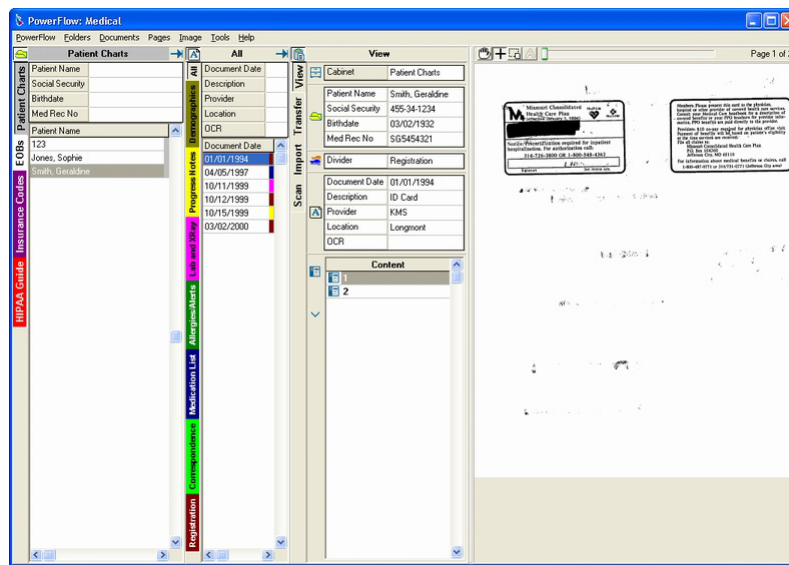


Introduction

Use this document as a how-to procedure reference guide. Detailed PowerFlow operation instructions are contained in the Help system (press **Shift+F1** from the program, or click on controls and areas of the interface and press **F1** for context-sensitive popup "What's this?" help).

Navigation and Panel Display

These following navigation actions show how to move about the PowerFlow interface (your mouse or selection focus in a panel or grid is shown by a dark blue highlighting). A complete navigation action and operation explanation can be found in *UG-002 PowerFlow Navigation Standards*.



Enter

Press the **Enter** key to advance *from...*

- The Folder panel to the Document panel.
- The Document view to the item list of the View panel.
- The View panel to the Modify attributes dialog (must have Edit privileges, unless a field is designated as Free Access in the Vault Structure setup).

Esc

Press the **Esc** key to return *to...*

- The Document panel from the View panel.
- The Folder panel from the Document panel.

Up/Down Arrow

Use the keyboard **Up-arrow** and **Down-arrow** keys to move appropriately up or down in the active grid or list.

Up/Down Page

Use the keyboard **PgUp** and **PgDn** keys to page through a group of entries in the active grid or list (helpful when the grid or list is longer than can be displayed in the screen).

Home/End



Use the keyboard **Home** and **End** keys to move to the first or last of the entries in the active grid or list.

Expand/Retract Panel

To expand or retract a panel to reveal or hide field columns:

- Click the **→** button on the panel (or press **Shift+Right-arrow**) to expand the panel.
- Click the **←** button on the panel (or press **Shift+Left-arrow**) to retract the panel.

Pin/Unpin Panel

Use the “unpin” function to allow a panel to automatically retract fully closed when it is not the focus, or “pin” it open so it always displays. To pin or unpin a panel, click the panel indicator button in the upper left-hand corner of each panel; the button depresses and changes its image to indicate the panel is pinned open. For example, the folder panel button looks like this  when it is unpinned (automatically retracted) and looks like this  when the panel is pinned open.

Insert (or + on numeric keypad)

Use the keyboard **Insert** key, or the keypad **+** key, to add a new folder or document. This operation requires that you have Edit privileges. Before you start, be sure you have the panels expanded so that the required attribute or indexing information is visible.

- If the focus is in the Folder panel, a Create New Folder dialog displays.
- If the focus is in the Document panel, a Create New Document dialog displays.
- If the focus is in the View panel item list, the folder/document insert is determined by the selected field in the View attributes panel.

Use the keyboard **Delete** key to delete a folder or document. This operation requires that you have Edit privileges.

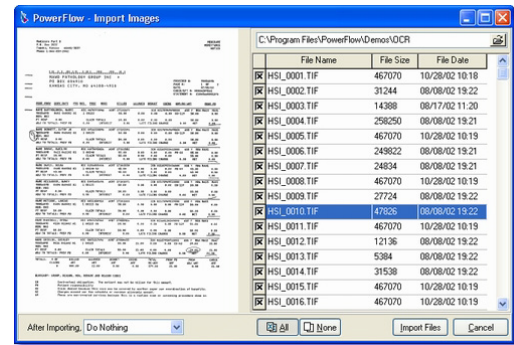
- If the focus is in the Folder panel, a warning displays: click **Yes** to delete the selected folder and all of its contents, or click **No** to escape without deleting the folder.
- If the focus is in the Document panel, a warning displays: click **Yes** to delete the selected document and all of its items, or click **No** to escape without deleting the document. If the deleted document is the last document in the folder, you will be prompted to delete the folder.
- If the focus is in the View panel item list, a warning displays: click **Yes** to delete the selected item, or click **No** to escape without deleting the item. If the deleted item is the last item in the document, you will be prompted to delete the document.

Working with Images

Importing Images

To import images into PowerFlow, you must have Import privileges and a unique user login id:


1. Select the appropriate destination cabinet.
2. Select **Tools|Import Images...** to display the Import Images dialog (this dialog also displays when you click the **Import** tab and there are no images in the list).
3. Select the input source folder (for example, as specified in PowerScan image scanning).
4. Select the appropriate **After Importing** option.
5. Select the files to import and click **Import Files**.

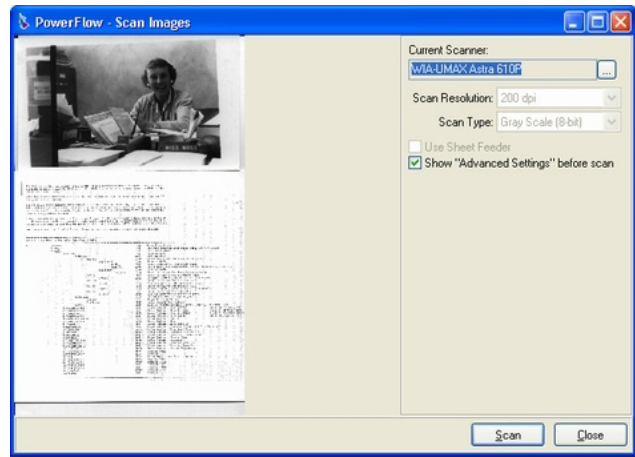


The imported images display in the View panel list and are ready for indexing (indicated with **red** color).

Scanning Directly to a Folder and Document

To scan an image for direct placement in a selected folder and document, you must have Scan privileges:


1. Select the appropriate destination cabinet—if you first select the desired folder (or create a new folder) and the desired document (or create a new document) you can quickly index all images by clicking the  button or Ctrl+Space.
2. Select **Tools|Scan Image** or Alt+T+S to display the Scan Images dialog (this dialog also displays when you click the **Scan** tab and there are no images in the list).
3. Set the appropriate scan parameters (right-click for popup help on each item).
4. Click **Scan**.



The scanned images display in the View panel list and are ready for indexing.

Indexing


OCR Indexing

You can index using the OCR function. When you have completed importing or scanning images, click the OCR button () or Ctrl+O. Depending on the OCR setup in PowerFlow, the process may create a new folder and document with assigned divider, or it may only create a new document with divider assigned but require indexing to the appropriate folder. The color coding indicates the recognition confidence level: Green=high, Yellow=moderate, Red=Low, Blank=item associated with document. There are four bars that may appear before each item. They indicate, from right to left, Content, Document, Folder, Divider identification derived from the item and used for index assignment.

Review the auto-indexing for accuracy (e.g., new folder and document creation as defined by the splitter pages). Be sure to commit the images after any indexing changes.

Manual Indexing

To index new images, you must have Edit privileges. Select the appropriate Folder panel attributes grid field. If you are indexing documents into a folder, the lookup field may be a document attribute grid field once the folder has been established. Then, begin typing current item identification data and the Folder panel will open and attempt to locate an existing folder with the same identification data (if not found, the search text displays with strike-through characters, to indicate there is no match on your lookup string).



1. Locate the folder: was the folder lookup successful?
 - Yes, press **Enter** to accept.
 - No, add a new folder (press **Insert**).
2. Do you want to add to an existing document?
 - Yes, select the document and press **Enter** to accept.
 - No, add new document (press **Insert**).
3. Press **Enter** to assign the item to the selected cabinet/folder/document as shown in the Attributes grid and advance to the next image.
4. View next image, add item to current document?
 - Yes, press **Enter** to assign the item to the selected cabinet/folder/document as shown in the Attributes grid and advance to the next image.
 - No, locate correct folder and document.
5. Commit the indexed images: click the  button or press **Ctrl+Enter** and approve the commit at the verification dialogue.

Changing Index Values

Select the folder or document requiring indexing changes. In the View panel, position the cursor on the attribute field to be changed and press **Enter** to display the Modify dialog. Make the appropriate changes and click **OK** to save and commit those changes.

Working with Items

Arranging the Order of Items in a Document

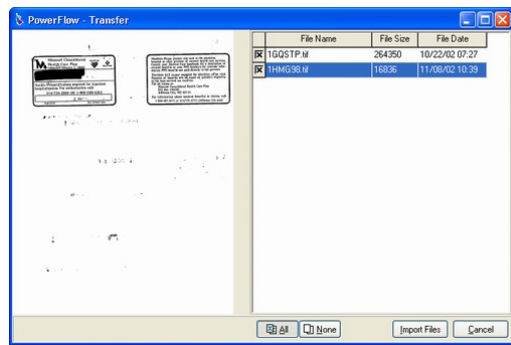
To re-arrange the order of a item in the View panel item list, select the item and click the up and down arrow buttons ( and ) to move the item appropriately. Alternatively, select the item and press **Ctrl+Up-arrow** or **Ctrl+Down-arrow** on the keyboard.

Moving or Copying Items from one Document to another Document

You can quickly move or copy items from one document to another document, folder, or cabinet:

To move or copy a item *from* a document, select a item in the View item list and right-click to display the context menu.

1. Click **Move to Transfer** or **Copy to Transfer**, as appropriate. The image is stored under the Transfer tab.
2. Select the destination cabinet and select or create the appropriate folder or document.
3. Click the **Transfer** tab to display the Transfer dialog.
4. In the Transfer dialog, checkmark the items to be transferred and click **Import Files**.



The transferred images display in the View panel list and are ready for indexing.

Printing Document Items

To print document items, from the menu bar select **Documents|Print** (or press **Ctrl+P**) to display the Print Options dialog. Select the appropriate item range and size and click **OK** to begin printing.

Faxing Document Items

Fax operation is dependent on installed fax hardware/software availability enabling fax output by selecting a printer that is a fax.

Emailing Document Items

The best method for emailing is to capture the images into a windows folder that can then be attached to an email. The **Copy to Transfer** will place the selected item in the **Transfer** folder which is located in the folder with the PowerFlow program. The contents of the transfer folder can be selected, cut and pasted to an email attachment.

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