

Basic Instructions

Using the Oracle IPM software to access documents.

Log In

Select "IBPM Startup" by clicking on the "Start" button selecting "Programs" and "Oracle" and "Imaging and Process Management" and "IBPM Startup."



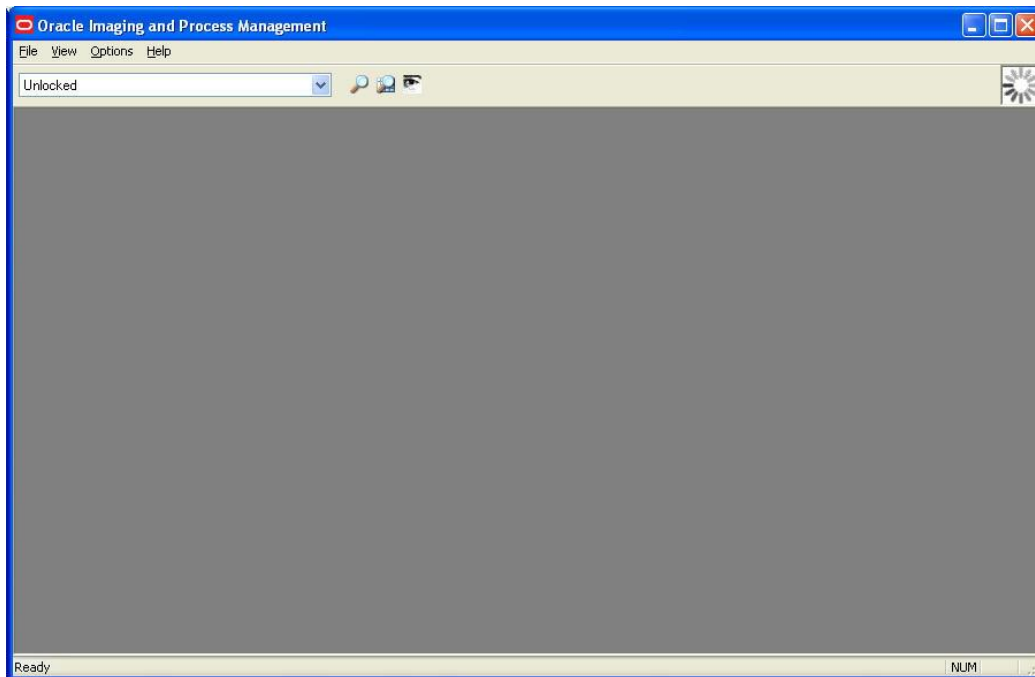
The log in box will appear.



Enter you network ID and password.

Oracle IPM will open. There will be some delay as the program updates itself if necessary.

Main Window

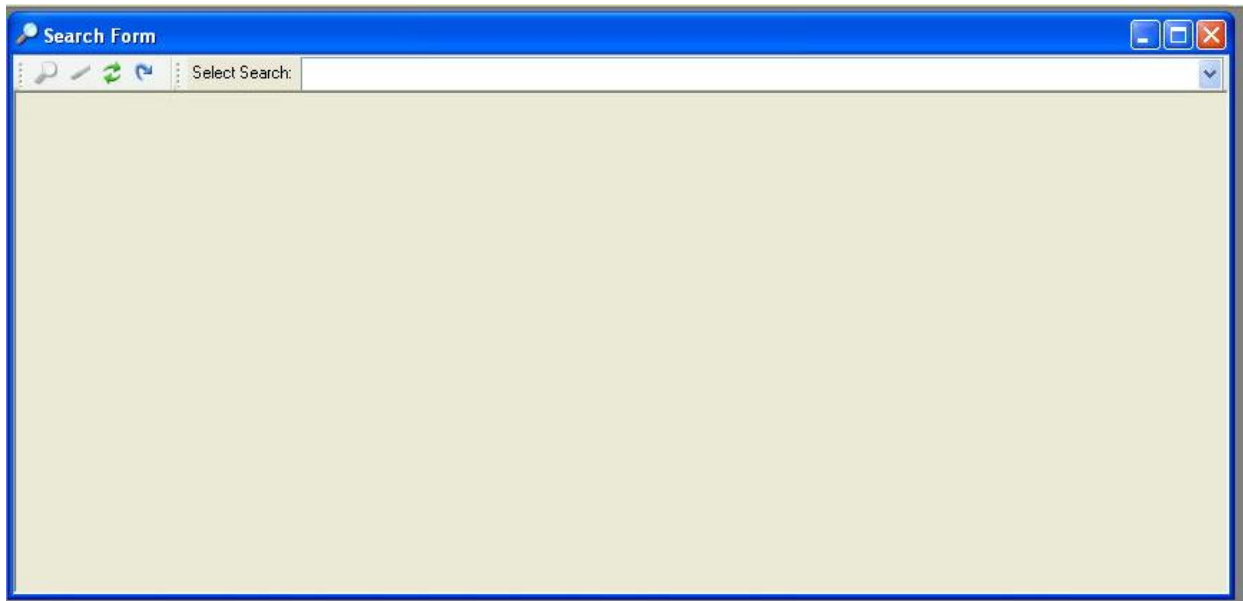


Once IPM opens your first choice is to open the "Search Form" tool. It is located under the "View" menu. Click on "View" and select "Search Form"

If you using IBPM to rout or approve Invoices your first choice will be the Worklist tool. It is located under the "View" menu. Click on "View" and select "Worklist" If this is the tool you want skip down this document to Worklist.

Some windows may be already open when you start IBPM. IBPM will open the same windows that were open when you last exited.

Search Form




Once the "Search Form" opens click on the "Choose" box to display the list of available searches.

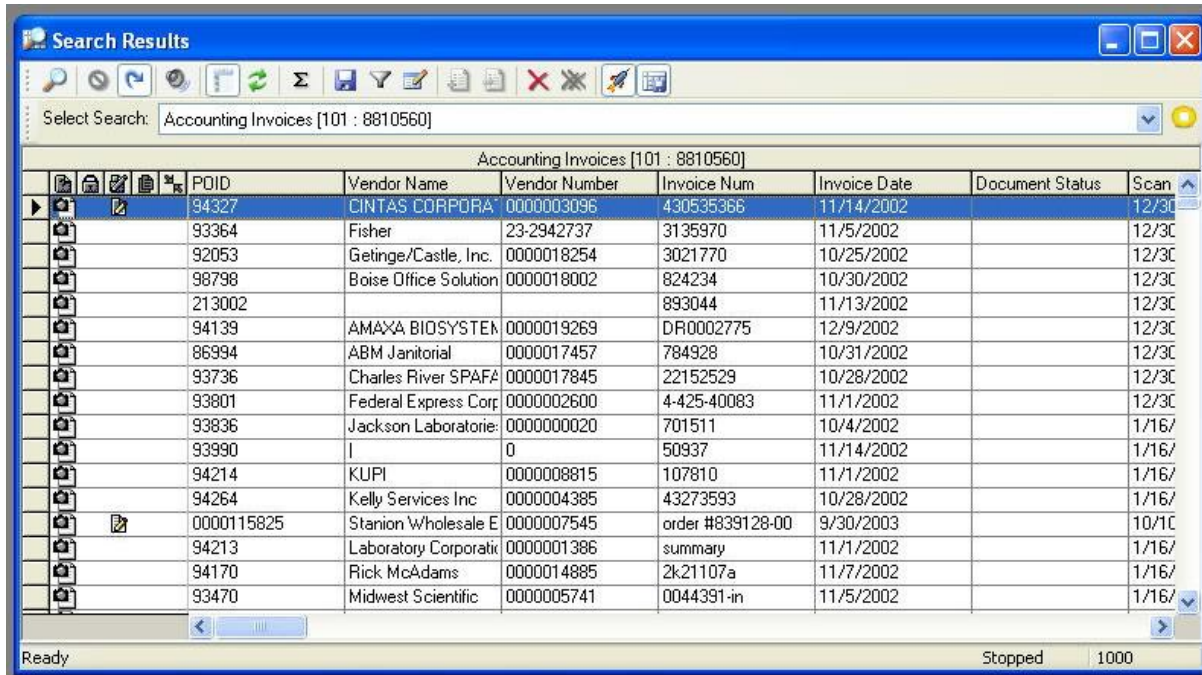
Select the search you wish to use.

After the search opens you can enter data into the search windows.

The more information you enter into the search form the fewer documents you will find. If you are having problems finding the document in question enter less information.

Click on the magnifying glass button  or press the enter button to execute the search.

Search Results

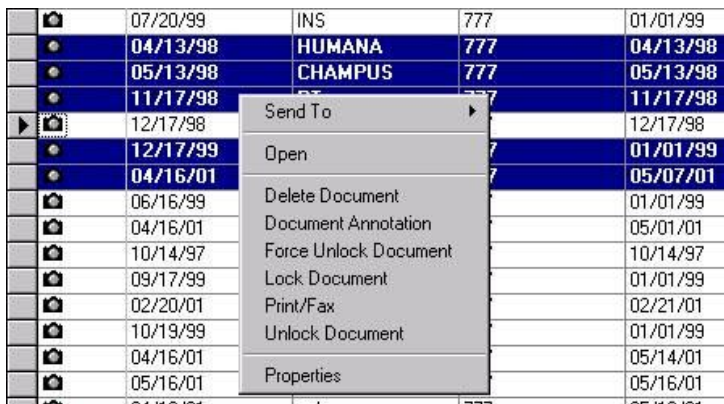


After the search is run the "Search Results" window will open. IPM will begin displaying results before the search is complete.

You can open a document by double clicking in any of the index columns. In the above picture they are "POID" "Vendor Name" "Invoice Date" "Vendor Number" and "Invoice Number"

The viewer window will then open with the requested document.

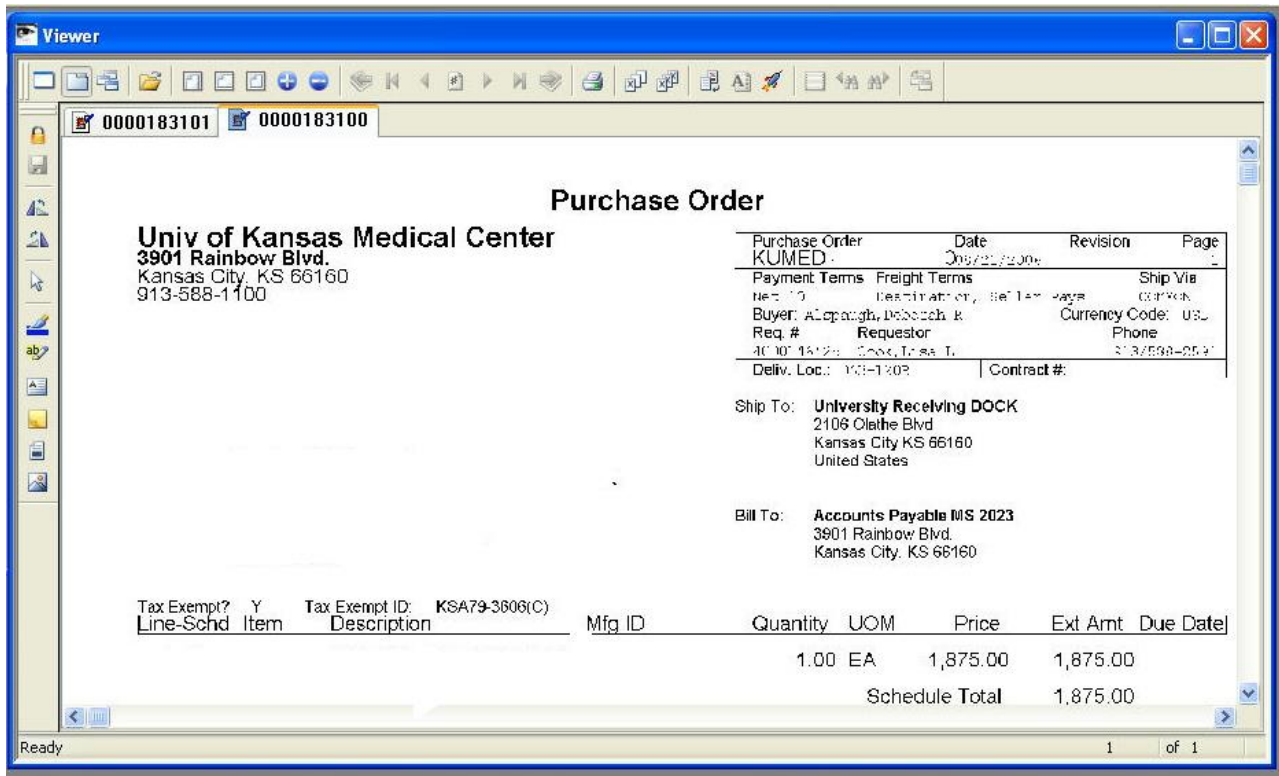
You can reorder the search results by clicking on the index column head. Clicking a second time will reverse the order.



To print documents from the search results select the documents you wish to print and right click. Multiple documents can be selected by using the Shift and or Ctrl buttons.

Under the right click menu you will find the Print command. Be sure and select "All Selected documents" in the print statement.

Viewer Tool



Once a document is open in the viewer.

The zoom  buttons will enlarge and shrink the size of the document.

The Print button  will allow you to print the document.

A complete list of the buttons and their function is available at www2.kumc.edu/imaging/Buttons

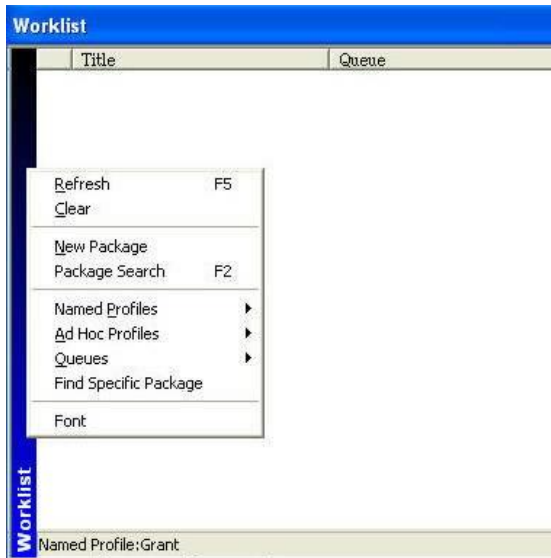
More in-depth help is available under the IPM help menu by selecting "Contents."

The most common error in the viewer is "Too many views open" it is caused when you have too many documents open in the viewer. The normal limit is 24 but this can be increased if you contact Document Management.

To close documents use the close documents buttons. The one on the left closes just the top document the one on the right closes all.



Work List Tool

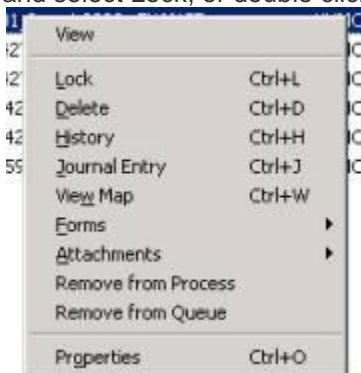


Right clicking on the Blue bar in the left of the window gives you the Worklist menu.

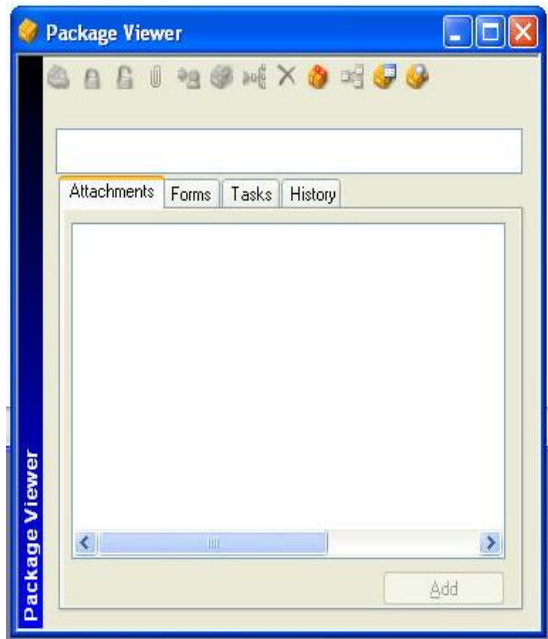
Refresh refreshes the contents of the window. Package Search and Adhoc Profiles allow you to write searches and profiles contact Document Management staff for more information.

Named profiles allows you to select a named profile. Most of the time this will be your userid.

Right clicking on a package in the wordlist tool opens the package menu View will open the Package viewer tool this is the same thing as double clicking on the package. If you are processing invoices you want to double click on the package or select view. If you are approving invoices you want to right click and select Lock, or double click on the package and select Lock from the package viewer tool.



Package Viewer Tool



The important button in this tool is the lock package tool. Locking the package opens the Document for viewing in the viewer and opens the Form Viewer for user input.

A complete list of the buttons and their function is available at www2.kumc.edu/imaging/Buttons

More in-depth help is available under the IBPM help menu by selecting "Contents."

Form Viewer Tool

There are no buttons or menus in the form viewer tool. But the individual forms may contain several.

The complete button will complete the package and route it out of your wordlist to its next queue. The Save button will commit any changes to fields in the form without completing the package.

A complete list of the buttons and their function is available at www2.kumc.edu/imaging/Buttons

More in-depth help is available under the IPM help menu by selecting "Contents."

There are several ways to switch between windows; the best is to use the "Window" menu to pick the window to go to. Do not close windows reopening them takes longer than switching. You can use either of the "Tile" commands under "View" to arrange the windows.

If you have special needs please let us know we can customize your viewer to give you the data you wish.

Contact information

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