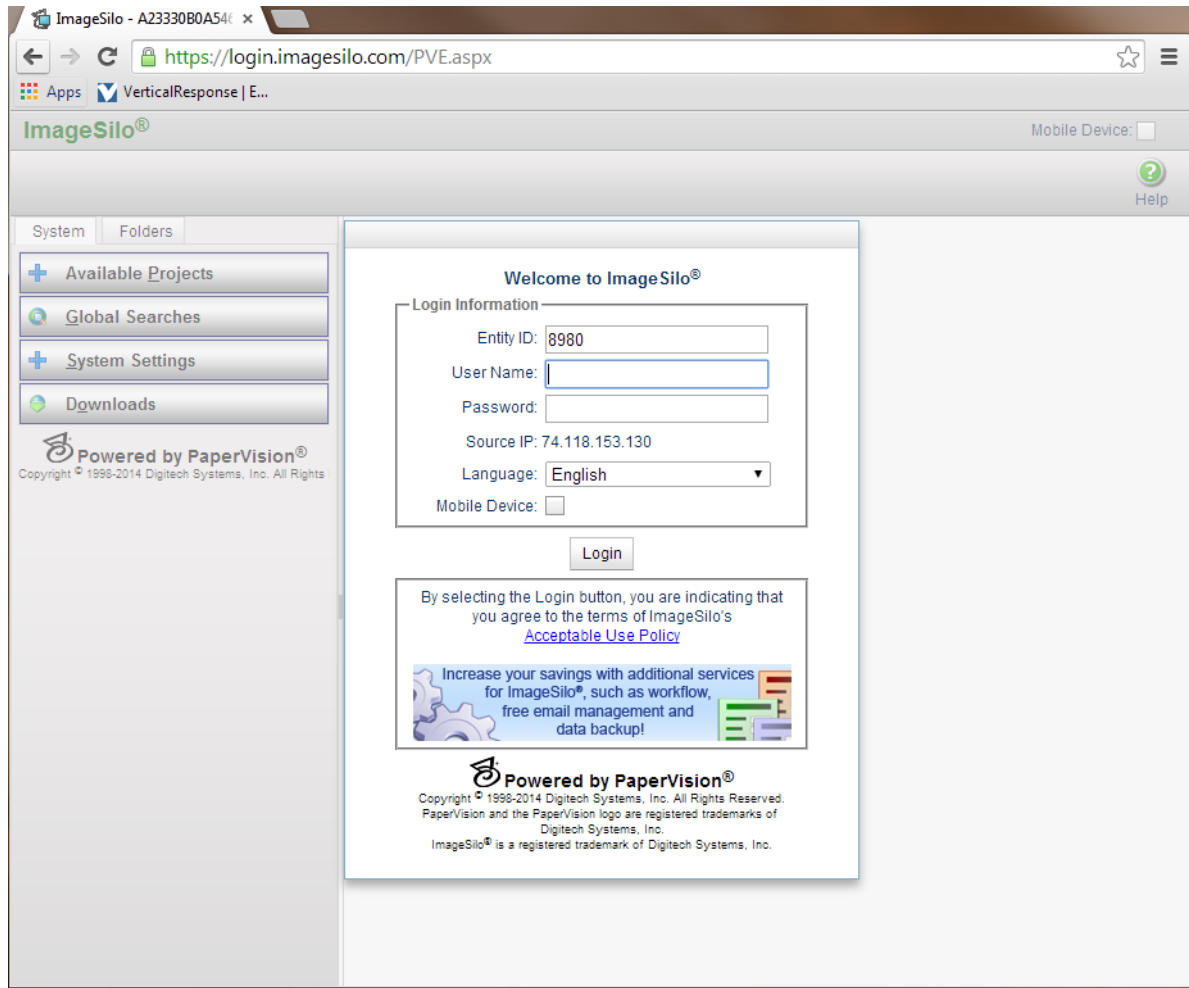# ImageSilo Free Trial Tutorial for Government Agencies

Welcome to the ImageSilo Free Trial! MuniMetriX would like to thank you for considering ImageSilo for your paperless office needs!

This ImageSilo Free Trial is "read only". You will not be able to scan or add documents to the account, but you will be able to perform searches and view documents, giving you a good overview of how our solution works.   We would also be happy to provide you with a live web-demo of ImageSilo showing the functionality not available in this demo. Please contact our Sales team at (800) 548-7895 to schedule a live demo.

This tutorial will walk you through the steps for logging in to ImageSilo, performing searches, and viewing documents.

Table of Contents

Logging in to ImageSilo

- ImageSilo can be used with Internet Explorer, Chrome, Firefox, and Safari (on iPad devices and Macs). In your browser's address bar, type in https://login.imagesilo.com. This will take you directly to the login screen for ImageSilo. You may want to save this address to your Favorites or create a shortcut on your desktop.

- The Entity ID for this demo account is **8980**. To login, enter the Entity ID and the User Name and password provided to you by MuniMetriX.


Go to the address: https://login.imagesilo.com to get to the ImageSilo login screen.

Enter the Entity ID **8980**, the User Name and Password provided to you by MuniMetriX.

System or Folders Tab

There are two methods for managing and viewing documents in ImageSilo – the **Systems** method and **Folders** method.   You can choose to use one method or a combination of both, depending on your needs.

System View Method

Folders View Method
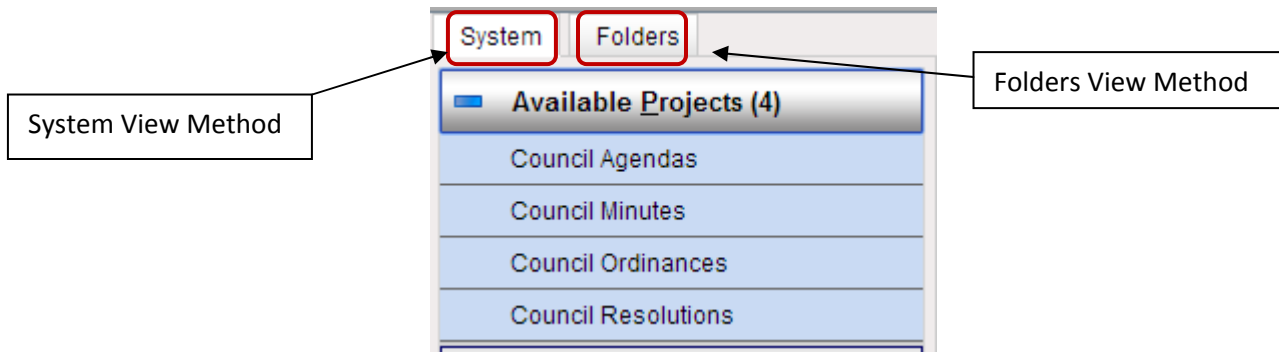
The **Folders** method provides the typical Windows Explorer folder view for accessing a document where you can organize your files in folders, subfolders, etc.
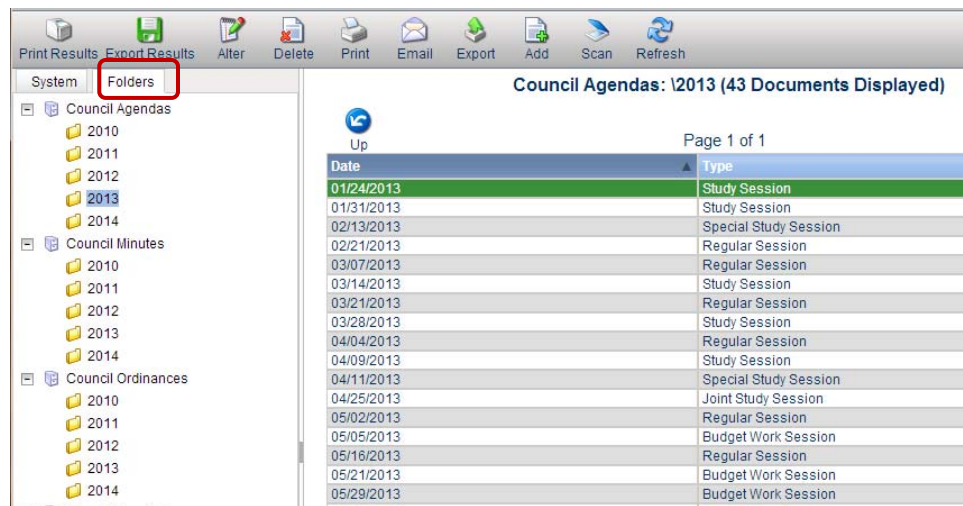
The **System** method is a database driven method where users search for a record by entering a keyword, combination of keywords or entering full text search criteria to retrieve documents.
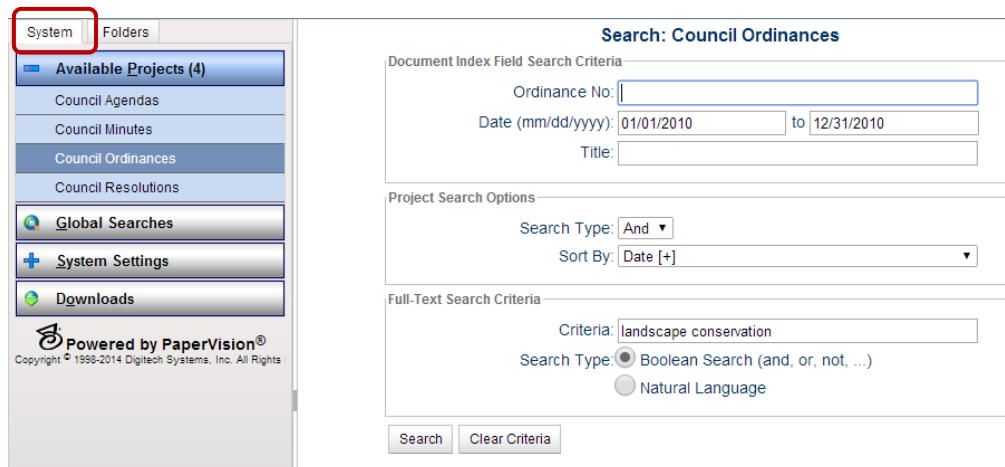
System View

The System View method allows users to perform broad document searches within a project by entering one or more keywords, searching by a specified date range, or a combination of both. The System View also allows users to perform full-text searches within documents that contain searchable text.

Available Projects

- Click on the **System** tab.
- Click on the symbol next to Available Projects to expand your project list. MuniMetriX has set up four projects for this demo – Council Agendas, Council Minutes, Council Ordinances, and Council Resolutions.
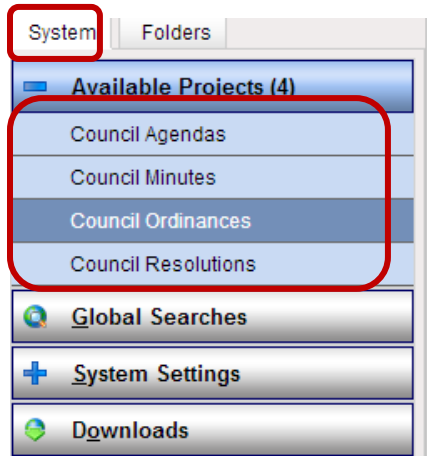
A **Project** is a related grouping of documents. You could compare a Project to a file cabinet or a file drawer. For example, you may have a file cabinet or file drawer where you file your Minutes and a separate drawer or cabinet where you file your Ordinances. You will separate your various categories of documents in projects, just like you do your File Cabinets.

You can have an **UNLIMITED** number of user-defined projects set up in your ImageSilo account.

Searching (System View)

Click on the Ordinances project to display the **Search Criteria** screen.

The Search Criteria screen contains multiple Document Index Fields that can be used to search for a particular ordinance.

Index Field Search

To perform a simple search in the Ordinances project, simply enter your search criteria and press **Enter** on your keyboard or click the **Search** button.   In the example below, we are performing a search for all Ordinances passed within a certain date range.

Click on Council Ordinances then enter the date range 01/01/2010 through 12/31/2010.

- The results screen will be displayed listing all records matching your search criteria. Also displayed is the index information for each document.
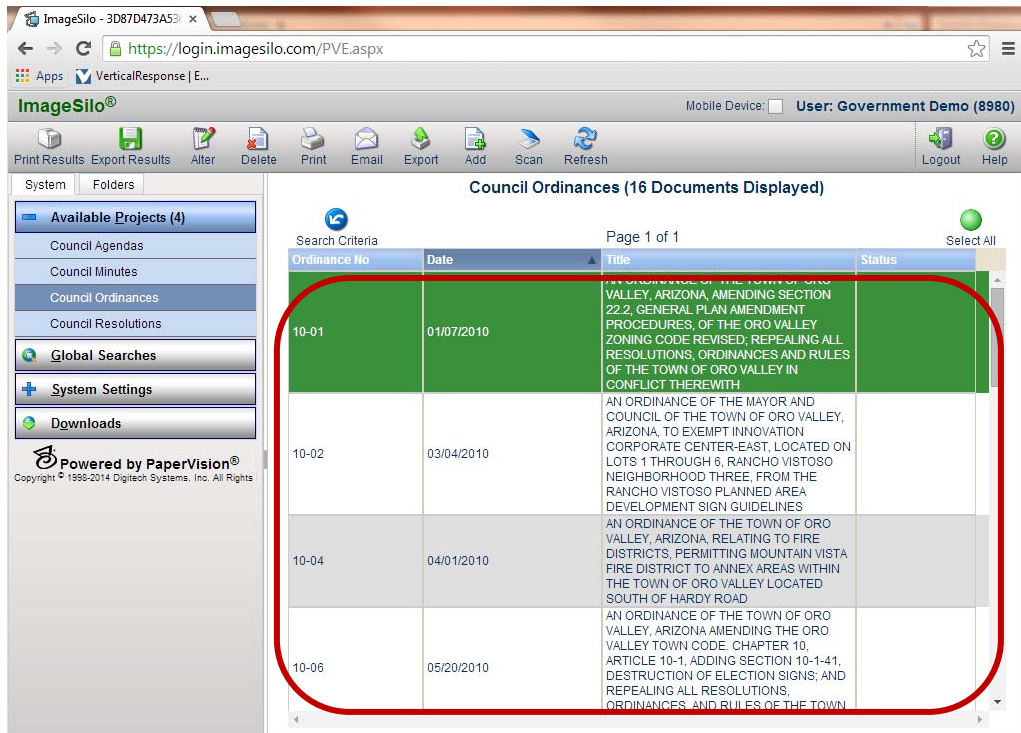
- To narrow your search down to a specific document, go back to the Search Criteria screen by clicking the button.

- Now with the date range still listed, tab to the **Title** field. As an example, if you wanted to find an ordinance related to the installation of solar measures in residential construction projects, you could simply enter the word "*solar*" in the **Title** field.

- When using multiple values in a search make sure that the Search Type is "And". Press **Enter** or **Search**.

- Now, the Results screen displays only one ordinance matching the criteria you entered.

- As you can see, the more information you enter in the Search Criteria screen, the more refined your results.

Note: If you are consistent when indexing documents that you have scanned or uploaded to ImageSilo, then locating a specific document is very fast and extremely easy!

Full-Text Search

If your documents contain searchable text, which means that they have gone through an OCR (Optical Character Recognition) process, you can also perform a text search for any word or phrase.

- To perform a full text search, in the Ordinances project, click in the **Full-Text Search Criteria** field, and type in the word "solar" to find all documents that contain the word "solar".

Note: You can search using a combination of Full-Text criteria and Index Field criteria.

- Our search has returned 18 documents containing the word "*solar*".

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Viewing the Full-Text Results

- To view a document, double-click the document you want to view. The first page of the document will be displayed in the Document Viewer.

- To locate the page containing the word "solar", click on the **Edit** tab, and then click on **FT Results.**
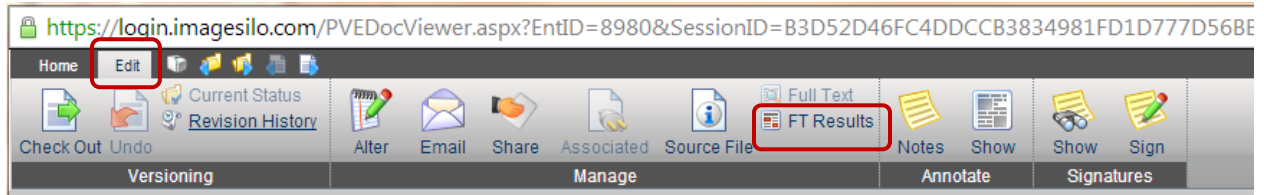
- The Full Text Search Results will show the page number and a portion of the text. Simply double click on the page you want to view.

Full Text Search Results

| Page	Word/Phrase	Context
1	SOLAR	... AS THE "2006 INTERNATIONAL RESIDENTIAL CODE" TO ADD A "RESIDENTIAL SOLAR ORDINANCE" REQUIRING INSTALLATION OF SOLAR READY MEASURES IN RESIDENTIAL CONSTRUCTION; ...
1	Solar	... International Residential Code", is hereby amended by adding the Residential Solar Ordinance, attached hereto as Exhibit "A" and incorporated herein by ...
1	SOLAR	... ORDINANCE" REQUIRING INSTALLATION OF SOLAR READY MEASURES IN RESIDENTIAL CONSTRUCTION; REPEALING ALL RESOLUTIONS, ORDINANCES, AND ...
1	solar	... and/or two family residential construction to have connections for future solar systems which will reduce heating and cooling demands, provide more ...
1	Solar	... known as the "2006 International Residential Code", adding the Residential Solar Ordinance, attached hereto as Exhibit "A" and incorporated herein by ...
3	SOLAR	... AND A HEAT EXCHANGER. Add the following section: SECTION M2301.1.1 SOLAR SYSTEM DEFINED. SOLAR SYSTEMS SHALL BE DEFINED AS THE FOLLOWING: ...
3	SOLAR	... BE DEFINED AS THE FOLLOWING: 1. PHOTO VOLTAIC SYSTEMS, 2. SOLAR DOMESTIC HOT WATER SYSTEMS, 3. SOLAR HOT WATER HEATING SYSTEMS ...
3	SOLAR	... CONDUIT, OR OTHER CONNECTIONS REQUIRED FOR THE FUTURE CONNECTION OF SOLAR SYSTEMS. THE BUILDING OFFICIAL SHALL DEVELOP STANDARDS TO PROSCRIBE INSTALLATION ...
3	SOLAR	... DOMESTIC HOT WATER SYSTEMS, 3. SOLAR HOT WATER HEATING SYSTEMS (ACTIVE), 4. PASSIVE SOLAR HEATING SYSTEM ...
3	SOLAR	... HOT WATER HEATING SYSTEMS (ACTIVE), 4. PASSIVE SOLAR HEATING SYSTEM WHEN DESIGNED BY A REGISTRANT, 5. WIND TURBINE ...
3	SOLAR	... INSTALLATION REQUIREMENTS. THE BUILDER OR OWNER SHALL INSTALL: * FULL SOLAR HOT WATER SYSTEM; OR * CONDUIT TO THE ROOF AND ...
3	SOLAR	... PIPING FOR THE WATER HEATER FOR LATER INSTALLATION OF A SOLAR HOT WATER SYSTEM WITH; OR * INSULATED PLUMBING FROM WATER ...
3	SOLAR	... PIPING FOR THE WATER HEATER FOR LATER INSTALLATION OF A SOLAR HOT WATER SYSTEM; AND * THE WATER HEATER(S) MUST BE ...
3	SOLAR	... SYSTEM DEFINED. SOLAR SYSTEMS SHALL BE DEFINED AS THE FOLLOWING: 1. PHOTO VOLTAIC ...
3	SOLAR	... WIND TURBINE FOR ELECTRICAL GENERATION 6. OTHER TECHNOLOGIES THAT UTILIZE SOLAR ENERGY AS APPROVED BY THE BUILDING OFFICIAL. ...
3	solar	... construction, installation, alteration and repair of equipment and systems using solar energy to provide space heating or cooling, hot water heating ...

Open in Native Application

Your also have the option of opening a document in its native application. For example, PDF documents will open up in an Adobe viewer, Word documents will open in Microsoft Word, etc.
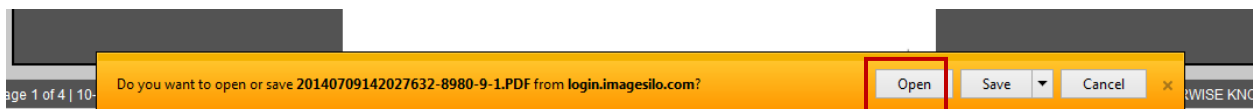
- When viewing the document, from the **Home** Menu, click on **Open**.
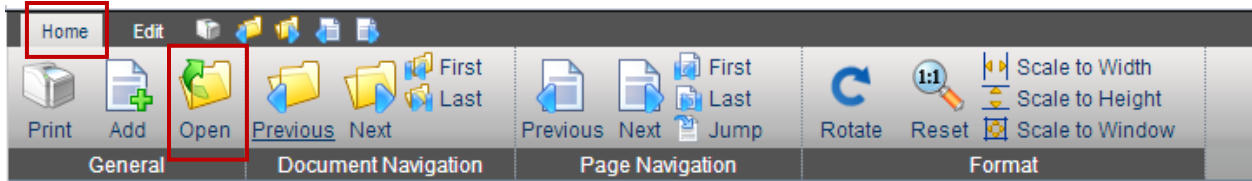

- You may be prompted with a message asking if you would like to Check Out the document. If you just want to view or save the document to your computer, just press Cancel without checking it out.
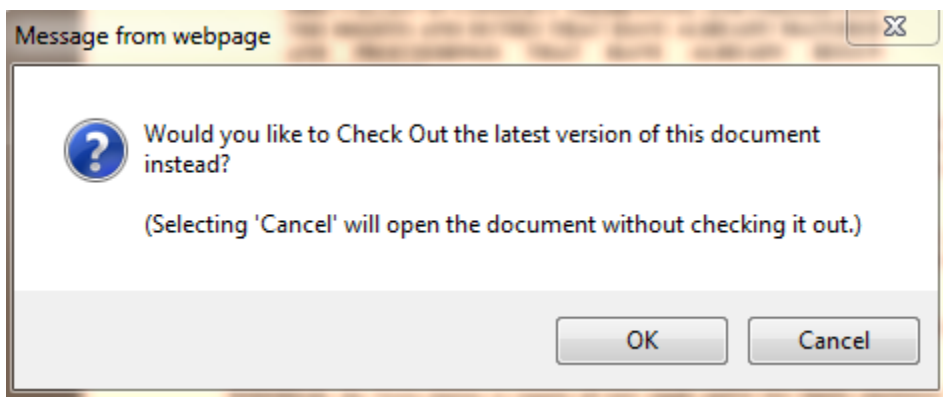
You may be prompted to either **Open** or **Save** the document. If you just want to view the document, press **Open**.
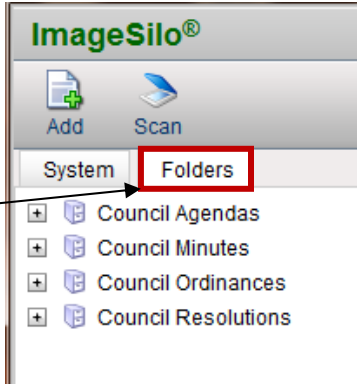
- The document will open in its native application. In the example below, the PDF document opened in Adobe Acrobat.
- Once the document is open in its native application, you can save the document to your PC, perform additional full-text searches within the document, etc.
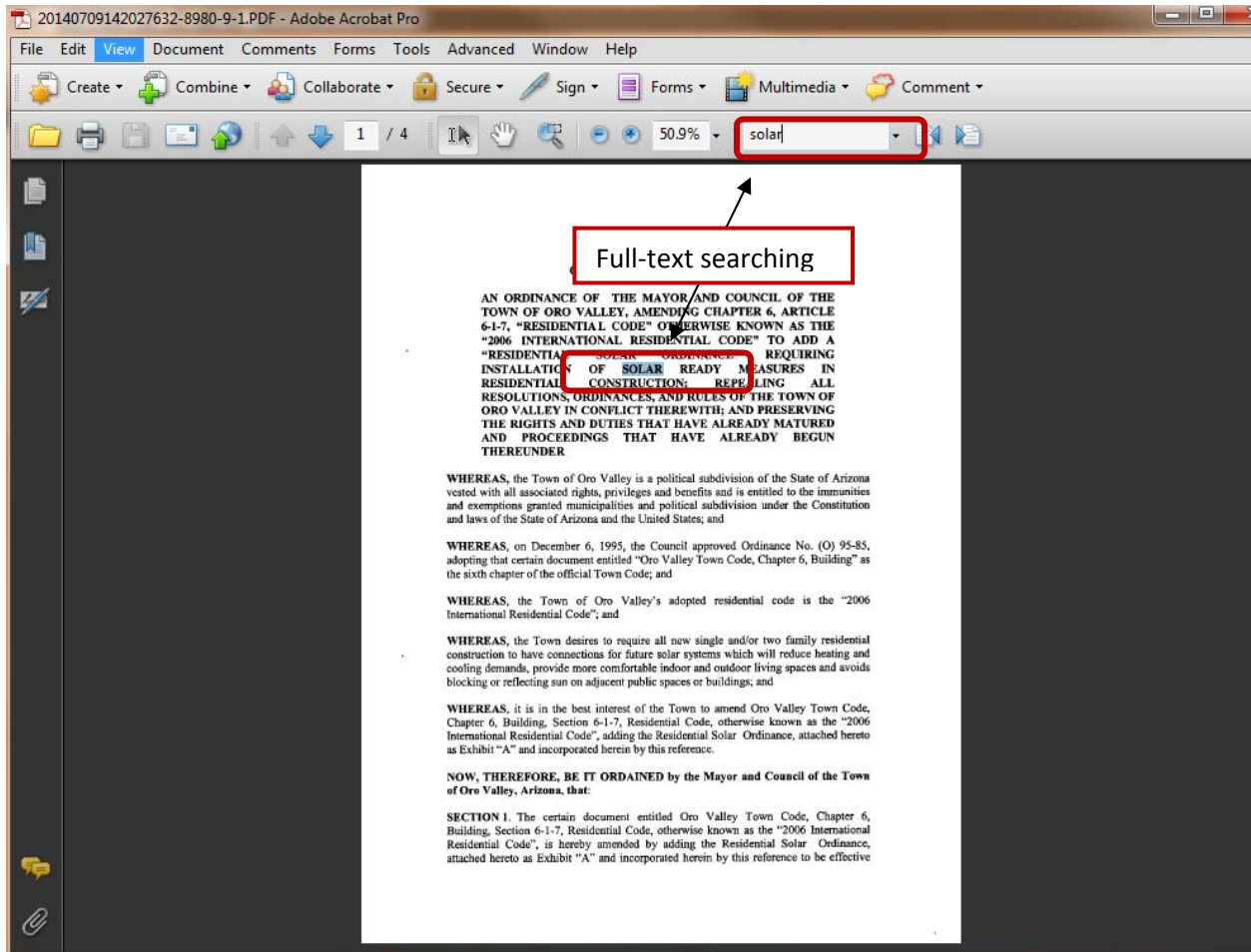
Folder View

Searching – (Folder View)

Now, try out the Folder View.

- Click on the **Folders** Tab.

- If any Folders exist under a project, there will be a plus + sign next to the Project name.   Click the plus sign to expand Folders.

- If you are looking for a particular Ordinance that was passed in 2011, just click on the 2011 folder to display all the Agendas for that year.

- To view an Agenda, just double click the Agenda you want to view.

The Results Screen

Depending on a user's security rights and the user's document viewer, various functions can be performed from the results screen in ImageSilo.

Print Results – Prints the selected documents from the results list in a Table format.

Export Results – Exports the selected documents from the results list to an XML format. (The XML file can then be opened in Excel for editing which is perfect for compiling a report from ImageSilo)

Alter – Document index values can be altered from the results screen. You can also alter index values for multiple documents at one time by selecting multiple documents from the results list. *(This function is disabled for the demo account)*

Delete – Deletes one or multiple documents from ImageSilo. *(This function is disabled for the demo account)*

Print – Prints the selected document or documents.

Email – Sends documents from any MAPI-complaint email application. *(This function is disabled for the demo account)*

Export – Exports a copy of the selected documents to user's PC . ImageSilo can export to various file formats, such as multi-page PDF, multi-page TIFF, JPEG, etc.

Add – Uploads documents from your PC to ImageSilo. *(This function is disabled for the demo account)*

Scan – Scans documents into ImageSilo using a dedicated, desktop scanner. *(This function is disabled for the demo account)*

Viewing a Document

- To view a document, double-click the document you want to view from the results list. The first page of the document will be displayed in the document viewer.

You will be able to perform various document operations, depending on your security access rights and the type of document you are viewing.

Document Navigation

The Browser-Based viewer features an intuitive ribbon interface with large icons representing groups of related operations, such as scaling, zooming, and document/page navigation operations.
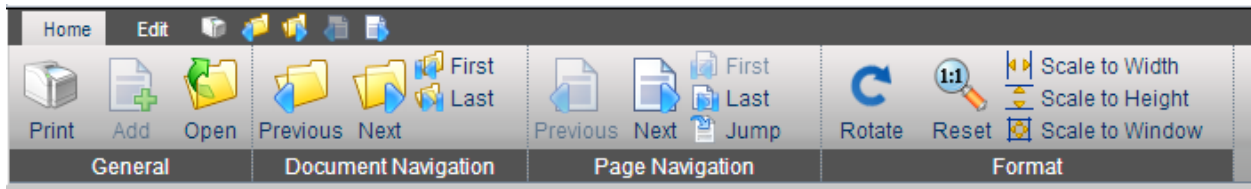
Printing Documents

To print the displayed document, select the Print icon. Select your printing parameters, and click OK.

Adding Documents

 The Add option allows you to upload almost any type of document format to ImageSilo by simply browsing to and selecting the document on your PC. *This function has been disabled for this Demo account.*

Open Document

Although ImageSilo offers document viewing capabilities for various types of documents and image formats, it may be necessary at times to open a document in its native application. ImageSilo offers the ability to open the file you are viewing in its native application (as determined by your operating system).

To open a document in its native application, when viewing the document in ImageSilo, select the icon. You will have the option of Checking Out the document or opening the document without checking it out. For purposes of this demo, press **Cancel** to open the document without checking it out.
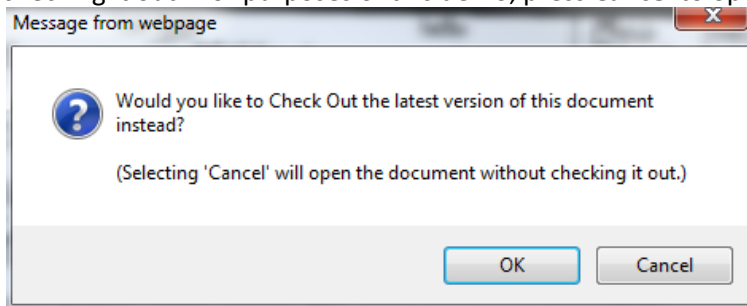

You may be prompted to Save or Open the document. Click Open if you want to just view the document, or Save it to your computer if you need to save it.
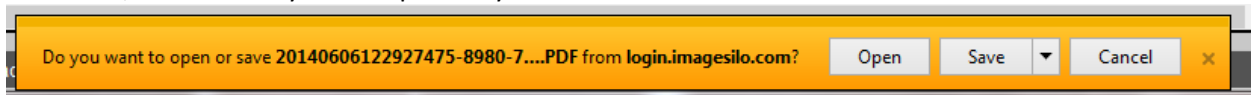
Note: The Check Out/Check In functions are related to ImageSilo's extensive document revision control features, allowing you to manage multiple versions of documents.

Document and Page Navigation

Depending on the number of documents found in the search and the number of pages comprising each, some of the navigational toolbar icons may be disabled. The following toolbar icons navigate you through documents and pages.
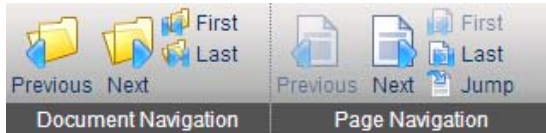
Icon	Description
	Previous: Returns to the previous document in the search results list
	Next: Proceeds to the next document in the search results list
	First: Returns to the first document in the search results list
	Last: Advances to the last document in the search results list
	Previous: Returns to the previous page of the current document
	Next: Proceeds to the next page of the current document
	First: Returns to the first page of the current document
	Last: Advances to the last page of the current document
	Jump: Jumps to the user's specified page of the current document

Rotate, Reset & Scale Image
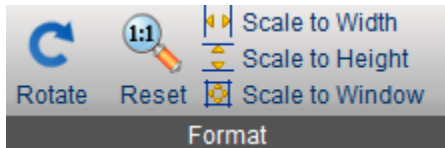
The Rotate icon rotates the image 90 degrees clockwise.

The Reset icon resets the image to its original size within the window.

Scale to Width displays the image at its full width.

Scale to Height displays the image at its full height.

Scale to Window displays the whole image within the window.

Contact Information

MuniMetriX would like to thank you for your interest in the ImageSilo paperless office system.

To learn more about ImageSilo or to schedule a live web-demo you may contact our Sales Team at:

MuniMetriX Systems Corp.
sales@munimetrix.com
(800) 548-7895