

INDEX BATCH

This application is used to index (provide document properties) and transfer batches of scanned documents to *OurLibrary*.

What is a batch?

According to Webster

Batch (bach) n. - the quantity of anything needed for or made in one operation or lot

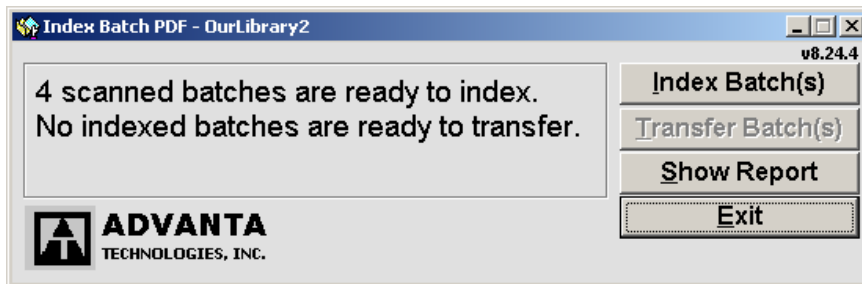
A batch can be one page or many pages – it can be one client file or numerous client files

1. Once the batch has been scanned index properties (document information) must be assigned to each page to enable future retrieval from the library
2. Several batches can be scanned prior to indexing



Note: Batches will be indexed in the order that they were scanned

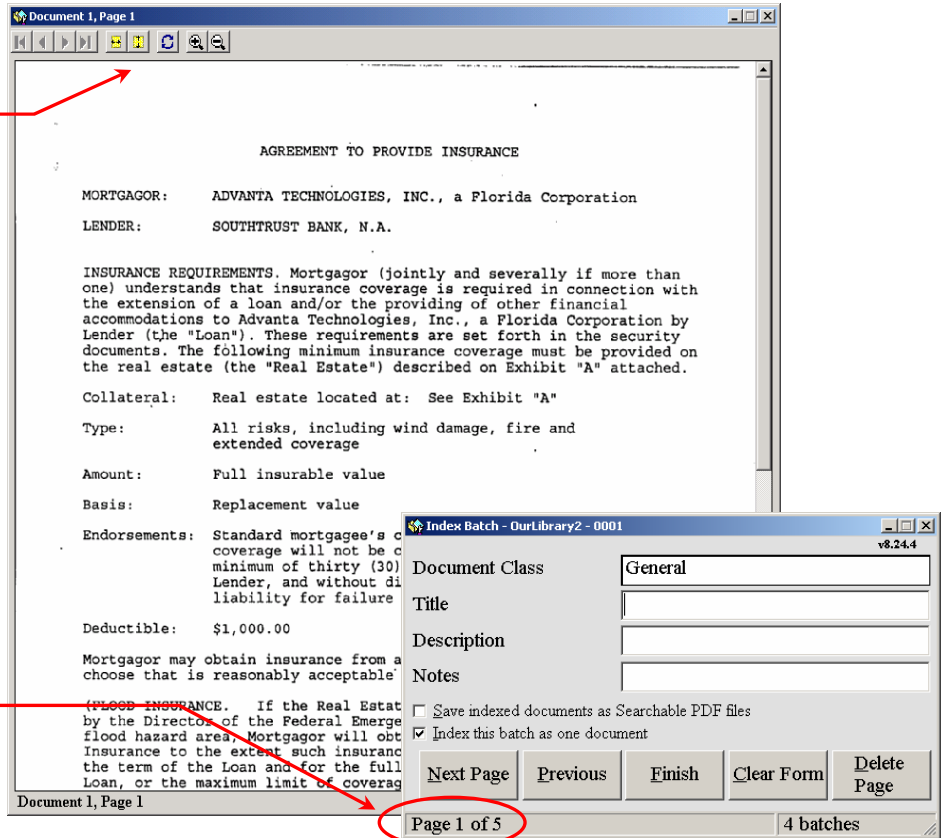
3. Double-click on the **Index Batch** icon on the desktop.
4. The following screen will appear:



5. In this example – there are 4 batches scanned and ready to index.
6. Click on the IndexBatch(s) button.

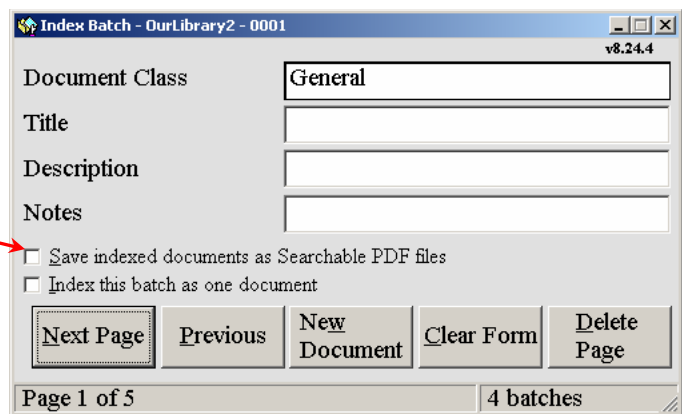
7. The first image of the batch and the **Index Batch** application window will appear:

Use the image manipulation tools to adjust image width, length or orientation



Current page (image) in the viewer and the total number of pages in the batch

8. If you are using the OCR capabilities, enable that feature
9. If you are Indexing this batch as one document, enable that feature, as well.



Note that when this feature is enabled the New Document button changes to Finish

10. Begin typing the first index value i.e. **Client Name** – a drop down list may appear – the unique Client Name can be selected from the list, or if it is the first name in the list click Enter.
11. If there has been a previously indexed document for this client, the **Client ID** will automatically be entered into the form. If this is the first scanned entry for this client it will have to be manually entered – but would be available every time thereafter.
12. Enter
 - ✓ Folder
 - ✓ Description, and
 - ✓ Document Date
9. If all pages in this batch are one document, put a check mark in the box – other wise continue as follows



Note: *This option is only available when the first page of the batch is in the viewer. If the operator clicks the Next Page button and then realizes that this is a multi-page document for one client, click the Previous button and put a check mark in the “Index this batch as one document” box*

10. Click **Next Page** button

Is this the second page of the same document?

11. Click **Next Page** button
12. If appropriate continue clicking next page until you reach the end of this document

Is this a new document?

13. Click the **New Document** button – the bottom of the application window will indicate that. (Please see example below)

Is this document for the same client?

14. Highlight any of the index fields (i.e. Description, Document Date, etc.) and retype

Is this document for a different client?

15. Click the **Clear Form** button

Client Name	Advanta Technologies
Client ID	123456
Folder	1757 South Patrick Drive
Description	
Document Date	3/21/98

Index this batch as one document

Next Page Previous New Document Clear Form Delete Page

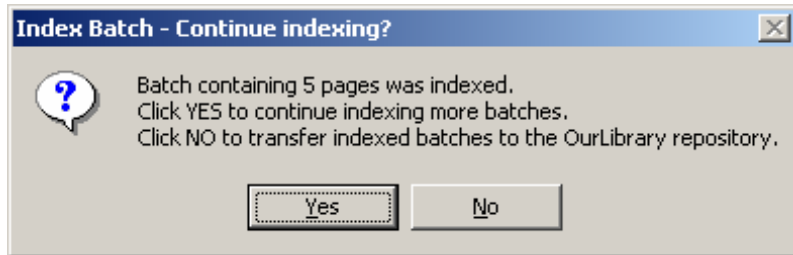
Page 12 of 43, Start of New Document

This example shows that the operator is viewing page 12 in a batch of 43 pages and this is the start of a new document. The only information that is new to this document is the Description. That field has been highlighted and removed - awaiting new Description information.

16. After completing the indexing of all of the documents in the batch, the operator will be prompted to confirm that you are either indexing Image Only files **OR** if appropriate Searchable Files (as shown in the box to the right)
17. If you are continuing to index files that are of the same criteria (i.e. image only) – put a check mark in the box “Do not show this message again – and you will not be prompted again until you exit the IndexBatch program and begin the process again.



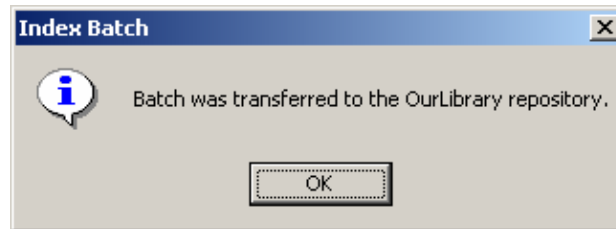
18. The following screen will appear:



Yes – continue indexing

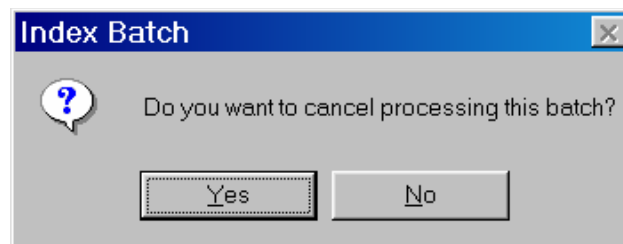
No – stop indexing and transfer batches to *OurLibrary*

19. After transferring is complete the following screen will appear:



Note: Scanned and indexed documents cannot be retrieved until after they have been transferred.

20. Should the operator not want to index a batch (at the beginning or a any time during the process), clicking on the **X** (close) on the index screen will present the following message box:



21. Clicking **Yes** will void any indexing the operator may have performed (on that batch). When the **Index Batch** icon is clicked again, that batch will be presented for indexing.