




Relink a Document

If a document has been linked incorrectly to a record in PeopleSoft, you may relink it by following the steps below. You will need to:

- Search for the document in the Student Records - UMBSR drawer
 - Add the document to Workflow
 - Open the document in the relinking queue
 - Perform a Search/Match for the student record in PeopleSoft
 - Search for the student record using the custom page in PeopleSoft
 - Link the document to the correct record and, if necessary, change the document type
 - Save the document.
1. In the ImageNow Explorer window, click on Documents, then click on All Student Documents – SR.
 2. *Search* for the document in the ImageNow Explorer grid.
 3. Double-click on the document in the ImageNow Explorer grid to display it in its own window.
 4. Click on the **Workflow** menu at the top of the document, then click on **Add to Workflow**. The *Add to Workflow* dialog box will appear.
 5. In the *Add to Workflow* dialog box, select the queue **UMBSR Relink Documents**.
 6. Click **Add**.
 7. Close the document window.
 8. Return to the ImageNow Explorer grid and expand the Workflow view.
 9. Click on **UMBSR Relink Documents**.
 10. Double-click on the document you wish to change. It will open in a new window.
 11. If the **Properties panel** does not appear, click on the **View** menu and click to place a checkmark next to **Properties**.
 12. Perform a **Search/Match** for the correct record in PeopleSoft.
 - a. Campus Community > Personal Information > Search/Match
 - b. Note the student's ID number
 13. Search for the student record in the ImageNow custom page in PeopleSoft.
 - a. Document Imaging > Document Imaging SR
 - b. Enter the ID and click Search.
 14. Leave the custom linking page open.
 15. Return to the document window.
 16. Ensure that the correct **Application Plan** at the top of the Properties pane is selected (WISER SR Student-Related).
 17. Click on the **Gold Key** icon to link the document.
 18. Make sure that the correct document keys default in from the custom page.
 19. Select or change the document type, if necessary.
 20. Click on the **Save** icon () in the toolbar at the top of the document.