



Captiva Capture: ScanPlus & Completion Quick Steps

Updated: January 3, 2017

Table of Contents

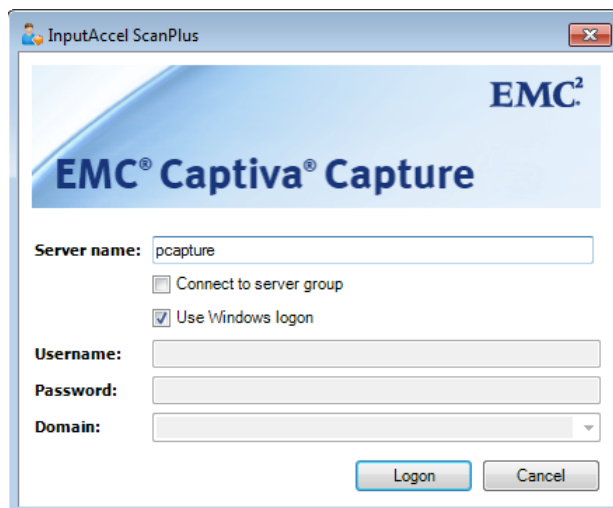
| | |
|--|-----------|
| ScanPlus | 3 |
| Log in | 3 |
| Scan pages..... | 3 |
| Create new batch | 4 |
| Open saved batch | 4 |
| Scanning the pages | 5 |
| Change File View default settings..... | 8 |
| Select/Modify scanner settings | 9 |
| Miscellaneous settings..... | 11 |
| View Settings..... | 12 |
| Batch summary | 12 |
| Log off | 13 |
| Captiva Completion | 13 |
| Log in | 13 |
| Process a batch | 14 |
| Select a batch | 14 |
| Index the pages within a document..... | 14 |
| Complete a batch..... | 16 |
| Log off | 16 |
| Create a new document..... | 17 |
| Move a page..... | 18 |
| Delete a page | 19 |
| View scanned files..... | 20 |

ScanPlus

Log in

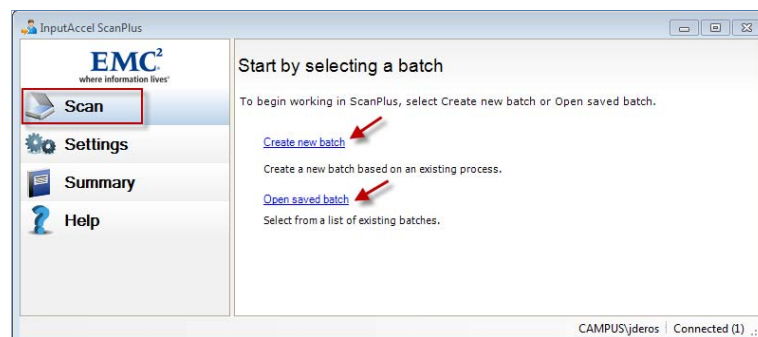
Captiva ScanPlus is used to scan paper documents. The process consists of logging into ScanPlus and using a scanner to create a batch.

1. Turn on the scanner
2. Start **ScanPlus**
3. Log into ScanPlus and fill in the fields as follows:
 - Server name: **pcapture**
 - When working from your desktop, select **Use Windows logon**
 - Leave Username, Password and Domain blank
 - Click **Logon**



Scan pages

The **ScanPlus** menu displays. When scanning, you will usually create a new batch. You may have to open a saved batch if you were interrupted when processing a batch and signed off before it was completed.



Create new batch

Use this to create a new batch. Your paper documents should be grouped by process (e.g. Admission, School, Student, Financial Services).

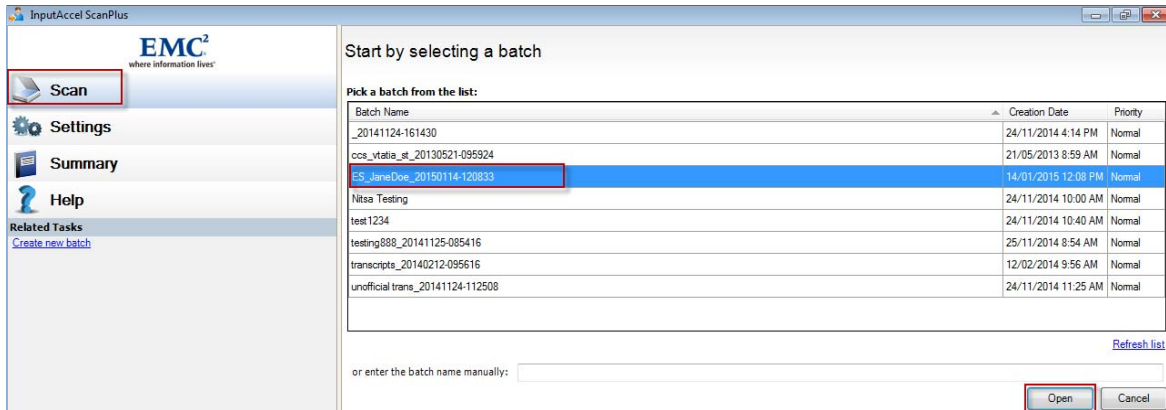
1. From the **Scan** menu, click **Create new batch**
2. Select the **Process on which the new batch will be based** from the process list.
3. Type a name for the new batch in the field **New batch name**. A date-time stamp will be automatically added to it. Contact your supervisor for naming conventions for your unit.
4. Click the **Create** button to create the new batch.

The screenshot shows the 'Create a new batch' dialog box in the InputAccel ScanPlus application. The dialog has a search bar for the process name. Below the search bar is a list of processes: AdmissionDocument, JHDocument, SchoolDocument, and StudentDocument. A red arrow points to 'JHDocument'. Below the list is a 'New batch name' field containing 'Admissions-JDR', with a red arrow pointing to it. Below that is a 'Name schema' field showing 'Admissions-JDR_20161017-171509'. Below that is a 'Batch priority' field set to 'Default priority from the batch process'. At the bottom right, there are 'Create' and 'Cancel' buttons, with a red arrow pointing to the 'Create' button.

Open saved batch

Use to open a previously created batch.

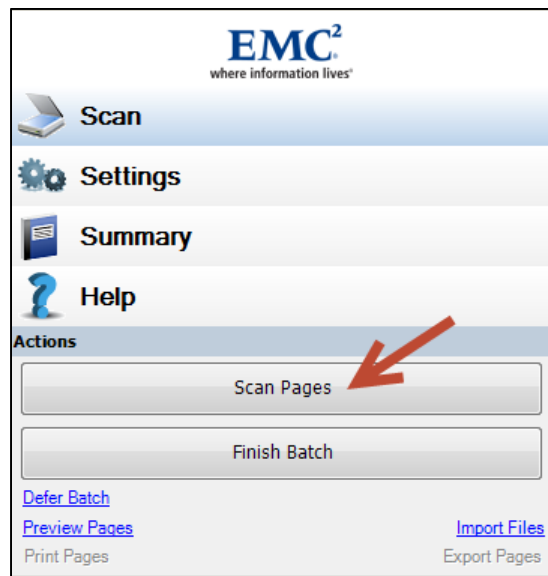
1. From the **Scan** menu, click **Open saved batch**.
2. From the **Scan** menu, select the batch from **Pick a batch from the list**
3. Click the **Open** button to open the batch (or double-click on the batch name)



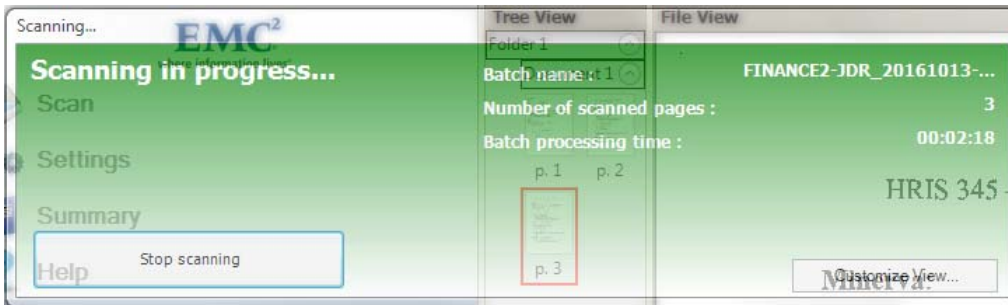
Whether you create a new batch or open a saved batch, use the **Settings** tabs to view settings, view and update scanner settings, and view batch summary. See [pages 7 to 12](#) for details on these tabs.

Scanning the pages

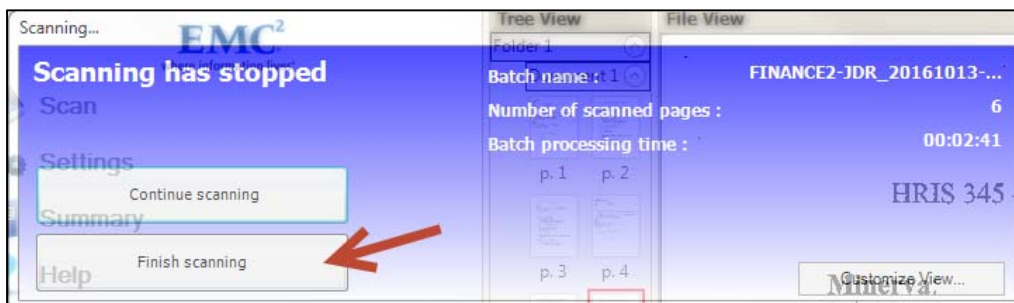
1. Place the pages in the scanner. Consult your scanner's documentation for instructions on how to load pages. If you are opening an existing batch, click the thumbnail image in the **Tree View** pane after which you want the newly-scanned pages to be inserted.
 - a. From the **Scan** menu, click **Scan Pages**.



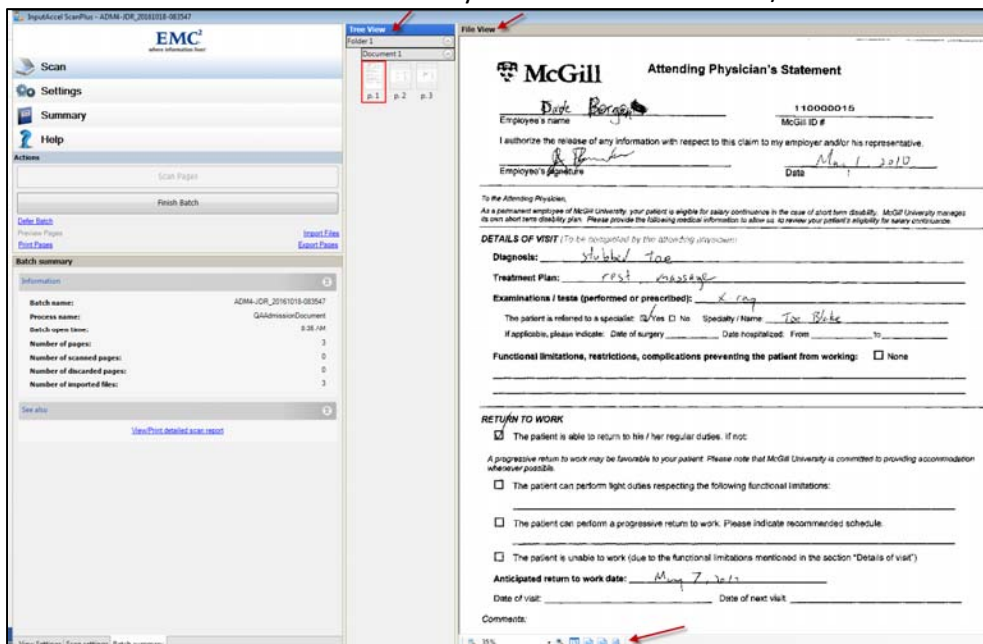
2. A settings panel for the scanner displays.
3. The **Scanning in progress** screen displays. Your scanner will begin scanning the pages and the new pages will appear in the **Tree pane**. During this time, a small Scanning progress window opens showing the number of pages that have been scanned. If you want to stop scanning, select **Stop scanning** in the Scanning in progress window.



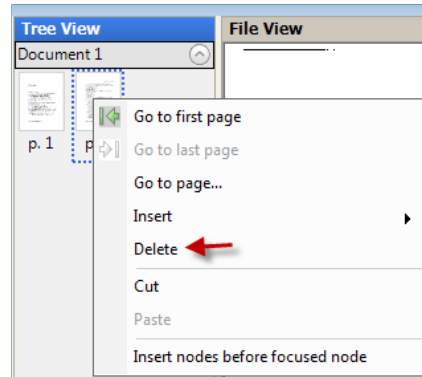
- When the scanner's document feeder is empty, or when you select Stop scanning, the ScanPlus module prompts you to continue scanning or finish scanning. To continue scanning, place another set of pages on the scanner's document feeder and select **Continue scanning**. To finish the scanning process, select **Finish scanning**.



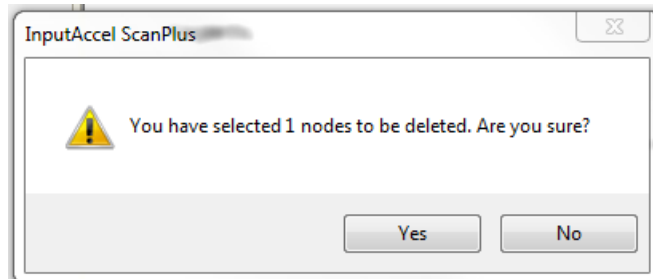
A screen displays the batch containing all the scanned pages. The **Tree View** is a graphical representation of a batch. It contains a thumbnail image of each page and displays it as a node in the tree. You can click on the thumbnail to view the page in the **File View**. You can use the controls found at the bottom of the file view to zoom or shrink the view. Click and drag the borders of different sections to make the section you're interested in wider/narrower.



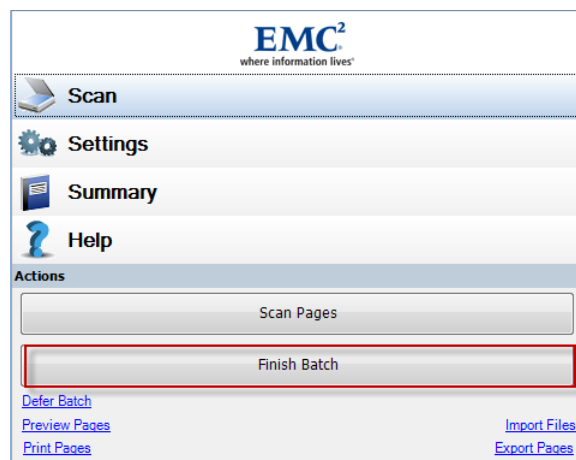
- To delete any page in the batch, right click on the page in the **Tree View** and click **Delete**.



Click **Yes** to delete the page.



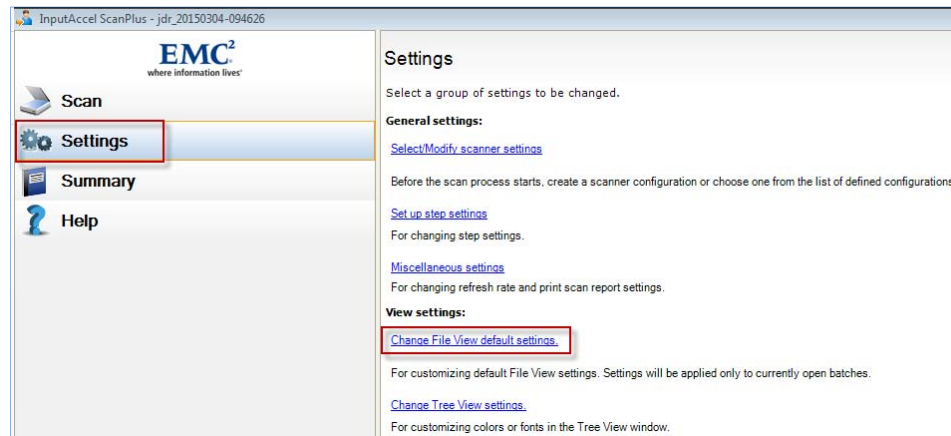
- When you are finished scanning pages into the batch, click **Finish Batch**. This will allow you to open and process the batch in **Completion** for indexing.



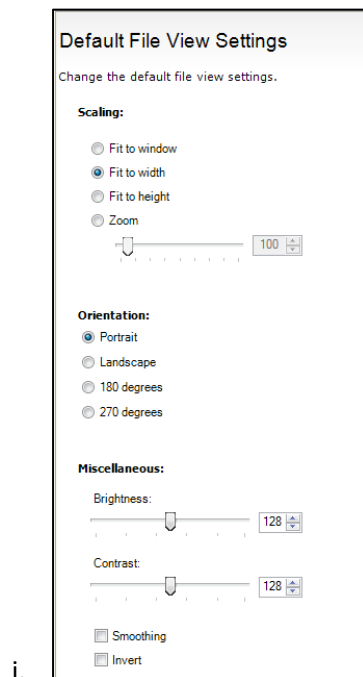
Change File View default settings

The File View settings allow you to set or update the way you view files in ScanPlus. It allows you to customize the scaling, orientation, brightness and contrast of images. It does not affect the way the files are saved. Settings will be applied only to currently open batches.

1. Click **Settings** from the menu
2. Click **Change File View default settings**



3. The **Default File View Settings** screen displays. Make changes to scaling, orientation (portrait, landscape), brightness and contrast, if required. It is recommended that you select **Scaling** = Fit to width).



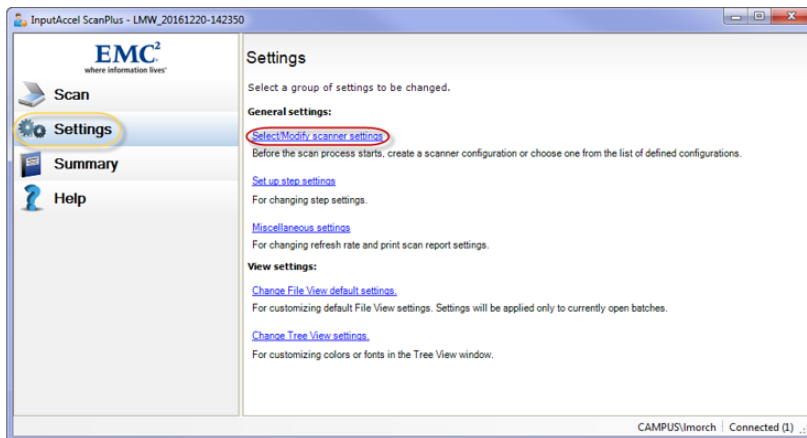
4. Click **Back to Settings Pane** to return to the **Settings** screen.

This does not affect the way the files are saved. It allows you to set or update the way you view the files in ScanPlus. It is recommended to select Scaling = 'Fit to width'. There is no **Save** button.

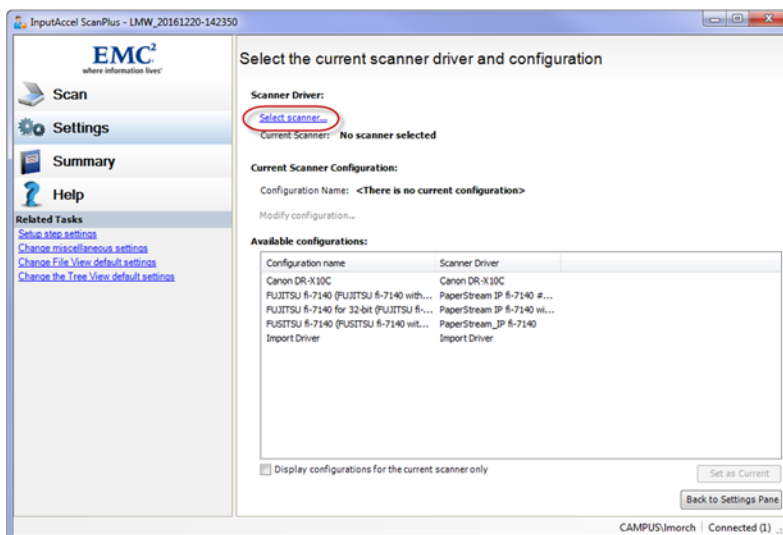
Select/Modify scanner settings

Use to select the scanner and its settings. These steps should be done once for each **Process on which the new batch will be based** that you use (AdmissionDocument, SchoolDocument, StudentDocument, JHDocument).

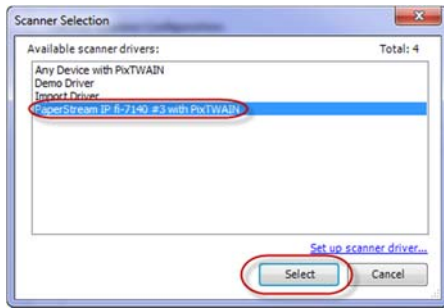
1. Open ScanPlus.
2. Create a new batch.
3. Before you scan, click **Settings** from the menu.
Click **Select/Modify scanner settings**.



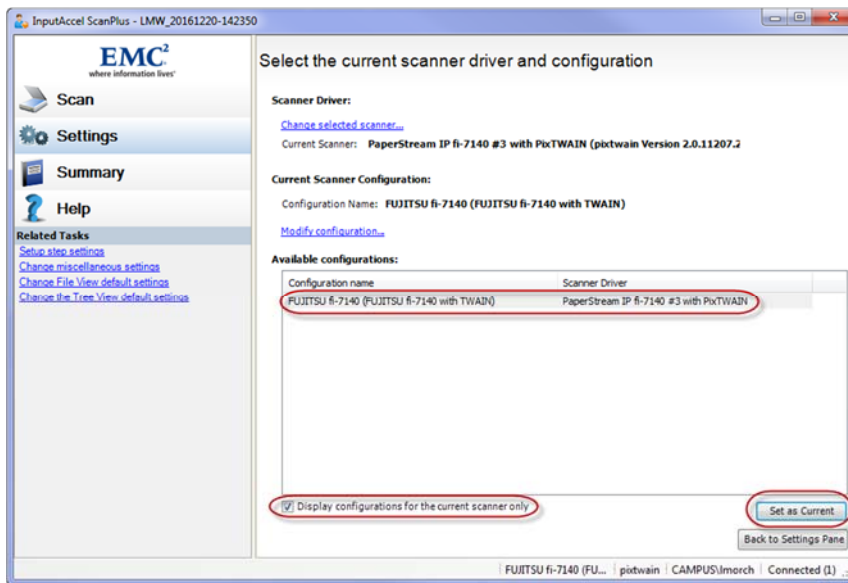
4. Click the **Select scanner...** link.



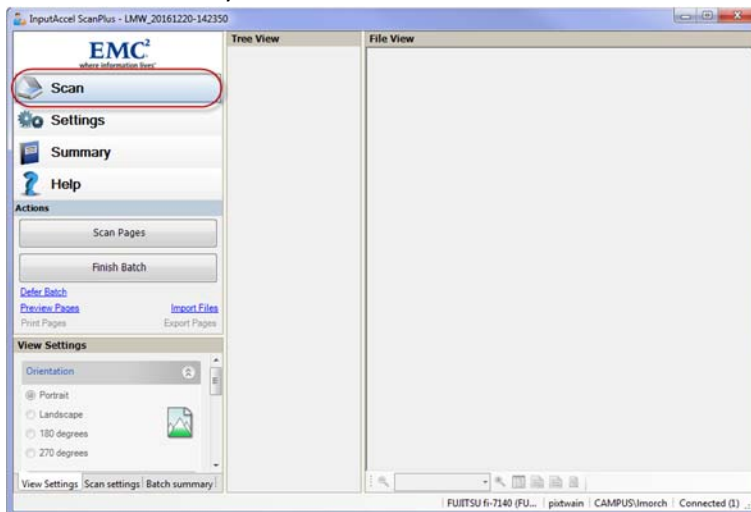
5. Find the scanner **PaperStream IP fi-7140 #3 with PixTWAIN** from the list and click **Select**.



6. Click on the Configuration name: **FUJITSU fi-7140(FUJITSU fi-7140 with TWAIN)**, click on the checkbox **Display configurations for the current scanner only** at the bottom of the dialog box and click **Set as Current**.



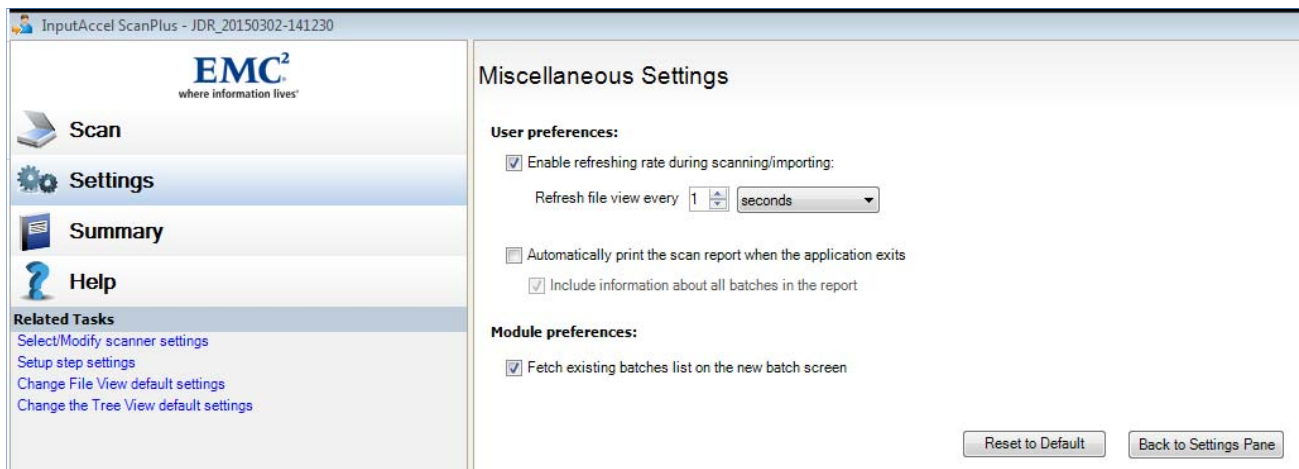
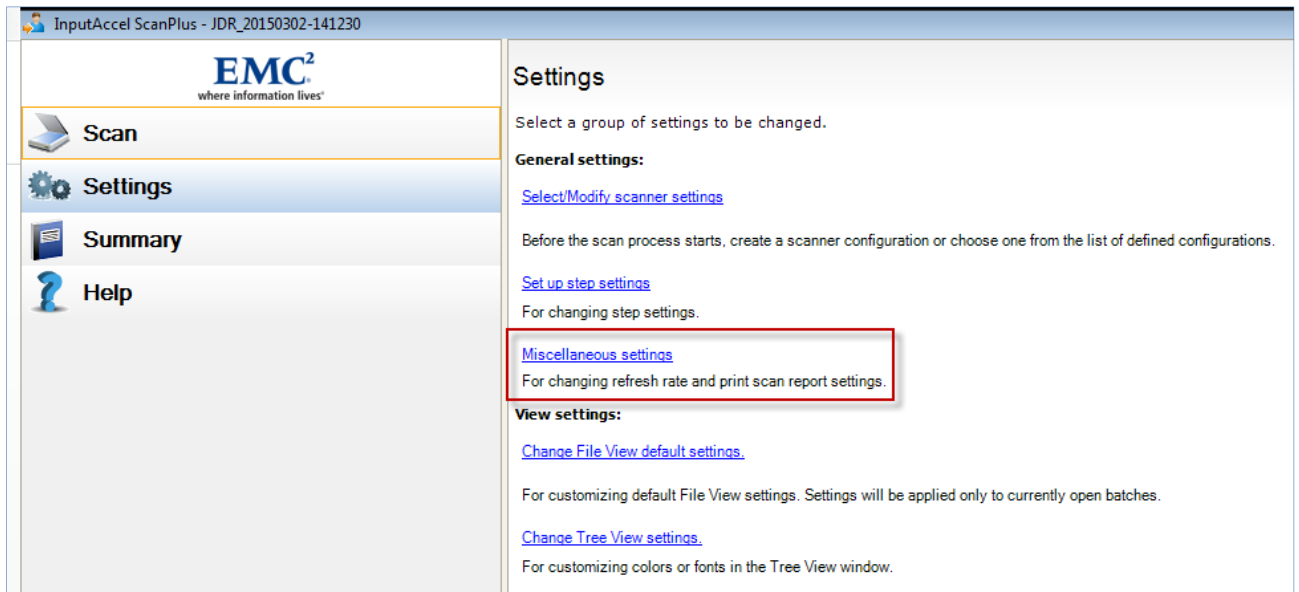
7. Click **Scan** to scan your batch.



Miscellaneous settings

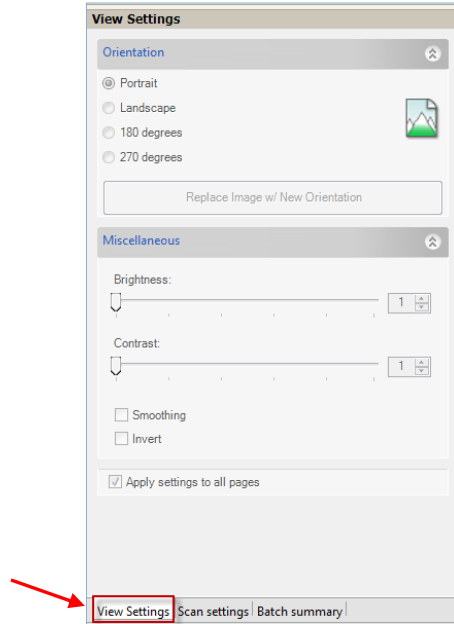
Use to change the refresh rate of the files you see when you are scanning.

1. Click **Settings** from the menu
2. Click **Miscellaneous settings**
3. Update refresh information, if required.
4. Click **Back to Settings Pane** to return to the **Settings** screen.



View Settings

If you have a batch open, click on **View Settings** from the bottom left of the screen to view orientation (portrait, landscape), brightness and contrast.



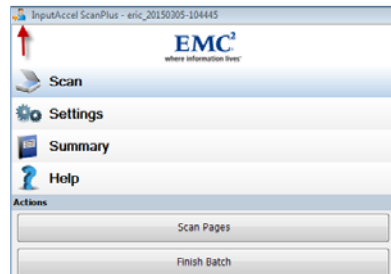
Batch summary

If you have a batch open, click on **Batch summary** from the bottom left of the screen to view Batch name, Process name, Batch open time, and number of scanned or discarded pages.

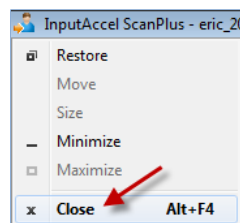


Log off

1. Click the icon on the top left of the screen.



2. Click the **Close** button. Or press **Alt-F4**.

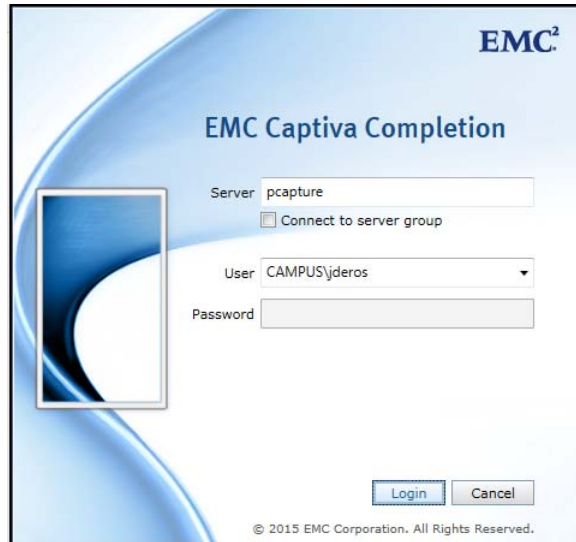


Captiva Completion

Log in


Captiva Completion is used to index documents that were scanned using ScanPlus. To support the indexing process, Completion connects with Banner to retrieve information such as student's first name, last name, primary faculty, fiscal period, fiscal year. The connection to Banner is done automatically after you log into Completion and start indexing the document.

1. Start **Completion**
2. Log into Completion and fill in the fields as follows:
 - Server name: enter **pcapture**
 - User: enter **CAMPUS** and your McGill short username
 - Password: enter your McGill password, if required.
 - Click **Login**



Process a batch

Select a batch

When the **Captiva Completion** module appears, open the batch of scanned pages that you want to index by double-clicking on the batch. Or you can highlight the batch and click the **Get Work** button. If you do not see the batch, click Refresh list .

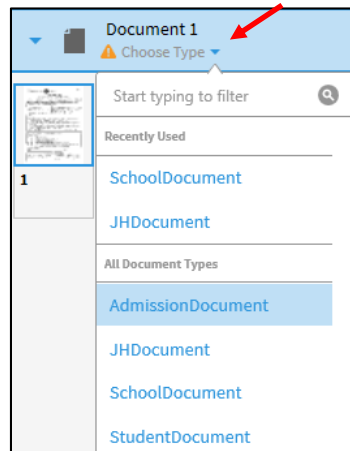
| Batch Name | ID | Tasks | Created | Priority |
|------------------------------|-------|-------|-----------------------|----------|
| (All Batches) | | | | |
| ..._20161009-183334 | 51200 | 1 | 10/9/2016 4:33:53 PM | 50 |
| Student1-JDR_20161006-112519 | 51700 | 1 | 10/6/2016 11:25:18 AM | 50 |
| Adm-JDR_20161006-112055 | 51400 | 1 | 10/6/2016 11:20:55 AM | 50 |
| Adm-JDR_20161006-112217 | 51500 | 2 | 10/6/2016 11:22:16 AM | 50 |
| ES_JDR_20161009-150648 | 51000 | 1 | 10/9/2016 3:06:48 PM | 50 |
| FINANCE2-JDR_20161013-132138 | 53700 | 1 | 10/13/2016 1:21:38 PM | 50 |
| FNNS-JDR2_20161013-155239 | 53900 | 1 | 10/13/2016 3:52:39 PM | 50 |

The batch opens. You will see the **Documents panel** on the left (documents and pages), and the **Page View panel** on the right. From the Documents panel, you can [create a new document](#), [delete a page](#), and [move a page](#).

Index the pages within a document

Select the document **Type** by clicking on the down arrow from the **Documents panel**. The list defaults from ScanPlus and is related to the process you selected in ScanPlus (e.g. Admission, JHDocument, School, Student).

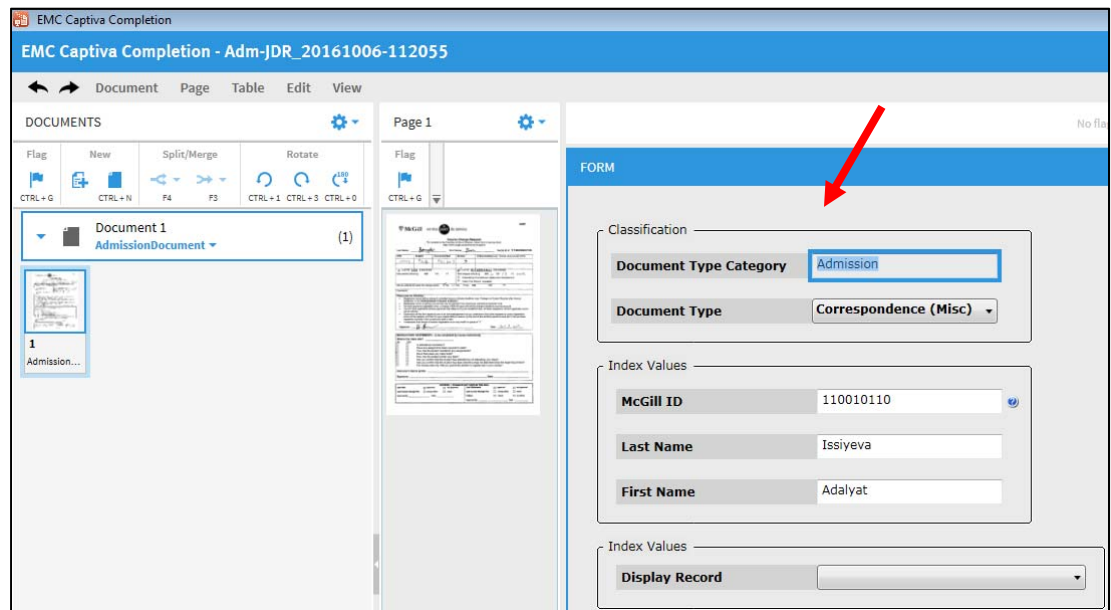
By default, all pages in a batch belong to one document. After you index the 1st page, all the other pages in the document take on the same index values.



The **Form panel** displays the index values; these depend on the selected process (e.g. Admissions). Enter the required indexing fields; other index values are automatically retrieved from Banner and filled in.

For Admissions, School, Student documents:

- Select the Document type, McGill ID and any other index field that need to be filled in.
- Press Tab.
- All the other index values are automatically retrieved from Banner and filled in.



For Finance documents:

- Enter the Document Number for the finance document.
- Press Tab.
- All the other index values are automatically retrieved from Banner and filled in (e.g. Fiscal Period, Fiscal Year, Type, Deposit Number, Currency).

Index Values

Document Number: J0000055

Fiscal Period: 01

Fiscal Year: 01

Type: CSR

Deposit Number: 1300100

Currency: USR


Transactions:

| | | | | | | | |
|--------|-------|--------|------|--------|--------|-------|---------------------|
| 425001 | 00310 | 700348 | 6705 | 001597 | 000000 | \$25 | 970016 A. Mondoloka |
| 425031 | 00310 | 700348 | 6705 | 001597 | 000000 | \$75 | 970078 A. Hexdall |
| 425001 | 00310 | 700348 | 6705 | 001597 | 000000 | \$50 | 990714 S. Pritchard |
| 425011 | 00310 | 700348 | 6705 | 001597 | 000000 | \$50 | 872114 J. Marler |
| 425094 | 00310 | 700348 | 6705 | 001597 | 000000 | \$50 | 981040 M. Zahara |
| 425037 | 00310 | 700348 | 6705 | 001597 | 000000 | \$200 | 910173 D. Shasha |
| 425090 | 00310 | 700348 | 6705 | 001597 | 000000 | \$60 | 990554 D. Runge |

FOATXT:

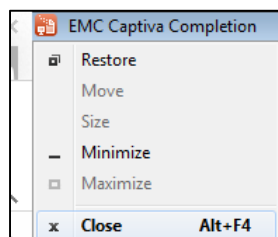
C. Pisimisis \$902
Jennifer Marler \$50.00
M. Zahara \$50.
D. Shasha \$200
Dieter Runge \$60.
S. Shoemaker \$90.
B. Gornstein \$50.

Complete a batch

1. Once you are done indexing, press **F10** or click on the  icon .
2. Click Cancel or close Completion. These indexed documents will be uploaded to Webtop in pdf format.

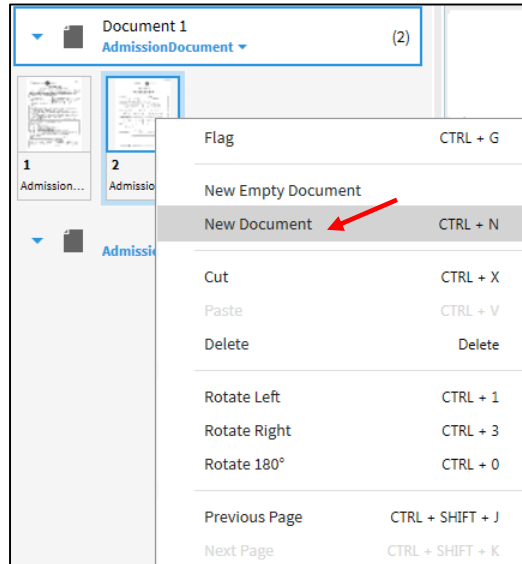
Log off

1. Click the icon on the top left of the screen.
2. Click the **Close** button. Or press **Alt-F4**.

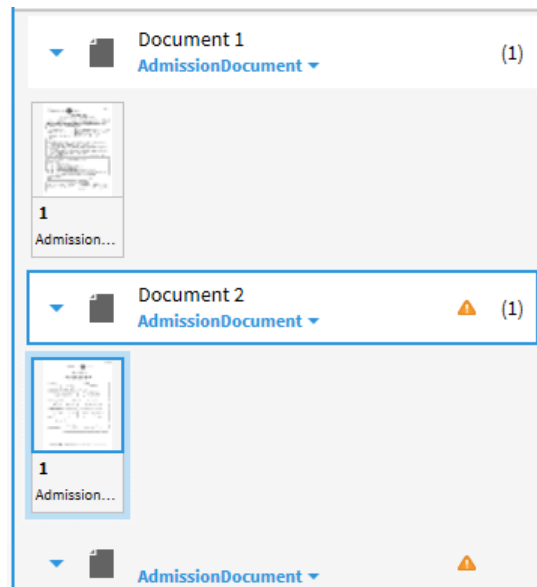


Create a new document

- a. Right click on the first page to include in the new document and select **New Document**



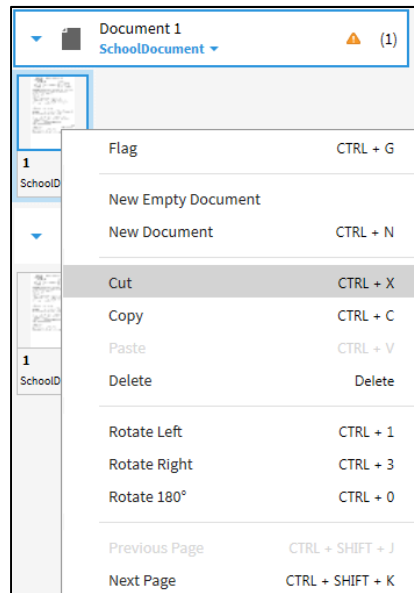
- b. This will create a new document separator. You can now index this new document by entering the required index fields.



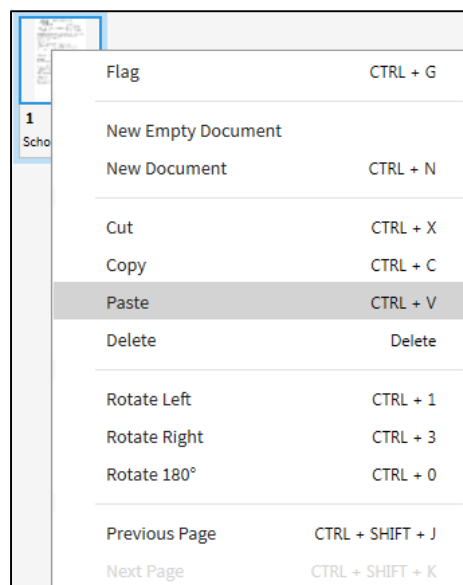
Move a page

You can move a page to another location or document. To do this:

1. Select the page(s) to move and right-click
2. Click **Cut**



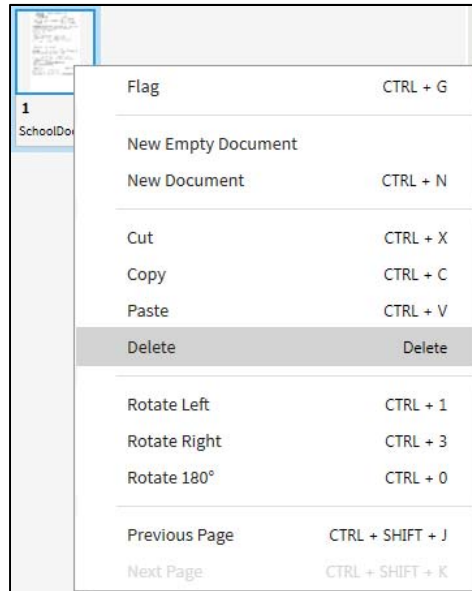
3. Go to the desired location where you want to insert the page(s), and right-click.
4. Select **Paste** to move the page (or pages) to the new location in the batch. Confirm you want to move the page (or pages).



Delete a page

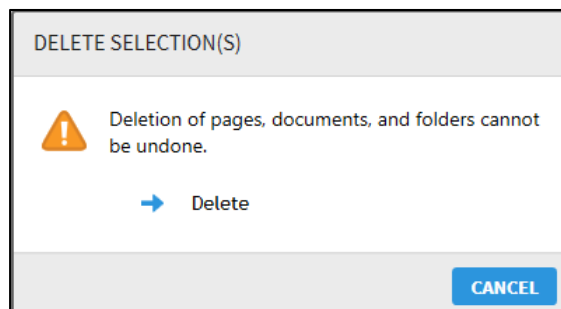
You can delete page(s). To do this:

1. Select the page(s) to move and right-click.
2. Click **Delete**.



Confirm you want to delete the selected pages. After confirmation, the pages are deleted and cannot be restored. Accidentally deleted pages must be rescanned.

- Click **Delete** to delete page(s)
- Click **CANCEL** to cancel the delete



View scanned files

The toolbar above the Page View panel enables you to:

- Zoom in and out
- Fit the image to the height, width and window of the **File View** panel.
- Rotate pages by clicking on the down arrow

