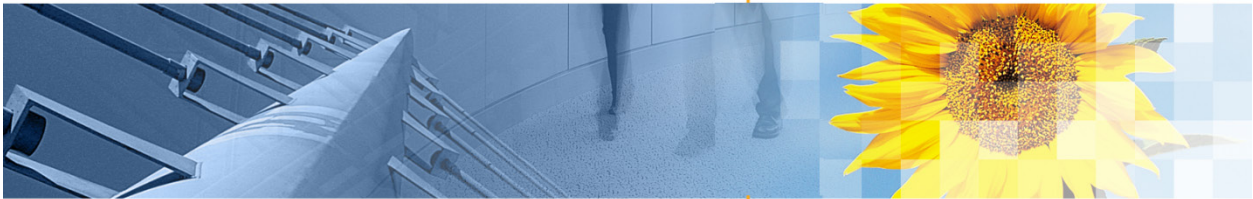


Related Documents and Projects Getting Started Guide

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Related Views

A user can display one or more related views from ImageNow Viewer or WebNow Viewer. When the user selects a related view to apply to the active document, the Related Documents pane displays documents that match the document with respect to the conditions you define for the related view.

Suppose, for example, the user views a student information document with a Tab value that contains the student's ID number. The user wants to see all the other documents with the same Tab value. If you defined the appropriate related view, the user can select this view, and the Related Documents pane displays any other documents that have a Tab value that match the student ID number in the active document. A document view or project view definition cannot achieve this goal because those view definitions must specify a specific value in the condition. A related view, on the other hand, takes as its comparison value whatever it finds in the specified document key or custom property of the active document.

As another example, suppose that a user views an inventory document with a custom property that contains a check number. Another set of business documents contains check number in Field 3 rather than in a custom property. Therefore, the user wants to see all documents with a Field 3 value that matches the Check Number custom property in the active document. If you defined the appropriate related view, the user can select this view, and the Related Documents pane displays any other documents that have a Field 3 value that match the Check Number custom property in the active document.

With owner or manager privileges, you can create, rename, and delete related views in ImageNow. When you modify a related view, you automatically enter ImageNow View Designer, where you can create or modify relationship conditions, activate the view, and assign security settings to it.


Related Documents

In ImageNow, you can create relationships between documents. These relationships allow you to view a set of documents that share common attributes, such as a common document key (folder or drawer).

You can create relationships between documents using Copy Document. This lets you make a copy of one or more pages of a document and change the document keys or custom properties for those pages – to distinguish the copied documents from the original pages. When you create a new document using Copy Document, the original document is called the parent and the copied document is called the child. If several related documents are created from the original document, they are called siblings. During the Copy Document procedure, you have the option of removing the copied pages from the original document.

Create a related documents view

Complete the following steps to create a related documents view based on document keys and custom properties. To perform these procedures, you must be a user with management privileges, a manager, or the owner.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console** dialog box, in the left pane, click **Relationships**.
3. Click the **Related Documents** tab and then click **New**.
4. In the **New Relationship** dialog box, complete the following substeps:
 1. In the **Name** box, type a name for your new relationship.
 2. In the **Description** box, type an optional description for your new relationship.
5. Click **OK**.
6. Verify that the new relationship is selected and then click **Modify**.
7. In the **View Designer** window, in the View tab, click the **Add**  button to add a condition.
8. In the **Add Condition** dialog box, perform the following substeps:
 1. In the **Constrain By** list, click either **Document Key** or **Custom Property**.
 2. In the **Type** list, click **Relationship**.
 3. In the **Field** list, select the document key or custom property in the original document or project that ImageNow will compare to a field in other documents or projects. If you selected Custom Property, remember that the relationship will return results only when the document or project opened in ImageNow Viewer includes the custom property you select in this step.
 4. In the **Operator** list, for a simple matching relationship, click **is equal to**. Other operators are also valid but generate more complex relationships.
 5. In the **Value** list, select the document key or custom property that you want to compare to the field you selected from the **Field** list. You can compare document key to document key, document key to custom property, custom property to document key, or custom property to custom property.
 6. If you want to narrow the results returned by the relationship view, you can repeat these substeps to add another relationship condition, or add normal or variable conditions.
9. When you have finished adding condition rows, click **OK**.
10. Save the view and then close **View Designer**.

View a document relationship

Complete the following steps to view a document relationship:

1. Open the document.
2. If the **Related Documents** pane is not already visible, on the **View** menu, select **Related Documents**.
3. On the **Related Documents** pane, in the **Relationship** list, select the related view you want.

Note Depending on the relationships you have created, you can display the original document from which this document was copied, copies of this document, or copies of the original document. You can also display documents with document keys or custom properties that are identical to the ones in your base document.


Related Projects

In ImageNow, you can create relationships between projects. These relationships allow you to view a set of projects that share common attributes, such as document type or a common document key (folder or drawer).

Related projects allow you to run a predefined query to match on these related fields or custom properties against other defined projects in ImageNow. For example, Sally works at a hospital as a nurse and uses ImageNow. Her ImageNow environment is set up so that each time a patient visits a hospital a new project is created and contains all documents related to that visit. So if a patient visits Sally's hospital twice, that patient will have two projects created, one for each visit. Sally is viewing a recent patient's visit and realizes she needs to see all other projects from past visits. When viewing the Related Projects pane, Sally can see this and select any project she needs to view.

Create a related project view

To perform these procedures, you must be a user with management privileges, a manager, or the owner.

1. On the **ImageNow** toolbar, click **Manage**.
2. In the **Management Console** dialog box, in the left pane, click **Relationships**.
3. Click the **Related Projects** tab and then click **New**.
4. In the **New Relationship** dialog box, complete the following substeps:
 1. In the **Name** box, type a name for your new relationship.
 2. In the **Description** box, type an optional description for your new relationship.
5. Click **OK**.
6. Verify that the new relationship is selected and then click **Modify**.
7. In the **View Designer** window, in the **View** tab, click the **Add**  button to add a condition.
8. In the **Add Condition** dialog box, perform the following substeps:
 1. In the **Constrain By** list, click either **Project Property** or **Custom Property**.
 2. In the **Type** list, click **Relationship**.
 3. In the **Field** list, select the project property or custom property in the original document or project that ImageNow will compare to a field in other documents or projects. If you selected Custom Property, remember that the relationship will return results only when the document or project you opened includes the custom property you select in this step.
 4. In the **Operator** list, for a simple matching relationship, click **is equal to**. Other operators are also valid but generate more complex relationships.
 5. In the **Value** list, select the project property or custom property that you want to compare to the field you selected from the **Field** list. You can compare project property to project property, project property to custom property, custom property to project property, or custom property to custom property.
 6. If you want to narrow the results returned by the relationship view, you can repeat these substeps to add another relationship condition, or add normal or variable conditions.
9. When you have finished adding condition rows, click **OK**.
10. Save the view and then close **View Designer**.

View a project relationship

Complete the following steps to view a project relationship:

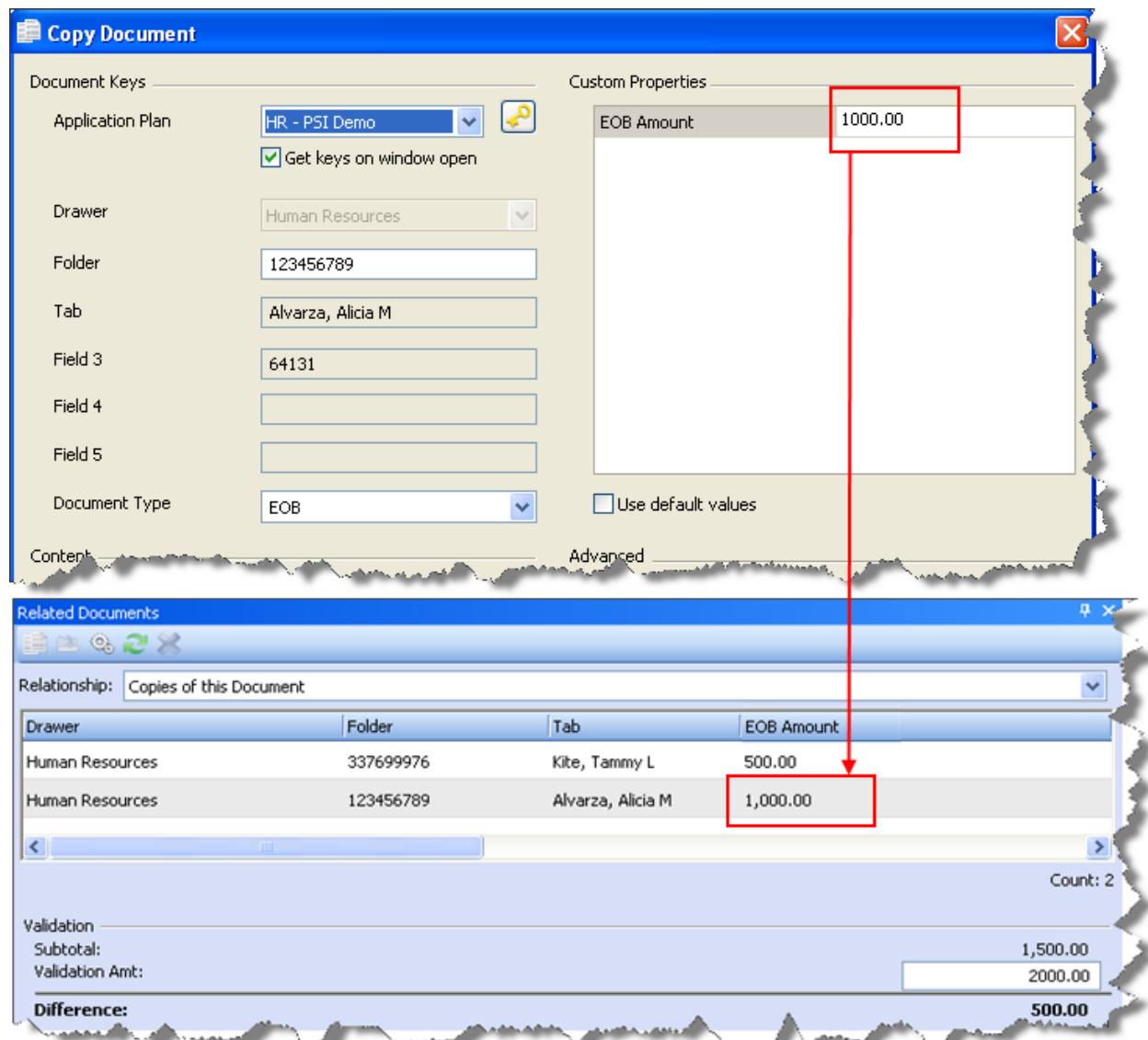
1. In the **ImageNow Explorer** grid, right-click the document for which you want to view related projects and the documents they contain and then click **View Related Projects**.
2. In the **Related Projects** pane, in the **Relationships** list, select the appropriate relationship and then double-click the project you want to view.
3. Optional. In **ImageNow Project Viewer**, do any of the following actions:
 - Click the **Documents** tab to view all the documents added to the project you selected.
 - Click the **Tasks** tab to view all the tasks associated to the project you selected.
4. Close **ImageNow Project Viewer**.

Appendix: Related Documents and Enhanced Copy

Enhanced Copy functionality can address a specific business process within the health care and insurance industry. Explanation of Benefits (EOB) documents are descriptive documents that support insurance payments to health care companies. As part of routine business, an insurance company will cut one check to a hospital that pays for many different patients. The accompanying EOB document describes how the single payment breaks down across the many patient accounts. When you receive a summary document, such as an EOB file from an insurance company, you can copy information from the summary document to individual accounts. All the copies will be related documents that are children of the summary document.

Enhanced Copy

You must add a numeric custom property to the summary document to use as a check sum. Each time you copy a page or pages to a patient's project, you enter the claim payment amount in this custom property. For example, in the figure below, a copy of the original document is created for the patient Alicia Alvarza. In the Copy Document dialog box, ImageNow populates the Document Keys section with the information from the host application and the claim payment amount is \$1000.00.




When you are finished copying all EOB pages, you can display the child documents of the summary document and compare the total of the amounts in the custom property field to the amount of the check received.

ImageNow maintains the relationship with the complete EOB, as seen in the View Related Documents tab. This enables you to easily access details, such as reason codes, on other pages of the EOB. ImageNow also allows you to modify the document using the redaction feature to mask personal information for other patients to protect their privacy. You can then route the EOB page for further processing.

Set up Enhanced Copy

Complete the following steps to configure your enhance copy functionality:

1. In **ImageNow Explorer**, double-click the document you want to open. ImageNow displays the document in **ImageNow Viewer**.
2. If the **Related Documents** pane is not already visible, on the **View** menu, select **Related Documents**.
3. In the **Related Documents** pane, click the **Manage**  button.
4. Complete the following substeps:
 - Add a column to the Related Documents pane
 1. In the **Related Documents** dialog box, select the relationship whose column content you want to validate and then click **Modify**.
 2. In the **Modify Relationship** dialog box, click **Add**.
 3. In the **Add Column** dialog box, under **Filter by**, select **Document Keys** or **All Custom Properties**.
 4. In the resulting list, select the row you want and then click **OK**.
 - Validate content in a column
 1. In the **Related Documents** dialog box, select the relationship whose column content you want to validate and then click **Modify**.
 2. In the **Modify Relationship** dialog box, select **Enable validation** check box and then, in the list, select the column you want.
 3. Click **OK**. When you view the Related Documents pane for the parent document, the Validation Amt box appears under Validation. Any amount you then enter in the Validation Amt box has the Subtotal amount subtracted from it, and the result appears in the Difference row.
 - Activate a document relationship
 1. In the **Related Documents** dialog box, select the relationship you want to activate and then click **Modify**.
 2. In the **Modify Relationship** dialog box, select the **Is active** check box and then click **OK**.
 - Run the last viewed document relationship
 - In the **Related Documents** dialog box, select **Remember and run the last viewed relationship**.
5. On the **Related Documents** dialog box, click **Close**.

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