

INDIANA OFFICE OF
TECHNOLOGY



WebCenter Enterprise Capture

Scanning Guide

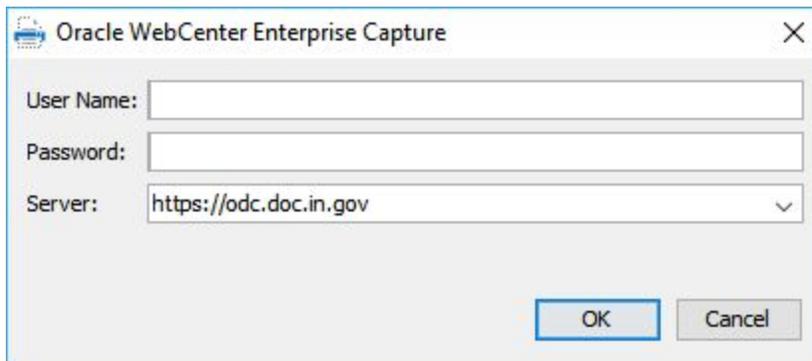
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1. Starting Capture

There are 2 ways to do this.

1. Click the desktop shortcut link. This will require you to select the environment from the dropdown and enter credentials. Username will be the same format as in IRIS [username]@doc.state.in.us and you state account password.



2. You can navigate to the client website. [https://\[hostname\].doc.in.gov/dc-client/](https://[hostname].doc.in.gov/dc-client/). You can then click the "Launch Client" link. This will use SSO to enter the login credentials for you based on the browser session and enter the environment based on the link used and open the desktop client for you.



Links by Environment

DEV	https://odcdev.doc.in.gov/dc-client/
QA	https://odcqa.doc.in.gov/dc-client/
PROD	https://odc.doc.in.gov/dc-client/

1.1. Selecting a Profile

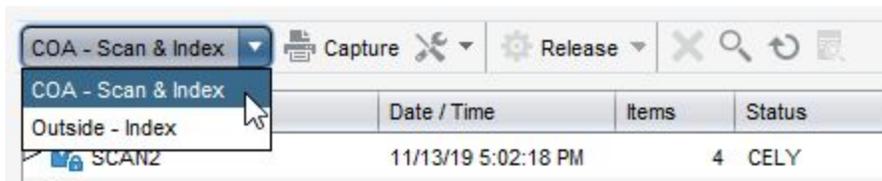
This section is only for Central Office users.

Once the Capture Client is up and running you can select a profile from the profile selection dropdown. There are two options to select from for COA users.

Profile Name	Purpose
COA - Scan & Index	Used to Scan batches at COA and Index those batches.
Outside - Index	Used to review batches coming in from Outside facilities.

You can think of COA - Scan & Index as IDOC Barcode B&W from the old environment.
You can think of Outside - Index as the 0-IDOCI - 9-IDOCI profiles from the old environment.

The profile selection is in the top right corner of the application. Click this and select the appropriate profile. If you are scanning you will always select the COA - Scan & Index option.



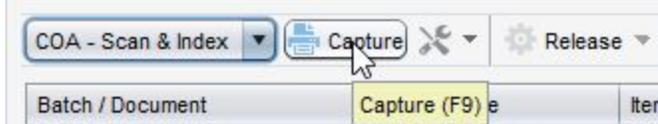
You will have to switch between both profiles to make sure that both are being indexed.

2. Capture Scanning

Before scanning make sure to insert Section barcode separator sheets between each section of the batch that you are scanning. The separator sheets can be accessed here:

https://ecm.doc.in.gov/cs/idcplg?IdcService=FLD_BROWSE&path=%2fHelpDocs&doMarkSubscribed=1

Place the batch on the scanning tray and click the Capture button to start scanning.



After the batch is done processing you will see it in the batch pane listing.

Batch / Document	Date / Time	Items	Status	Priority	Note
 SCAN2	11/13/19 5:02:18 PM	4	CELY	1	

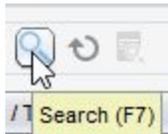
You can tell if the document is done processing by the Unlocked & Ready icon  beside the batch in the batch pane. A description of the icons are in the table below. You can periodically refresh  the batch list to see any changes to the list.

Icon	Meaning
	Locked to You
	Locked to Another User
	Unlocked & Ready
	Processing
	Error

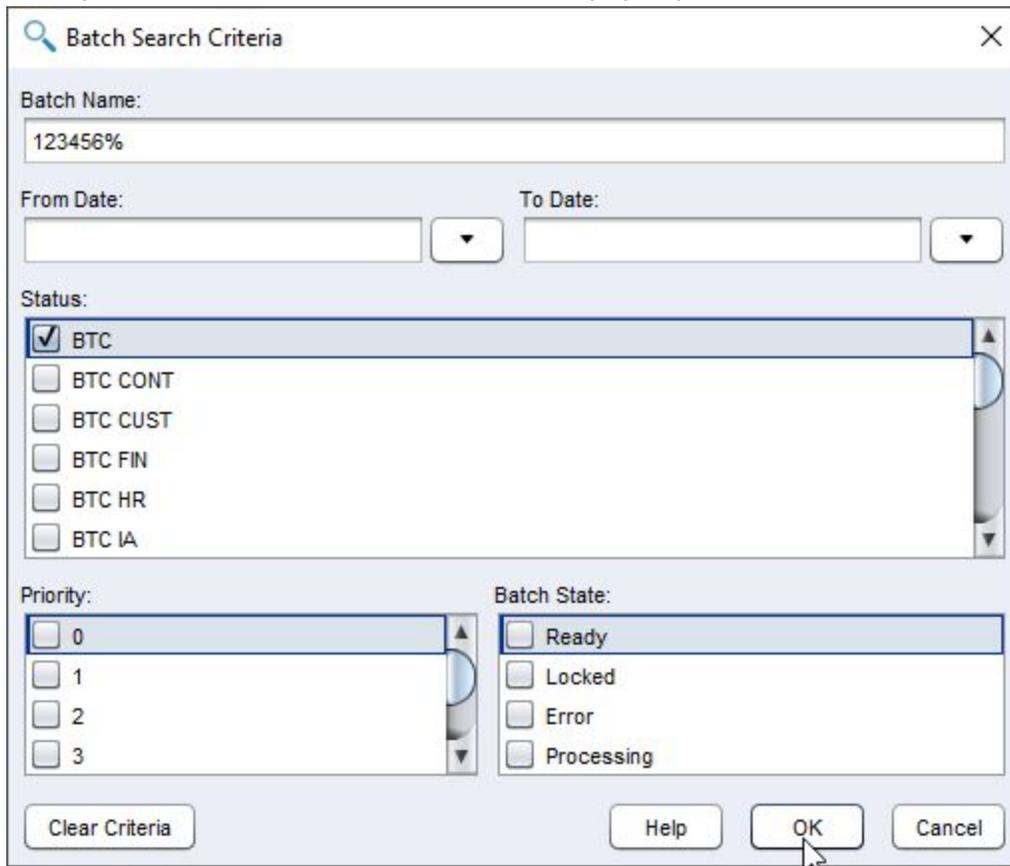
3. Capture Review & Index

3.1. Search for a Batch

You can either select the top batch in the result list or do a target search for a batch. To search for a batch click the search button on the batch pane.



Enter your search criteria in the window that pops up.

A screenshot of a dialog box titled 'Batch Search Criteria'. The dialog has a search icon in the top left and a close button (X) in the top right. It contains several input fields and lists:

- Batch Name:** A text box containing '123456%'.
- From Date:** An empty text box followed by a dropdown arrow.
- To Date:** An empty text box followed by a dropdown arrow.
- Status:** A list box with a scroll bar. The first item, 'BTC', is checked. Other items are 'BTC CONT', 'BTC CUST', 'BTC FIN', 'BTC HR', and 'BTC IA', all with unchecked checkboxes.
- Priority:** A list box with a scroll bar. The first item, '0', is checked. Other items are '1', '2', and '3', all with unchecked checkboxes.
- Batch State:** A list box with a scroll bar. The first item, 'Ready', is checked. Other items are 'Locked', 'Error', and 'Processing', all with unchecked checkboxes.

At the bottom of the dialog are four buttons: 'Clear Criteria', 'Help', 'OK', and 'Cancel'. A mouse cursor is pointing at the 'OK' button.

You can search on DOC Number (Batch Name Field), Scan Source (Status Field), Scan Date Range, Priority or any combination of the 4 fields.

DOC Number Searches

You can now search on batches by DOC number. To search on DOC Number use the Batch Name field. You have to search on the exact name of the batch you are looking for, so to make it work you will have to use the “%” wildcard character to search for the DOC Number within the batch name.

Here are 4 examples searches that would return document for DOC Number “123456”:

Exact DOC Number Search	123456%
Starts With Search	123%
Ends With Search	%456%
Contains Search	%234%

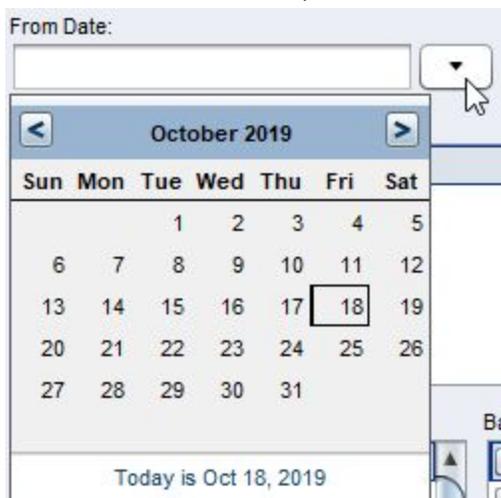
Scan Source Searches

You can select a specific source if you only want to see results that have come from that source. You can also check multiple sources if needed.



Date Range Searches

Clicking on the arrow beside the fields will provide a date picker. You can set a “To” date, a “From” date, both or neither.



Batch Priority Searches

The priority defines what type of document was scanned or imported into the profile. Those priorities are defined in the table below.

Priority	Meaning
1	Juvenile - Undefined Section Juvenile - (VII) Confidential - Parole Board Action Juvenile - (VII) Confidential - Vitals Juvenile - (VIII) Education Adult - Undefined Section Adult - (V) Internal - Visitation Adult - (VI) Parole - Classification Adult - (VII) Confidential - Parole Board Action Adult - (VII) Confidential - Vitals
2	Juvenile - (I) Legal Adult - (II) Legal/Offenses
3	Juvenile - (II) Discipline Adult - (IV) Conduct
4	Juvenile - (III) Progress Adult - (V) Internal
5	Juvenile - (IV) Receipts & Correspondence Adult - (III) External
6	Juvenile - (V) Community Supervision Adult - (VI) Parole
7	Juvenile - (VII) Confidential Adult - (VII) Confidential
8	Juvenile - (IX) Security Threat Groups (STG) Adult - (VIII) Security Threat Groups (STG)
9	Juvenile - (X) SVOR Adult - (IX) SVOR
10	Undefined Offender Type Juvenile - (VI) Miscellaneous Adult - (I) Access

Click OK when you have selected the search criteria you need and the Batch List will update and only show the batches that meet that criteria.

Note:

Batches currently locked to you will always display in the batch list at the top regardless of whether they meet the criteria or not. This is to prevent you from starting to index a batch and then forgetting about it.

Note:

The batch list will continue to only show the batches that meet this criteria for the remainder of your session and you either clear the criteria, update the criteria or close the application.

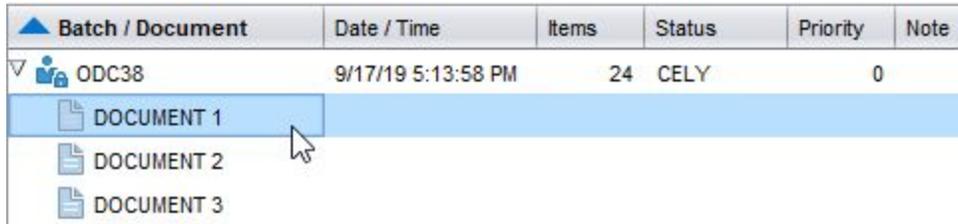
3.2. Open a Batch

Either click the arrow next to the batch name you want to open or double click in the row for that batch to open it.



Batch / Document	Date / Time
▶ ODC38	9/17/19 5:13:58 PM

Once it is opened you will see a list of documents under the batch in the batch list.



Batch / Document	Date / Time	Items	Status	Priority	Note
▼ ODC38	9/17/19 5:13:58 PM	24	CELY	0	
DOCUMENT 1					
DOCUMENT 2					
DOCUMENT 3					

Each document would represent a section of the batch you will be indexing. This is where the application separated the scan into separate sections/documents at the barcode separator pages.

In this version of Capture a new section is not automatically created by changing the Section value on a page in the batch. If you change an index value it will apply that value to all pages for the document you have selected. However, if barcodes are properly used, the documents should already be separated and indexed by section. If there was an error during scanning where a separator was missed and a document needs split into two sections, the application will allow you to do that, as well as combine documents or append pages to a documents. This will be discussed in a later section.

3.3. Review/Index (DOC Number)

Click on the first document underneath the active batch to select it and view that documents metadata.

Batch / Document	Date / Time	Items	Status	Priority	Note
▼ ODC38	9/17/19 5:13:58 PM	24	CELY	0	
DOCUMENT 1					
DOCUMENT 2					

Enter the DOC Number in the “DOC Offender Number field” in the metadata list that shows below the document.

* DOC Offender Number

This is a double verification field. You will receive a popup like below as soon as you hit any key while you are in this field. You will have to input the DOC Number in the DOC Number and confirmation fields and click “OK”.

Double Verification Confirmation

Enter DOC Number:
123456

Confirm DOC Number:
123456

OK Cancel

You can use the “Tab” key to switch between the two fields and you can use the “Spacebar” to click OK without using the mouse.

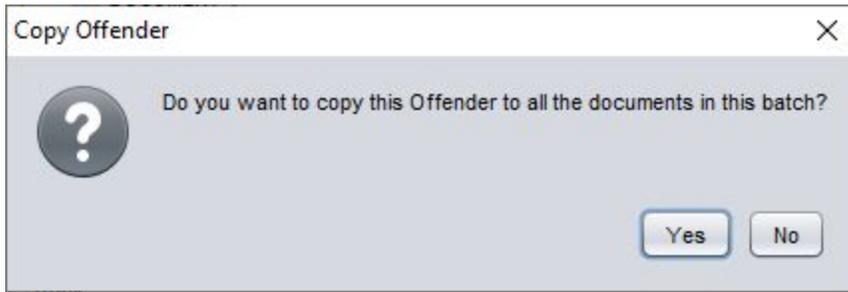
If the values do not match it will give you the following error dialog.

Double Verification Failed

The field value **123456** and your confirmation value **654321** do not match. Please enter a new value and try again.

OK

If the values match and you are indexing the first document in the batch it will ask you if you want to copy the Offender to all of the documents in the batch. If the batch is a packet for a single offender click "Yes", otherwise click "No".



Note:

In most cases Packets should be scanned as one Offender per batch. The main exceptions should be if you are scanning a single section or document type for multiple Offenders. This way you do not have to index the same offender for multiple section individually.

If you click yes it will apply the DOC Number to all documents. In all other scenarios it will apply the DOC Number to the active document only. Also the application should automatically apply the First Name, Middle Name, Last Name, Suffix, Date of Birth, and all SSN fields based on the DOC Number.

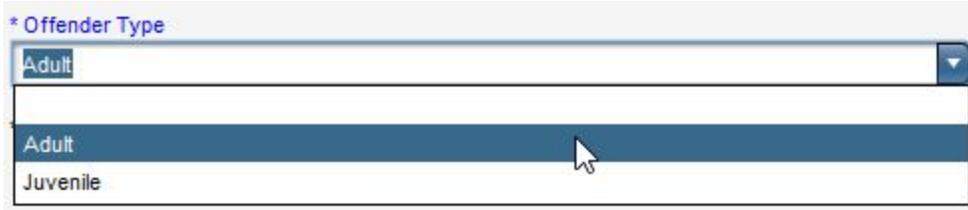
* DOC Offender Number
265245
* Offender Type
Adult
* Section
(I) Access
* Report Date
01/09/2020
First Name
DANIEL
Middle Initial
E
Last Name
BABICS
Suffix
Date of Birth
08/22/1999

For Central Office Only:

If you are in the Outside - Index profile the DOC Number likely was already entered when scanned by the outside facility. In this case a DOC number will already be in the field and would not have to be indexed again and only reviewed.

3.4. Review/Index (Offender Type)

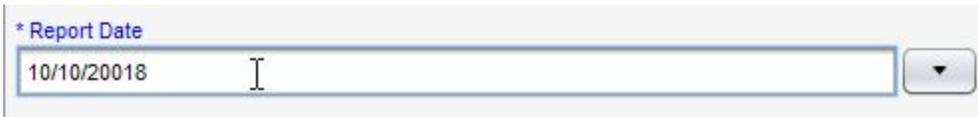
The Offender Type field will likely already be indexed based on the barcode separator sheet. The only reason the Offender Type should not be populated is if a barcode sheet was not used. In this scenario you will have to manually select the Offender Type. The interface provides a dropdown to select either “Adult” or “Juvenile”. Select the correct option and hit “Enter”.



A screenshot of a web application interface showing a dropdown menu for the field labeled "* Offender Type". The dropdown is open, displaying two options: "Adult" and "Juvenile". The "Adult" option is currently selected and highlighted with a blue background. A mouse cursor is positioned over the "Adult" option. The text "Adult" is also visible in the main input field above the dropdown.

3.5. Review/Index (Report Date)

To index the Report Date, select the “Report Date” field and enter the date in the following format “MM\dd\yyyy” and hit “Enter”.



A screenshot of a web application interface showing an input field for the field labeled "* Report Date". The input field contains the date "10/10/20018" and has a vertical cursor (I-beam) positioned at the end of the text. To the right of the input field is a small dropdown arrow button.

3.6. Review/Index (Section)

The Offender Type field will likely already be indexed based on the barcode separator sheet. The only reason the Offender Type should not be populated is if a barcode sheet was not used. If barcodes were not used between the sections when scanned, then you will have to split the batch into separate documents manually.

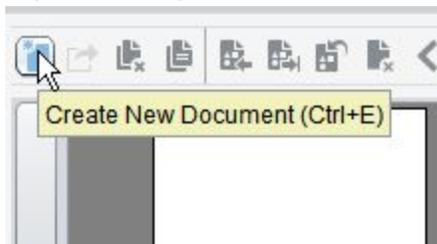
Note: You should index as much as you can before splitting a document. Most of the metadata for a batch is shared across all documents in the batch since it is all for the same Offender. Once you split the batch it will copy the index data from the first document to the splitted document. After that each document must be indexed separately.

Splitting Documents

You can split the batch into separate Sections by selecting the thumbnail of the first page of the new document you wanted to be created.



Then click the “Create New Document” button as shown in the screenshot below, or hit Ctrl+E on the keyboard to split the document.



The thumbnail window will now show a split in the grey background to show a separation between the two sections.



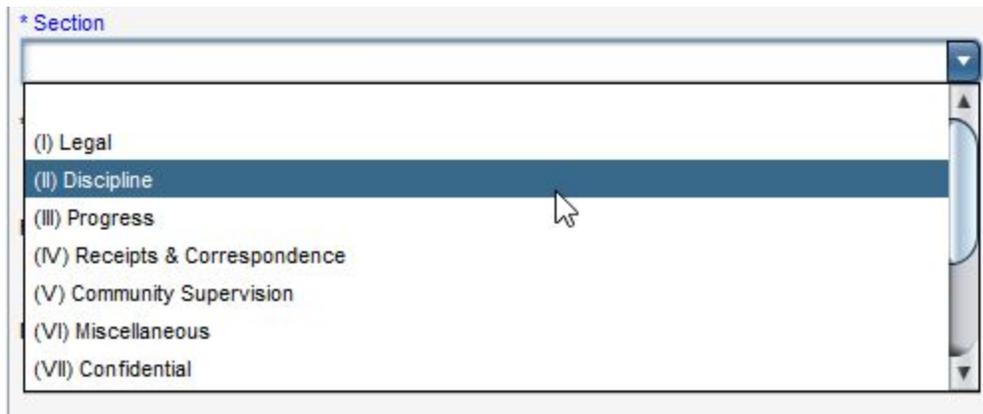
And you will see 2 separate documents for the batch in the batch profile pane.

Batch / Document	Date / Time	Items	Status	Priority	Note
ODC38	9/17/19 5:13:58 PM	24	CELY	0	
DOCUMENT 1					
DOCUMENT 2					

You will want to do this for each section in the batch until you have split out each section in the packet as a separate document. You can then review and index each document separately.

The Offender Type value should already be index based on the Offender Number in previous steps. This will dictate what sections are available to select for the user.

Select the Section for the active document.



Proceed to the next document and repeat.

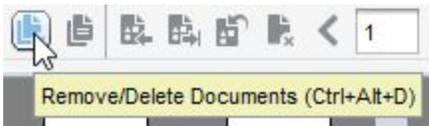
3.7. Document Manipulation

Combining/Deleting Documents

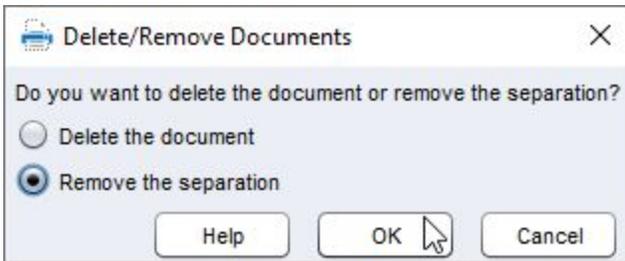
You can combine documents by selecting the first page after a break between two documents in the thumbnail view.



Then click the "Delete" button.



Select "Remove the separation" to combine the document with the previous document. If you select "Delete the document" it will remove the document and its pages from the batch.



Once the document is combined there will no longer be a split between the documents in the thumbnail view.

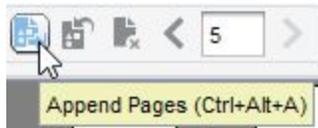


There will also be only one document shown in the batch view for this batch. The pages that were the second document will assume the metadata of the first since they are combined into the first.

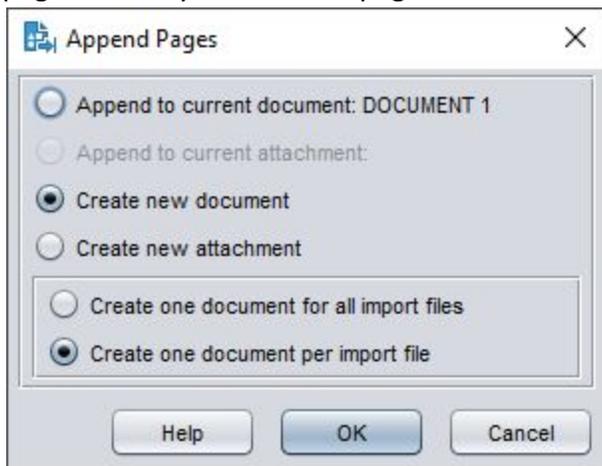
Batch / Document	Date / Time	Items	Status	Priority	Note
SCAN2	11/13/19 5:02:1...	4	CELY	1	
DOCUMENT 1					

Appending/Inserting Pages

Select the document where you want to append pages after, in the thumbnail view. Then click the “Append Pages” button.



You can either choose to append the pages to the end of the selected document or as a new document after the selected document. Choose the correct selection you are wanting and click ok. If you are wanting to insert pages in the middle of a document, select the “Insert pages button” option to insert pages before your selected page.



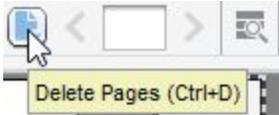
The application will then allow you to scan or import image to the batch. When completed the batch will close while processing and will have to be reopened.

Deleting Pages

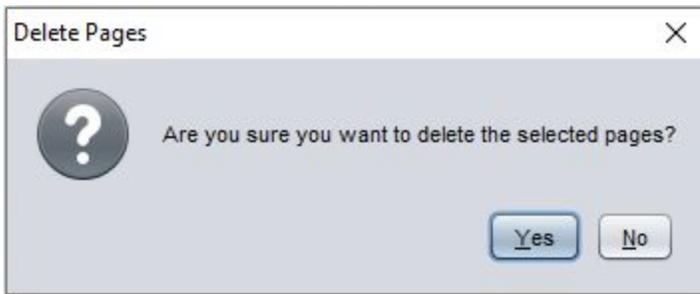
Select the pages you want to delete in the thumbnail view. You can use Ctrl + Click to select multiple pages at once.



Then click the "Delete" button to delete those pages.



Click "Yes" to confirm the page deletions.



Those pages will then no longer exist in the batch.



Buttons and Shortcut Review

Button	Name	Shortcut
	Split into new document at the selected page	Ctrl+E
	Combine selected document with proceeding document	Ctrl+Alt+D
	Append pages to the end of selected document or as a new one	Ctrl+Alt+A
	Insert pages before selected page	
	Delete selected pages	Ctrl+D

3.8. Release

Click through each document in your batch to verify that each document has been indexed properly before proceeding.

Click the Release button in the top left to release the current batch.



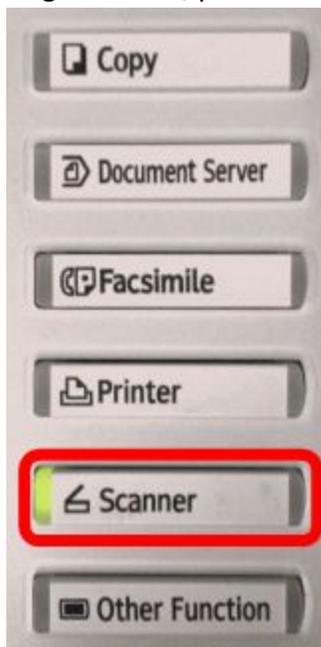
For COA and RDC, these documents will be released directly to IRIS. For all other Facilities the documents will be sent to the Index Profiles for COA for a second review.

4. RICOH Scanning

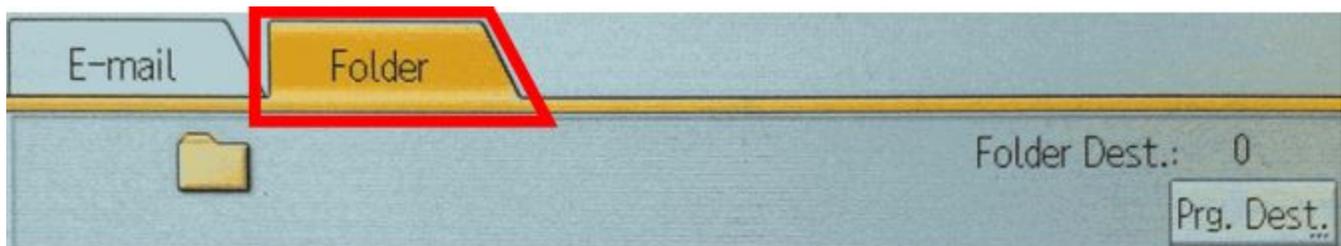
Steps

1. Select Scanner Button
2. Select Folder Tab
3. Select the ODC Address Book record
4. Set as a Multi-Page TIFF
5. Set Filename as DOC Number
6. Start the scan

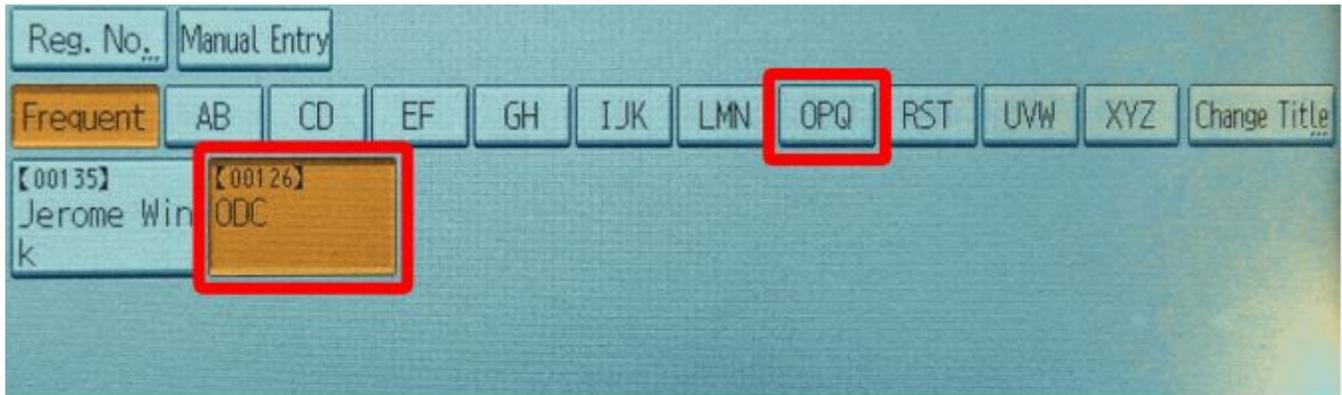
To get started, press the **Scanner** function button on your RICOH multifunction scanner/printer.



Press the **Folder** tab on the screen.



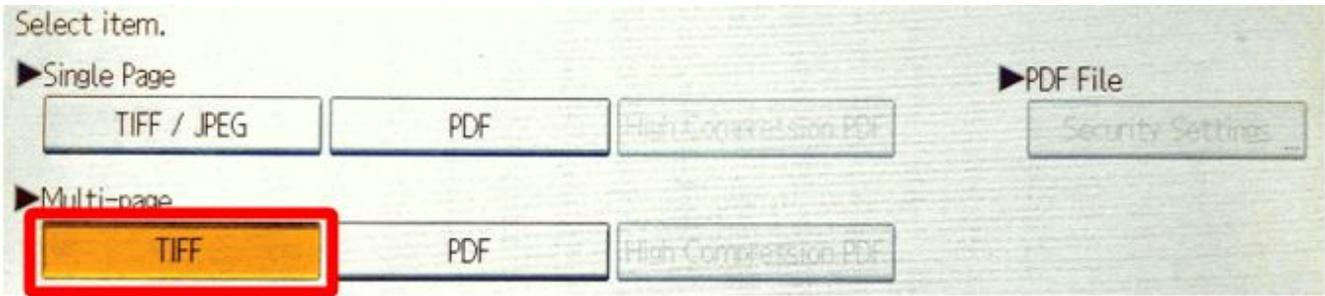
Select the **ODC** contact that shows up in the address book. If it does not display on the first screen, you can hit the **OPQ** button to narrow down the contacts.



Press the **Send File Type / Name...** button.



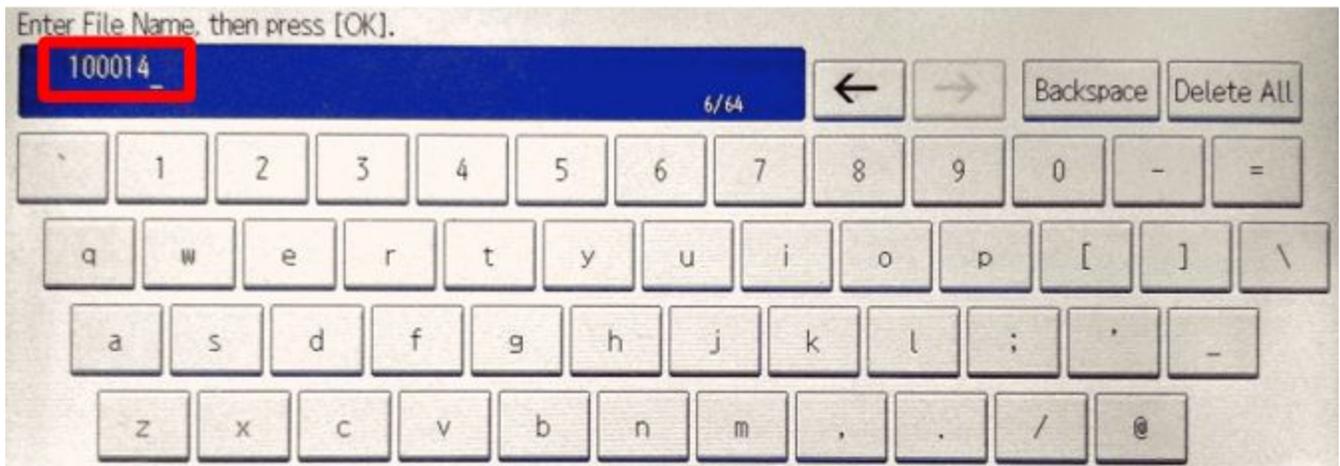
Verify **TIFF** is selected under the **Multi-page** option.



Select the empty box for filename.



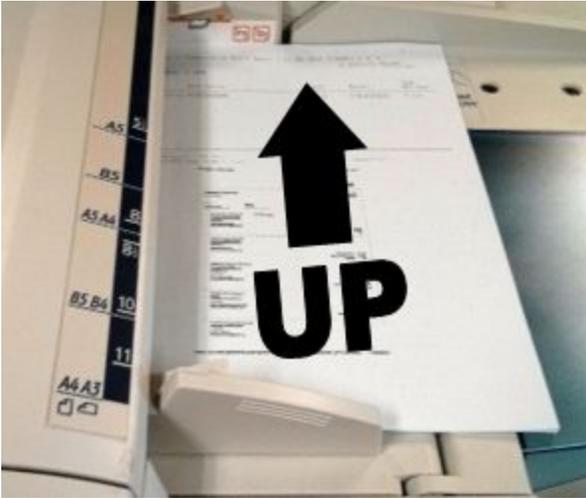
Type in the **DOC number** in the window using the on-screen keyboard.



Press **OK** twice to save.



Insert the packet face up with the top facing away from you. If all pages will not fit, slide the remaining pages underneath the pile as the packet scans.



Press the Start button.



After the document is released the documents will be automatically be split into smaller documents and section metadata applied based on the barcode pages and their values. The offender type and all other offender information will also be automatically applied based on the offender number supplied in the indexing step.

The batch will be reviewed and fully indexed by a COA user in [Section 3](#) and committed to IRIS from there.

4.1. RICOH “Direct Commit” Scanning

This process is the same as the section above except that:

1. It is only available on select RICOH’s at RDC.
2. There will be a separate Address Book record named “IRIS” that must be selected for this process.
3. Barcode sheets must be used between sections.
4. The Report Date will be published with the current date.
5. These documents will skip the manual indexing process in ODC and be automatically committed to IRIS.