Document Imaging Instructions – Managing Documents

Steps for Imaging Supplier Certifications from Receiving

Check

The documents will come interleaved with bar coded cover sheets. Hopefully, they will be in sort-order by Insco lot number, aka. Batch number . If not, go ahead and sort them now. If you need to go back and fix a page, you'll be glad you did. It's best to first go through and make sure documents are correctly oriented for scanning. This is mostly because the software is looking at a specific location on the cover sheet for the bar coded data.. Cert. images can be easily rotated later but it's just as easy to do it now. Also, separating the sheets so they don't stick during scanning is a good idea. If they stick you'll need to delete all and re-scan.

Prepare

Each lot number created during the receiving process generates a bar coded cover sheet. Each cover sheet must have its own copy of the cert. behind it, unless the supplier does not normally provide them – i.e. Brady. Sometimes you will need to make additional copies of certs., such as when a supplier uses one cert. document but it has two or more mfg. lot numbers.

Capture

Place the documents face down into the Fujitsu fi-5650C scanner's ADF (auto document feeder), making sure not to exceed the number of recommended sheets. The tops of portrait pages should lead into the scanner.

Bring up the Co-Star Inflow program. Make sure the 'Current document type' drop-down box has

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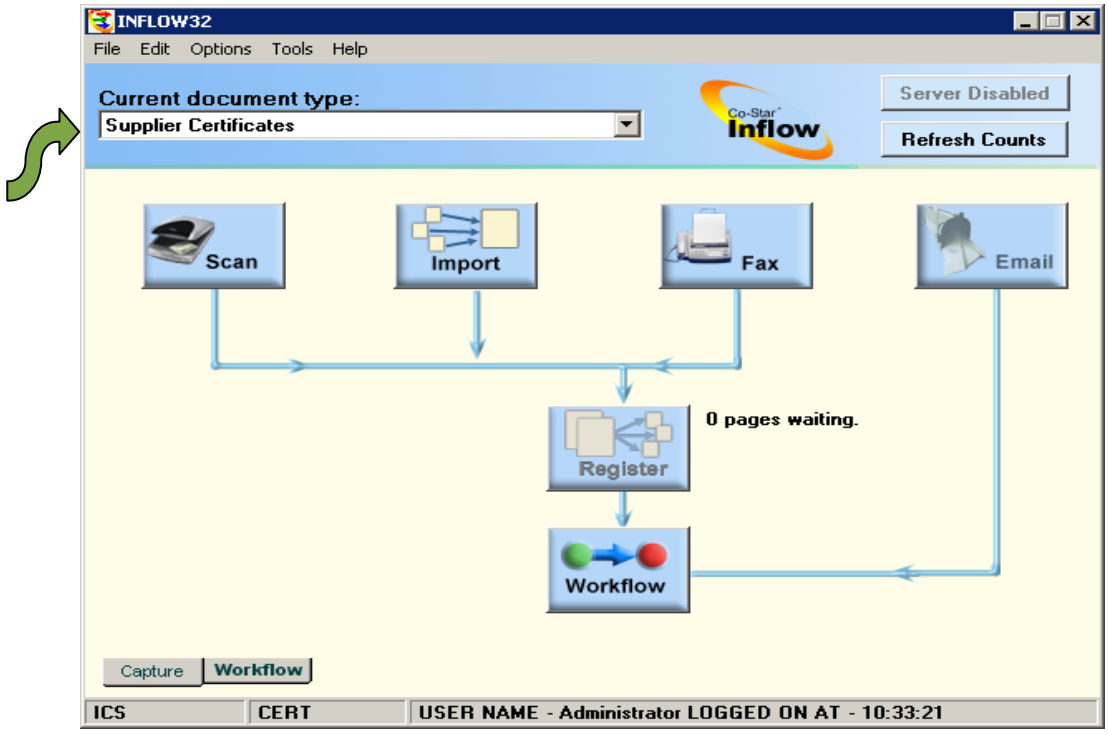

'Supplier Certificates' displayed, as shown below:

If the program is already up and you are in the Workflow screen, simply click on Capture to get to the above screen.

Click on Scan and you will be asked; "Do you wish to scan "Supplier Certificates" forms?". This is to make sure you are using the appropriate template. Other templates are used for manual scanning and for other document types.

Next, you will see the scanner screen pop up. Go ahead and choose Scan and watch the documents feed through the scanner, watching for sticky or crooked pages.

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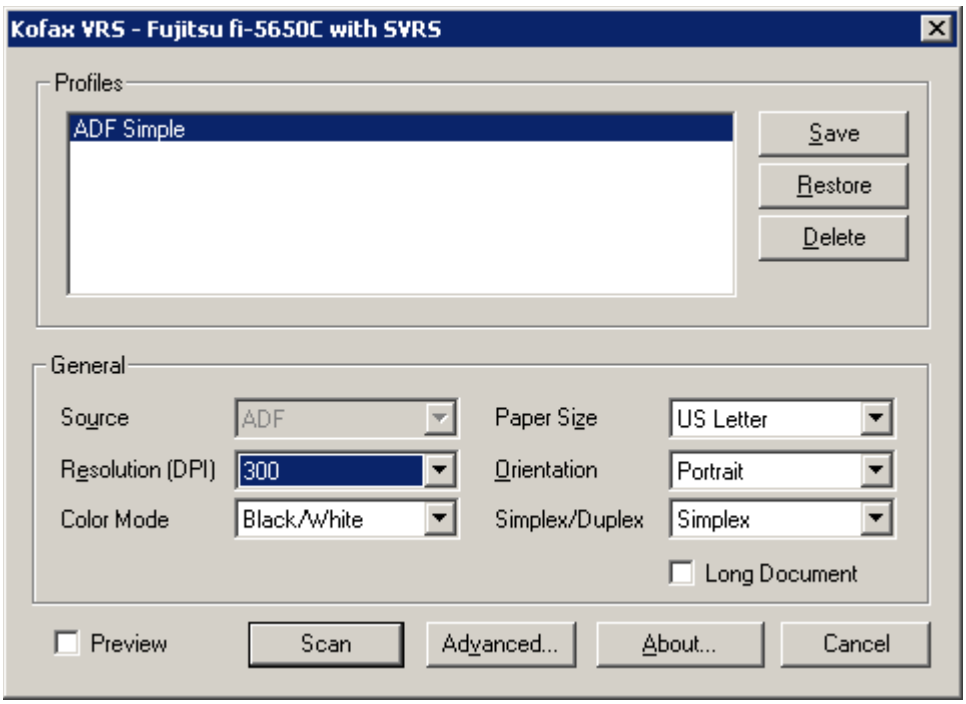
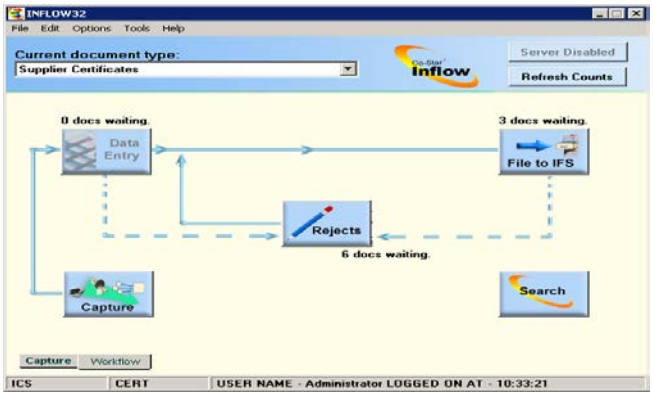


Once the pages have all fed through, you will be alerted that you are out of paper. If you have more to scan, place them in the scanner. Otherwise, click Cancel. You may have to click Cancel on the above window as well. After the scan you should see a 'number of pages waiting' at the Register button. Click on Register and you will be taken to the Workflow screen.

Process



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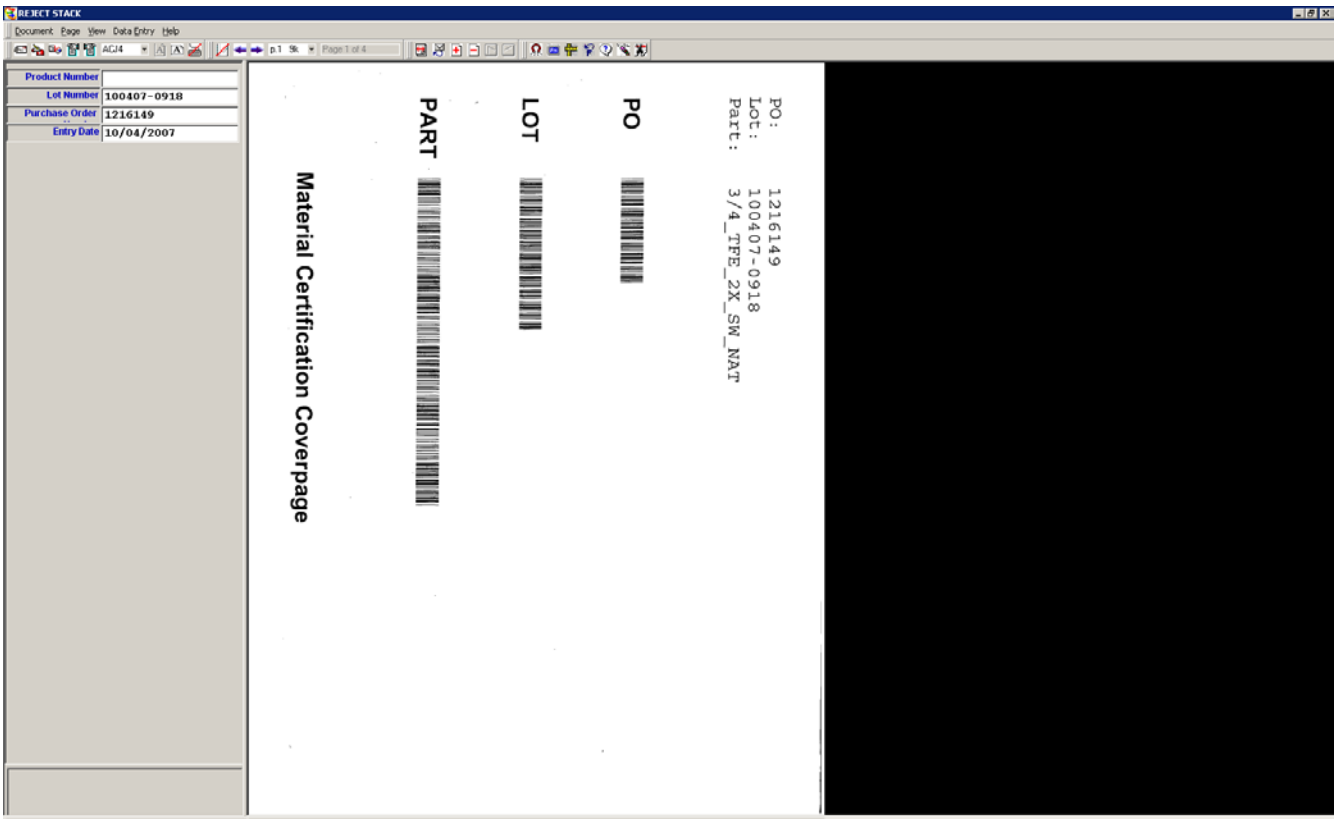
There will likely be several documents waiting at the Data Entry button and perhaps some waiting at the Rejects button. In the example above you'll see there are 3 docs waiting at the File to IFS because I've already processed them. More on that later.

We'll focus on Rejects first. Documents are in Rejects because the software failed to read the bar code data correctly. This means that some data will need to be hand-typed so the images can be searched for and found later. Clicking on either Data Entry or Rejects will bring up a screen similar to the one below. The difference between the two is that the Rejects will be missing info while the Data entry stack documents just need to be checked before sending to the File to IFS button.



Fill in the missing info. Then scroll down a page by pressing the Page Down button. Cycle through all the pages to make sure they all belong behind the cover sheet. You will need to delete and then re-scan any errant documents, along with their cover pages. If you run across upside-down certs that are portrait oriented, use <CTL-R> to rotate the pages. Landscape

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oriented certs won't much matter. Just don't turn them into portrait because they won't print well – they'll be squished!

If the document set looks OK, save the doc to the IFS stack. When all of the documents have been examined and fixed, they will show as waiting next to the File to IFS button. Click it and send them on their happy journey to Prelude land.

The Inflow Update Procedure must be run in Prelude so the documents can be called up from there. If you are authorized, you will be shown how to do that as well as how to edit document reference data, and more.

Steps for Imaging Customer Purchase Order Documents

Prepare

To scan the PO's into the system so they can be called up by prelude requires that we perform a few fairly simple tasks. First we are going to enter a bit of information into a spreadsheet. That data needs to be in the following format:

Sort the data by SO number. It then needs to be saved saved as a CSV file so it can be read by

SONumber	CustNumber	PONumber
1029913	2256	AV106808
1030807	9905	ELE003127
1030811	1652	6158021
1030818	1401	2656643
1030819	955	31766
1030820	12323	N103430006
1030821	11294	89409
1030822	10494	13078
1030823	10653	14171
1030825	5427	49154
1030826	4065	22158

the Keynet Cover Page program. Save the file to your desktop or wherever you prefer.

Create Cover Pages

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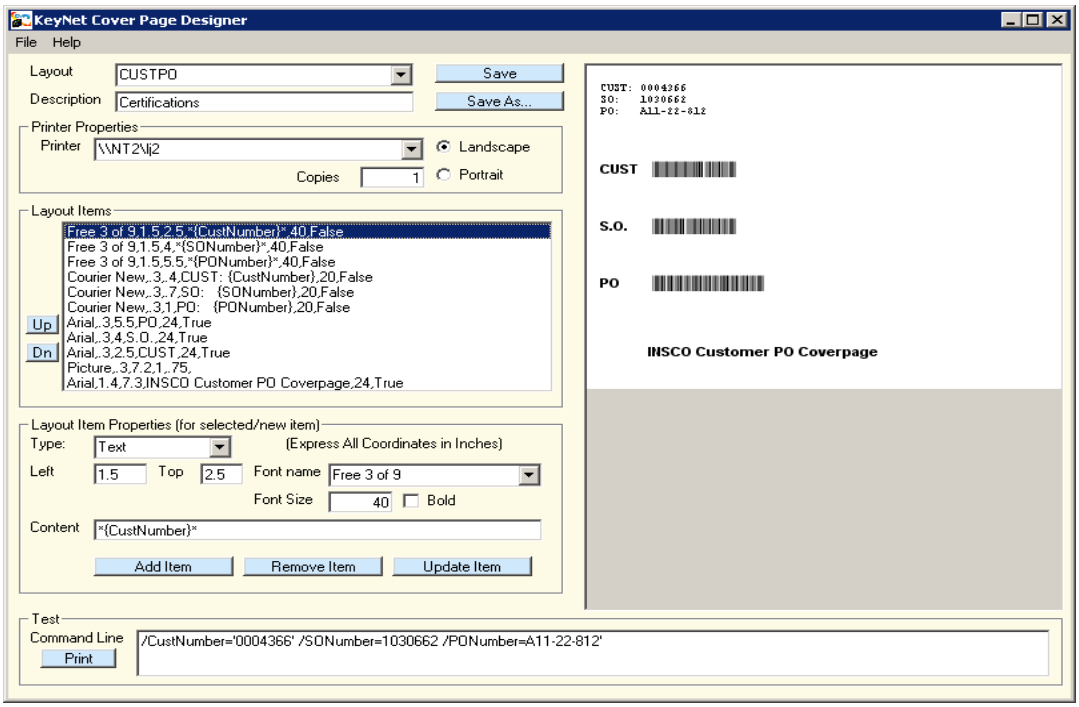
Open up the Keynet Cover Page program. You will need to make sure the Layout drop-down box shows CUSTPO.



Go to File and then click on Batch Print to get the box you see below. Click Browse and navigate to the CSV file you created.

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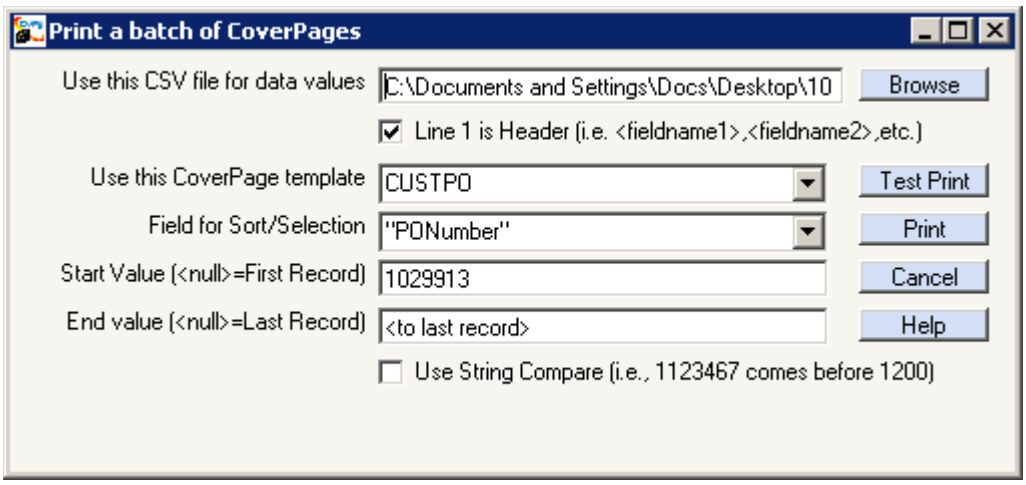


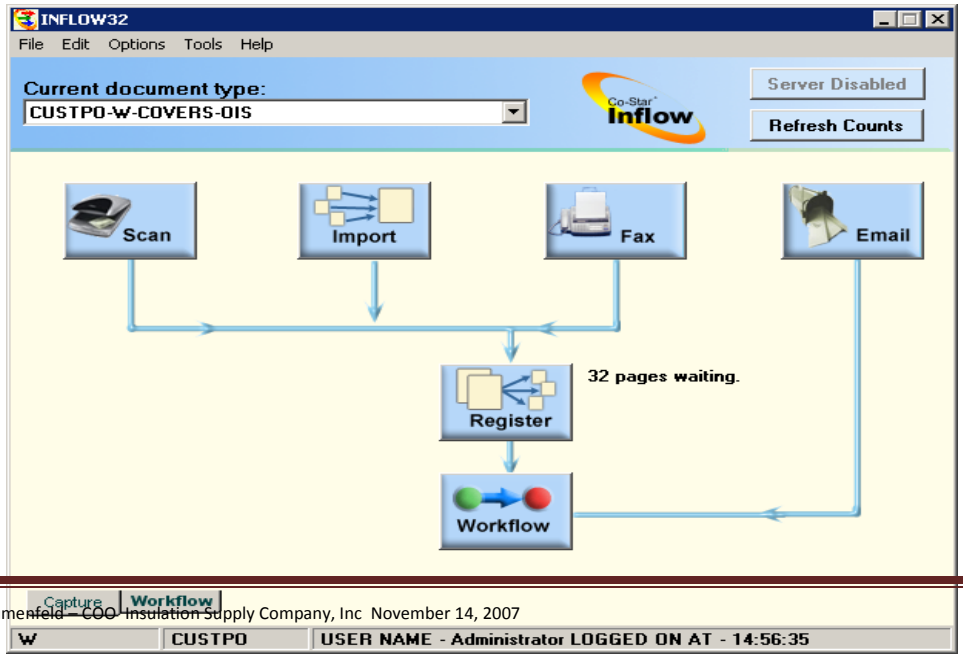
Enter the start value - the first SO number in the list. Enter the last SO number or let it default to <to last record>. Click print and the cover pages will be printed.

Interleave Cover Pages

Now you will place the customer purchase order documents behind the appropriate cover page for scanning. Maintaining the sort order is not essential to the software but it will make your life easier if you need to go back and fix a document. It will also greatly aid in filing.

Scan

Place the stack face down in the Fujitsu fi-5650 scanner's ADF (automatic document feeder) tray. The tops of the portrait layout pages show feed first. Open up the Inflow32 program and



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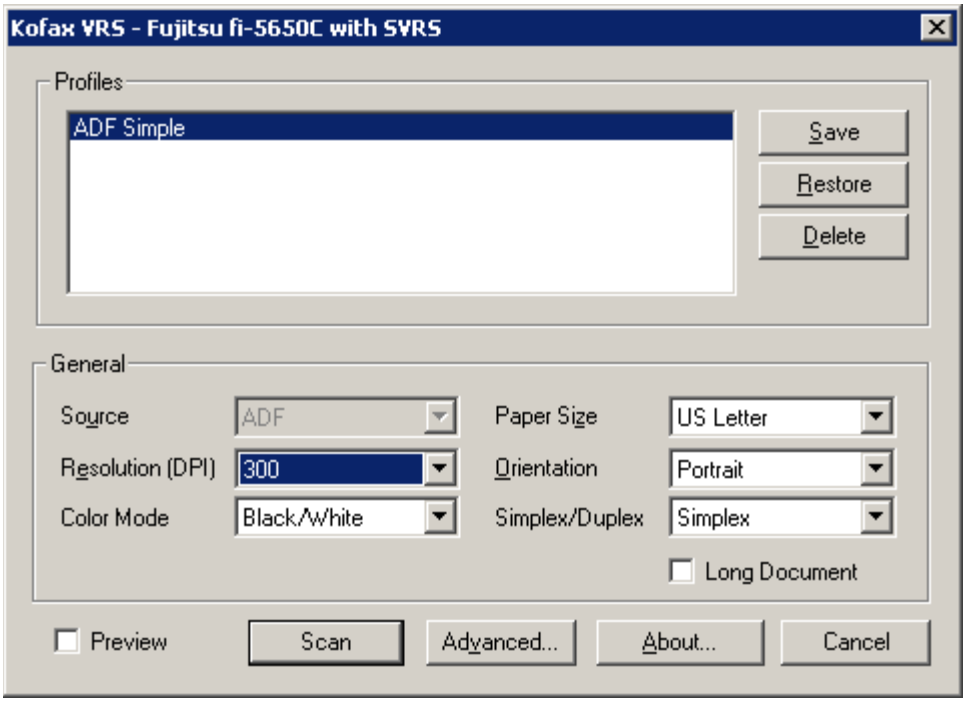
make sure the Current document type drop-down box says CUSTPO-W-COVERS-OIS.

If the program was already up and you are on the Workflow page, simply click Capture to get back to the page shown above. Click Scan. You will see the following window appear. Click Scan and watch the documets start to feed. There will be a slight pause before it starts



Watch the pages as they go through the scanner to assure that only one page at a time goes through. If you get a mis-feed it might be easier to just delete and re-scan the stack.

Once the pages have all fed through, you will be alerted that you are out of paper. If you have more to scan, place them in the scanner. Otherwise, click Cancel. You may have to click Cancel on the above window as well. After the scan you should see a 'number of pages waiting' at the Register button. Click on Register and you will be taken to the Workflow screen.

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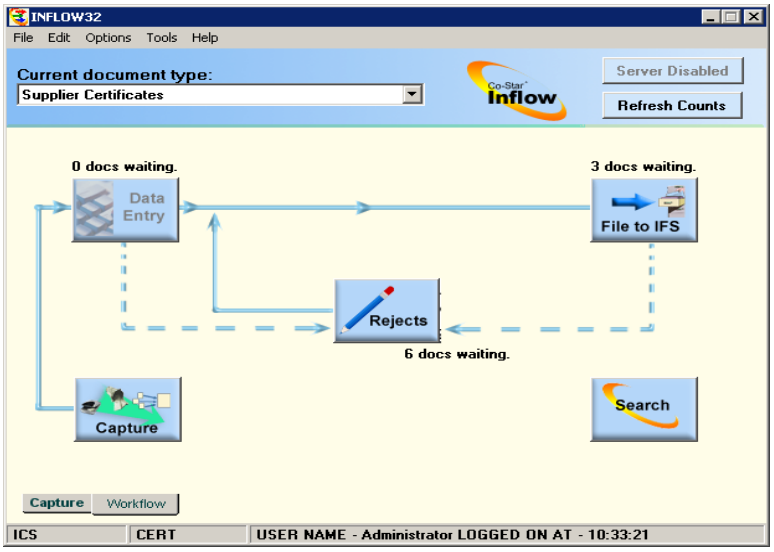

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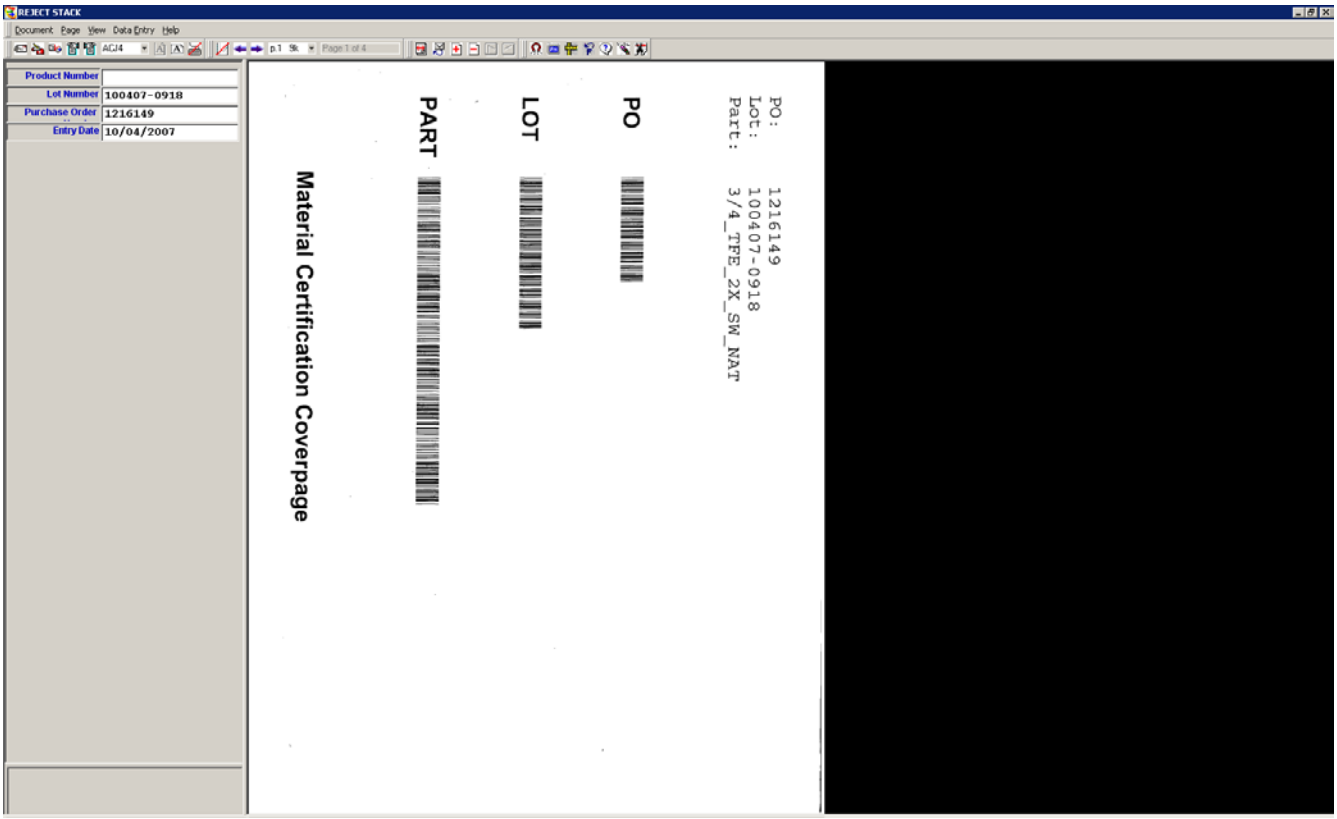

The above example shows a cert cover page but the PO cover page is very similar. Fill in the missing info. Then scroll down a page by pressing the Page Down button. Cycle through all the pages to make sure they all belong behind the cover sheet. You will need to delete and then re-scan any errant documents, along with their cover pages. If you run across upside-down pages that are supposed to be portrait oriented, use <CTL-R> to rotate the pages. Landscape oriented documents won't much matter. Just don't turn them into portrait because they won't print well – they'll be squished!

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Deleting Images

Sometimes scanned documents are incorrectly referenced. When this happens, depending on the circumstances, it may be necessary to delete the errant image(s) along with any reference to them. We will need to remove the references and images from both CoSearch and Prelude.

Deleting In CoSearch

Start the CoSearch program and bring up the documents using the appropriate Search Criteria box. The "Full Text Search" is usually helpful for those part numbers that don't want to come up using "Product Number". Highlight the item to be deleted and then right-click it. One of the options that will show up on the mini-menu is "Delete Record". You can use CTL+D instead if you prefer. This will remove it from CoSearch but you still need to take care of the Prelude references.

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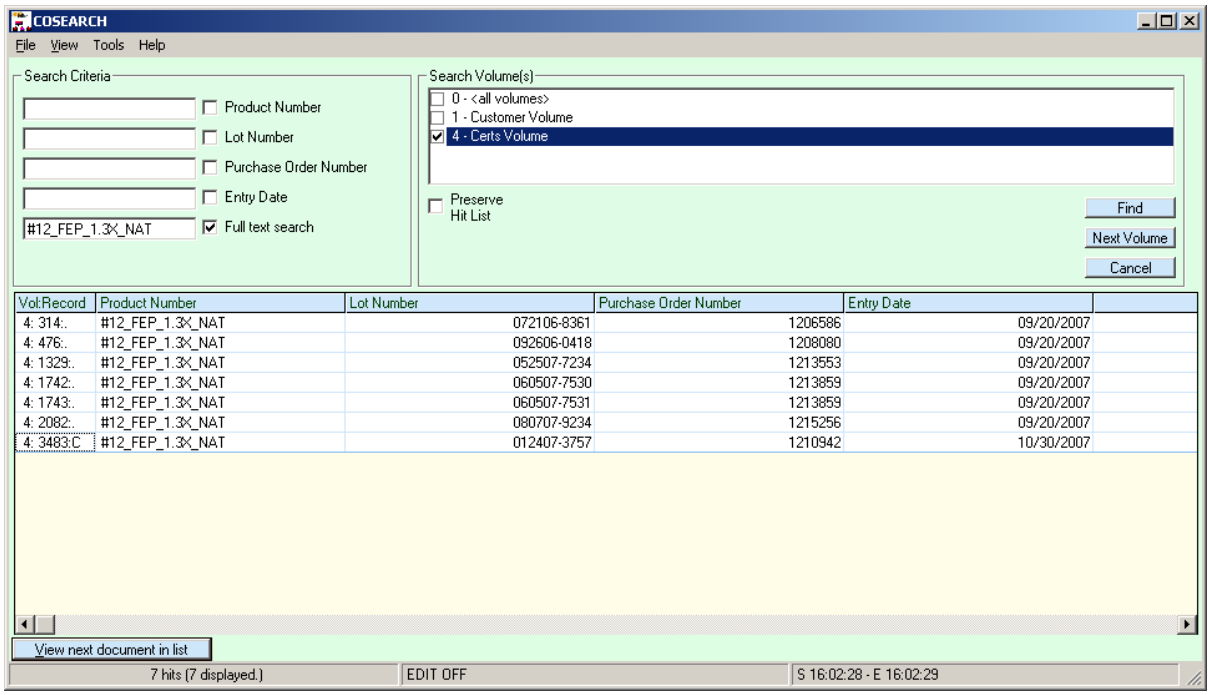

Deleting In Prelude

From the Prelude main screen go to Systems>Imaging>Maintenance>Inventory Image Maintenance (for certs). In Image type, enter the word CERT. For Image ID enter the part number. Highlight the Image ID you want to delete. With the item highlighted, enter a backslash "\" and then enter. The line will disappear. Click or press F2 to save the change.

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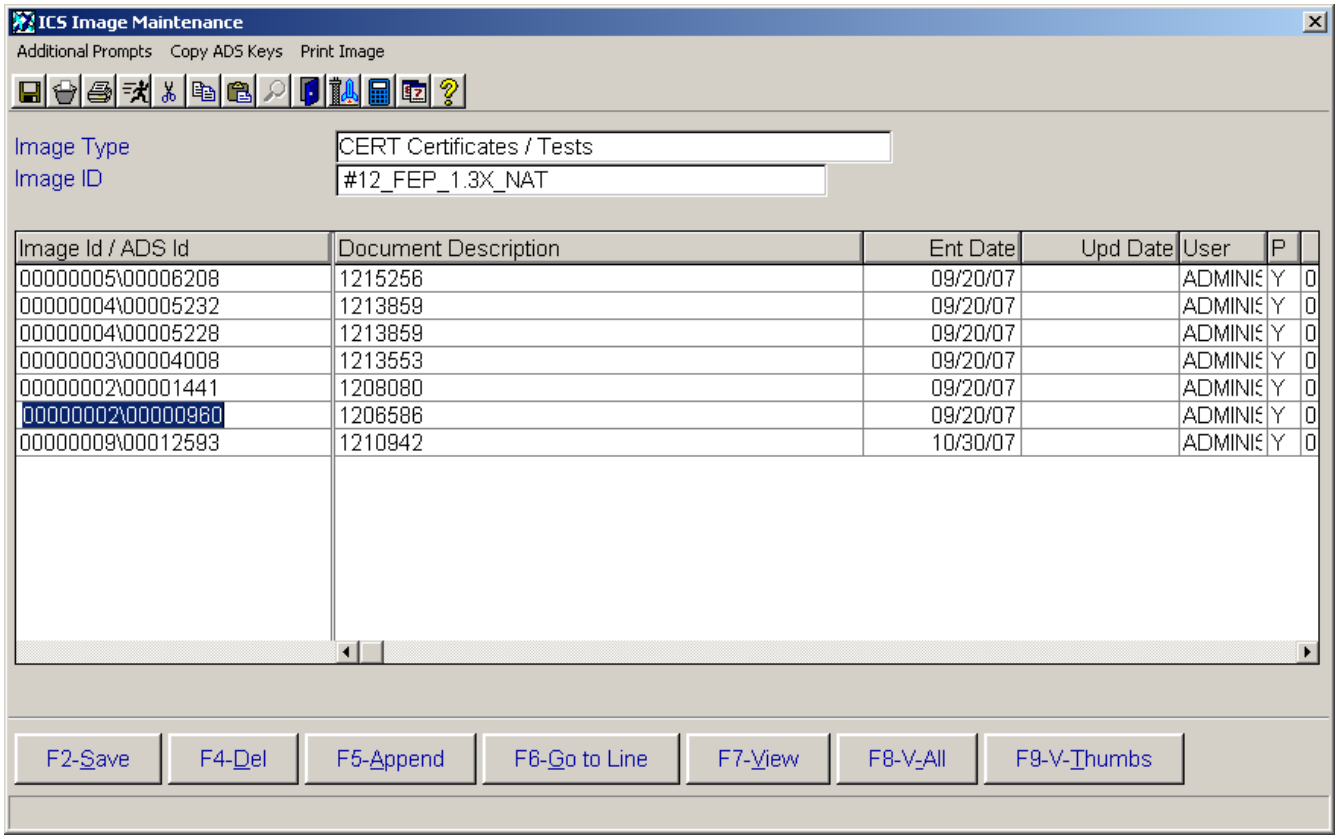

Revision Notes: Was Rev 'A' but was re-issued to Rev 'N/C' because revision notes were not tracked here.

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