

# “Solutions” Image Services

## Scan Console

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### Introduction

This document explains using Scan Console to scan documents and having multiple batch templates.

### Summary Process

Open Scan Console

- Import Mode is Batch Template
- Select appropriate Batch Template      (Scan Template defaults with Batch Template)
- Scan Pages
  - Verify physical pages scanned (removing any blanks, rescan if necessary, deskew, etc)
- Import Pages
  - Verify each file is correct with the appropriate Index information
- Import
  - Verify images are in Document Locator (can take a few minutes-if they do not show within 5 minutes contact Solutions)

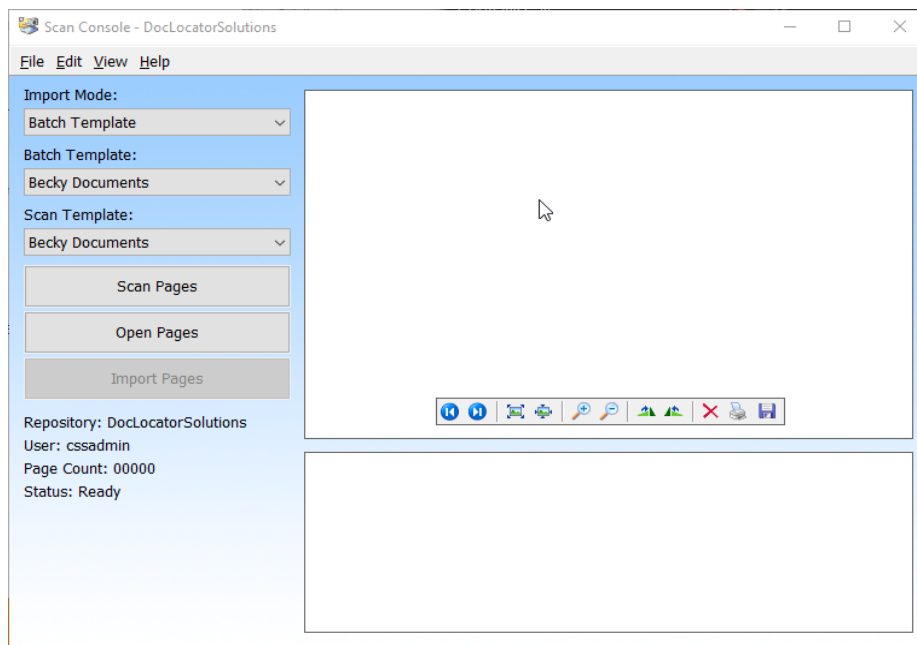
### Detail Process

#### Process

Open Scan Console, either by clicking on an icon on the desktop or by going into Start, ColumbiaSoft, Scan Console.

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### Scan Console



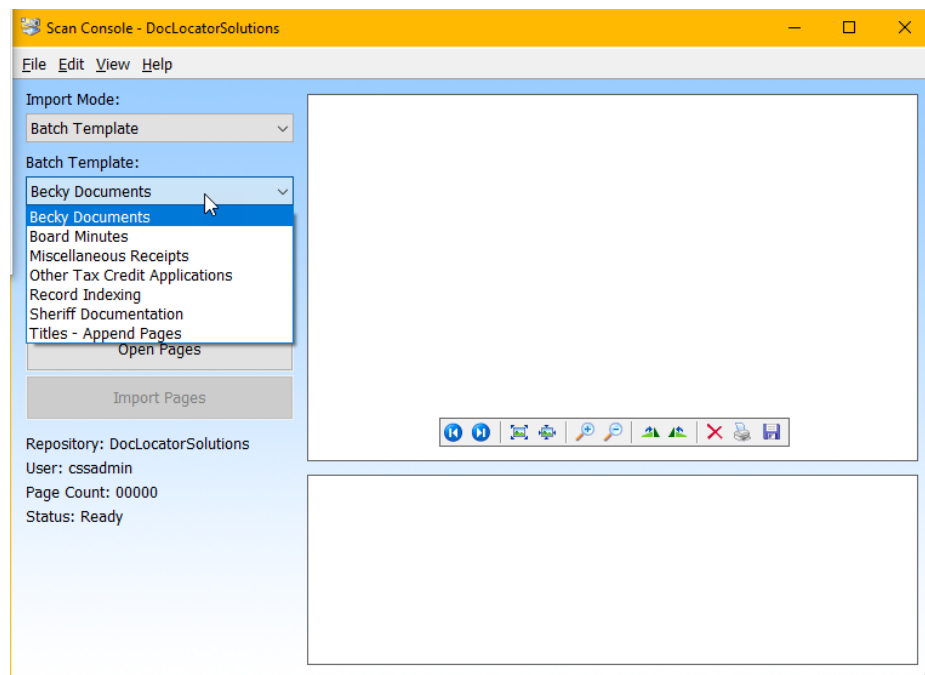
#### Batch Template

The Import Mode can be Batch Template (usually the recommended method) or Manual. Using a Batch Template allows for scanning batches of documents with minimal input or setup during the scan. Batch templates dictate where the files will be imported to, the scanner settings to use, whether to import as a single page or multiple page document, which profile to use, separator page information, etc. Manual indicates the user will dictate all this information during the scan process.

Select the appropriate Batch Template for the type of document you wish to scan.

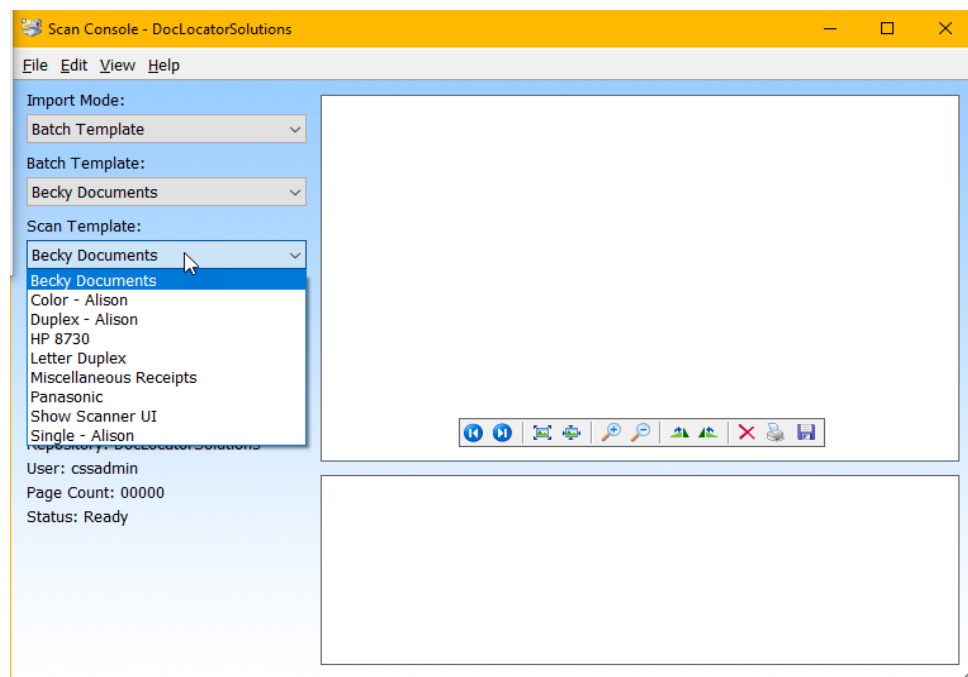
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### Scan Template

The Scan Template is usually set up with the Batch Template and will change accordingly when a Batch Template is selected. Otherwise, select the appropriate Scan Template to use for the batch of documents. Scan Templates contain the scanner settings to use for this batch—scanner to use, paper size, picture type, resolution, deskew, double-side scanning, etc. A single Scan Template can be used in multiple Batch Templates.

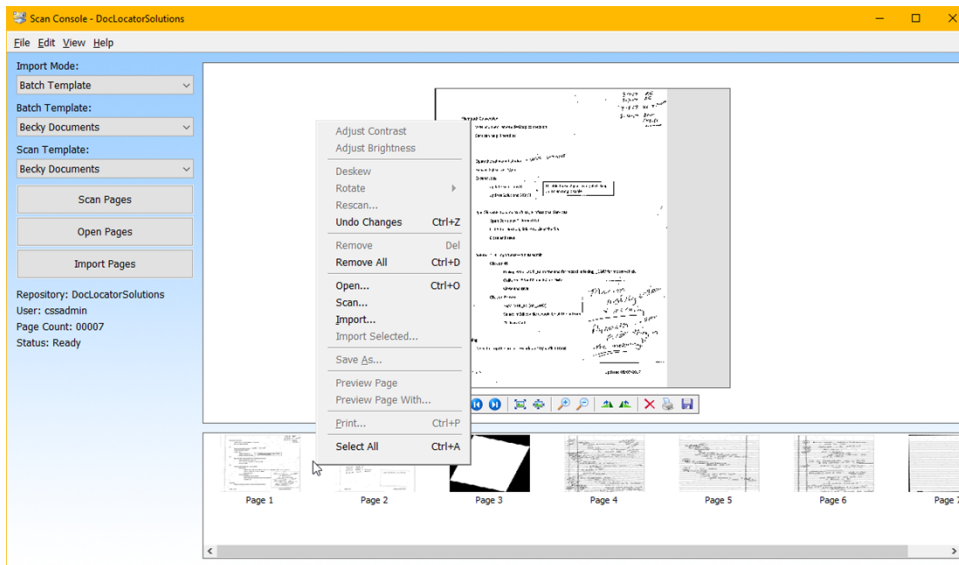


Click on Scan Pages to start scanning.

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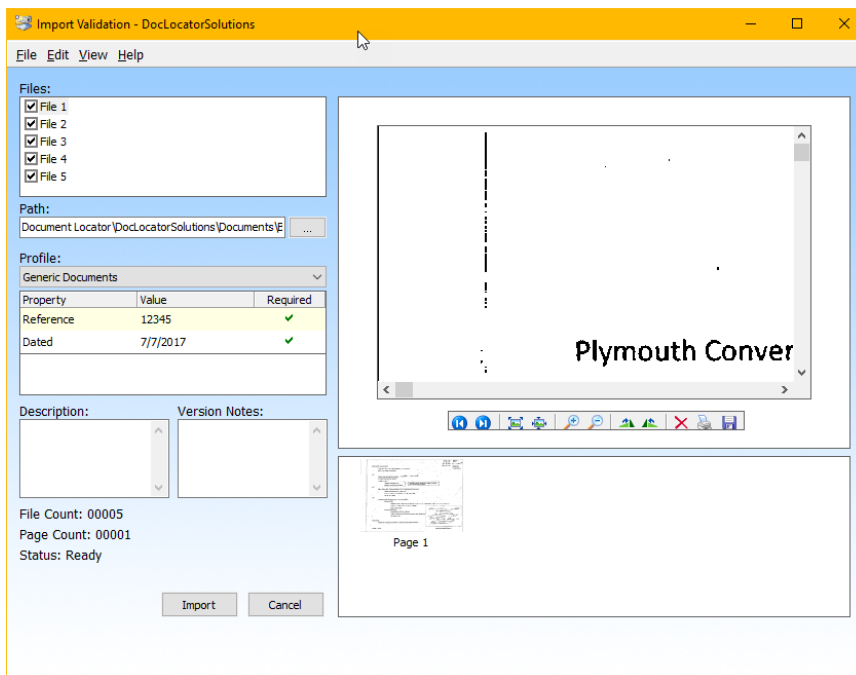
The scanned pages will appear as thumbnails at the bottom of the screen. Right clicking on a thumbnail offers a variety of options such as deskew, rotate, rescan, delete, remove, etc.



### Import Pages

After verifying that you have all the necessary pages, click on Import Pages.

The first import will separate the pages into files per the settings in the Batch Template.



Click on **each** file to verify there are the correct number of pages in each file. Enter in the index property information if necessary. Required items are indicated with a checkmark. If there is a file that you do not wish

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to import—you want to scan additional pages, need to remove pages, etc--uncheck it. Only files that are checked will go through the final import. Enter in any description or version if desired.

Click on import to import the items into Document Locator. Exiting scan console without doing the final import will cause you to have to rescan the pages. The program does not save a batch in progress.

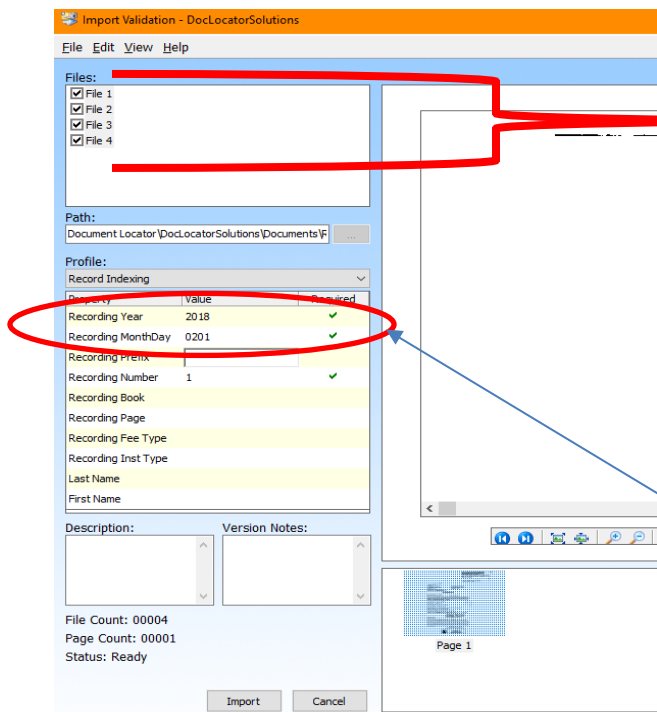
Clicking Cancel will return you to the scan pages screen and no items will be imported into Document Locator.

### Importing Multiple Files with Similar Properties

#### Process

Scan in your necessary documents and click on import once the pages have been verified.

#### Highlight/Select Files



Highlight all the files that have similar property information. Click the first file, press the shift key, and click the last file.

#### Multiple File Property Information

Enter the property information that would be the same for all the selected files. In this example, the Recording Year and Recording MonthDay would be the same for all selected files.

#### Individual File Properties

Once the similar information is keyed, select the individual files and key in the property information specific to the selected file.

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Import Validation - DocLocatorSolutions

File Edit View Help

Files:

- ☒ File 1
- ☒ File 2
- ☒ File 3
- ☐ File 4

Path:

Document Locator\DocLocatorSolutions\Documents\F ...

Profile:

Record Indexing

Property	Value	Required
Recording Year	2018	✓
Recording MonthDay	0201	✓
Recording Prefix		✓
Recording Number	0304	✓
Recording Book		
Recording Page		
Recording Fee Type		

In this example, the Recording Number is the only information that changes among the four files.

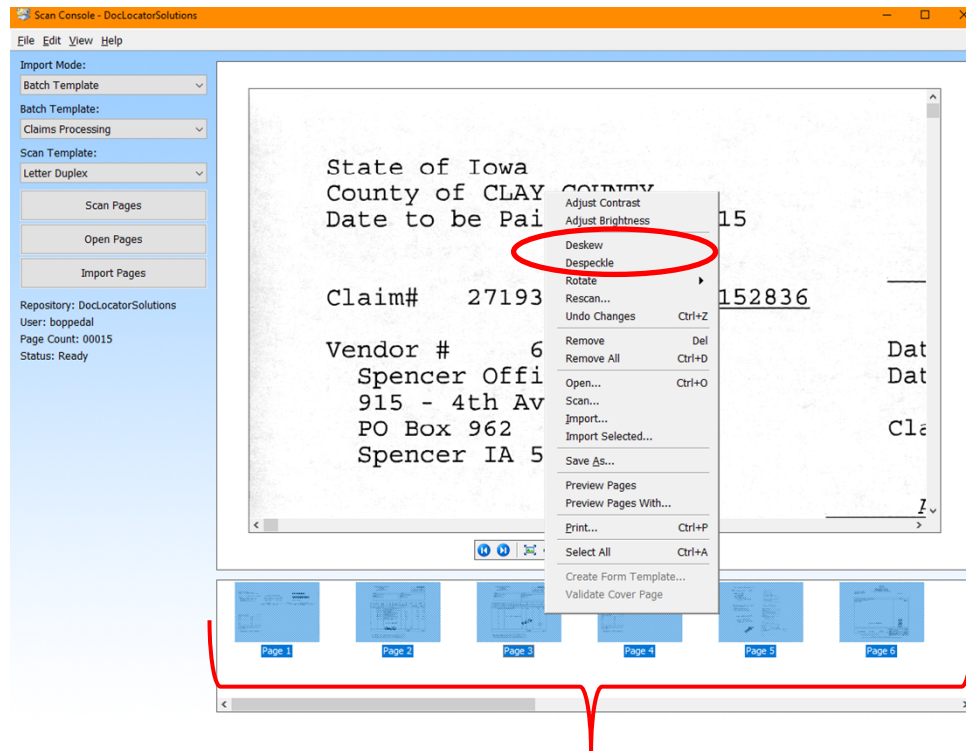
Once all files have their necessary properties entered, click on Import to do the final processing of the documents into Document Locator and attached to items in Solutions Vision if applicable.

### Deskew or Despeckle All Pages at Once

Once you have all the pages scanned in, you can despeckle or deskew them all at once by selecting all thumbnails (click on a thumbnail and then do Control+A or click on the first thumbnail, press the shift key, click on the last thumbnail), right click and select Despeckle and/or Deskew.

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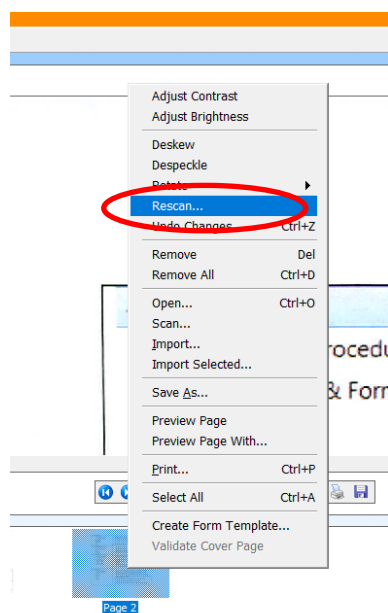
### Scan Console



All thumbnails are highlighted/selected

### Rescan vs Scan

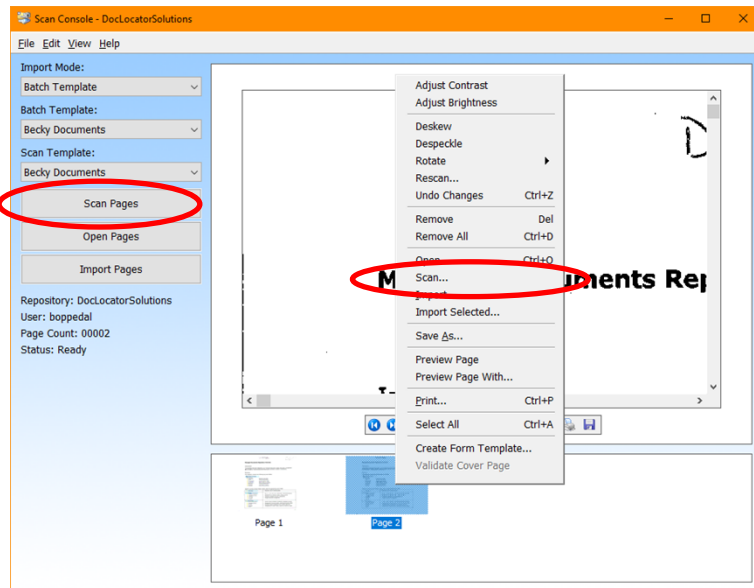
While verifying the images, if there is a need to rescan, right click on a thumbnail and select Rescan. Rescan will replace the page selected. Depending on your settings, it may scan front and back of the page.



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### Scan Console

Selecting Scan on the right click menu or Scan on the main screen, will place the newly scanned page at the end of the thumbnails. The thumbnail can then be dragged to its necessary place.



### Considerations:

If the imported items are connected to information in Solutions software, the final import will start the process to link the items. It may take a few minutes for the indicators to appear in Solutions software. The indicator may be an asterisk or a yellow image icon depending on the program in Vision.

nst		
002	*	W
008	*	W
001	*	W
	*	W



### Verify Images or Image Indicator are Visible after Scanning

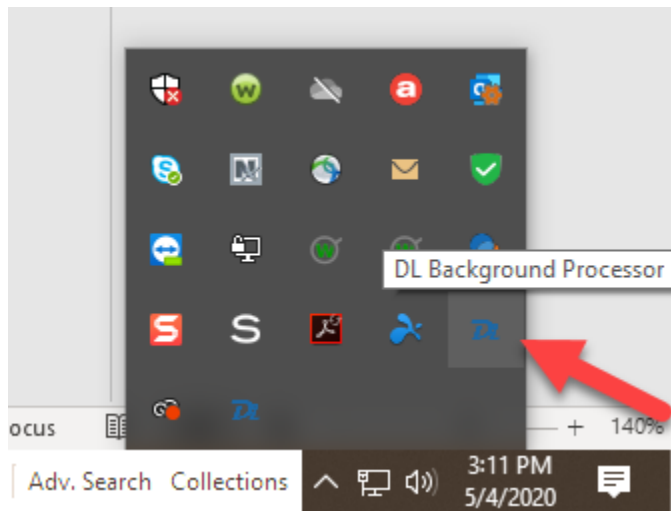
After scanning, **always** verify the images are in Document Locator. Either use an Advance Search by Import Date for the profile being scanned or go into Vision and verify there is an image indicator for every document scanned.

### Background Processor

If the images are not visible in Document Locator or the image indicators are not visible in Vision, check to see if there is anything in the Failed Queue of the Background Processor. Right click on the DL Background Processed by the clock on the pc and select Show.



## “Solutions” Image Services Scan Console



### Failed Tab

There is a Failed tab. If there are any images on this tab, please contact Solutions for assistance at [dl@gmdsolutions.com](mailto:dl@gmdsolutions.com) or 712-262-4520. Do not rescan your documents.

