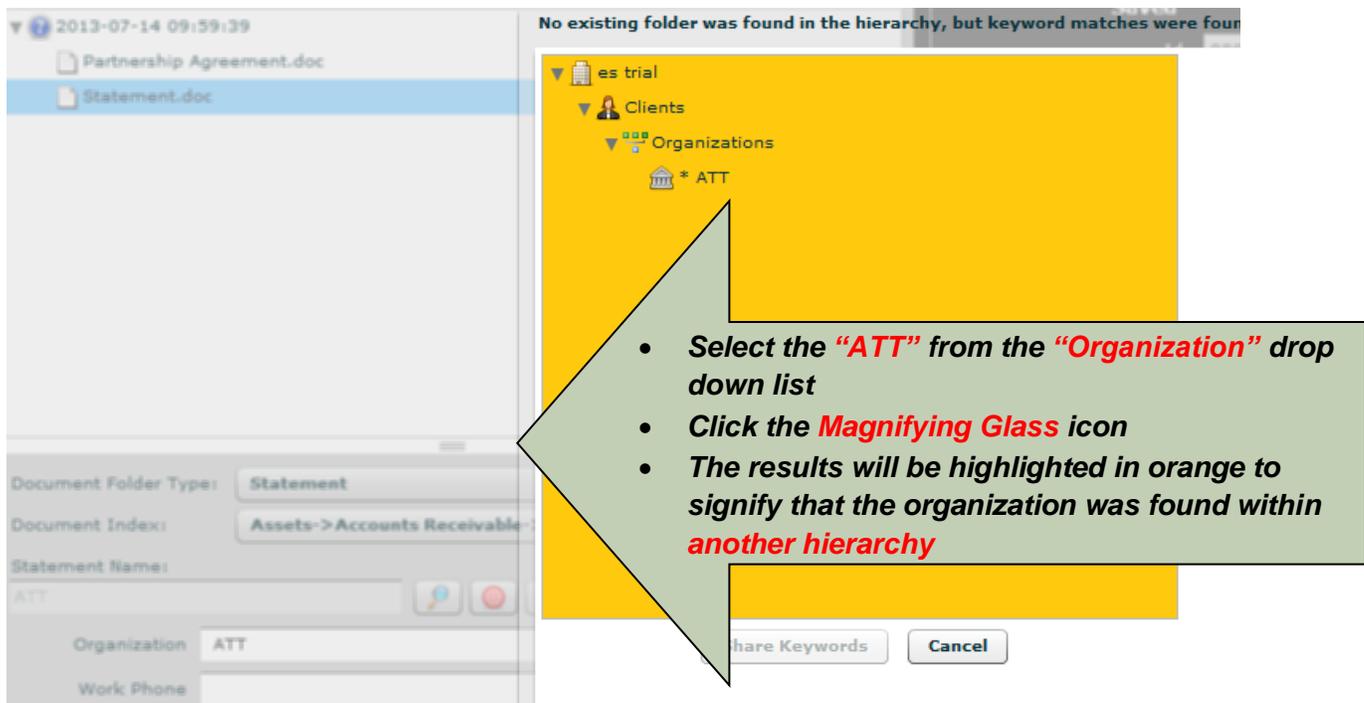
Existing Document Folder/Index (within alternate folder path)

When the folder does not already exist for the selected index, but it does exist elsewhere, the ability to share keywords is available (if the *system administrator* has enabled this feature). This might be the case when there are clients located within several paths, for instance, Accounts Payable and a Clients folder. A keyword associated to a client might be the work phone. In order to maintain this in one place and prevent updating these keywords, the shared keywords should be used.

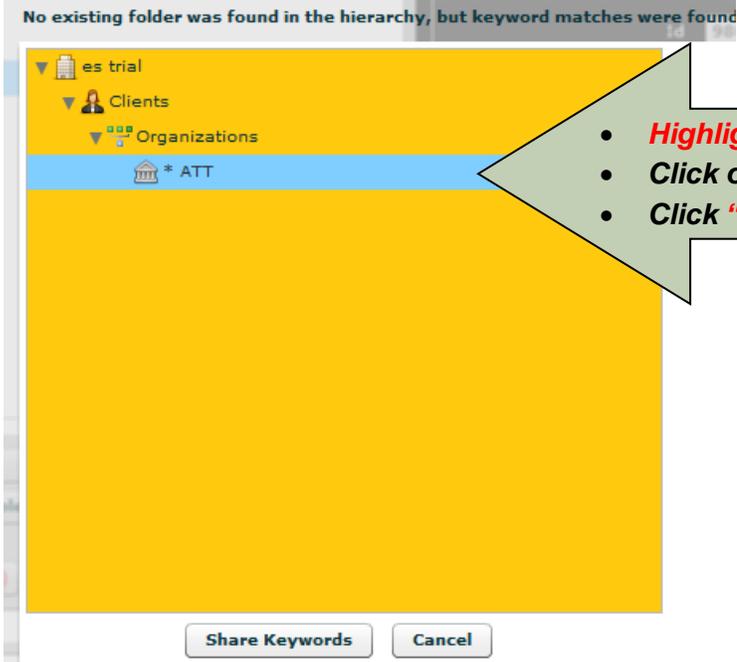


- Notice that there is a **“Client Billing”** within **“Assets/Accounts Payable”** and also in **“Clients/Organizations”**
- The **“Properties”** panel shows the keywords for ATT

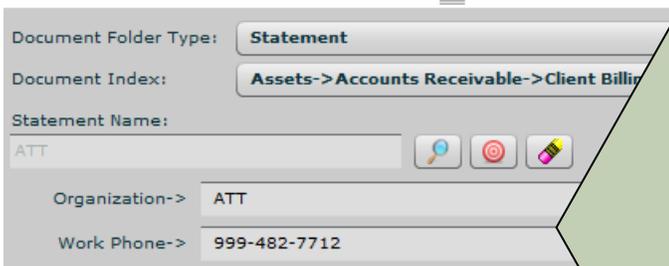
The following steps show how to ensure both **“Organization”** and **“Work Phone”** (as well as any other associated keywords) **can be shared when indexing**.



- Select the **“ATT”** from the **“Organization”** drop down list
- Click the **Magnifying Glass** icon
- The results will be highlighted in orange to signify that the organization was found within **another hierarchy**



- **Highlight** the item preceded by an asterisk (*)
- Click on **“Share Keywords”**
- Click **“Save”** to complete indexing



- Notice the **Work Phone** was obtained from the **previously indexed ATT document**
- Note that **any changes to Work Phone via the Properties panel**, will now be reflected in both ATT folders
- Click **“Save”** to complete indexing
- The document can now be searched (see **“Using Advanced Search” section**) using these keywords

New Document Folder/Index

If the previous steps yield no results, then the *keywords* will need to be entered. Once entered and saved, this search criteria will be available for reuse by following the steps in **“Existing Document Folder/Index”**.

Standard Form 52
Rev. 7/81
U.S. Office of Personnel Management
FPM Supp. 296-33, Subch. 3

REQUEST FOR PERSONNEL ACTION

PART A - Requesting Office (Also complete Part B, items 1, 7-22, 32, 33, 36, and 39.)

1. Actions Requested Begin Employment	2. Request Number 1003
3. For Additional Information Call (Name and Telephone Number) Joan H. [redacted] (231) [redacted]-8934	4. Proposed Effective Date 12/16/06
5. Action Authorized By (Typed Name, Title, Signature, and Request Date) M. [redacted] CIO	6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date) Elizabeth Cochran

Document Folder Type: Personnel Transaction
Document Index: Personnel Employment
Personnel File Name: Lowder, Henry
First Name: Henry
Last Name: Lowder
SSN: 333-33-3333

- If a **previously indexed document is not found** (using Magnifying Glass icon), then type in the appropriate values for each keyword
- Notice that the **“Personnel File Name”** is automatically built with the entered **“Keyword”** values

PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)

1. Name (Last, First, Middle) Lowder, Henry	2. Social Security Number [redacted]	3. Date of Birth 06/01/70	4. Effective Date 12/16/06
5-B. Nature of Action Begin Employment	SECOND ACTION		
5-C. Code	6-A. Code	6-B. Nature of Action	
5-D. Legal Authority	6-C. Code	6-D. Legal Authority	
5-E. Legal Authority	6-E. Code	6-F. Legal Authority	

Document Folder Type: Personnel Transaction
Document Index: Personnel Employment
Personnel File Name: Lowder, Henry
First Name: Henry
Last Name: Lowder
SSN: 333-33-3333
Personnel Transaction: Begin Employment
Personnel Transaction: Payroll Dues Deduction
Personnel Transaction: Prior Service
Transaction Date: 12/16/06

- **Tab** to the next indexing area
- **Select the appropriate value** (or type in the value if not found) from the drop down list and enter the date
- Press **“Save”**
- A message that the **“Save was successful”** will display across the bottom of the screen

Batch Indexing

Another feature appropriate to reduce redundant entry of *keywords* during indexing is the **“Batch Indexing”** function. This saves time and increases the accuracy of *keyword* values for images/files with the same index values (or for a multi-page image).

• **To apply the same keyword values to all pages within a folder, type or select in the appropriate values for each keyword**

• **Press on the “Batch Indexing” icon (folder icon)**

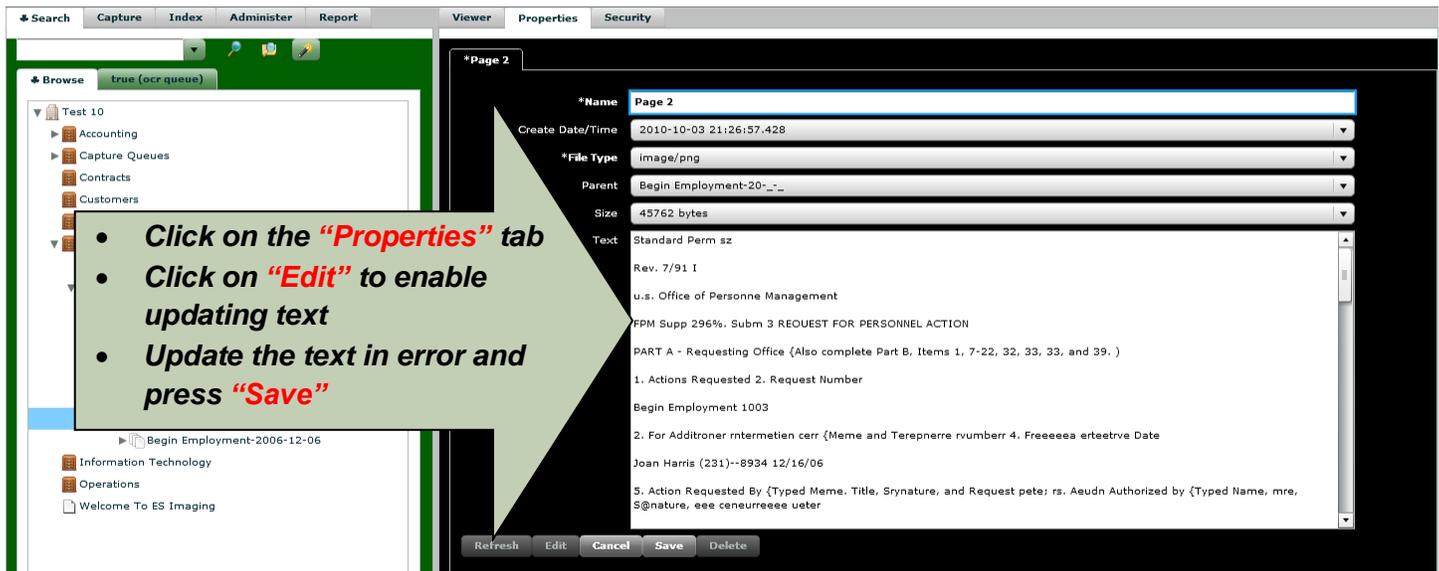
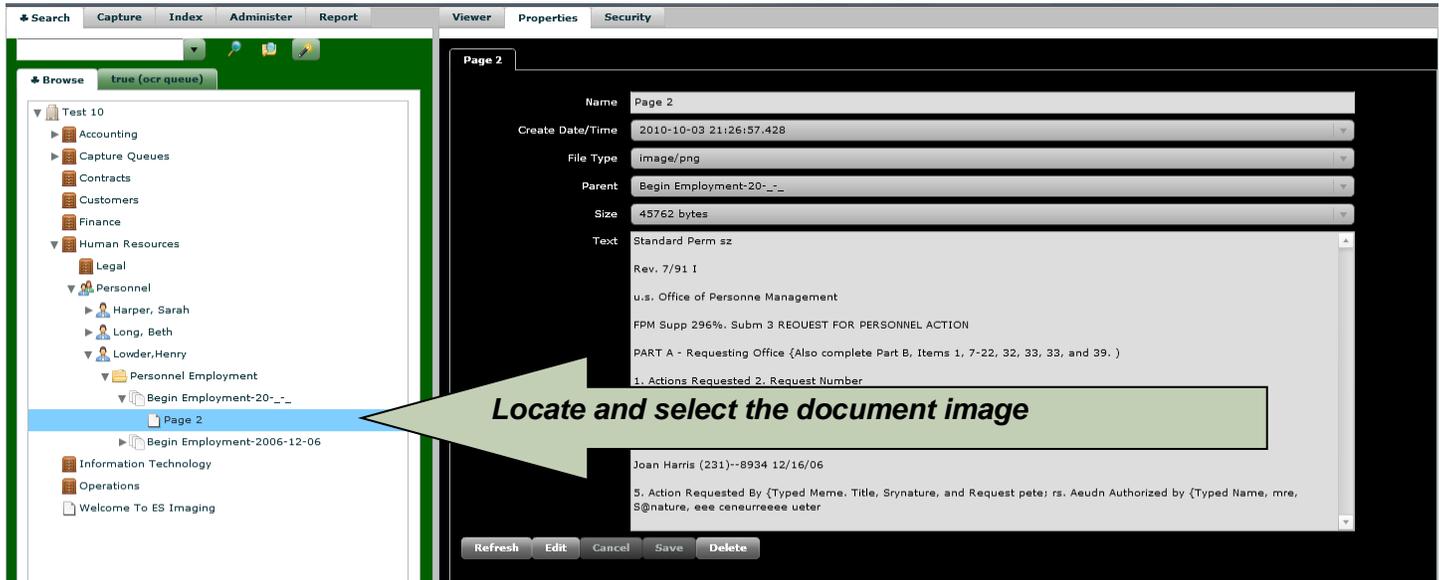
1. Name (Last, First, Middle)	Long, Beth	2. Social Security Number	[REDACTED]	3. Date of Birth	07/06/88	4. Effective Date	10/01/09
PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)							
FIRST ACTION							
5-A. Code	07	5-B. Nature of Action	Suspension		5-C. Code		
5-D. Legal Authority	5-E. Code						
SECOND ACTION							
6-A. Code	6-B. Nature of Action		6-C. Code		6-D. Legal Authority		
6-E. Code							
6-F. Legal Authority							
7. FROM: Position Title and Number				15. TO: Position Title and Number			

• **Notice that the Capture Queue is empty, since all pages were indexed at one time**

3. For Action Requested (Typed Name and Telephone Number)	Joan Hain	4. Proposed Effective Date	1240					
5. Action Requested By (Typed Name, Title, Signature, and Request Date)	Michael Lutz, CIO	6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date)	Elizabeth Cochran, CEO					
PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)								
FIRST ACTION								
1. Name (Last, First, Middle)	Long, Beth	2. Social Security Number	[REDACTED]					
5-A. Code	07	5-B. Nature of Action	Suspension		3. Date of Birth	07/06/88	4. Effective Date	10/01/09
5-C. Code	5-D. Legal Authority							
SECOND ACTION								
6-A. Code	6-B. Nature of Action		6-C. Code		6-D. Legal Authority			

Correcting OCR Document Text

In order to rely on full-text searching, there are times when scanned text needs to be corrected. The below identifies how to do so.



Capturing Screen Shots and Printed Documents

Storing and Indexing Screen Shots and Printed Documents

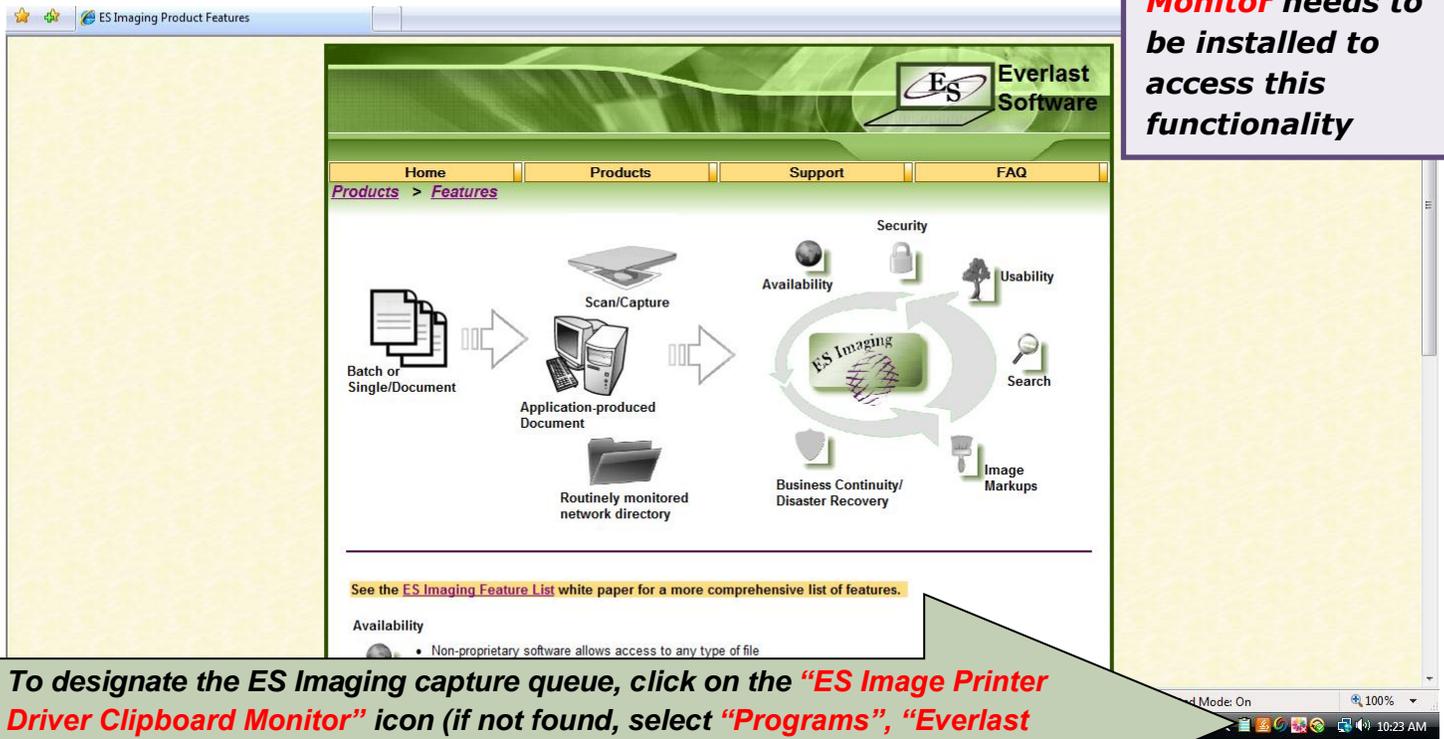
Certain business needs might benefit from storing screen shots or report images within ES Imaging. For instance, for Help Desk functions, the development of a knowledge base is extremely helpful to document support issues and resolutions. Screen shots can be captured and documented with keywords. Just like *scanned* or *imported* documents, these images can be *indexed* with *keywords* for searching at a later time.

For reports that are currently generated from other software products, it might be helpful to retain an image of the report to later easily recall using ES Imaging search functionality.

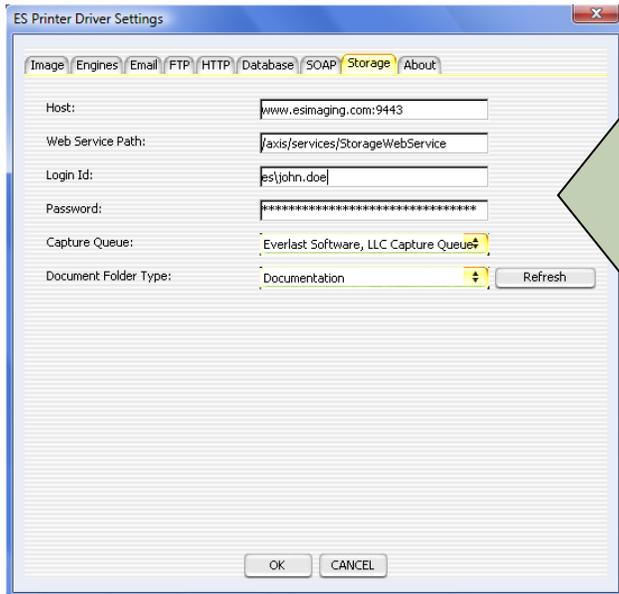
The following section describes the necessary steps to capture screen shots or route reports into an ES Imaging *capture queue* and *document folder type*. It requires the ES Image Printer Driver Clipboard Monitor to be installed.

Setting Screen Shot Destination

ES Clipboard Monitor needs to be installed to access this functionality



To designate the ES Imaging capture queue, click on the "ES Image Printer Driver Clipboard Monitor" icon (if not found, select "Programs", "Everlast Software", "ES Image Printer Driver Clipboard Monitor" to add the icon).



Click on the "Storage" tab and enter the appropriate Login Id, Password, Capture Queue and Document Folder Type.

These settings are retained until a change is necessary.

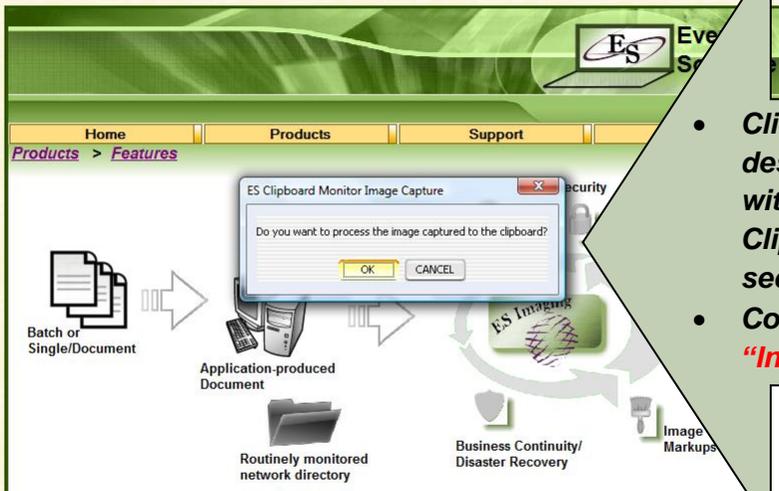
Saving Screen Shots

ES Clipboard Monitor needs to be installed to access this functionality

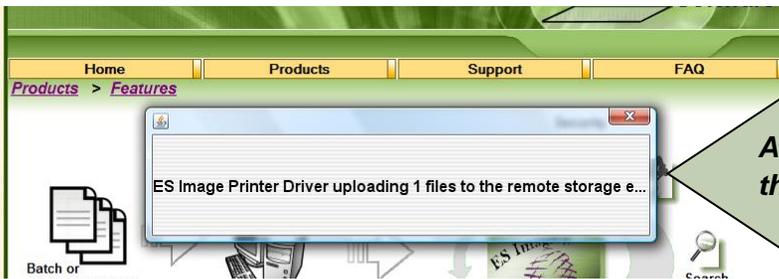
The screenshot shows the ES Imaging Product Features website. The navigation bar includes Home, Products, Support, and FAQ. The main content area features a diagram illustrating the workflow: Batch or Single/Document -> Scan/Capture -> Application-produced Document -> Routinely monitored network directory. A central circular graphic contains the ES Imaging logo and is surrounded by icons for Security, Availability, Usability, Search, and Image Markups. Below the diagram, there is a link to the ES Imaging Feature List white paper and a section for Availability with a bullet point: Non-proprietary software allows access to any type of file. A large green arrow points from the bottom of the screenshot to the ES Image Printer Driver Clipboard Monitor icon in the taskbar.

Call up the image to be captured and click on the **“ES Image Printer Driver Clipboard Monitor”** icon.

User Manual



- Click on **“Ok”** to import the image to the destination capture queue designated within the **ES Image Printer Driver Clipboard Monitor settings** (see previous section).
- Continue with indexing the image (see **“Indexing”** section)



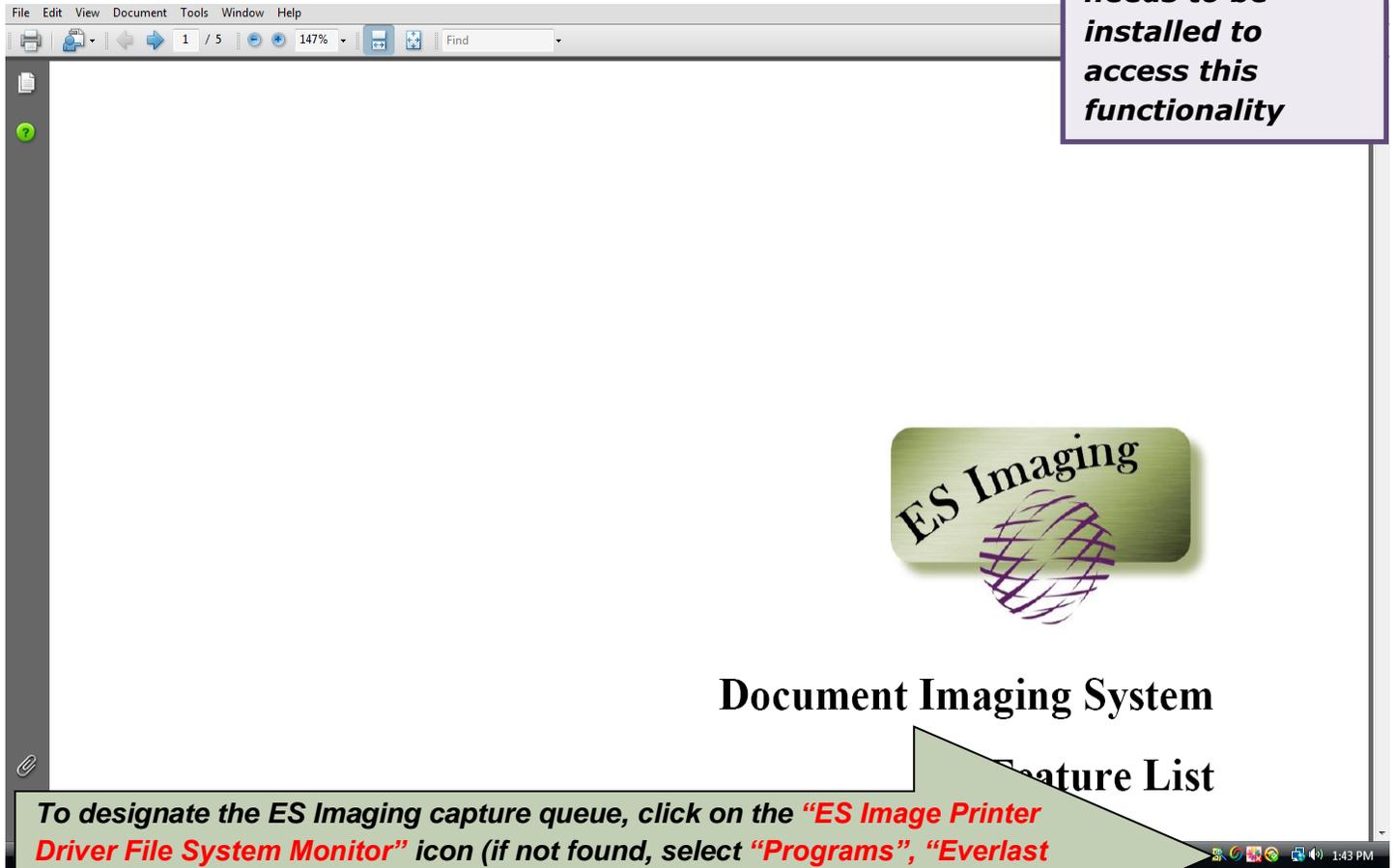
A dialog box will appear reflecting the status of the upload.



The image is placed within the capture queue designated within the **ES Image Printer Driver Clipboard Monitor settings** previously established and placed in a folder that has date/time of the screen capture.

Setting Image Printer Driver Destination

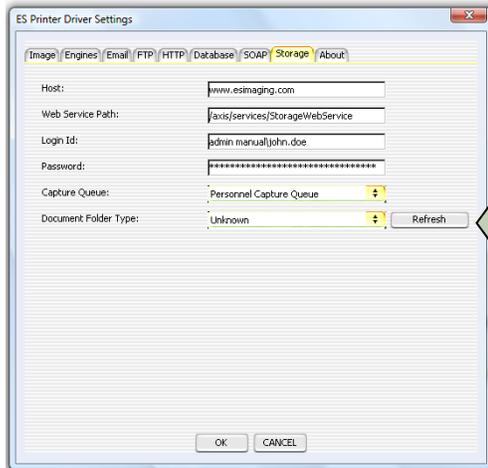
ES Printer Driver needs to be installed to access this functionality



Document Imaging System

Feature List

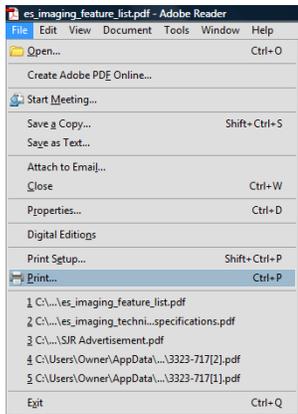
To designate the ES Imaging capture queue, click on the **“ES Image Printer Driver File System Monitor”** icon (if not found, select **“Programs”**, **“Everlast Software”**, **“ES Printer Driver File System Monitor”** to add the icon).



Click on the **“Storage”** tab and enter the appropriate **Login Id**, **Password**, **Capture Queue** and **Document Folder Type**, then click **“OK”**.

These settings are retained until a change is necessary.

Routing Printed Document

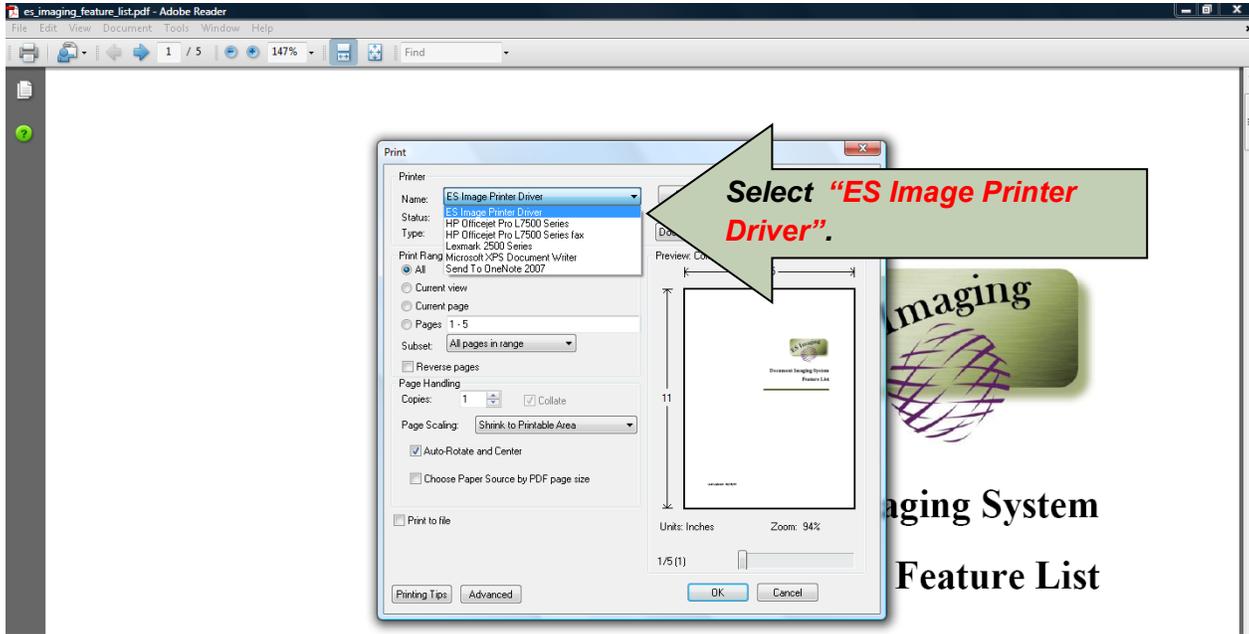


Open the file to be routed to ES Imaging and select "Print".

ES Printer Driver needs to be installed to access this functionality



Document Imaging System
Feature List



User Manual

