The Leeds Teaching Hospitals **NHS**

NHS Trust

WinDIP Version 2.2.81
STANDARD OPERATING PROCEDURE
Title: **Scanning into WinDIP - HR**
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SCOPE

This procedure covers the instructions on *Scanning into WinDIP - HR*

TRAINING REQUIREMENTS

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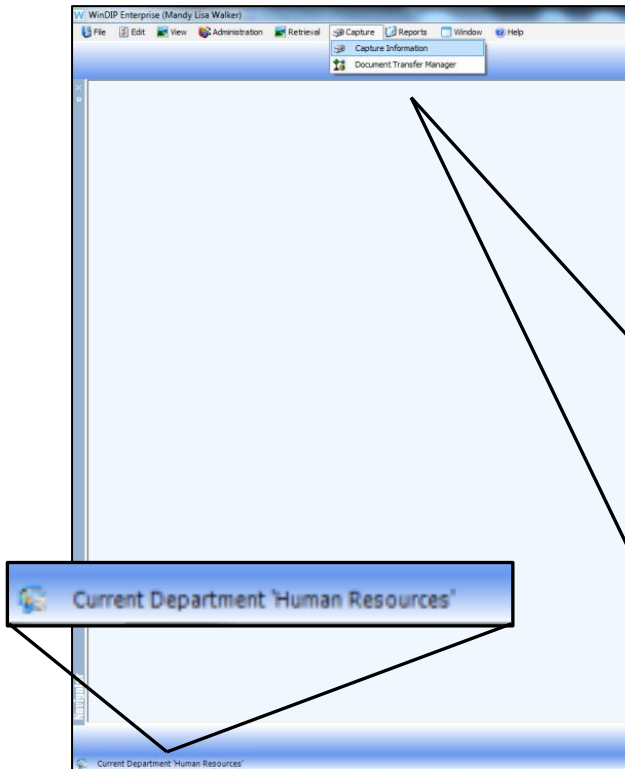
WARNINGS AND SPECIAL PRECAUTIONS

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

EQUIPMENT REQUIRED

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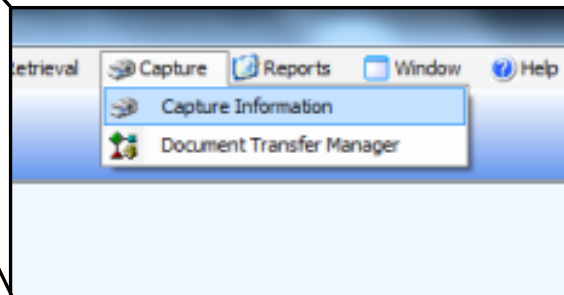A scanner, with a Kofax licence, for WinDIP.

Scanning Documents to WinDIP

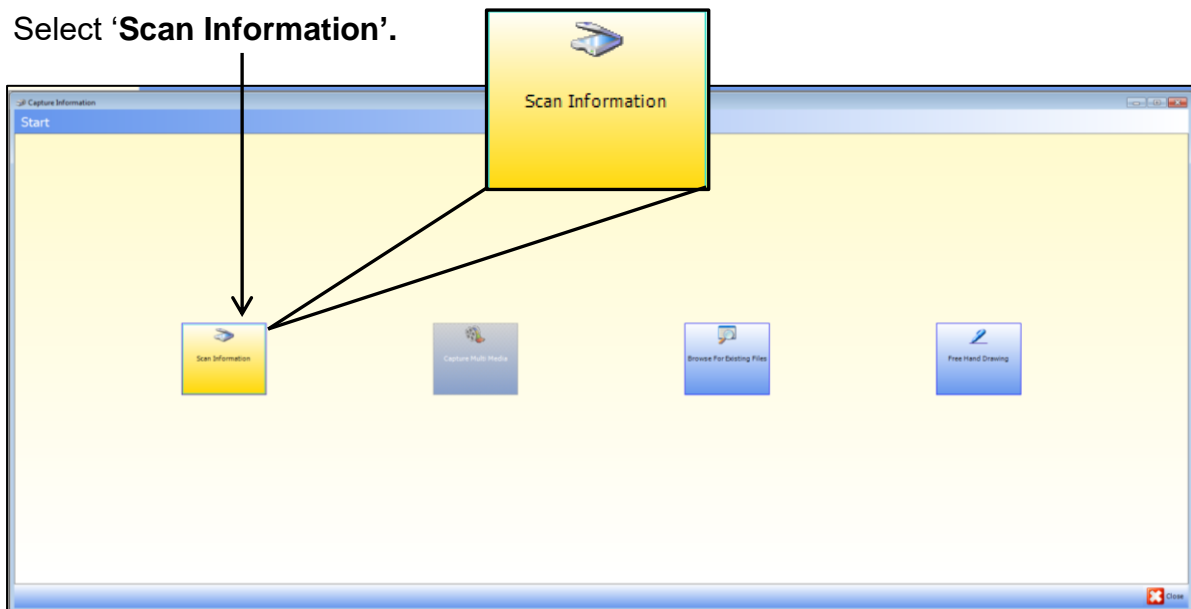1. Log into **WinDIP Enterprise**, (not WinDIP e-viewer)

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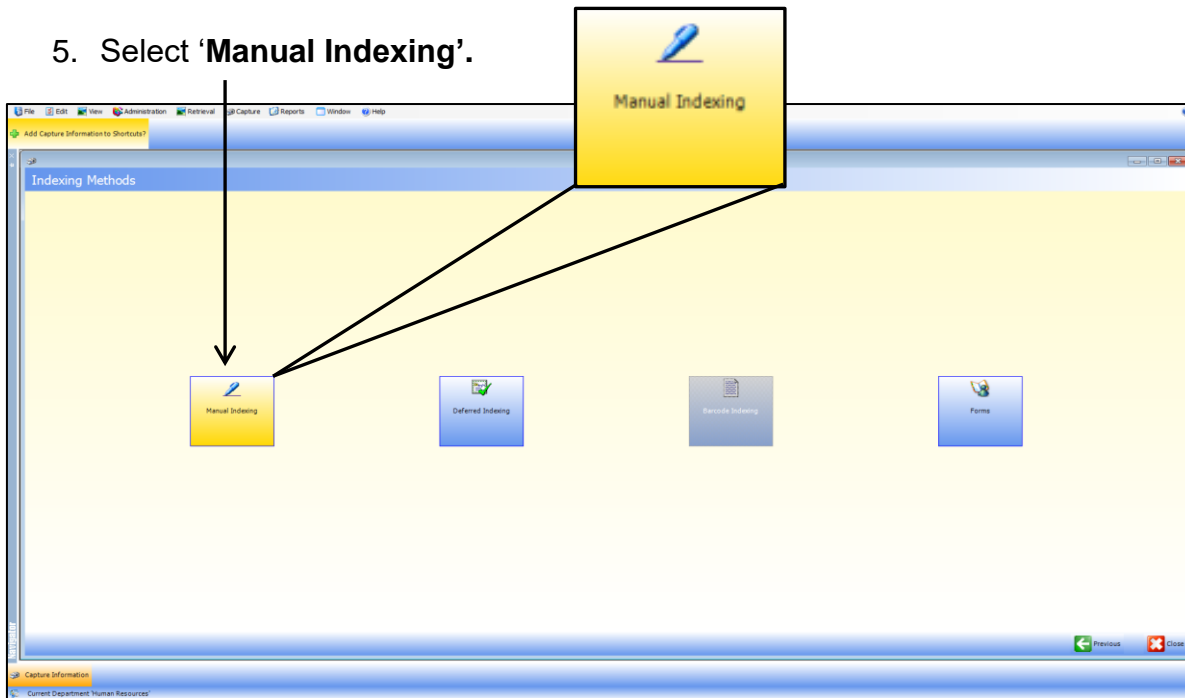
3. Select **Capture** from the menu bar at the top of the screen and then click on **Capture Information**.
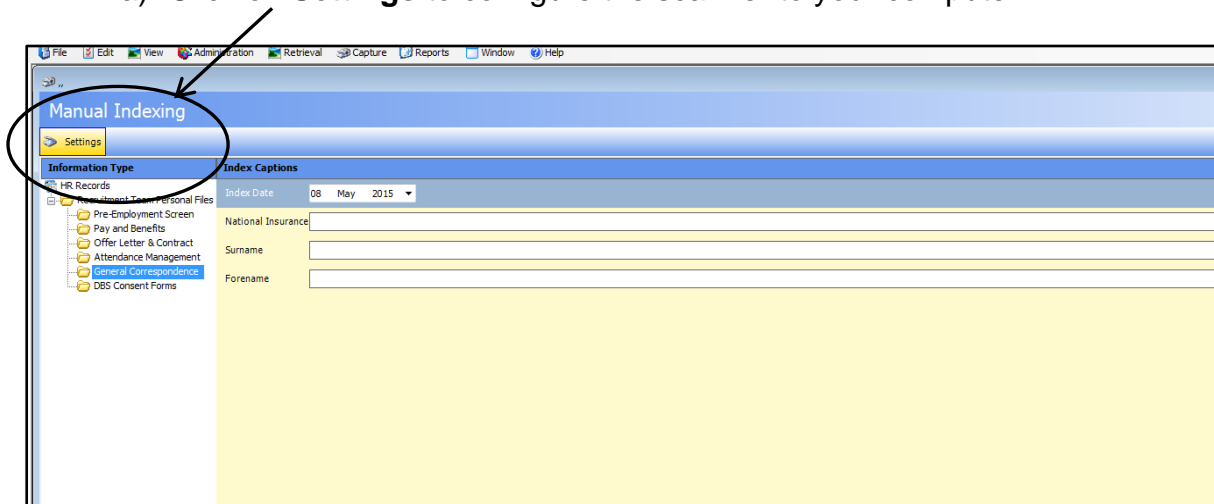

4. Select '**Scan Information'.**
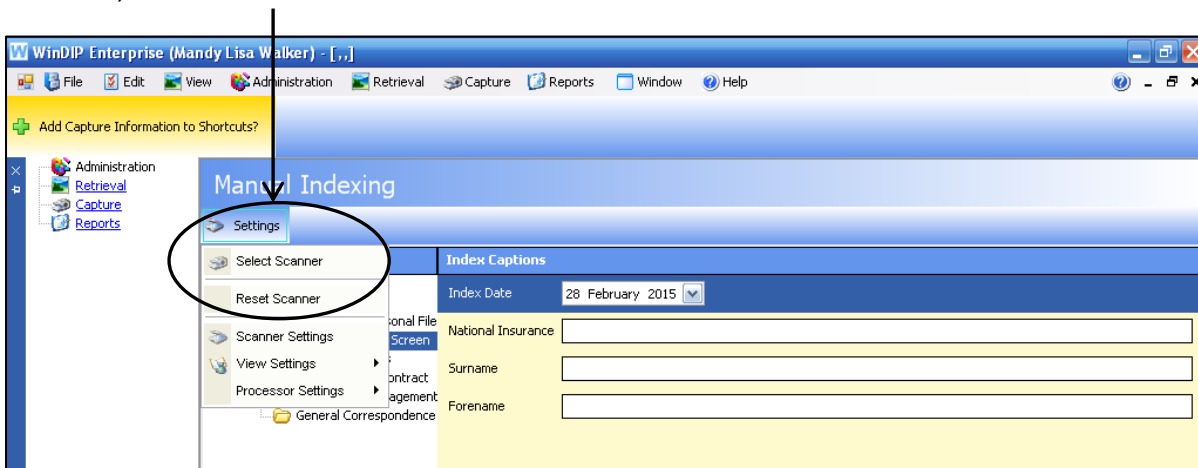
5. Select '**Manual Indexing'.**
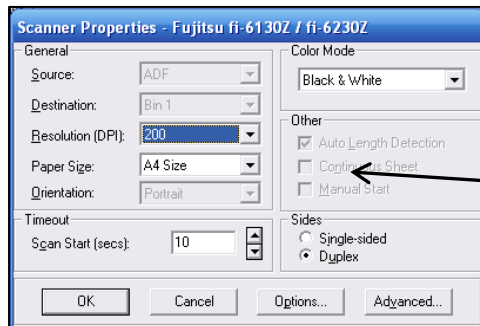

6. ** FIRST TIME ONLY **
   a) Click on **Settings** to configure the scanner to your computer.
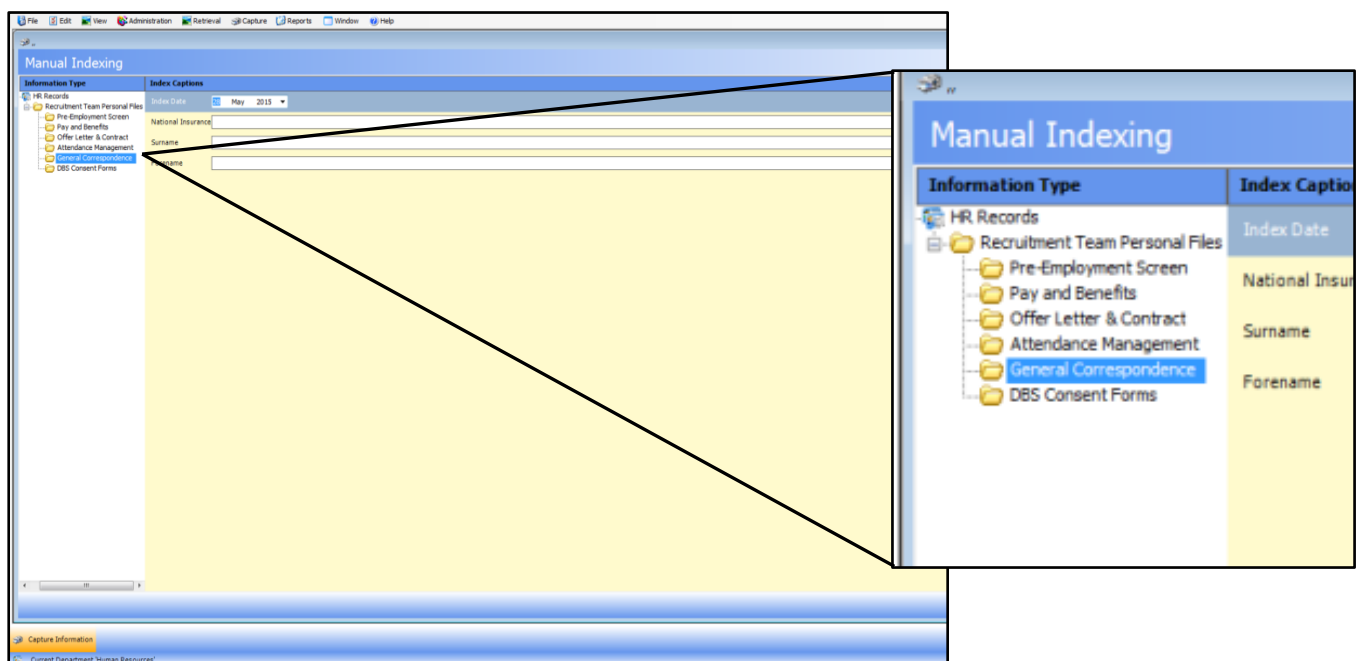

b) Click on **Select Scanner.**

c) Select the correct following scanner and then click '**OK**':

d) In Settings again, select Scanner Settings and configure as follows, then click **OK**:
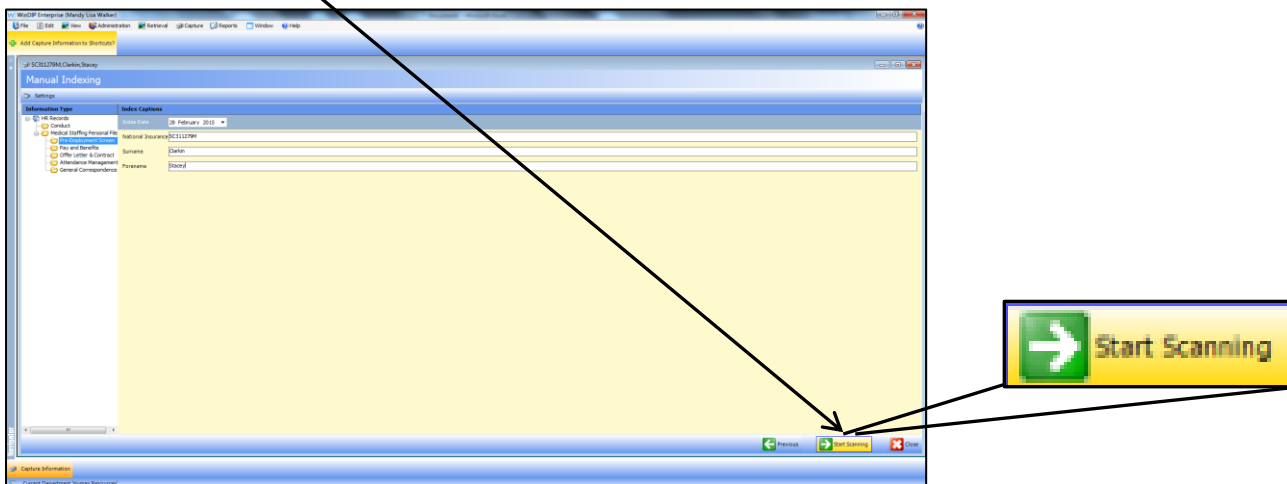
Resolution: 200
Page Size: A4
Color Mode: Black & White
Sides: Duplex

7. Under Information Types, select the relevant folder you wish to scan to:
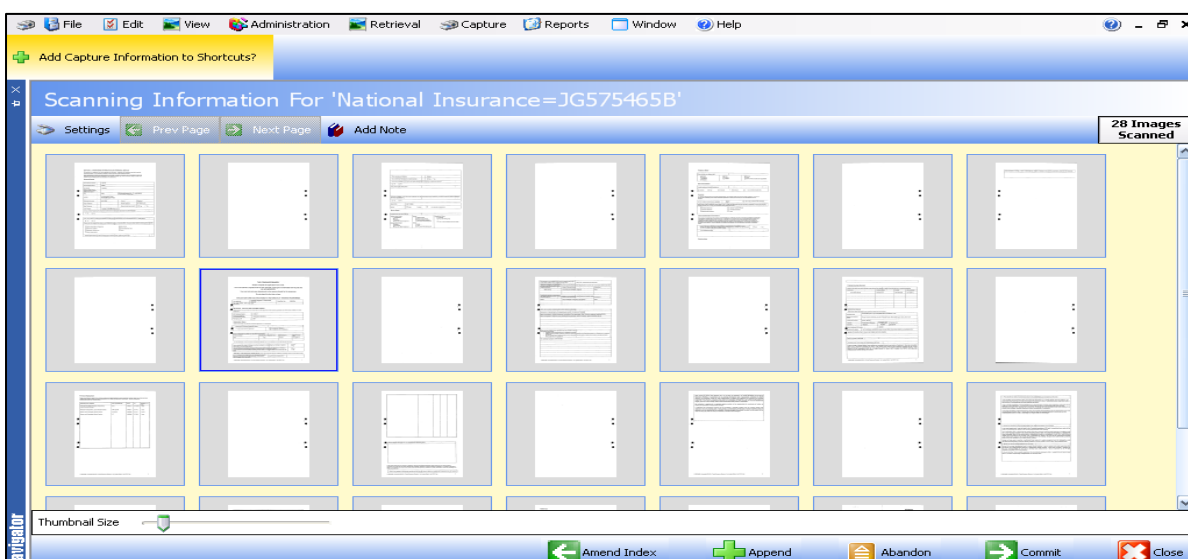
8. Enter the NHS number of the patient in the search bar and press enter.

9. Put documents in scanner (make sure it is switched on!), face down and head first.

Click **'Start Scanning'**.
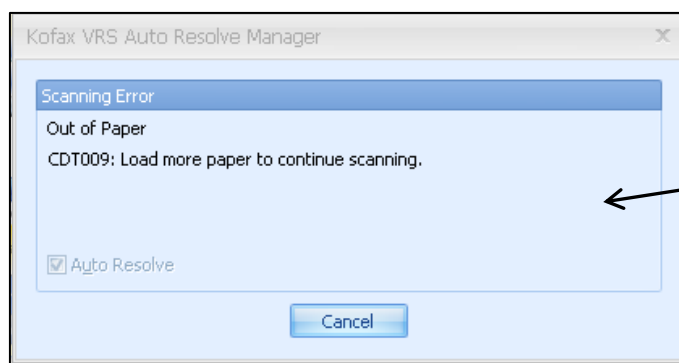
Once scanning is complete you will see this message. Just add more paper to scan, or when finished, click **cancel**.

10. You will see all the scanned documents on screen, as below.

You must check that all the pages have been scanned and are of a legible quality.

Double click on a page to see it in full screen and then double click to return to the main screen below.
PLEASE NOTE: We are required to retain all blank pages. Please do not delete them!

11. If you need to remove, rescan or rotate a page, you can do this by right clicking on the page and selecting from the drop down menu, as below.
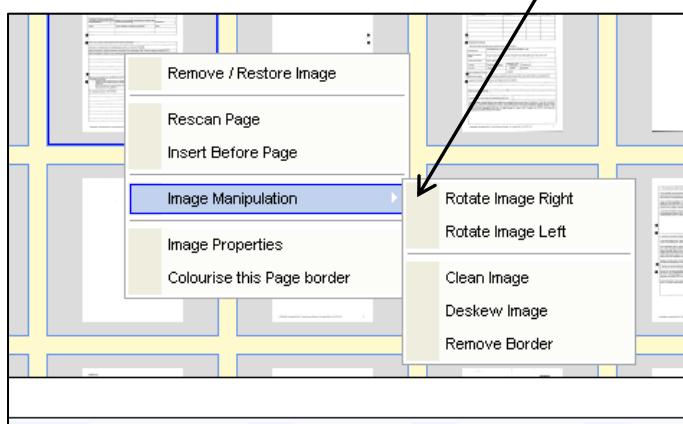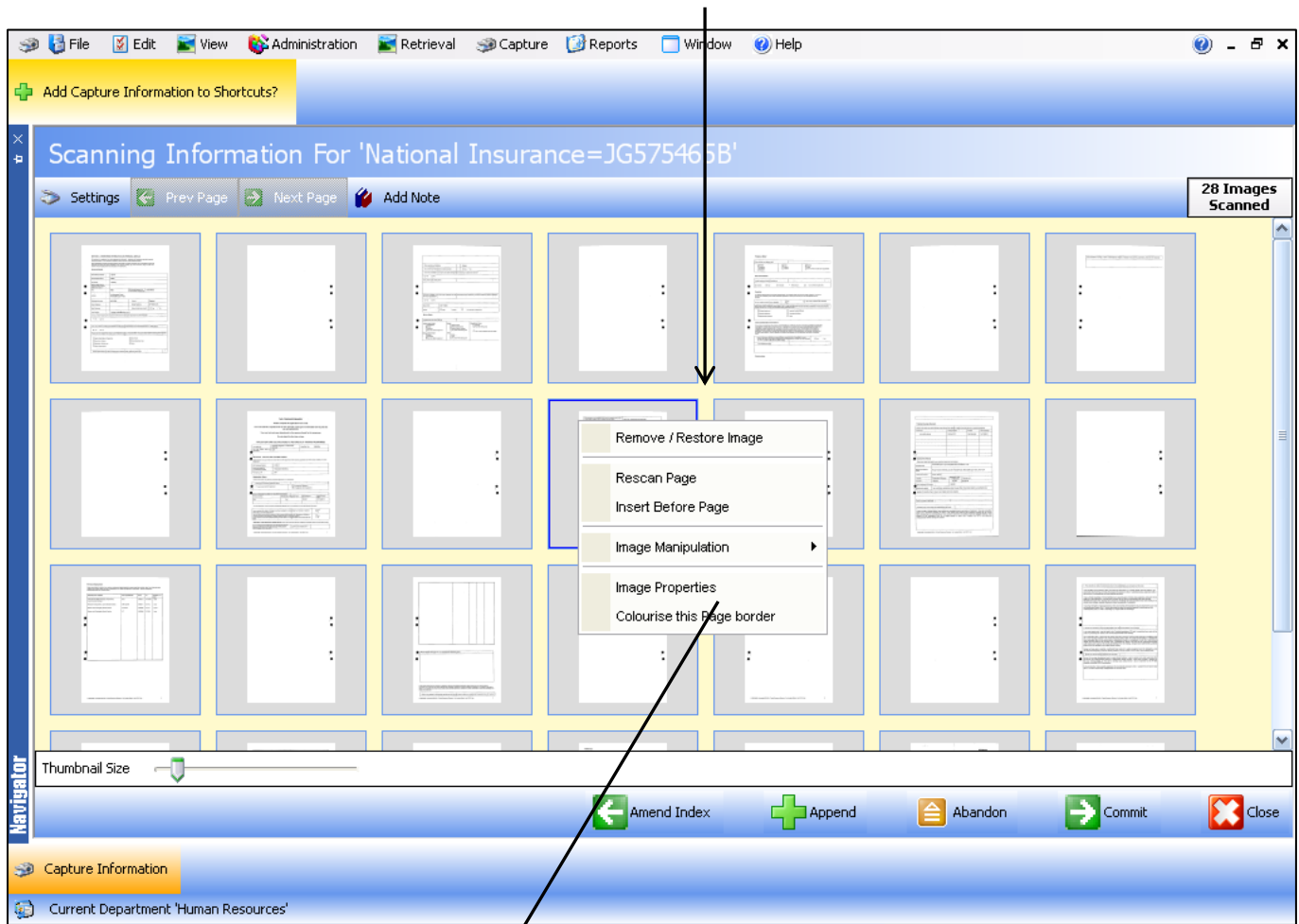
12. If you need to add more scanned documents into the folder, put them into the scanner and click '**Append**', as below. This will automatically scan the documents in to the bottom of the folder.
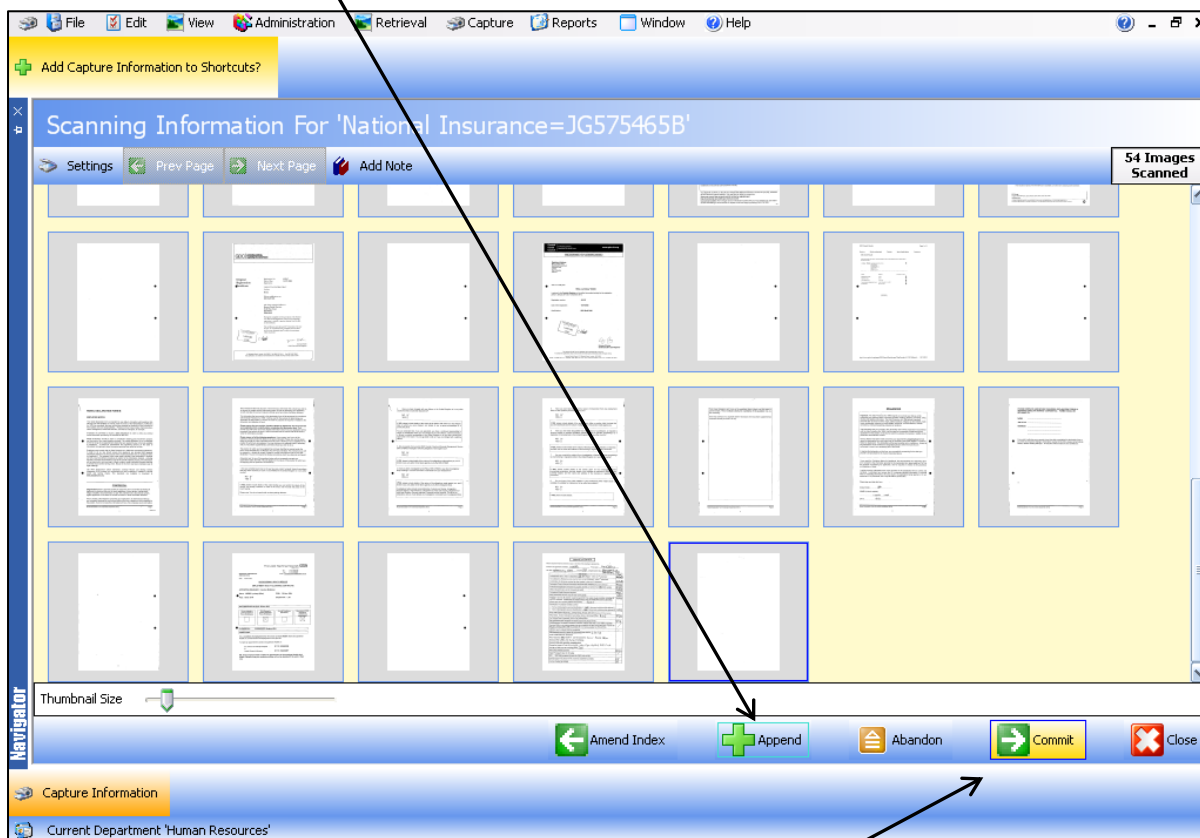
13. Once you are happy that you have scanned all documents required for the folder and that they are legible, you can click on '**Commit**'.
You can also chose to click '**Abandon**' if you do not want to save any of the scanned document.

PLEASE NOTE: Once you have clicked on **Commit** you will no longer be able to amend or delete documents once you have done this.

Once you have clicked 'Commit' you will see the following screen:
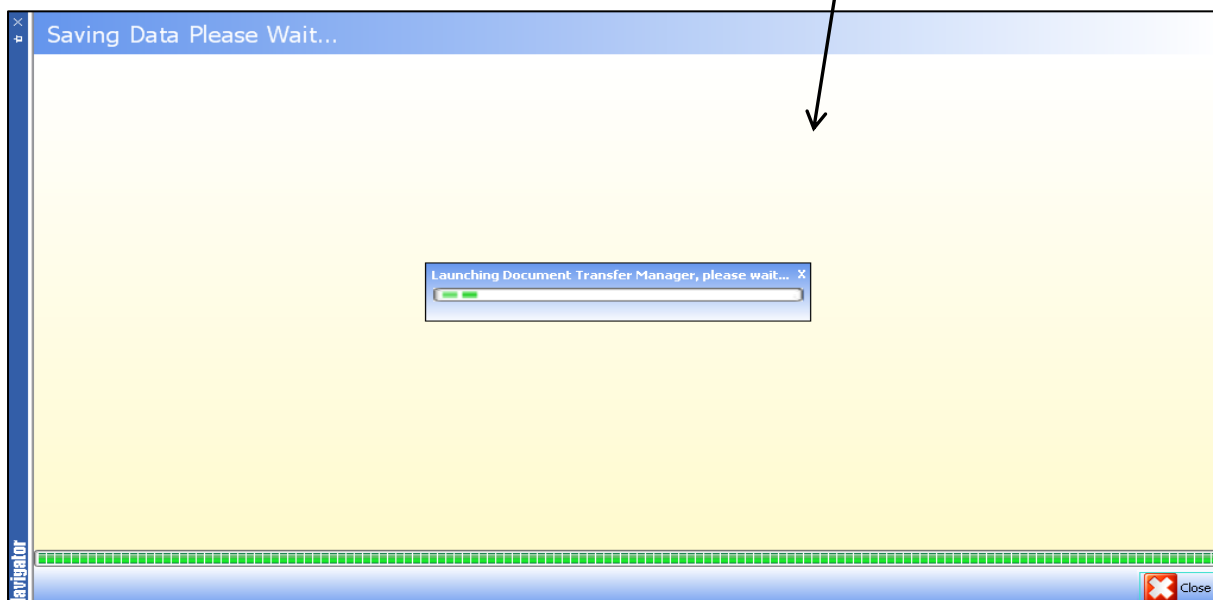
14. WinDIP will return to the screen below, where you can repeat the process to scan in additional documents, or upload existing electronic files (see procedure notes for Adding Electronic Documents to WinDIP).