# **P-File Imaging Procedures**

This document provides directions on how to use ImageNow software for scanning and capturing personnel files (P-File). The first time you use this document please follow along with guidance from DoIT's Imaging team or your division's Human Resources (HR) director or manager.

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# Section 1: Imaging Overview & Document Orientation

Campus has the option to utilize ImageNow for personnel file (P-File) imaging to store all personnel files electronically.

**Note:** Imaging will <u>only be used for required (e.g., appointment letter) and optional (e.g., emergency contact) personnel file imaging at this time</u>. P-file imaging does not include documents related to payroll & benefits, medical, etc.

### P-File Imaging Access

- Access to personnel files is granted to HR staff only.
- Requests for access are accepted from HR Directors and HR Managers.
- HR Directors authorize access to their Divisions drawers.
- The Office of Human Resources (OHR) provides oversight related to applicable P-File policies and procedures and authorizes access to the cross-campus view.
- User account requests are fulfilled by Office of Cybersecurity via a dedicated JIRA website (<u>https://kb.wisc.edu/page.php?id=41763</u>).

### Drawers

Drawers are a primary way of organizing documents in the imaging system.

The standard naming convention for divisional drawers is:

- "A\_OHR\_'division acronym'\_Pfile\_DivSpec" or
- "A\_OHR\_'division acronym'\_Pfile\_Required"

For ease of reference in this document we will refer to them by their suffix. Foex example:

- \*\_DivSpec,
- \*\_Required)

Drawer Abbreviation	Drawer Name	Example				
This information is viewable by your division's HR staff. This drawer is for documents that are optional personnel file documents. These documents include things such as resumes, new employee orientation acknowledgment forms, etc.						
*_DivSpec	"A_OHR_'division acronym'_Pfile_DivSpec"	A_OHR_DOIT_Pfile_DivSpec, A_OHR_OVCRGE_Pfile_DivSpec				
This information is viewable by your division's HR staff, OHR staff, and staff from any other opting-in division staff. This drawer is for required personnel file documents such as position descriptions, performance reviews, etc.						
*_Required	"A_OHR_'division acronym'_Pfile_Required"	A_OHR_ENGR_Pfile_Required, A_OHR_PHARM_Pfile_ Required				

### Document Types

- Each drawer has document types specific to its purpose. Refer to the "<u>ImageNow</u> <u>P-File Document Crosswalk</u>" to identify which document types are in each drawer.
- When scanning and reviewing, assigning the correct document type values is critical for campus consistency and for locating documents in subsequent searches.

# Document Metadata (Index Keys / Custom Properties)

Regardless of drawer or type, each document in P-File imaging has the same metadata fields. Metadata fields provide the key to help locate the document after it is placed in the system.

Document Me	tadata
Field 1	EMPLID
Field 2	Employee Name
Field 3	Position Number
Field 4	UDDS

Field 5	Unique Value (system generated)
Custom Properties	A_OHR_Pfile_Job Code: Job Code A_OHR_Pfile_Appt_Title: Appt. Title A_OHR_Pfile_Appt Title Code: Appt. Title Code A_OHR_Pfile_Eff Date: Effective Date Z_CreationDate (required) Z_RetentionDate

### Imaging Methods

Both electronic and paper/hardcopy documents can be input into ImageNow. Refer to your division's P-File workflow document for internal process.

- Electronic documents ImageNow Printer (INP) and Associated Capture Profiles: ImageNow Printer enables you to get electronic documents (e.g., email, web page, PDF) into ImageNow. Refer to KnowledgeBase document: <u>https://kb.wisc.edu/ecms/page.php?id=33106.</u>
- Hardcopy documents Scanner (SCAN) and Associated Capture Profiles: Scan paper documents into the Imaging system as electronic documents.

### **Capture Profiles**

A capture profile must be selected when beginning the document capture process. The capture profile determines which drawer the document will be filed in and how it will be linked to index keys/custom properties (manually or through HRS).

Capture Profile Examples	
SCAN DivSpec LRN Private IE (Version #):	<ul> <li>Method: ImageNow printer (electronic document)</li> <li>Destination: *_DivSpec</li> <li>Document index key data: HRS Employee Information(ImageNow)</li> </ul>
SCAN Required MAN:	<ul> <li>Method: Scanner (hardcopy document)</li> <li>Destination: *_Required</li> <li>Document index key data: manual data entry</li> </ul>

# **Section 2: Scanner Overview**

Please refer to your division's scanner manuals for correct operating procedures.

# Section 3: Logging In

1. Double-click the **Perceptive Content** icon on the desktop to launch ImageNow.



2. Enter your **User name** (NetID@wisc.edu) and **Password** (NetID password) and then click **Connect**.



3. You will now see the ImageNow toolbar.



# Section 4: Scanning and Storing Documents Using Learn Mode Linking

Learn Mode is the most consistent approach available for linking documents because it minimizes data entry and errors by pulling metadata from a standard Human Resource Syestem (HRS) webpage. The Learn Mode requires user access to the Employee Information(ImageNow) HRS Resource. At the time of document capture must be logged into HRS in Internet Explorer as well as the imaging client.

### Part A: Learn Mode Linking of a Paper Document

- 1. Login to the ImageNow client on the <u>workstation with the scanner.</u> (Reference: Section 3, page 5)
- 2. Login to HRS using the **Private Internet Explorer Shortcut** on your desktop.
- Navigate to Employee Information(ImageNow). To do this, go to Workforce Administration > UW External HR Systems > Employee Information(ImageNow).

ORACLE'	
Menu 🗖	
Search:	Main Menu > Workforce Administration >
> My Favorites	UW External HR Systems
Self Service	UW External HR Systems
<sup>7</sup> Workforce Administration	Employee Information(ImageNow) Page is used for documet imaging software (ImageNow)
<ul> <li><u>Employee</u> Information(ImageNow)</li> </ul>	

4. Search for the desired employee by **Empl ID**. (You may search by "Employee name" but it will take considerably longer.)

Find an E	xisting Value
▼ Search C	Criteria
Search I	begins with
Search	Advanced Search

5. This returns a list of appointments for the specified "Empl ID." Click the correct **Empl entry with "(blank)" listed in the Job End Date field**. If these conditions

do not match your results, contact your divisional HR representative.

View All								First 🔣
Empl ID	Empl Rcd Nbr	<u>Name</u>	Position Number	Job Begin Date	Job End Date	Department	Description	Emple
	0		(blank)	02/24/2013	03/08/2015	A961330	STUDENT HELF	SH
	1		(blank)	02/24/2013	08/24/2014	A961310	STUDENT HELF	SH
	2		(blank)	02/24/2013	03/09/2014	A96 320	STUDENT HELF	SH
	2		(blank)	01/21/2015	03/08/2015	4961320	STUDENT HELF	SH
	3		(blank)	10/14/2013	03/08/2015	A060350	STUDENT HELF	SH
	3		02111819	03/09/2015	(blank)	A060350	HR ASST	CJ

6. You should now see the employee information that will be used in Learn Mode Linking.

E	mployee Name:	
E		
	mployee ID:	
P	osition Nbr:	
D	ept Id:	
J	ob Code:	
J	ob Title:	
E	mpl Class:	

- 7. Keep the Internet Explorer window open. Next, place the hardcopy document to be scanned into the document feeder of your scanner. Be sure to orient the physical document according to your scanner requirements (e.g., face down with the bottom of the document feeding first)
- 8. In this step, you will choose a LRN (Learnmode) capture profile associated with a drawer (DivSpec or Required) appropriate to your document. On the ImageNow toolbar, click the **Capture down arrow** and then select the **capture profile** you want to use (e.g., SCAN DivSpec <u>LRN</u> Private IE (Version #) or SCAN Required <u>LRN</u> Private IE (Version #)).

Connect Settings Help	
Applications • Batches • Docume	nts • 📰 Folders • 📝 Tasks • 🍚 Workflow • 🔛 Capture • 😂 Manage 🕜 Help •
<b>e</b>	SCAN DivSpec LRN Private IE 10
	SCAN DivSpec MAN
	SCAN Required LRN Private IE 10
	SCAN Required MAN
	SCAN Backscan
H	Import from disk - Batch Mode
H	Import from disk - Single Mode
0	Package Mode
	Manage Capture Profiles

- 9. This will return the **Proposed Keys** dialog, image shown below. Review the information for accuracy.
- 10. In the **Document Type drop-down**, select the correct **Document Type option** based on the content of your document. Refer to "ImageNow P-File Document Crosswalk" document.

	Proposed Keys	
Be sure to review the information for accuracy.	Location	
	A_OHR_DoIT_Pfile_Required	
	Name:	** All fields are required except "Notes"
	Document Keys	
	Example EmpliD	
	Employee Name:	
	Example Employee Name	
	Position Number:	
	Example Postion Number	
	UDDS:	
	Example UDDS	
	Unique ID:	
	321YZ9Q_01K9332NF001NEH	
	Document Type:	To select Document Type: Use the
Notes should be entered if there is	A_OHR_Pfile_Discipline	"ImageNow P-File Document
an internal question about the document.	Notes:	Crosswalk"
This issue should then be resolved		
during the QA or Review and the		
notes then deleted.	Capture Cancel	

### 11.Click **Capture**.

- 12.Next verify the scan and metadata. In **Content Viewer**, verify image quality, Document Type, Index and Custom Property Values. Make any desired changes. The **Recycle** icon can be used to delete blank pages. If you need to rescan, close the **Content Viewer** window and start over.
- 13.Enter the Effective Date\* of the document (e.g., date of letter) in "A\_OHR\_Pfile\_EffDate." Refer to "ImageNow P-File Document Crosswalk" document for relative effective date.



14. Click **Save**. The document is now saved into your division's QA queue.

15.Next, move the document from the QA Queue to the Review Queue. From the ImageNow toolbar click the **Workflow down arrow** and select your division's **QA Queue**. All your division's HR capture profiles are configured to deposit to this queue. Your menu items may be different than those shown here.



16. This will open the QA Queue in the ImageNow Content Explorer. Review the **Document Keys** for the documents you have created. Double-click on a document to open it in the Content Viewer.

Perceptive Content Explorer										
]										
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Folders	WOINIOWIC	in scatus + Is equal to		• Mail						
E Z Tasks	Notes	Employee Name	E	UDDS	A_OHR_Pfile_A A	_OHR_Pfile_Eff Date	Туре	Drawer	Pages	Created By
E 💁 Workflow										, ic
A_OHR_DOIT_Pfile A OHR DoIT_Pfile Backscan Proc		Buck E. Badger	05	A065555	0	8/08/2008	A_OHR_Pfile_Context_Email	A_OHR_DoIT_Pfile_DivSpec	1	
A_OHR_DoIT_Pfile_Backscan QA			05	A061234	1	0/16/2015	A_OHR_Pfile_Discipline	A_OHR_DoIT_Pfile_DivSpec	1	
A_OHR_DoIT_Pfile_Backscan Rev			05	A064545	0	1/01/2015	A_OHR_Pfile_Discipline	A_OHR_DoIT_Pfile_DivSpec	1	
A_OHR_DoIT_Pfile_QA										
A_OHR_DoIT_Pfile_Review										



- 17. Route forward if the document passes your QA. To do this, click **Workflow** > **Route Forward** (or shortcut). You can select multiple documents to route forward by using the **CTRL key**. Note: Once forwarded, an administrator will need to delete a document if there is an error.
- 18. If you need to correct the document's metadata or delete the document:
  - a. Make corrections: Double-click the document to open in Content Viewer. Change document keys and **Save**. If unable to make corrections, delete.
  - b. Delete document: While in the QA Queue, click the red X or navigate to
     Edit > Delete.

Perceptive Content Explorer		
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Workflow	Chuck 05 A060000	
A_OHR_DOIT_Pfile	Buck 05 4065555	
🚯 A OHR DoIT Pfile B	Buck 05 A005555	

19. The document will now be in the Review Queue and is considered complete and accurate.

### Part B: Learn Mode Linking of an Electronic Document

- 1. Login to ImageNow on either your <u>personal desktop or the desktop with the</u> <u>scanner</u>. (Reference: Section 3, page 5)
- 2. Login to HRS using the **Private Internet Explorer Shortcut** on your desktop.
- Navigate to Employee Information(ImageNow). To do this, go to Workforce Administration > UW External HR Systems > Employee Information(ImageNow).

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Menu 🗖	
Search:	Main Menu > Workforce Administration >
> My Favorites > Self Service	UW External HR Systems
<ul> <li>Workforce Administration</li> <li>✓ UW External HR Systems</li> <li>– Employee Information(ImageNow)</li> </ul>	Page is used for documet imaging software (ImageNow)

4. Search for the desired employee by **Empl ID**. (You may search by "Employee name" but it will take considerably longer).

Find an Existing Value	
▼ Search Criteria	
Search by: Empl ID V begins with	
Search Advanced Search	

5. This returns a list of appointments for the specified "Empl ID." Click the correct **Empl entry with "(blank)" listed in the Job End Date field**. If these conditions do not match your results, contact your divisional HR representative.

View All								First 🔣
Empl ID	Empl Rcd Nbr	<u>Name</u>	Position Number	Job Begin Date	Job End Date	Department	Description	Emple
	0		(blank)	02/24/2013	03/08/2015	A961330	STUDENT HELP	SH
1 2 2 3	1		(blank)	02/24/2013	08/24/2014	A961310	STUDENT HELP	SH
	2		(blank)	02/24/2013	03/09/2014	A96 320	STUDENT HELP	SH
		(blank)	01/21/2015	03/08/2015	4961320	STUDENT HELP	SH	
	3		(blank)	10/14/2013	03/08/2015	A060350	STUDENT HELP	SH
	3		02111819	03/09/2015	(blank) 🦰	A060350	HR ASST	CJ

6. You should now see the employee information that will be used in Learn Mode Linking.

mployee Information	
Employee Nam	
Employee ID:	
Position Nbr:	
Dept Id:	
Job Code:	
Job Title:	
Empl Class:	

- 7. Keep the Internet Explorer window open.
- 8. Open the document in the business application that houses the document (e.g., Adobe Acrobat, MS Word, E-mail). In that application, choose **File** > **Print**.
- 9. Select ImageNow Printer and then Print.



10. In this step, choose a LRN (Learnmode) capture profile associated with a drawer (DivSpec or Required) appropriate to your document. On the ImageNow toolbar, click the **Capture down arrow** and then select the **capture profile** you want to use (e.g., SCAN DivSpec <u>LRN</u> Private IE (Version #) or SCAN Required <u>LRN</u> Private IE (Version #)).



- 11.Click **OK**.
- 12. This will return the **Proposed Keys** dialog, image shown below. Review the information for accuracy.
- 13. In the **Document Type drop-down**, select the correct **Document Type** option based on the content of your document. Refer to "<u>ImageNow P-File Document</u> <u>Crosswalk</u>" document.

-	Proposed Keys	
Be sure to review the information for accuracy.	Location	
	Drawer	
	A_OHR_DoIT_Pfile_Required	** All Calala and as main al
	Name:	except "Notes"
	Document Keys	
	EmpIID:	
	Example EmpIID	
	Employee Name:	
	Example Employee Name	
	Position Number:	
	Example Postion Number	
	UDDS:	
	Example UDDS	
	Unique ID:	
	321YZ9Q_01K9332NF001NEH	
	Document Type:	To coloct Decument Type: Lice the
Notes should be entered if there is	A_OHR_Pfile_Discipline	"ImageNow P-File Document
an internal question about the	Notes:	Crosswalk"
document.		Crocowant
This issue should then be resolved		
during the QA or Review and the	Capture Cancel	
notes then deleted.		

### 14. Click **Capture**.

- 15.Next, verify the scan and metadata. In **Content Viewer**, verify image quality, Document Type, Index and Custom Property Values. Make any desired changes. The **Recycle icon** can be used to delete any blank pages. If you need to rescan, close the **Content Viewer** window and start over.
- 16.Enter the Effective Date\* of the document (e.g., date of letter) in "A\_OHR\_Pfile\_EffDate." Refer to "ImageNow P-File Document Crosswalk" document for relative effective date.
- 17. Click **Save**. The document is now saved into your division's QA queue.



18.Next, move the document from the QA Queue to the Review Queue. From the ImageNow toolbar click the **Workflow down arrow** and select your division's **QA Queue**. All your division's HR capture profiles are configured to deposit to this queue. Your menu items may be different than those shown here.



19. This will open the QA Queue in the ImageNow Content Explorer. Review the **Document Keys** for the documents you have created. Double-click on a document to open it in the Content Viewer.

Perceptive Content Explorer									
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🕀 🚞 Folders	L								
🕀 😨 Tasks	Notes	Employee Name	E UDDS	A_OHR_Pfile_A	A_OHR_Pfile_Eff Date	Туре	Drawer	Pages	Created By
Workflow									ic ic
A_OHR_DOIT_Pfile		Buck E. Badger	05 A06555	5	08/08/2008	A OHR Pfile Context Email	A OHR DoIT Pfile DivSpec	1	
A_OHR_DoIT_Pfile_Backscan QA			05 A06123	4	10/16/2015	A OHR Pfile Discipline	A OHR DolT Pfile DivSpec	1	
🚯 A OHR DoIT Pfile Backscan Rev			05 /100120			A_OFINE_DIScipline			
A OHR DoIT Pfile Complete			05 A06454	5	01/01/2015	A_OHR_Ptile_Discipline	A_OHR_DoIT_Pfile_DivSpec	1	
A OHR DolT Pfile OA									
A OHR DOTT Pfile Review									
NO P_OLIT_PHIE_REVIEW									

Important!					
QA Review: In this view, the goal is to audit the index keys and ensure the correct information was selected.					
Your division may prefer that you only review documents that you created. There may be documents in QA Queue created by other users in your division.					
Check all fields for accuracy comparing with document.					
Document Type and Effective Date must align with "P-file Scanning Document types" reference.					
All documents should have your Divisional UDDS prefix (e.g., A34, A07).					
Double click on a document row to open the full view in Content Viewer if needed.					

- 20. Route forward if the document passes your QA. To do this, click **Workflow** > **Route Forward** (or shortcut). You can select multiple documents to route forward by using the **CTRL key**. Note: Once forwarded, an administrator will need to delete a document if there is an error.
- 21.To correct the document metadata or delete the document:
  - a. Make corrections: Double-click the document to open in Content Viewer. Change Document Keys and **Save**. If unable to make corrections, delete.
  - b. Delete document: While in the QA Queue, click the red X or navigate to
     Edit > Delete.

Perceptive Content Explorer		
<u>File Edit View W</u> orkflow	<u>H</u> elp	
Add to Workflow	D     O	
Route Up     Route Early	A_OFDoIT_Pfile_QA	- 📽 🖗 🔲 🎜
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∃ 🕘 Workflow	Chuck 05 A060000	
A_OHR_DOIT_Pfile	Buck 05 A065555	

22. The document will now be in the Review Queue and is considered complete and accurate.

# Section 5: Manual Linking (Not Recommended)

If Learn Mode is not working you are able to manually link the documents by manually entering the metadata.

### Part A: Manual Linking of a Paper Document

- 1. Login to the ImageNow client on the <u>workstation with the scanner</u>. (Reference: Section 3, page 5)
- 2. Login to HRS using the **Private Internet Explorer shortcut** on your desktop.
- 3. On the ImageNow toolbar, click the **Capture down arrow** and then select the **capture profile** you want to use (e.g., SCAN DivSpec MAN or SCAN Required MAN).

<u>C</u> onnect	Settings	Help							
Appli Appli	ications 👻	Batches •	Docume	nts 🔹 💼 Folders 🔹	Tasks •	🕒 Workflow 🝷	Capture -	🤗 Manage	? Help -
							-		
				SCAN DivSpec	LRN Private I	IE 10			
				SCAN DivSpec	MAN				
			<b>1</b>	SCAN Require	d LRN Private	IE 10			
				SCAN Require	d MAN				
				SCAN Backsca	n				
			H	Import from d	isk - Batch M	ode			
			H	Import from d	isk - Single M	lode			
			0	Package Mode	:				
				Manage Captu	ire Profiles				

4. In the **Proposed Keys** dialog, manually enter the **Document Keys** and select the appropriate **Document Type**. All fields are required. You may look up this information in Job Data in HRS. (Reference: Section 6, page 20).

	Proposed Keys	
Be sure to review the information for accuracy.	Location Drawer A_OHR_DoIT_Pfile_Required v Name:	** All fields are required except "Notes"
	Document Keys EmplD: Example EmplD Employee Name: Example Employee Name Postion Number: Example Postion Number UDDS: Example UDDS	
Notes should be entered if there is an internal question about the document. This issue should then be resolved during the QA or Review and the notes then deleted.	Unique ID: 321YZ9Q_01K9332NF001NEH Document Type: A_OHR_Pfile_Discipline  v Notes: Capture Cancel	To select Document Type: Use the "ImageNow P-File Document Crosswalk"

- 5. When complete, click **Capture**.
- 6. Then continue to follow the same process from Section 4, Part A, page 6 and refer to the "P-File ImageNow Document Crosswalk."

### Part B: Manual Linking of an Electronic Document

- 1. Login to ImageNow on either your <u>personal desktop or the desktop with the</u> <u>scanner</u>. (Reference: Section 3, page 6)
- Open the document in the business application that houses the document (e.g., Adobe Acrobat, MS Word, e-Mail). In that application, navigate to File > Print.
- 3. Select ImageNow Printer and click Print.



4. In this step, choose a capture profile that is appropriate for the document and drawer (e.g., DivSpec or Required). Select the **capture profile** you want to use (e.g., SCAN DivSpec MAN or SCAN Required MAN).



- 5. Click **OK**.
- 6. In the **Proposed Keys** dialog, manually enter the **Document Keys** and select the appropriate **Document Type**. All fields are required. You can look up this information in Job Data in HRS. (Reference: Section 6, page 20)

	Proposed Keys	×
Be sure to review the information for accuracy.	Location	
	A OHR DolT Pfile Required	
	Name:	** All fields are required
		except "Notes"
	Document Keys	
	EmplID:	
	Example EmpIID	
	Employee Name:	
	Example Employee Name	
	Position Number:	
	Example Postion Number	
	UDDS:	
	Example UDDS	
	Unique ID:	
	321YZ9Q_01K9332NF001NEH	
	Document Type:	To colocit Decument Turou Lies the
Notes should be entered if there is	A_OHR_Pfile_Discipline	"ImageNow P File Document
an internal question about the	Notes:	Crosswalk"
document.		orosswaik
This issue should then be resolved		
during the QA or Review and the	Canturn	
notes then deleted.	Capture Caricer	

- 7. When complete, click **Capture**.
- 8. Then continue to follow the same process from Section 4, Part B, page 11.

# Section 6: LearnMode and Linking Tips

# Acceptable Formatting for Effective Dates

Ways you can enter the effective date:	Ways you cannot enter the effective date:
04/08/2016	04082016
4/8/16	4816
04-08-2016	4.8.16
4-8-16	04.08.16

# If you need to manually link, use HRS Job Data screen to find values for the Document Keys

Menu 🗖 Search:					
> My Favorites > Inbound File Upload > Self Service	Work Location Job I	Information Job EMP	Labor Payroll* S	alary Plan <u>C</u> or <mark>ID:</mark>	npensation    U\
> Manager Self Service > Workforce Administration	Work Location				
Personal Information Job Information	HR Status: Act	tive	Payroll Status: Ac	tive	
Contract Administration	Effective Date: 04/	01/2016	Sequence:	o 🗍	Job
Review Job Information Networks – Job Data	Action: Da	ta Change		Reason:	ICI Deferred Sta
- Current Job	Last Start Date:	10/14/2013	Termination Date:		
<ul> <li>Vorkforce Reports</li> <li>UW External HR Systems</li> <li>Benefits</li> </ul>	Expected Job End Dat	e 03/31/2018			Position Entry
Compensation	Position Number:	02111819	HR ASST		
> Payroll for North America	Override Position D	ata	Position Mana	gement Record	
Mgmt	Regulatory Region:	USA	United States		
> Payroll Interface > Workforce Development	Company:	UWS	University of Wisc	onsin System	
> Organizational Development	Business Unit:	UWMSN	UW Madison		Department E
> UW Absence Management	Department: UDDS	A060350	DOIT/HUMAN RE	SOURCES	
Reports	Location:	A0155	COMPLITER SCI	ENCES	

# **Section 7: Document Search**

#### Search Feature

1. Click **Documents** in the toolbar to begin your search

<u>Connect</u> <u>Settings</u> <u>H</u> elp					
Applications - Batches -	Documents •	Folders •	Tasks - 🌄 Workflow	🔹 🛃 Capture 👻 🎇 Manag	e 🕜 Help 🔹

 This will open the Documents section in the ImageNow Viewer. Select the "A\_OHR\_'division acronym'\_Pfile" view for your division. (Please note this screenshot is from DoIT. Your division acronym will be listed in your system.)

/iews	Quick Search Search		
Documents	Employee Name 🔻 starts v	vith 👻 craig	
A_OHR_CampusView_Pfile     A_OHR_DoIT_Pfile	A_OHR_Pfile_Eff Date	Employee Name	EmplID
😼 DoIT Doctype	09/16/2015	craig	12345
🔏 DoIT Drawer 🦷 🦓 😪 DoIT EmplID	01/01/2015	craig	05
😪 DoIT Name	01/15/2015	craig	05
Control Position Number	09/14/2015	craig	12345
<ul> <li>All Documents</li> <li>GS-StudentApplicationLookup</li> <li>Registrar</li> <li>My Recycled Documents</li> <li>Folders</li> <li>Tasks</li> <li>Tasks</li> <li>A_OHR_DOIT_Pfile</li> <li>A_OHR_DoIT_Pfile_Backscan Proc</li> <li>A_OHR_DOIT_Pfile_Backscan Rev</li> <li>A_OHR_DOIT_Pfile_Backscan Rev</li> <li>A_OHR_DOIT_Pfile_Backscan Rev</li> <li>A_OHR_DOIT_Pfile_Complete</li> <li>A_OHR_DOIT_Pfile_QA</li> <li>A_OHR_DOIT_Pfile_Review</li> </ul>	Select appropriate docu - A_OHR_'Division Acr search all documents wi - A_OHR_CampusView required documents in o be done for an approve	ment type you are searce <b>onym'_Pfile</b> will allow y thin your division. <b>v_Pfile</b> will allow you to other divisions (this shound d business purpose).	hing for. rou to search Ild only

# Filter

- 1. Click on the appropriate **document search filter** in the left column (e.g., Empl ID, Name, UDDS). Enter the **search value** in the dialog pop-up.
- 2. Click **OK**. Results will be listed and can be sorted by each column.

Views	Ψ×	Search	
Batches Cocuments A_OHR_CampusView_Pfile A_OHR_DoIT_Pfile C DoIT Doctype C DOIT Drawer C DOIT EmpIID			≥ oluc
Control Name Control Name Control Number Control Doll Position Number Control Doll UDDS  Control Documents  Control Documents		Select a Search Value	

### Quick Search (Searching by 1 Value)

1. Using the Quick Search Toolbar, define your criteria with the drop-down menus.

File Fau Alem Mouthon Loide	ers <u>H</u> eip	
🌞 • 🖆 🥢 😭 📾 🏦 🖶 🛈		
	🚡 A_OHR_DoIT_Pfile 🔹 😪 😭 🔲 🤍 🔍 🗸	
iews	P × Quick Search Search	
🗉 🦲 Batches		
Documents	Type  is equal to A_OHR_Pfile_Perfrm_Doc	
🗉 💼 A_OHR_CampusView_Pfile		
😑 💼 A_OHR_DoIT_Pfile	A_OHR_Pfile_Eff Date Employee Name EmplID UDDS	A
જ DoIT Doctype		
😙 DoIT Drawer		

2. Click **Go** in the upper-right section.

	▼ <b>₽</b> 60
Created By	Created

#### Search (Searching by >1 Value)

- 1. Click on the **Search tab** and then select the **+ icon** to add search conditions.
- 2. Click **OK**. Results will be listed and can be sorted by each column.

- A 0	HR Dott Pfile						
4 ×	Cost Same						
		Ŷ &					
	Employee Name contains S	TEPHENSON					
	A_OHR_Pfile_Eff Date	Employee Name	EmplID	UDDS		A_OHR_Pfile_Appt Title	Туре
	09/14/2015	Smith		A06788	00	CP	A_OHR_Pfile_Cont.
	09/14/2015	Smith		A06788	30	CP	A_OHR_Pfile_Cont.
				Add Condition		8	2
				Constrain by:	Document key	•	
				Type:	Normal	•	
				Field:	Employee Name	•	
				Operator:	contains	¥	
				Value:	Smith		
							1
						OK. Cancel	

Note: You can enter additional values to narrow your results. The search in the example below will return resume document types for all divisional employees with the name specified.

# ×     Quick Search     Search       Image: Search     Search     Search       Image: Search     Search     Search       Image: Search     Search     Search	私 全 単 tains STEPHENSON		
A_OHR_Pfile_Eff Da	ite Employee Name EmplID	UDDS	A_OHR_Pfile_Appt Titl
09/14/2015	Smith	A067880	CP
09/14/2015	Smith	A067880	CP
	Add Condition  Constrain by: Document key  Type: Normal  Field Type  Operator: is equal to  Value: A_OHR_Pile_Resume_CV  OK	Earcel	

# **Section 8: Exporting Documents**

- 1. Locate and open the desired document. (Reference: Section 7 starting on page 21)
- 2. Click **File** > **Export**.

🧟 Pero	ceptive (	Content Viewe	r - [Page 1]			
<u>F</u> ile	<u>V</u> iew	<u>Annotation</u>	<u>W</u> orkflow	F		
0	apture f	Ctrl+O				
<u> </u>	lose	Ctrl+F4				
[	lose <u>A</u> ll		Ì			
H Save						
🏦 E	xport			4		

3. When the Export window opens, customize the Profile, Format, Pages and Annotations. The recommended settings are shown below.

Export			23
General			
Profile:	Default		•
Format:	Single PDF		•
File Name:			Browse
Pages			
	▼ Page 1		Select All Deselect All
Annotations-			
Include:	No annotations		•
Options		ОК	Cancel

- 4. To name a file, click **Browse** and choose a location on your computer where you would like the PDF to be saved. Enter a name for the file and click **Save**.
- 5. Click **OK**.
- 6. Your PDF will be saved to the location you specified.

# Section 9: Redacting Information on a Document in your QA Workflow

1. Locate and open the document in your QA workflow.



2. Select the **Redact tool** on the ImageNow toolbar.



3. Click and drag the **redaction boxes** around the information you wish to remove.



4. Click File and select Generate Redacted Document.

Rerceptive Content Viewe	r - Workflow - [			
File View Annotation	Workflow F			
Capture from disk	Ctrl+O			
Close	Ctrl+F4			
Close <u>A</u> ll				
H Save				
1 Export				
🖉 🖉 Launch Associated App	lication			
Generate Redacted Doc	ument.			
Copy Selected C	trl+Shift+C			
Copy Document	Ctrl+Y			
Create Shortcut				
Apply Retention <u>Hold</u>				
Process Approval Requ	ests			

5. To generate the redaction, you must change a few things in the **Generate Redacted Document menu**.

- a. Add an "**R**" in front of the **EmplID**.
- b. Check Send to workflow queue and select the QA queue (e.g., z
- "A\_OHR\_'division acronym'\_Pfile\_QA").
- c. Verify **All Pages** is selected under **Page Options**.
- 6. Click **OK** to generate the new version of your document.

🗯 Generate Redacted Docu	iment	× 1
Application Plan Select an application plan		Document Options
(None)	•	
Use as default application	n plan	Sabmit to Content Server
	in provi	Send to workflow queue
Location		A_OHR_VCRGE_Pfile_QA
Drawer: -		
A_OHR_VCRGE_Pfile_Re	quired	
Name:		Page Options
		Current anna
Properties		Current page
EmpIID:		All open pages
12345		All pages
Employee Name:		Page range
Smith		
Position Number:		Example: 1,3,5-12
00873964		
UDDS:		
A349300		
Unique ID:		
321Z071_01QWK5CM400	4QMF	
Type:		
A_OHR_Pfile_Resume_CV	/	•
Custom Properties		
A_OHR_Pfile_Appt Title	SENIOR SCIENTIST	*
A_OHR_Pfile_Appt Title	AS	1
A_OHR_Pfile_Eff Date	07/01/2016	E
A_OHR_Pfile_Job Code	E10BN	
Z_CreationDate	07/01/2016	•
Use default values		OK Cancel

6. Your workflow queue will now contain both the non-redacted and redacted version of the document you updated.

Quick Search       Search         Quick Search       Search         Workflow item status       is equal to         Anny       Anny         Notes       Employee Name         Employee Name       Employee Name         Smith       12345         Anny         Notes       Smith         This is needs to       Anof7130         CP       Anof7130         CP       Anof7130         CP       Anof7130		e <b>x</b> .										0 P 3
Image: Second plant	etflow Help											
Provide and the second	# × [	HR, VORGE, PEIN, QA	• # A []	e₹.								
None     Topic     Date: Proj     Date: Proj       None     Topic     Addr. Mar. Addr. Mar. Addr. Mar. Addr. Mar. Addr. Mar. Mar. Proj     Bitter Date: Proj       Mar. Proj     Addr. Mar. Addr. Mar. Addr. Mar. Mar. Mar. Mar. Proj     Addr. Mar. Proj     Bitter Date: Proj       Mar. Proj     Addr. Mar. Addr. Mar. Mar. Mar. Mar. Proj     Addr. Mar. Proj     Addr. Mar. Proj       Mar. Proj     Addr. Mar. Mar. Mar. Mar. Mar. Mar. Mar. Ma		Koldon transtatus	• is equal to •	Any								• 🖬 Ca
AND/D         AS         OP/02/2016         A.OHE //Re. Resume(V)         A.		iotes	Employee Name	EmplID	UDDS	A_OHR_Pfile_Appt Title	A_OHR_Pfile_Eff Date	Type	1	Drawer	Pages C	reated By
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Quick Search       Search         Workflow item status       is equal to         Notes       Employee Name         Employee Name       EmpliD         UDDS       A349300         Smith       12345         A349300       AS         A349256       SH         A067130       CP         UDDS       A067130       CP         A067130       CP         Constrained       A067130       CP					1							
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Quick Search       Search         Workflow item status       Is equal to         Any       Any         Notes       Employee Name         Smith       12345         A349300       AS         A340256       SH         A067130       CP         UDDS       A067130         This is needs to       A067130       CP         A067130       CP												
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Smith         12345         A349300         AS           A340256         SH           A067130         CP           UDDS         UDDS           This is needs to         A067130         CP           A067130         CP           A067130         CP           A067130         CP				- (	· · · ·		-		A3155	00		AJ
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A06/130 CP									A0671	20		CD
									A00/1	30		CP
A067130 CD									40074	20		00

7. Open the redacted version to make sure the redactions are correct. (The document with the "R" in front of the EmpIID.) If the redactions are accurate, close the document.8. Delete the original version of the document. (The document without the "R" in front of the EmpIID.)

9. Click **Yes** in the **Delete Items** dialog box.

Delete Items	8
Deleting these items from workflow deletes the actual documents or folders the items represent. In addition, deleting these items also removes all associated workflow history information.	
Yes No	

10. Locate and open the redacted document in your QA workflow. (The document with the "R" in front of the EmplID.)

11. Remove the **"R"** in front of the **EmplID**.

12. Save the edits and route on to the **Review Queue**.

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	n Martin	~
	Sample CV: Sciences	ad <u>*</u>
	000 West 1111h Street Apt-0 West 111h Street Apt-0 West 111h Street Apt-0 (646) 222 2222	
	EDUCATION	/
Columbia University	Graduate School of Arts and Sciences, New York, NY	<u> </u>
Doctor of Philosophy, C Master of Philosophy, M Master of Arts, Ma	Themistry: Emphasis: Organic Synthesis, July 2009 (expected)	12/2016 12/2016 12/2016
Swarthmore Colle-		
Bachelor of Arts, C	Properties 4 X	
Columbia Univers	Document Keys	
Advisor: Professor	Drawer -	
	A_OHR_VCRGE_Pfile_Required	Page1 #2
	Name	
	321Z071_01QWKCCM4004YML	
	EmpIID	
	XXXX 12345	
	Employee Name	
	Smith	
	Position Number	
	00873964	
	UDDS	
	A349300	
	Unique ID	
	321Z071_01QWK5CM4004QMF	
	Туре	
	A_OHR_Pfile_Resume_CV	
	More	
	<u>more</u>	
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X		

# Section 10: Troubleshooting Information

### **KnowledgeBase Documents**

#### ImageNow Concepts: How it works

<u>https://kb.wisc.edu/ecms/page.php?id=33110</u>

#### End User Training: Perceptive Content Fundamentals

https://kb.wisc.edu/ecms/page.php?id=33111

#### Enterprise Content Management Service (ECMS) KnowledgeBase

<u>https://kb.wisc.edu/ecms</u>

# How to Get Support for Technical Issues

#### Scanner or Client Issues

• Contact your Local IT Support (e.g., DoIT DS, AIMS, Internal IT Support).

### ECMS / Imaging Service Issues

- Contact DolT Helpdesk @ 608-264-4357 or
- E-mail @ imaging-support@lists.wiscnet.net.

# **Questions regarding internal process**

• Contact your Divisional HR Manager.

# Workforce Relations P-File Resources

• <u>http://www.ohr.wisc.edu/workforce/p-file.aspx</u>