Document Imaging
Document Capturing Quick Reference Guide

Capturing a document from a scanner source

Capture Profile: Scanner Source in BATCH MODE

1. Load the documents you want to scan into the document feeder.
2. On the **ImageNow** toolbar, click the **Capture** down arrow and then click to select the capture profile you want where **Scanner** is the source and your mode is **Batch**.
3. Optional. If you specified **Validate page count** as a batch option when creating the capture profile, the **Pre-Scan Worksheet** dialog box prompts you to select **Prep User** name, **Prep Date**, and **Pages**. Select or enter the values you want and then click **OK**.
4. Optional. In your capture profile, if you selected the **Show Batch Report** check box, in the **Batch report** dialog box, the **Local Batch ID**, **Pages scanned**, and **Pages discarded** information appears. Click **OK**.
5. On the **ImageNow** toolbar, click **Batches**, and then double-click the batch you just scanned to begin the quality assurance and document linking process.

Capture Profile: Scanner Source in SINGLE MODE

Note: Single Mode is only used in the exception cases, when a single document needs to be scanned, quality assured and linked in an expeditious manner.

1. Load the document you want to scan into the document feeder. Make sure the Business Application is open to the record you will be linking with.
2. On the **ImageNow** toolbar, click the **Capture** down arrow and then click to select the capture profile you want where **Scanner** is the source and your mode is **Single**.
3. In **ImageNow Viewer- Single Scan**, verify image quality, make any changes you want using the options available to you.
4. Perform one of the following actions:
   - Click **Save Scanned Image**.
   - Click **Rescan Page**, click the capture profile name, and then repeat scanning steps.
   - Click **Discard Scanned Image**.

   NOTE: After scanning is completed, you will automatically be directed to QA & Linking.

Quality Assurance

In the ImageNow Viewer, inspect the page. It is acceptable when it meets most or all of the following standards:
- The scanned or imported image resembles the original document.
- No part of the page is missing due to a scanner misfeed.
- All critical elements of the document are legible (e.g., signatures, account numbers, and totals).
- Document is properly oriented and aligned.

Icon	Description
	Mark page as OK. If the batch was a single page document, you are returned to the ImageNow Explorer. If you are quality assuring a multi-page batch, the next page of the document appears, and you must click **Mark page as OK** until you complete QA on all pages in the batch.
	Rescan page. Rescan a page if it does not meet your standards of quality. Locate the original document and either place it back into the scanner feed or re-import it from a file system.
	Suspend batch. Choose this option if you want to review another batch and conclude the current QA session later.
	Delete batch page. Discard the page if you want to remove it from the batch and the ImageNow server. If, instead, you want to replace it with a newly scanned version, click **Rescan page**.

Linking

Link a document or batch

1. On the **ImageNow** toolbar, click the **Applications** down arrow, and then select the application plan for the business application you want to use to link a batch.
2. On the **ImageNow** toolbar, click the **Batches** down arrow, and then click **Ready for Linking**.
3. In **ImageNow Explorer** grid, select the batch you want to link.
4. Double Click on the **File** menu.
5. In **ImageNow Viewer - Link**, identify the displayed page from its name, account number, or other distinguishing information.
6. In the business application, display the corresponding record.
7. Using your dual monitors, position the **ImageNow Viewer - Link** window and the corresponding business application record.
8. **Note:** In a few cases, the entire business application record may need to be visible for linking to work.
9. On the **Batch Link** toolbar, click the **Link page** button to create a link between ImageNow and your business application. The **Properties** pane slides in from the right.
10. In the **Properties** pane, under **Document Keys**, enter required values if necessary, and then, on the **Batch Link** toolbar, click the **Save Batch Page** button. The next page in the batch is displayed. Repeat steps 5-9 as necessary until all linking is completed