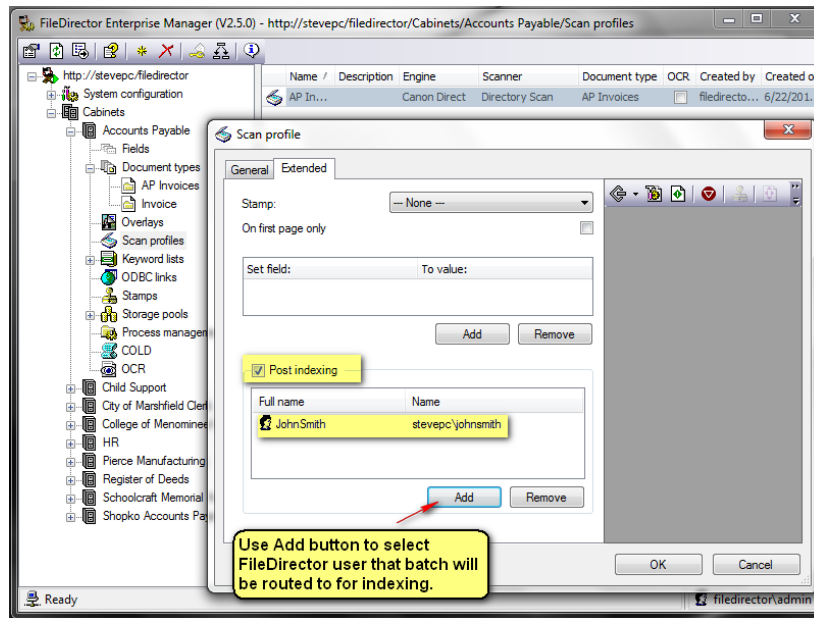


Using FileDirector PostIndex Scanning

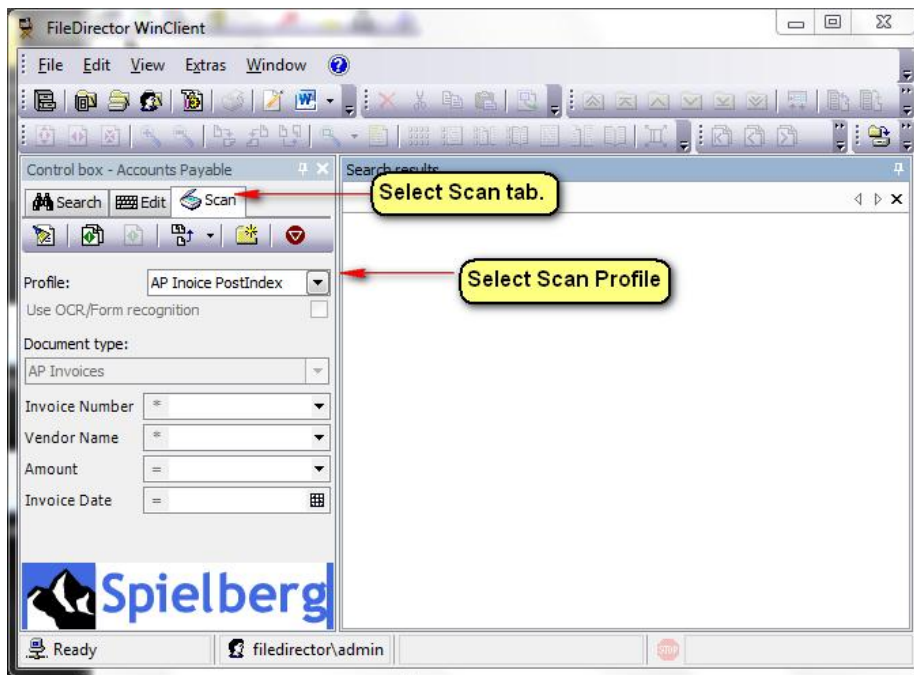
Preparation

Before using Post-Indexing option you must first use FileDirector Enterprise Manager to enable it in the Scan Profile.



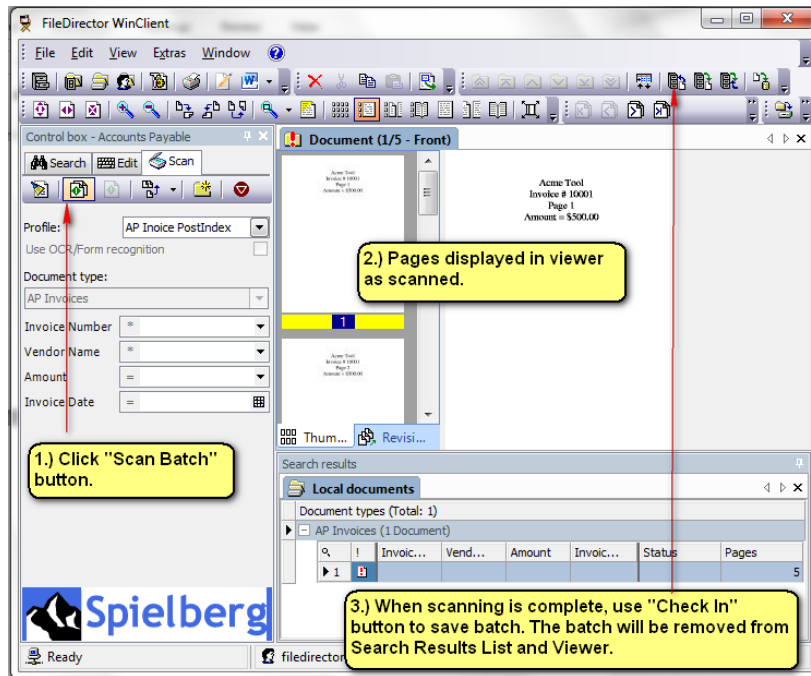
Scanning

In the FileDirector WinClient open File Cabinet you wish to scan into.

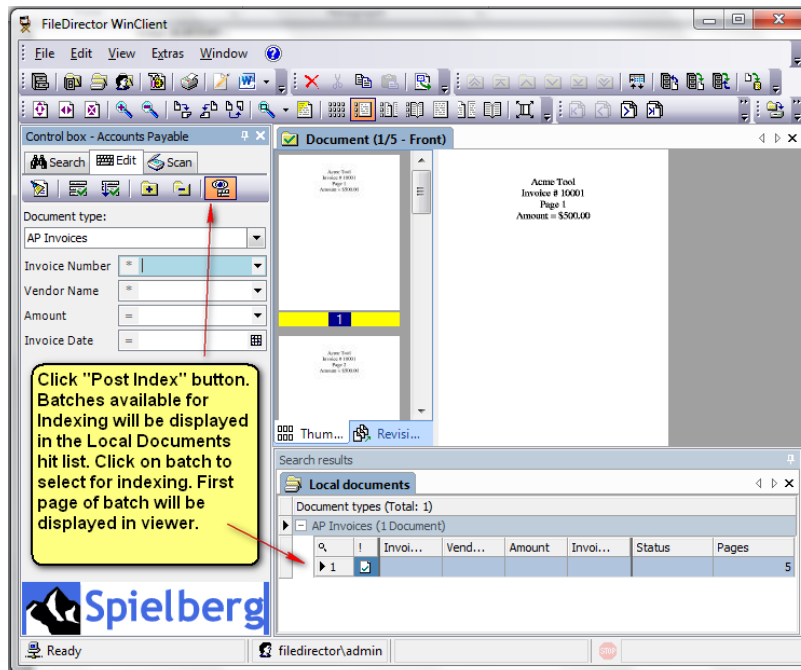


Using FileDirector PostIndex Scanning

For our example we will be scanning 5 pages into batch. Pages 1 and 2 are one invoice. Page 3 is a single page invoice and pages 4 and 5 are a third invoice. Load batch documents into scanner.



Batches can be indexed from any FileDirector workstation. To index batch go to the Edit tab of the WinClient Control Box.



Using FileDirector PostIndex Scanning

FileDirector WinClient

Control box - Accounts Payable

Document type: AP Invoices

Invoice Number: 10001

Vendor Name: Acme Tool

Amount: 500.00

Invoice Date: 6/21/2011

Document (1/5 - Front)

Acme Tool
Invoice # 10001
Page 1
Amount = \$500.00

Enter index values for first document and click the "Save Changes" button.

Search results

Local documents

Document types (Total: 1)

Invoice N...	Vendor N...	Amount	Status	Pages
1				5

Ready | filedirector/admin

FileDirector WinClient

Control box - Accounts Payable

Document type: AP Invoices

Invoice Number: 10001

Vendor Name: Acme Tool

Amount: 500.00

Invoice Date: 6/21/2011

Document (1/4 - Front) | 10001 (1/1 - Front)

Acme Tool
Invoice # 10001
Page 2
Amount = \$500.00

The next page of batch will be displayed. If like in this example the page needs to be appended to previous document click "Combine Documents" button

Search results

Local documents

Document types (Total: 1)

Invoice N...	Vendor N...	Amount	Invoice D...	Status	Pages
1					4
2	10001	Acme Tool	500.00	6/21/2011	1

Ready | filedirector/admin

Using FileDirector PostIndex Scanning

FileDirector WinClient

Control box - Accounts Payable

Document type: AP Invoices

Invoice Number = 20022

Vendor Name = ABC Manufacturing

Amount = 3500.00

Invoice Date = 6/20/2011

Document (1/3 - Front) | 10001 (2/2 - Front)

ABC Manufacturing
Invoice # 20022
Page 1
Amount = \$3500.00

Page 3 of batch displayed. Since this is first page of new document, new index values need to be entered. When done click " Save Changes" button.

Search results

Local documents

Document types (Total: 1)

AP Invoices (2 Documents)

	Invoice N...	Vendor N...	Amount	Invoice D...	Status	Pages
1						3
2	10001	Acme Tool	500.00	6/21/2011		2

Ready | filedirector\admin

FileDirector WinClient

Control box - Accounts Payable

Document type: AP Invoices

Invoice Number = 30300

Vendor Name = Tech Services Inc.

Amount = 1750.00

Invoice Date = 5/5/2011

Document (1/2 - Front) | 10001 (1/1 - Front)

Tech Services Inc.
Invoice # 30300
Page 1
Amount = \$1750.00

Page 4 of batch displayed. This also is the first page of new document, so new index values need to be entered and "Save Changes" button clicked.

Search results

Local documents

Document types (Total: 1)

AP Invoices (3 Documents)

	Invoice N...	Vendor N...	Amount	Invoice D...	Status	Pages
1						2
2	10001	Acme Tool	500.00	6/21/2011		2
3	20022	ABC Manuf...	3,500.00	6/20/2011		1

Ready | filedirector\admin

Using FileDirector PostIndex Scanning

FileDirector WinClient

Control box - Accounts Payable

Document type: AP Invoices

Invoice Number: 30300

Vendor Name: Tech Services Inc.

Amount: 1750.00

Invoice Date: 5/5/2011

Page 1 of 1

Tech Services Inc.
Invoice # 30300
Page 1
Amount = \$1750.00

Combine Documents

Page 5 of batch is the second page of the previously indexed document. Index values do not change. Click "Combine Documents" button.

Search results

Local documents

Document types (Total: 1)

AP Invoices (4 Documents)

Q	I	Invoice N...	Vendor Name	Amount	Invoice	Status	Pages
▶ 1							1
2		10001	Acme Tool	500.00	6/21/20		2
3		20022	ABC Manufacturing	3,500.00	6/20/20		1
4		30300	Tech Services Inc.	1,750.00	5/5/2011		1

Ready | filedirector\admin

FileDirector WinClient

Control box - Accounts Payable

Document type: AP Invoices

Invoice Number: 30300

Vendor Name: Tech Services Inc.

Amount: 1750.00

Invoice Date: 5/5/2011

Page 2 of 2

Tech Services Inc.
Invoice # 30300
Page 1
Amount = \$1750.00

No pending documents.

OK

When all pages in batch have been indexed, you will get following this message.

Search results

Local documents

Document types (Total: 1)

AP Invoices (3 Documents)

Q	I	Invoice N...	Vendor Name	Amount	Invoice	Status	Pages
1		10001	Acme Tool	500.00	6/21/2011		2
2		20022	ABC Manufacturing	3,500.00	6/20/2011		1
▶ 3		30300	Tech Services Inc.	1,750.00	5/5/2011		2

Ready | filedirector\admin

Using FileDirector PostIndex Scanning

