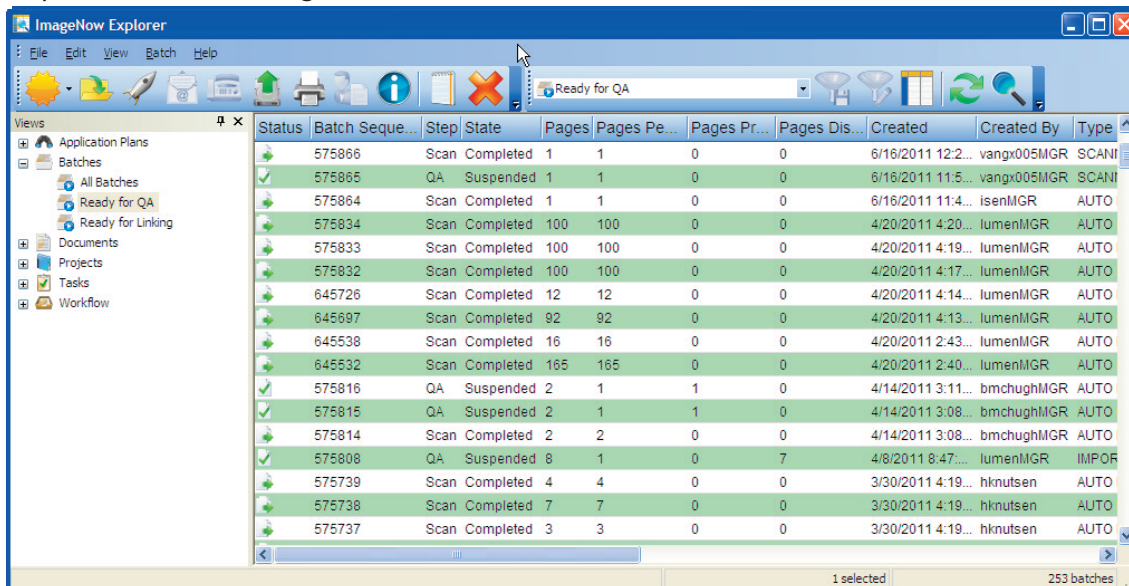


Processing a Batch: Open for Viewing

Whenever batches are imported or scanned, they enter the Batch View grid (except those batches that are sent directly to workflow queues-- they do not display in Batch View). The Batch View grid is then used to open and view the batch pages for quality assurance and linking.



The screenshot shows the ImageNow Explorer application window. On the left is a tree view with folders: Application Plans, Batches, Documents, Projects, Tasks, and Workflow. The 'Batches' folder is expanded, showing sub-items: All Batches, Ready for QA, and Ready for Linking. The 'Ready for QA' item is selected. The main area displays a grid of batch information. The grid has columns: Status, Batch Sequence, Step, State, Pages, Pages Pending, Pages Processed, Pages Displayed, Created, Created By, and Type. The grid contains 18 rows of batch data.

Status	Batch Sequence	Step	State	Pages	Pages Pending	Pages Processed	Pages Displayed	Created	Created By	Type
✓	575866	Scan	Completed	1	1	0	0	6/16/2011 12:2...	vangx005MGR	SCANI
✓	575865	QA	Suspended	1	1	0	0	6/16/2011 11:5...	vangx005MGR	SCANI
✓	575864	Scan	Completed	1	1	0	0	6/16/2011 11:4...	isenMGR	AUTO
✓	575834	Scan	Completed	100	100	0	0	4/20/2011 4:20...	lumenMGR	AUTO
✓	575833	Scan	Completed	100	100	0	0	4/20/2011 4:19...	lumenMGR	AUTO
✓	575832	Scan	Completed	100	100	0	0	4/20/2011 4:17...	lumenMGR	AUTO
✓	645726	Scan	Completed	12	12	0	0	4/20/2011 4:14...	lumenMGR	AUTO
✓	645697	Scan	Completed	92	92	0	0	4/20/2011 4:13...	lumenMGR	AUTO
✓	645538	Scan	Completed	16	16	0	0	4/20/2011 2:43...	lumenMGR	AUTO
✓	645532	Scan	Completed	165	165	0	0	4/20/2011 2:40...	lumenMGR	AUTO
✓	575816	QA	Suspended	2	1	1	0	4/14/2011 3:11...	bmcughMGR	AUTO
✓	575815	QA	Suspended	2	1	1	0	4/14/2011 3:08...	bmcughMGR	AUTO
✓	575814	Scan	Completed	2	2	0	0	4/14/2011 3:08...	bmcughMGR	AUTO
✓	575808	QA	Suspended	8	1	0	7	4/8/2011 8:47...	lumenMGR	IMPOF
✓	575739	Scan	Completed	4	4	0	0	3/30/2011 4:19...	hknutsen	AUTO
✓	575738	Scan	Completed	7	7	0	0	3/30/2011 4:19...	hknutsen	AUTO
✓	575737	Scan	Completed	3	3	0	0	3/30/2011 4:19...	hknutsen	AUTO

Follow these steps to open a batch:

Note: One or more batches must be previously scanned or imported to display in the Batch View grid.

1. Click on the Batch icon from the ImageNow ControlBar. This action opens **ImageNow Explorer** with the Batch grid displayed.
2. Double-click on the desired batch for processing , or select (highlight) it and **Right-Click > Open** from the pop-up menu.

The selected batch will display in ImageNow Viewer in QA mode.

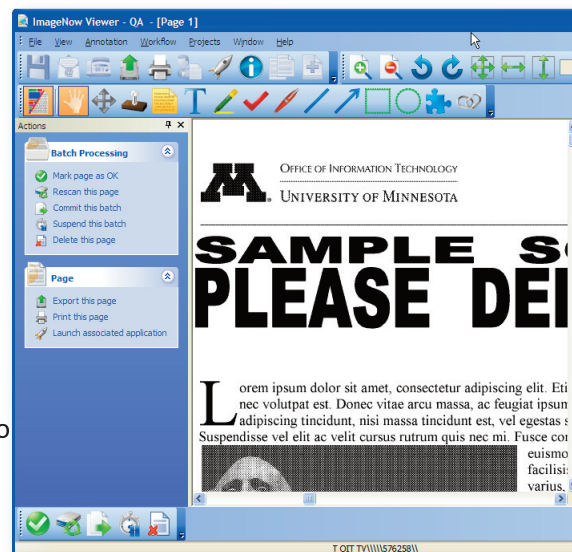
Quality Assurance

Q/A simply means looking through each page in the batch and deciding which ones to keep, which ones to discard, and which ones to rescan. When a batch is chosen for Q/A, the first page of the batch appears in the ImageNow Viewer, and the Q/A process begins.

Linking

Linking is the process of assigning DocKeys to the pages of a batch. The DocKeys are what enable a page to be found with a search query. If the pages are not linked, they will not be indexed into the database structure and will not be found with a search query.

Once the pages are quality assured and linked, they are moved from the Batch View grid to the Document Search grid. Batch View closes once all of the batches are quality assured and linked.




ImageNow Viewer - QA Mode

Processing a Batch: QA

Quality assuring documents takes place in ImageNow Viewer QA Mode. ImageNow Viewer QA Mode has its own toolbar that appears in the bottom left corner of the ImageNow Viewer window. The same set of tools will also appear in a Task pane within the Viewer window. Depending on your security privileges, additional toolbars and icons may be available.

Using this toolbar, you will be able to quality assure each of the pages in the batch.

Follow these steps to Q/A a batch:

1. In ImageNow Explorer, select the document you want to QA and select File > Open, or click the Open icon  (The batch must be eligible for Q/A.)

2. In ImageNow Viewer QA, look at the displayed page and determine whether it is acceptable or if it needs to be discarded. A page is acceptable when it meets most or all of the following standards:

- The scanned or imported image resembles the original document.
- The entire page is visible; no portion has been cut-off due to a scanner misfeed.
- All critical elements of the document (e.g. signatures, account numbers, totals amounts, etc.) are readable.
- The document is properly oriented and aligned.

3. Click one of the following options on the Q/A Toolbar:

Note: You may want to use ImageNow Viewer's Zoom features to help you check the document for signatures and other small items.

- A.  Mark Page OK

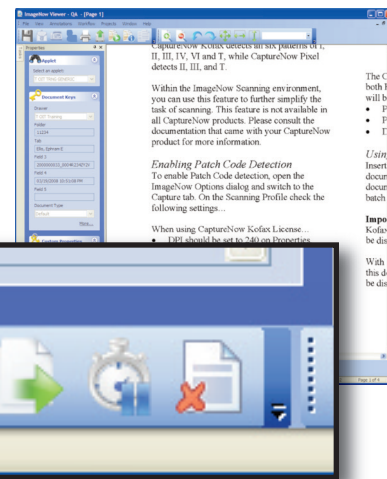
If the page satisfies the Q/A standards, click the **Mark Page OK** icon. The page has now completed the Q/A process. If the batch was a single page document, the Batch Q/A Completed dialog box will display. If you are linking a multi-page document, the next page of the document will display in the ImageNow Viewer window.

Note: Though it is important to check each page in a batch, you can Q/A the batch without looking at all of the pages individually. Click on the **Commit Batch** icon to approve all of the pages in the batch as Q/A complete.

- B.  Delete or  Rescan

If the page does not meet the Q/A standards, you will need to discard or rescan the page (you do not need to discard a page before you rescan it). To discard the page, click the **Discard** icon; the page will be deleted from the system. To rescan the page, locate the original document and place it back into the scanner feed (if you imported the document, locate the original file). Click the **Rescan** icon.

4. Repeat steps 2 and 3 until the entire document is quality assured and the Batch Q/A Completed dialog box appears.



Processing a Batch: Linking


Linking documents takes place in ImageNow Viewer Link Mode. Link Mode has it's own toolbar that appears in the bottom left corner of the Viewer window and similar tools in the Tasks pane.

Using this toolbar or the set of tools in the task pane you will be able to link documents to your host system.



Batch link toolbar

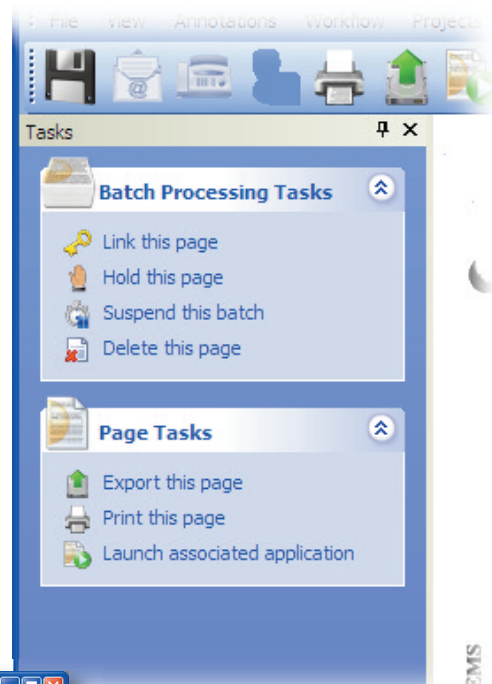
Follow these steps to link a document

1. In the Batch View grid, select (highlight) the document you want to link and select File > Open, or click the Open icon (the document must be eligible for linking).
2. Launch the host application and retrieve the correct host record information that will be used to match the image to be displayed in the ImageNow Viewer-Link window.
3. In the Applet Menu on the ImageNow toolbar, select the applet that matches your host system (the one that contains the record you want to link the document to).
4. Click the Link icon  to create a link between the two systems (ImageNow and your host application).

If the link is successful, the document keys will contain the updated information from the host application.

5. Click **Save Batch Page**. The next image to be linked will appear automatically.

Repeat steps 3, 4, and 5 until the entire batch is linked.



Tasks pane

