ImageNow QG: Batch Scan Documents and Link Later

REMINDERS:
- The documents you scan could be one page or many pages. The stack of documents you place into the scanner is the “Batch.”
- Patch sheets are required. Make sure they have no extraneous markings. If you need extra Patch sheets, PRINT them rather than copy. You will find the Patch Sheet word document on the scanner monitor desktop.
- The number of pages in a single Batch should be no greater than about 100, including Patch sheets.
- We will link the documents after they are ALL scanned (Linklater)
- Because you are not linking as part of the scanning process, it doesn’t matter which Applet you have selected on your ImageNow Client Control Menu
- If the scanner and computer are off, turn the scanner on before you turn on the computer

Scan Documents:

A. Prepare Documents:
   1. Sort documents by the **Project number** you will assign to each and insert a Patch sheet **each time the Project number changes**. Now repeat this process by looking at all of the documents with the same project number. For documents with the same project number, sort the documents by **DOCTYPE** you will assign and insert a Patch sheet **each time the DOCTYPE changes** for that Project.
   2. Remember, documents with the SAME Project number and SAME DOCTYPE will append when you link them. In addition to having the same Project and DOCTYPE, documents that append have the same Drawer, Grant Number, PI, and Financial Contact.
   3. Place the “Batch” (all of the documents and patch sheets for all projects) in the Feeder Tray – face down and head first.

B. Select Capture Profile:
   1. From ImageNow Control Menu, RIGHT-click the capture icon and select **SP_LINKLATER**

C. Capture the Documents
   1. From ImageNow Control Menu, click capture icon . The **Proposed Key** dialogue box opens with another dialogue box behind it.
a) select Drawer where you want the Document to be, e.g. S_SP.

b) notice the DOCTYPE in the dialogue box is “pslink” and is not active.

c) click [scan] on the dialogue box:

1) document(s) start moving through the scanner to the feeder tray and stop after the page following the Patch page goes through the scanner.
2) the Proposed Key dialogue box opens again. Repeat steps a), b), and c) until all of the documents in the Batch have been fed through the feeder tray.

d) When the feeder tray is empty, a dialogue box will open and ask if you want to process another Batch. Click No.

2. You are done scanning the documents in the Batch and can link them now or later. They will wait for you until you’re ready in the SP_PS_LINK queue.

Link the Batch Scan Documents:

1. On your ImageNow Client Menu, click Workflow and select queue: SP_PS_LINK where you will see a list of all of the documents that have been scanned, but not linked. The DOCTYPE on each of them will be PSLINK. Click Refresh to ensure all of the documents you scanned have been brought into SP_PS_LINK.

2. Double-click on the listing of a document. The document will open in PowerView Workflow Mode. Click F9 to see how many pages are in the document.

3. Do QA: Is the document legible? Are all pages there? Is important information visible?

4. If DOCKEYs don’t appear, click F7 to open them. Note, the Drawer is the drawer you chose when you scanned the document. The SP_DocTypes field shows PSLINK. Click the DOCTYPES pull-down menu and select the DOCTYPE you will assign to the document.

5. Determine the Project Number to which you will link this document. Open the Attributes Page in PeopleSoft for that project number.

7. Click the gold key to scrape the Project number, PI, Financial Contact, and Grant Number from the PeopleSoft Attributes Page and copy it to the ImageNow DOCKEYs.

8. Look at the information that populated the DOCKEYs to verify you choose the correct project number for the document displayed.

9. Route the document to the SP_COMPLETE queue.

END