

Status: Live

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| | WinDIP Version 2.2.81 |
|----------------------------------------------|-----------------------------------|
| STANDAR | D OPERATING PROCEDURE |
| Title: | Scanning into WinDIP - HR |
| Author(s): Approver: Document version: | Jason Clark Jason Clark 1.0 |

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

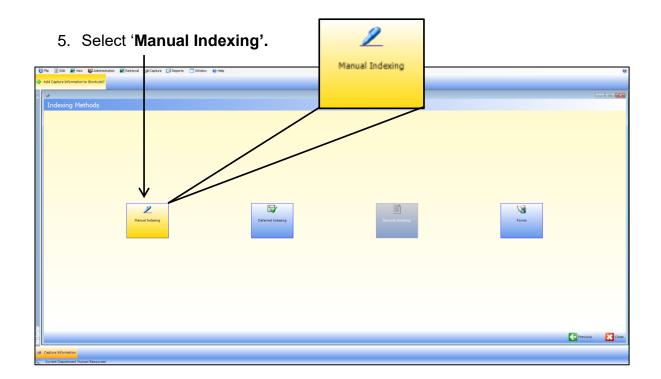
Ensure scanned data is in the correct order and scanned into the correct locations.

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

- V WinDIP Enterprise (Mandy Lisa Wal Capt 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. etrieval. Capture Approximation Control Contr Window 🕐 Help Capture Information 11 Document Transfer Manager 🚱 Current Department 'Human Resources 4. Select 'Scan Information'. \gg Scan Information
- 1. Log into WinDIP Enterprise, (not WinDIP e-viewer)

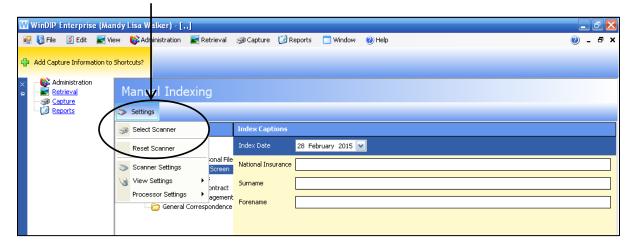


6. ** FIRST TIME ONLY **

a) Click on **Settings** to configure the scanner to your computer.

| | | / | |
|---|------------------------------|--------------------|--------------------------------------------|
| | 👹 File 📓 Edit 📰 View 🚯 Admin | tration 🐹 Retr | rieval 🥪 Capture 🕼 Reports 🔲 Window 🌒 Help |
| | 3. V | | |
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| ł | Manual Indexing | | |
| | | <u>۱</u> | |
| (| Settings | | |
| N | Information Type | Index Captions | |
| ſ | HR Records | | 08 May 2015 - |
| | Pre-Employment Screen | National Insurance | |
| | Pay and Benefits | National Insurance | |
| | | Surname | |
| | General Correspondence | | |
| | DBS Consent Forms | Forename | |
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b) Click on Select Scanner.



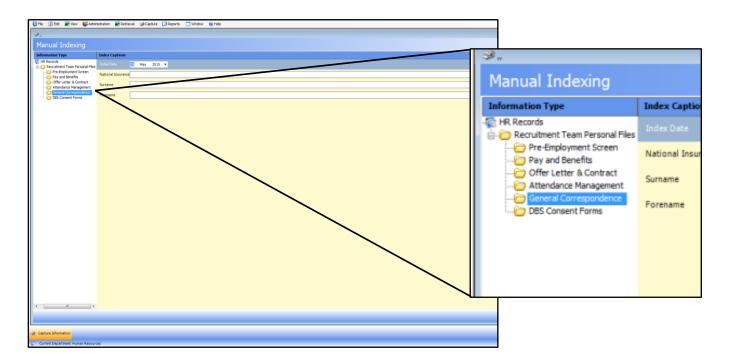
c) Select the correct following scanner and then click 'OK':

| Scanner Propert | ties - Fujitsu fi-6' | 130Z / fi-6230Z | c |
|-----------------------------|----------------------|----------------------------|---|
| - General | | Color Mode | |
| <u>S</u> ource: | ADF 💌 | Black & White 💌 | |
| Destination: | Bin 1 💌 | | |
| <u>R</u> esolution (DPI): | 200 💌 | Auto Length Detection | |
| Paper Size: | A4 Size 💌 | Continuous Sheet | |
| Orientation: | Portrait 💌 | Manual Start | |
| - Timeout | | Sides | |
| S <u>c</u> an Start (secs): | 10 | C Single-sided ○ Duplex | |
| ОК | Cancel | Options Advanced | |
| | | | |

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'. | Line of a second Second |
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| ACCEDITION/Anice Amery Access Acces Access Ac | |
| | Start Scanning |
| Kofax VRS Auto Resolve Manager × Scanning Error Out of Paper CDT009: Load more paper to continue scanning. ✓ | Once scanning is complete you will see this message. Just add more paper to scan, or when finished, click cancel . |
| Auto Resolve | |

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

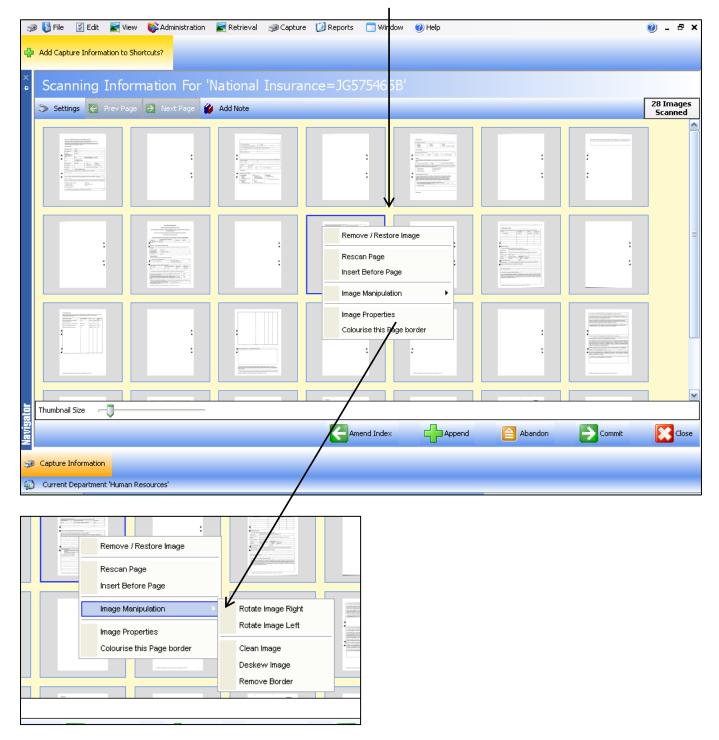
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| Thumbnail Size | | | _ | | | | |
| Thumbnail Size — 🗍 — | | | Amend Index | | Abandon | Commit | Close |

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.

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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:

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| lavigator | | | Close |

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).

| 38 Capture Information | | | |
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