

Scanning & Indexing HR Documents

Purpose: Guidelines and instructions for scanning HR documents and indexing and committing them into OnBase.

Target Audience: Regional HR Offices
SW Records Management

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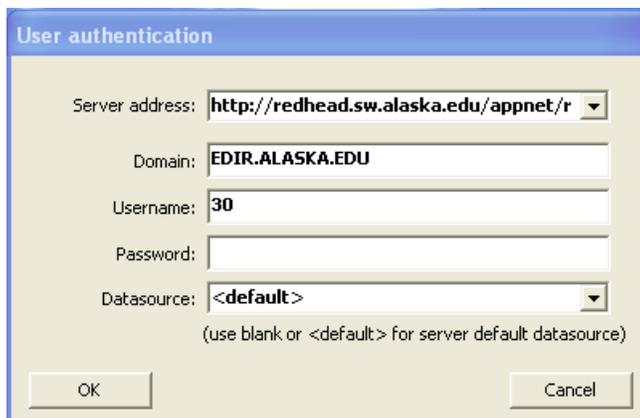
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SCANNING AND CORRECTING VRS ERRORS

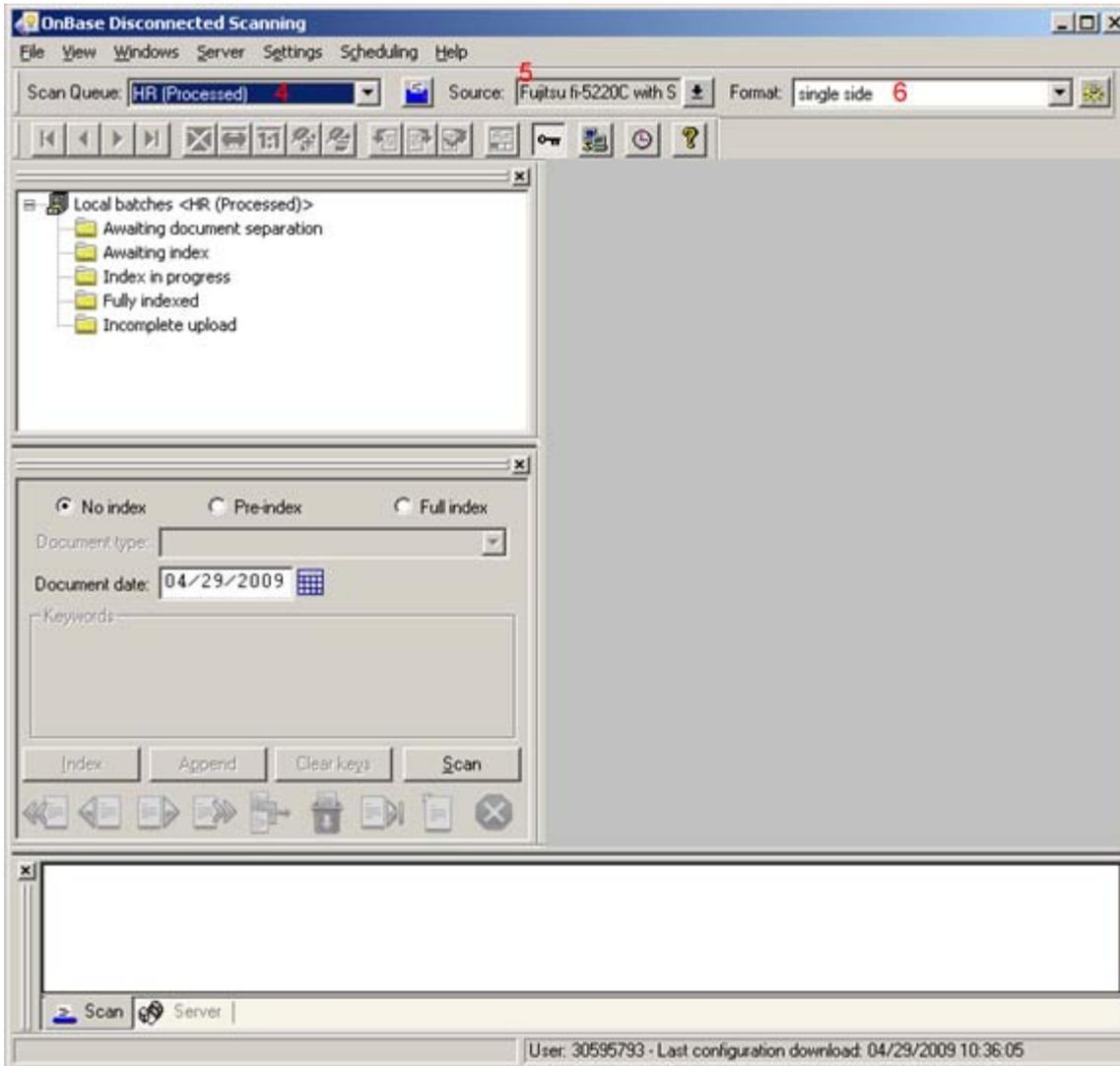
1. Log-in to OnBase Disconnect Scanning
2. Open Disconnected Scanning
3. Log in
 - A. Username: your UAID: 30.....#
 - B. Password: your AuthServe password (used for eDir, UA Google, EMLO, others)
 - C. Click on "Web Server"



- D. Verify you have the correct "Server address" selected
 - i. PREP "http://redhead.sw.alaska.edu/appnet/remotescan"
PROD: "http://goldeneye.alaska.edu/appnet/remotescan"
or "https://ddi.alaska.edu/appnet/remotescan"
- E. Verify "Domain" : edir.alaska.edu
- F. Enter username 30....#
- G. Reenter your Password (AuthServe Password)
- H. Verify "Datasource" is set to <default>
- I. Click on "OK"

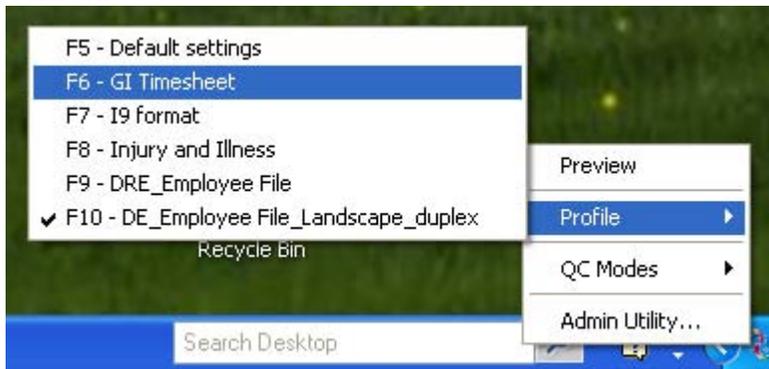


Once you have logged on to OnBase Disconnect scanning the following screen will appear



4. Choose your Scan Queue
5. Choose your Source
6. Choose your Format
7. Select your VRS Profile (see Scanner Setup Procedure for instructions for setting up your profile at www.alaska.edu/hr/procedures/PDF/payroll.record_retention.scanner_setup.pdf).

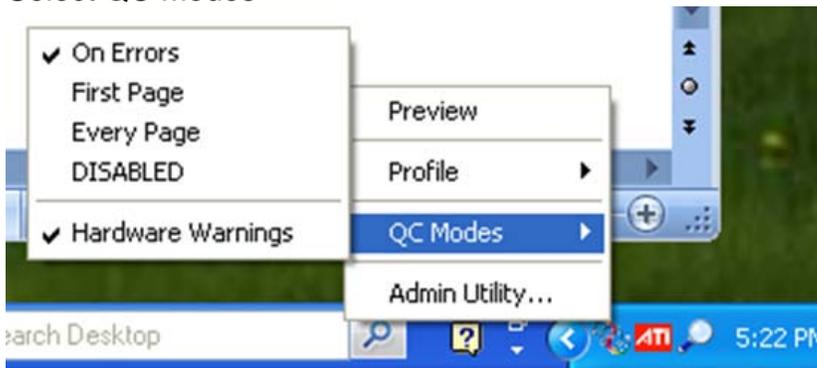
- A. Right click on the VRS Icon in the Windows Tool Bar in the lower right of your screen.



- B. Select Profile
- C. Select the profile you want to use.

- 8. Set your VRS QC (Quality Control) settings if needed.

- A. Right click the VRS Icon
- B. Select QC Modes



- i. "On Errors" will stop the scanner where VRS detects errors. (recommended)
- ii. "First Page" will stop the scanner and display the first page
- iii. "Every Page" will stop the scanner and display each page.

- 9. Put your documents in to the scanner click on the  button at the lower left of the screen

- 10. Enter your Batch Name
[MAU]_[Document Type]_[Year (Run#)] [(Last Initial) or (UAID)]_[Staff Initials]



Examples:

- i. UAF_HR TS_2005 R01 M_ANJKL (timesheets)
- ii. UAS_HR TERMED FILE_1999_30080555_DRE (terminated employee file)
- iii. UAA_HR I9_2010_MLP (I9)

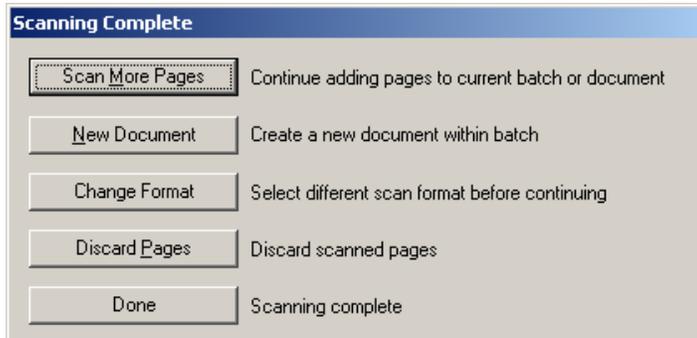
Once the documents are all scanned you will see this screen.

11. Click on “Cancel”



Then the below screen will appear giving you more options

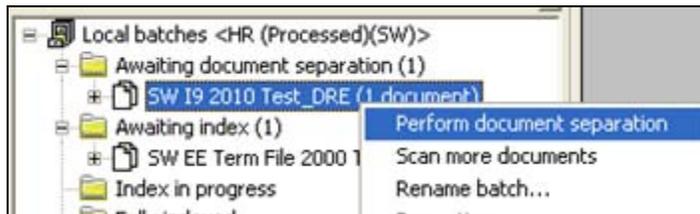
12. If you have completed scanning the documents click “Done”



13. Double-click on “Awaiting document separation” in the upper left corner of the screen to select and see a list of batches awaiting separation.

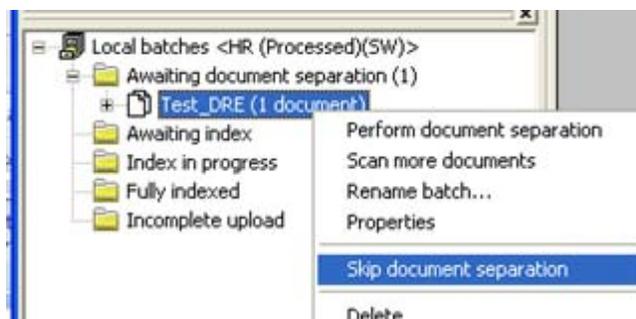
14. Right Click on the batch you want to separate or upload without separating.

A. To perform document separation select “Perform document separation” from the pop up menu.

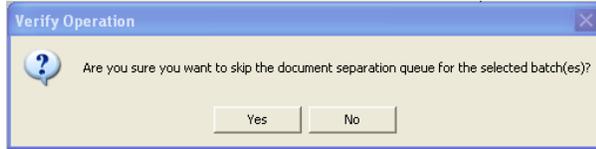


i. got to step #13 below.

B. To skip Document Separations (if all scanned documents are the same document type for the same employee or are timesheet that don't need to be separated) select “Skip document separation” from the pop up menu.

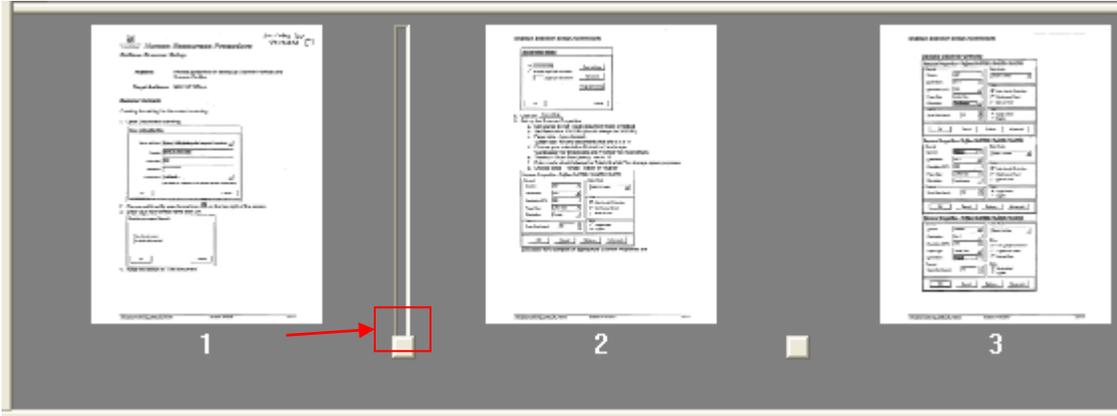


- i. Click “Yes” in the Verify Operation dialog box.



- ii. got to step #16 below.

15. Click on the check box between the thumb nail of pages that you want to split into separate documents.



16. Click on the save and close button on the top left corner of the separation window.



17. Click “Yes” in the “Verify Operation” dialog box

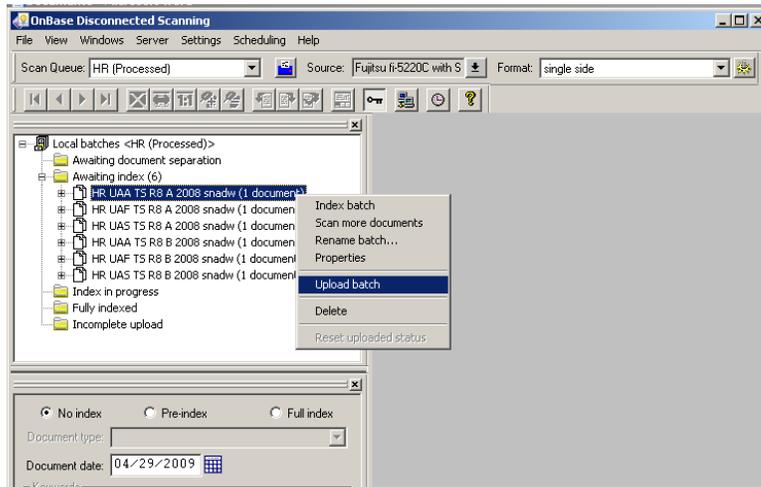


18. Double-click on “awaiting index

19. Choose the batch you are ready to Upload to OnBase.

- A. Choose the batch by right clicking on it.
- B. choose “upload batch” from the pop up menu

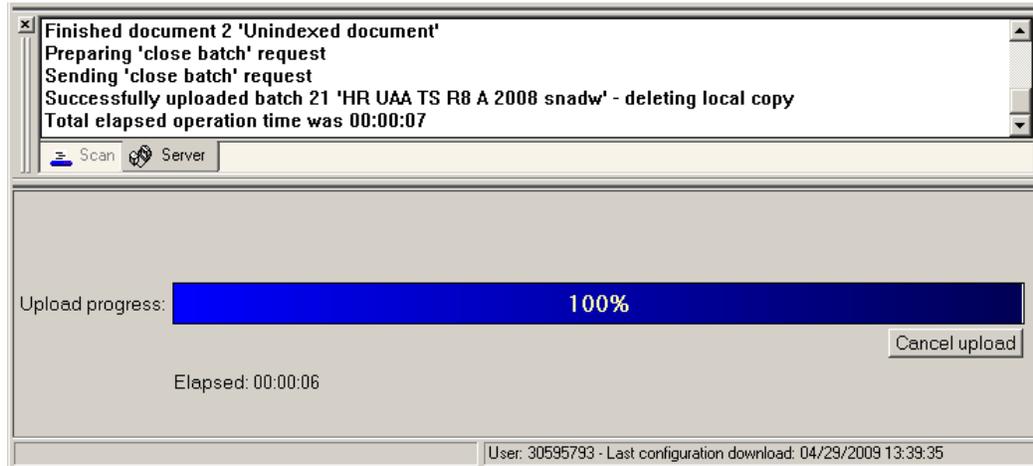
Scanning & Indexing HR Documents (Continued)



You will see this verification screen

20. Click “Yes” in the “Verify Operation” dialog box

You will see a status box as the batch uploads into OnBase



Once the batch is up loaded the upload progress bar will show 100% and the box just above it will let you know that the upload was successful and how long it took

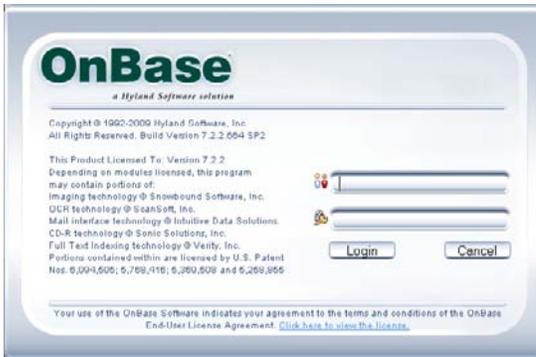
INDEXING & COMMITTING

INDEXING

1. Open OnBase Thick Client if it is not already open (or for most extended/rural sites launch OnBase Thin Client).



2. Log-in to OnBase Thick client
 - A. Use your UAID (30.....#)
 - B. Use your Authserve Password (same password as you use for eDir or UA Google)



You will see the OnBase Client Window.

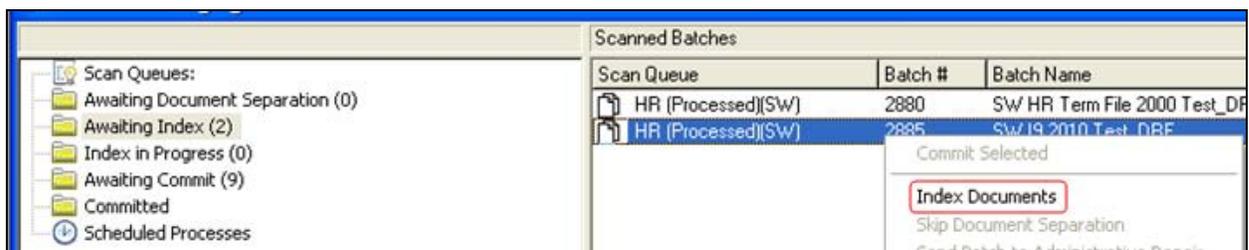
3. Click and hold on “Processing” in the menu bar
 - A. Drag to “Scan/Index” and release the mouse button



4. Now click on the folder “Awaiting Index”

Find the Batch you need to Index

5. Click on the batch name to highlight
6. Right click on the batch name and choose “Index Documents” from the pop up menu.



7. Select the appropriate document type from the drop down menu

The keywords bock will populate based on the keywords associated with the document type you have selected.

8. Enter the keyword values for each keyword field.

Notes

- You can lock the value of keywords that you will use repeatedly by clicking on the lock icon to the right of the keyword so that you don't have to enter it repeatedly. For example, If you are indexing Anchorage documents you can lock the "ReceivingCampus" to "A" and not have to enter A again for the next document you index.
- For Document types that have a UAID associated with it, after you key the UAID and tab or return, some of the other keyword fields will populate with the employees data from Banner. If you Lock the UAID and then change document types to a document that has different keywords that autofill from Banner data, these new keywords will not update. You must unlock the UAID and rekey it.
- MAU "ReceivingCampus"
(A=UAA, F=UAF, J=UAS, SW=SW,GI=GI)
- See "OnBase Document Types" fields for a complete list of HR Document types and their associated keyword fields at (www.alaska.edu/hr/procedures/PDF/payroll.record_retention.doc_tyes.pdf).

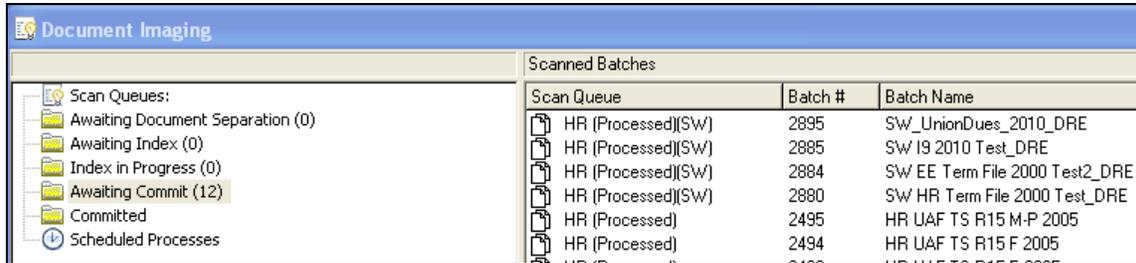
9. Once you have entered all the required keyword fields click the "Index" button.

10. Repeat steps 7-9 for each document in the batch.

COMMITTING BATCHES

Once indexing is done your batch moves to the “Awaiting Commit” Folder on the left side of the screen. Each batch needs to be committed to be retrievable.

1. Click on



2. Click on batch name you want to commit to select it
3. Right click on the batch name and select “Commit Selected”
4. Click “OK” in the commit dialog box.



- *Once this batch is committed to OnBase anyone that has the correct security class (access to this document type) can retrieve it.*
- *Dance around the cubicle and sing once you have committed your first batch into PROD.*

EXIT

1. Click on “File” in the menu bar at the top left of the screen.
2. Click on “Exit” in the pop-up menu.

