The Leeds Teaching Hospitals **NHS**
NHS Trust

WinDIP Version 2.2.81

STANDARD OPERATING PROCEDURE

Title:	**Uploading into WinDIP - HR.**
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Document version:	1.0

SCOPE

This procedure covers the instructions on *Uploading into WinDIP - HR.*

TRAINING REQUIREMENTS

HR staff uploading information into WinDIP must be familiar with this SOP
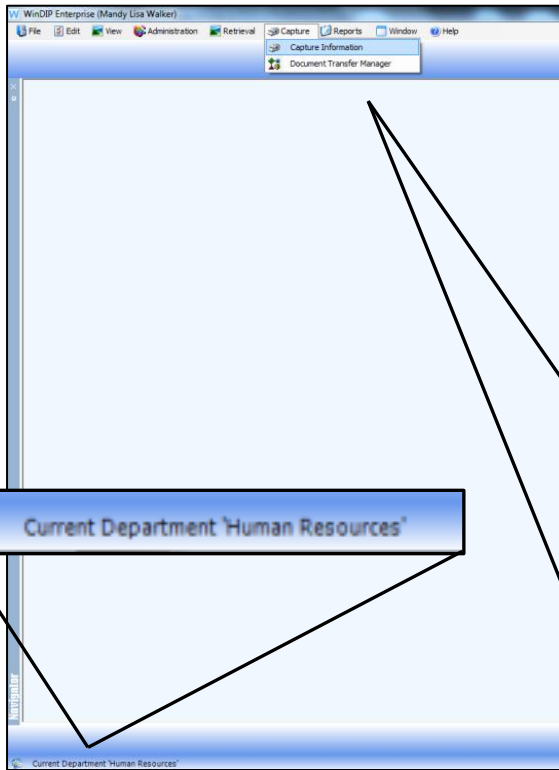
WARNINGS AND SPECIAL PRECAUTIONS

Ensure uploaded data is in the correct order and uploaded into the correct locations.

EQUIPMENT REQUIRED

WinDIP Enterprise found via Start>All Programs>WinDIP>WinDIP Enterprise v2.2.81
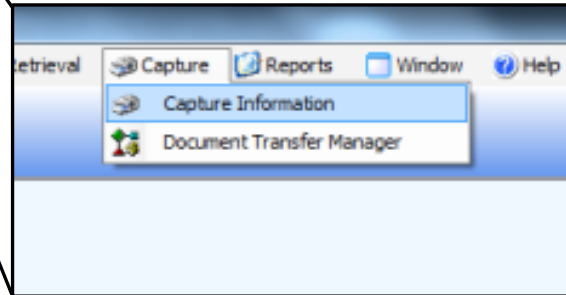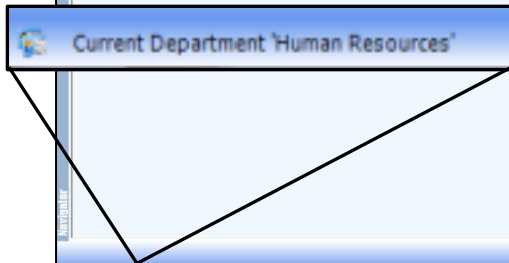A scanner, with a Kofax licence, for WinDIP.

Adding Electronic Documents to WinDip

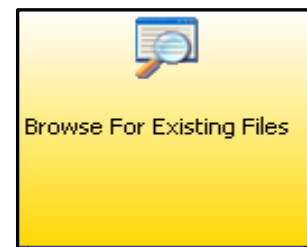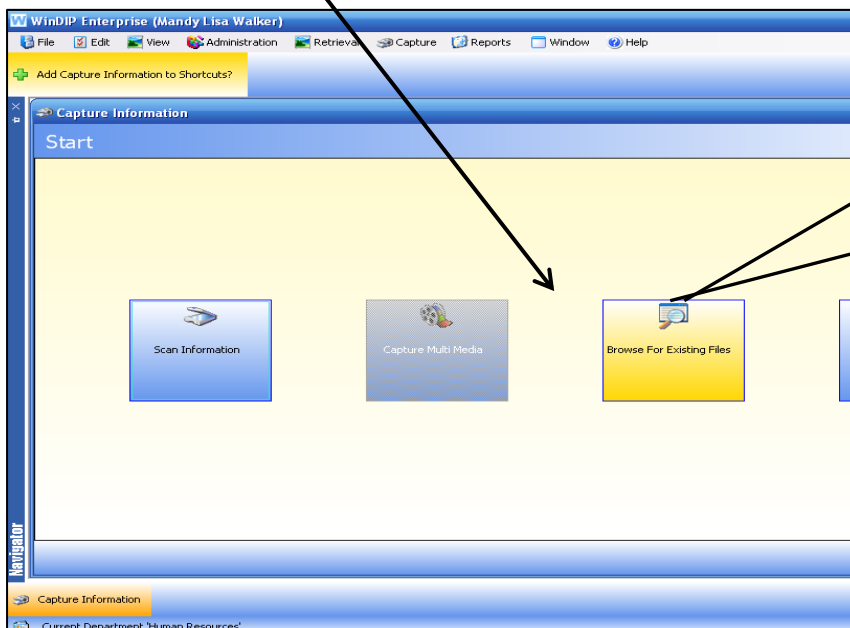1. Log into WipDip Enterprise, (not WinDip e-viewer)

2. You will see this screen. Check in the bottom left of the screen that the department you are in is **Human Resources.**
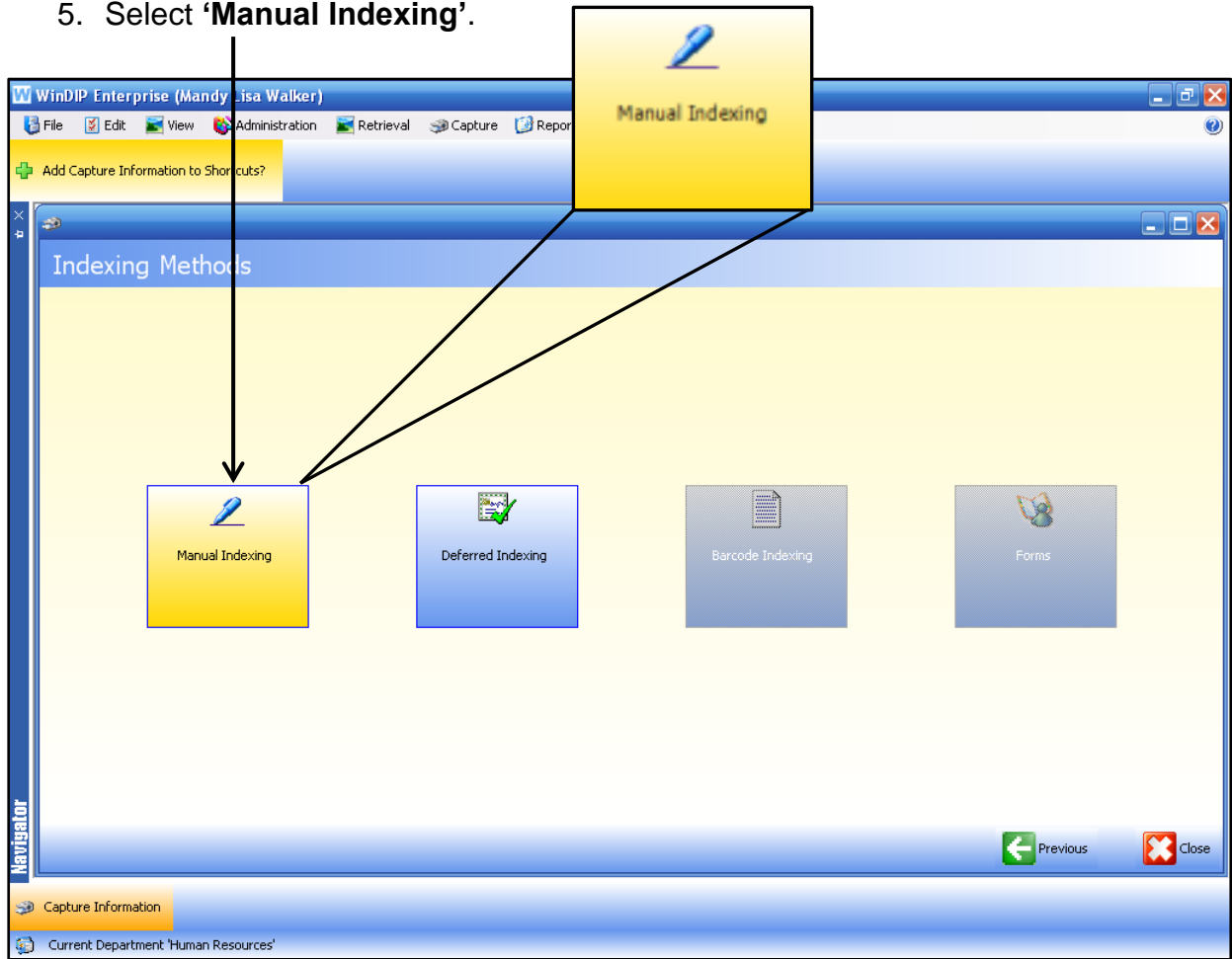
3. Select **Capture** from the menu bar at the top of the screen, and then click on **Capture Information**.
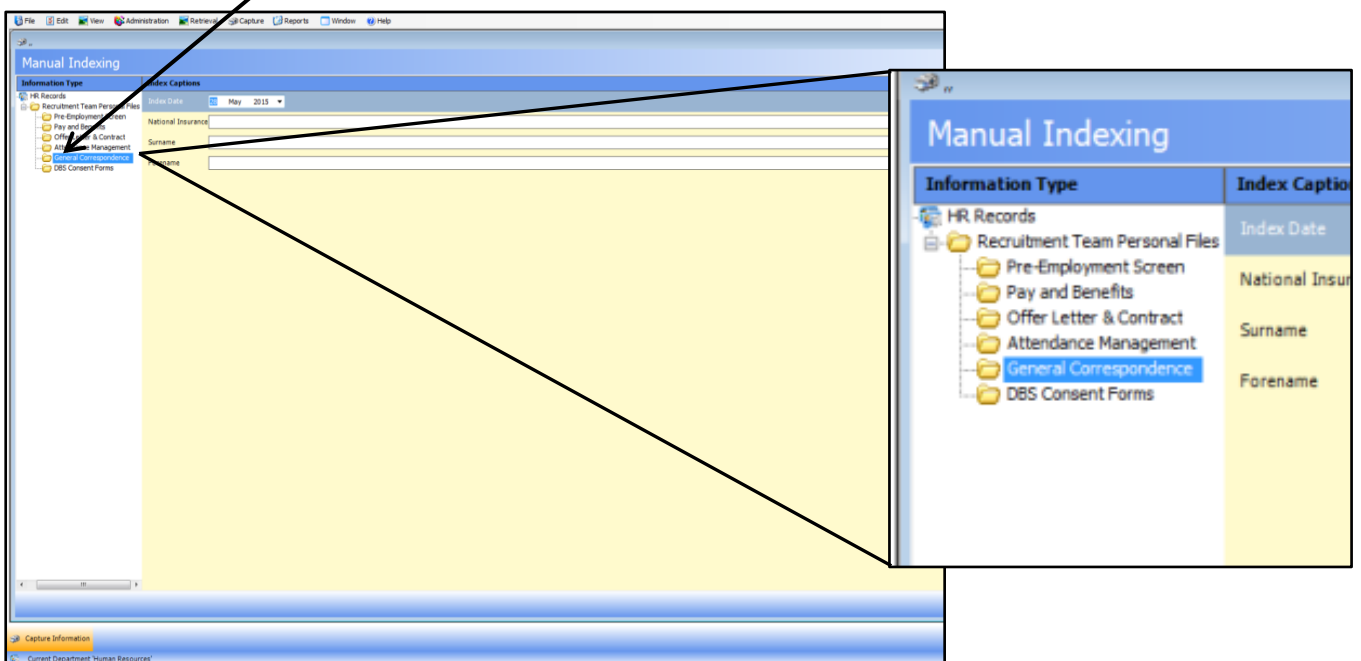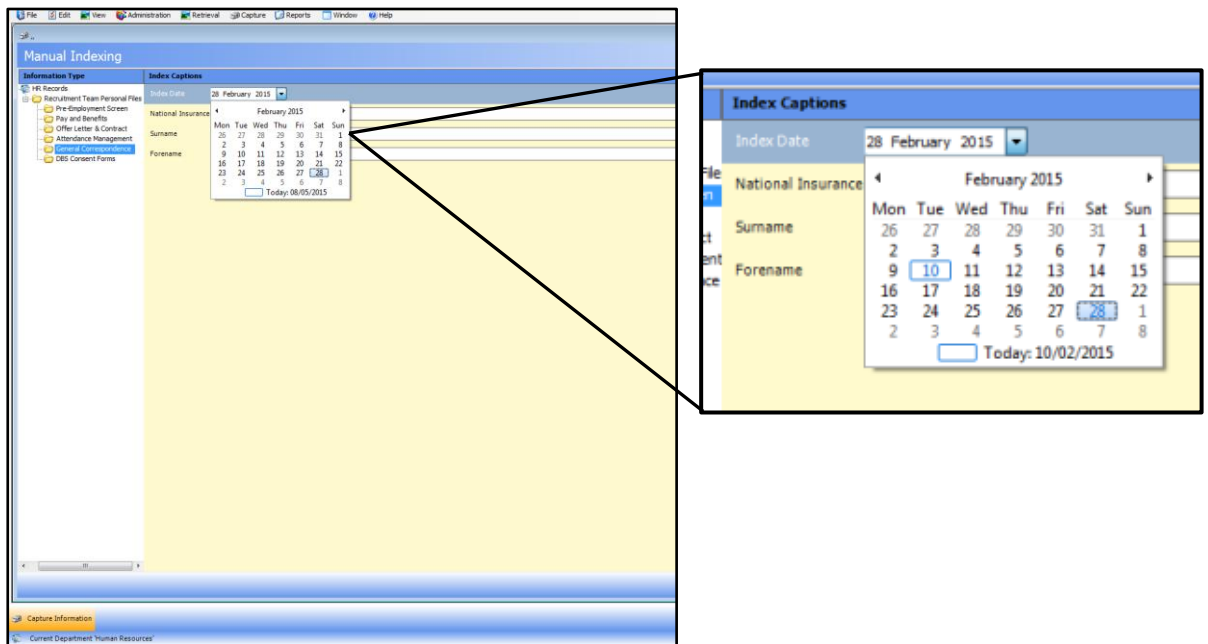

4. Select **'Browse for Existing Files'**.

5. Select **'Manual Indexing'**.

6. Under Information Type select the folder you wish to scan to.

7. ***IMPORTANT*** Change the **Index Date** as follows:
   For NEW Personal files, change the date to the 28th of the current month
   For existing personal files, change the date to 01/01/1901

8. Enter the correct NI Number, Surname and Forename of the employee.

   NB. If the employee does not yet have an NI Number, enter a temporary reference in this field as follows:
   Forename & Surname Initials/ 6 number date of birth/ M (for medical staffing).
   E.g. SC311279M (Stacey Clarkin, 31st December 1979, M)
   NEVER INPUT THIS ONTO ESR

   Log this temporary NI Number in the NI Number spread sheet located in
   G:\MEDICAL STAFFING\WinDip\Temporary NI Numbers.xlxs

9. Click **'Next'.**

10. Click **'Add Files'**.

11. Select the files you wish to add, this can be more than one. If the files are in different areas they will need to be selected separately.
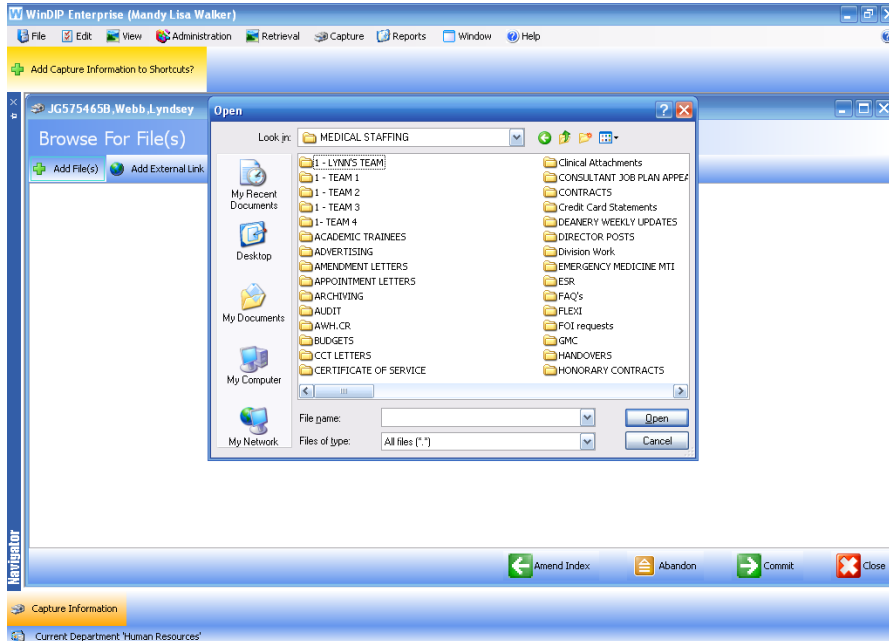
12. Once you have selected all files you require click **'Commit'**.

   Please note: You will no longer be able to amend or delete documents once you have done this.
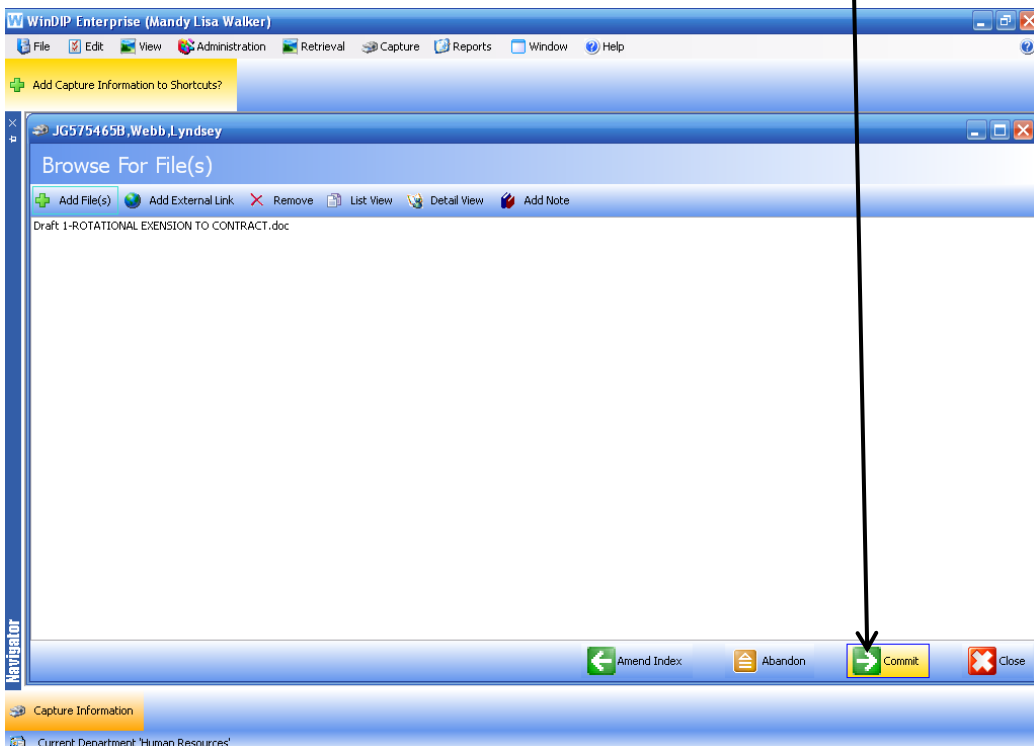
13. WinDip will return to the screen below where you can repeat the process or scan in documents (see procedure notes for Scanning Files to WinDIP).