

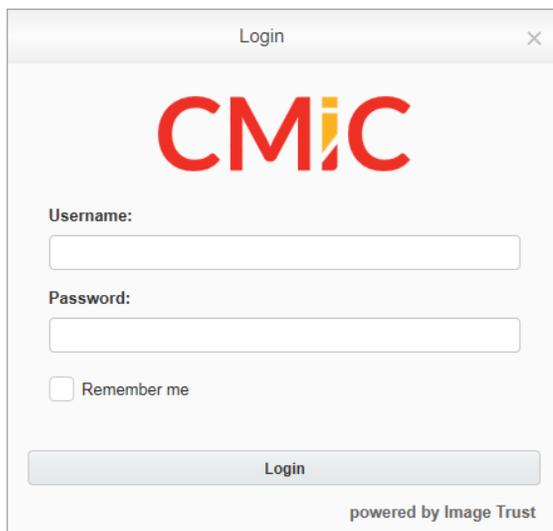
CMiC Cloud Scanning – Quick Guide

Overview

This quick guide provides the basic procedures for using CMiC's Cloud Scanning software application, a unique browser-based capture solution. This scanning application is used to scan documents to Cloud.

Login

While testing, to log in to the CMiC Cloud Scanning application, open a web browser and go to <https://testscanner.cmiccloud.com/client-html/>.

A screenshot of a web browser window titled "Login". The window displays the CMiC logo in red and yellow. Below the logo are two input fields: "Username:" and "Password:". There is a checkbox labeled "Remember me" below the password field. At the bottom of the form is a "Login" button. The text "powered by Image Trust" is visible at the bottom right of the form area.

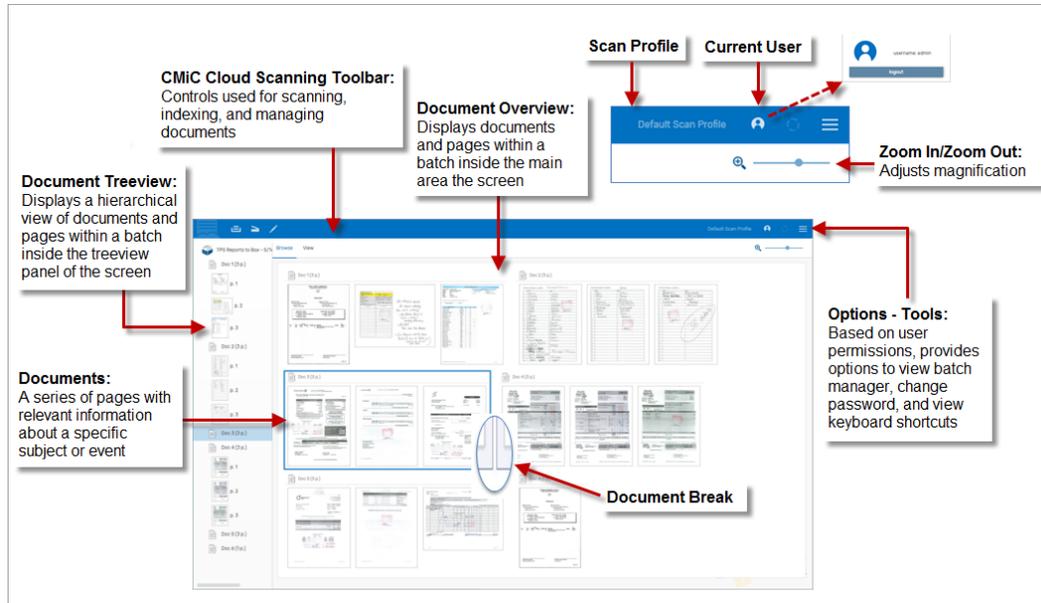
Enter username and password and click on **[Login]**.

Quick Tour

The screen is divided into two panels: Document Treeview (left panel of screen) and Document Overview (main area of screen). The main area of the screen has two modes: Browse and View. Browse mode is used to work with multiple pages and batches, and View mode is used to work with individual pages.

Batch View

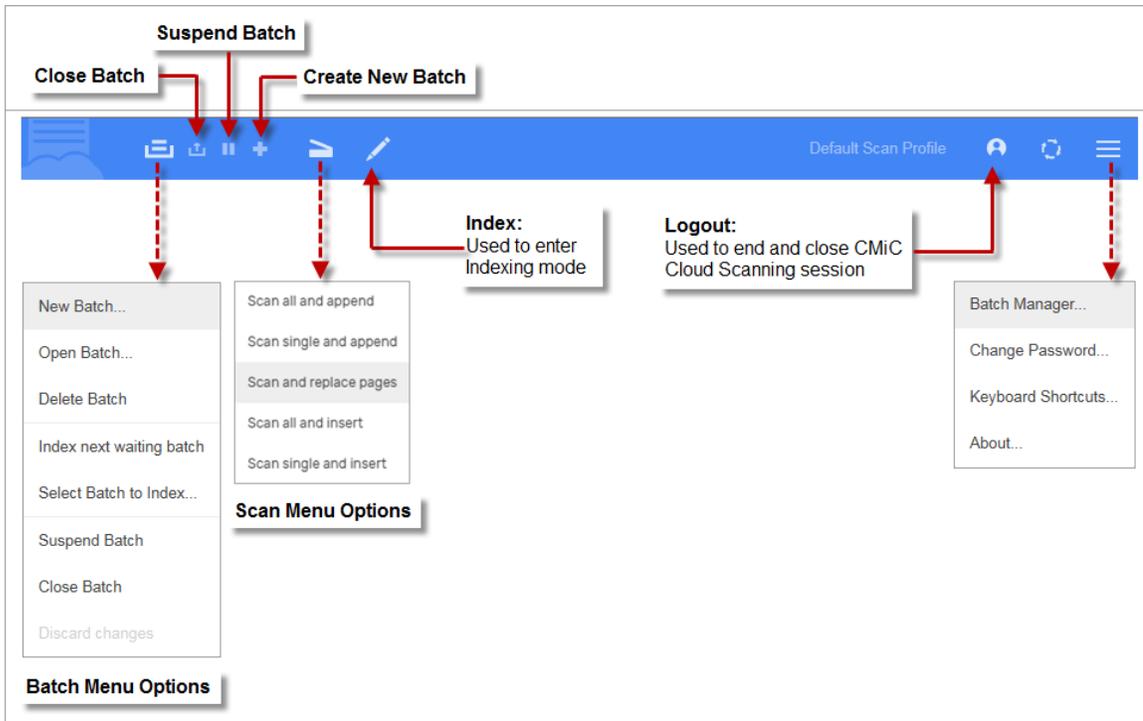
The basic elements of the screen are described in the screenshot below.



NOTE: Most features described in this guide can be performed from both the Document Treeview and the Document Overview documents.

CMiC Cloud Scanning Toolbar

The drop-down menus and options on the CMiC Cloud Scanning toolbar are described in the screenshot below.



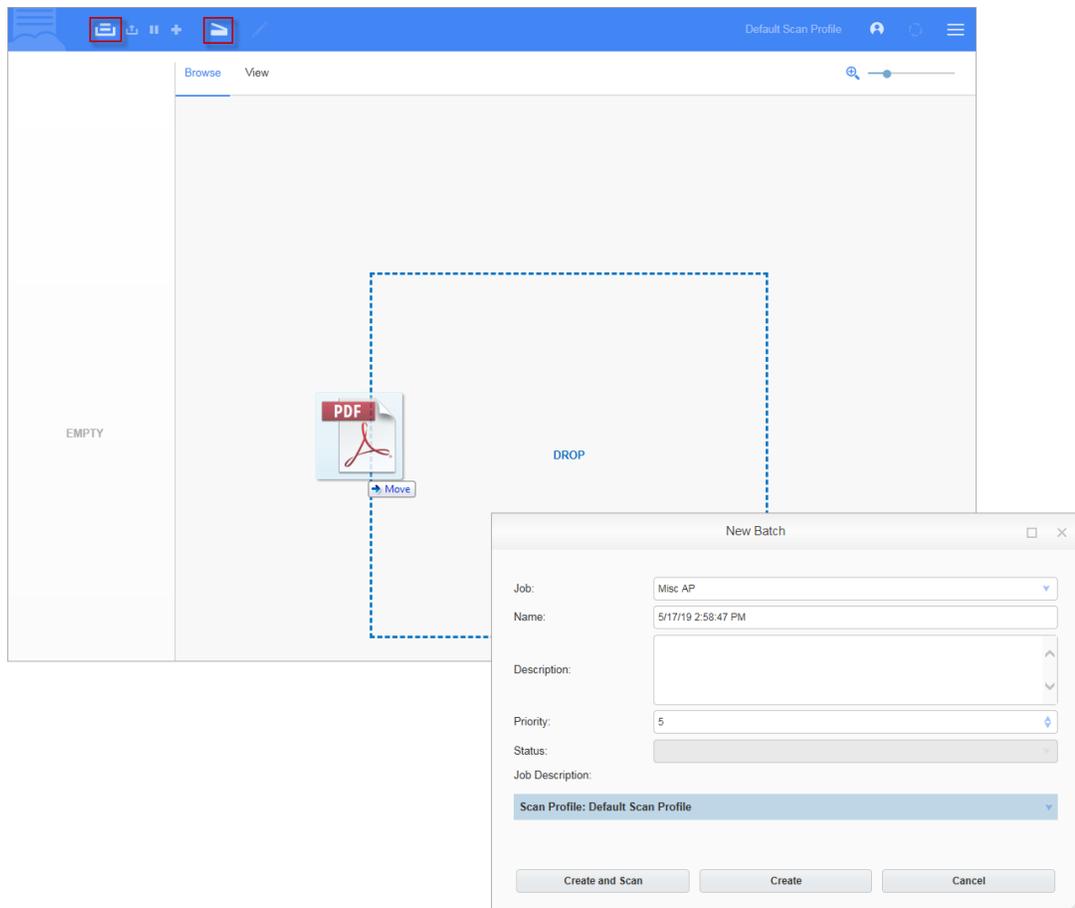
The options enabled in the drop-down menus vary according to the processing stage of the document in the application. For example, the Scan Menu icon (📄) opens the New Batch pop-up window in the initial stages but once the document is loaded into the application, clicking on the icon opens the drop-down menu as shown in the screenshot above. In addition, the Close Batch (🔴), Suspend Batch (⏸), and Create New Batch (⊕) icons do not appear in the toolbar until a document is loaded.

Scanning/Importing

Start a New Job/Batch

A new job, or batch within a job, can be created by scanning or importing documents.

1. Select the Scan icon (📄) or the new Batch icon (📁) from the CMiC Cloud Scanning toolbar, or simply drag and drop a file into the empty batch overview area of the screen to open the New Batch pop-up window.



2. In the New Batch pop-up window, select the type of document being scanned or imported using the Job field's drop-down menu. Options are "Misc AP" or "RFP via SC".
3. If scanning a document using a desktop scanner, place the documents in the scanner and click on the **[Create and Scan]** button in the New Batch pop-up window. Alternatively, if a file was dragged and dropped into the application, select the **[Create]** button from the pop-up window.

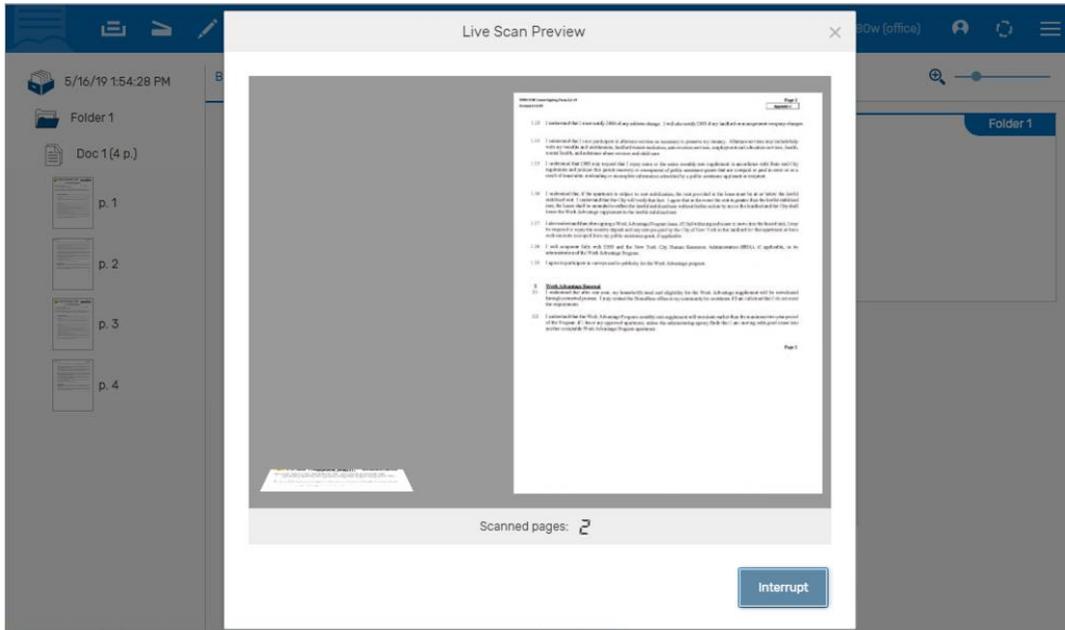
NOTE: The Default Scan Profile can be set to define if a job will default to document scan or document import. This setting can be changed by clicking on the Default Scan Profile in the application toolbar or by clicking on **[Scan Profile: Default Scan Profile]** in the New Batch pop-up window.

Scan/Import/Drag and Drop

Users can load documents into the application, either by scanning, importing, or dragging and dropping. Afterward, you can perform document management functions and organize your pages.

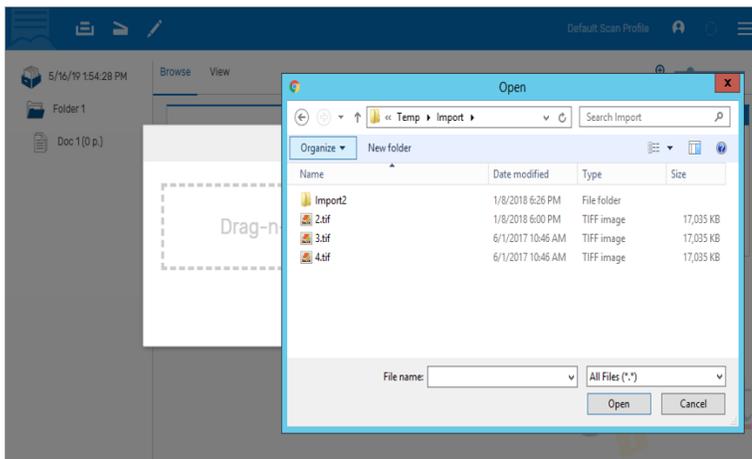
Scan

As documents are being scanned or imported, the Live Scan Preview pop-up window previews documents to monitor quality and content issues.



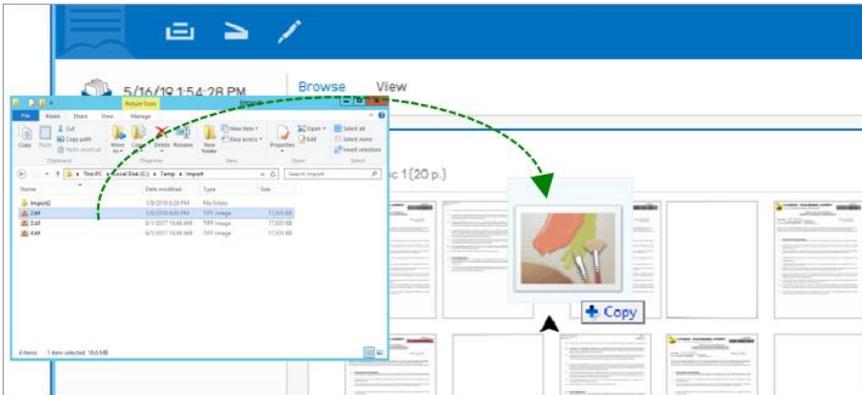
If an issue is detected with a scanned or imported document, the **[Interrupt]** button in the Live Scan Preview pop-up window is used to interrupt scanning. See the *Inserting/Replacing Pages within a Document* section in this guide to correct the issue.

Import



To import a file, browse to the folder/file(s) to be imported, select the files, and then click on **[Open]**.

Drag and Drop



To drag and drop a file, browse to the desired file(s) and drag and drop them to the desired location within a document. An insert guide will appear to help visually guide the process.

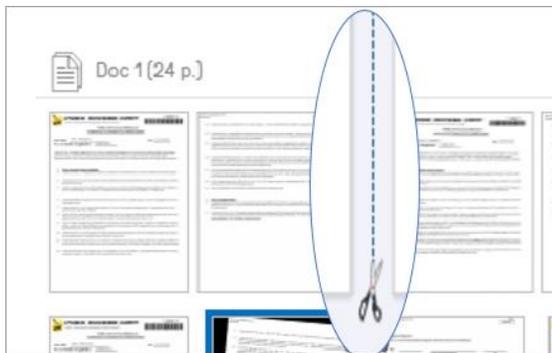
Creating a Document Break

New documents can be created in several ways: detecting a barcode, a blank page, by page count, or any document type that is defined to trigger a break.

There are two methods for creating a document break.

Method 1 – Scissor Option

1. Place mouse pointer where the document break is required. A scissor icon will appear.

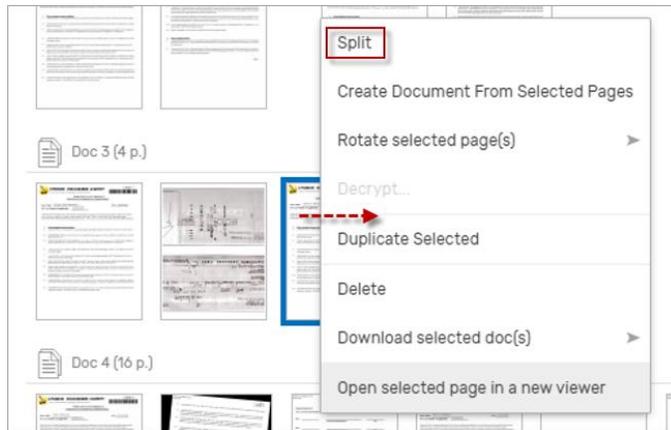


2. Click the mouse to create a document break.



Method 2 – Menu Option

1. Select the page that will be the first page in the new document. Right-click on the page to open a drop-down menu.



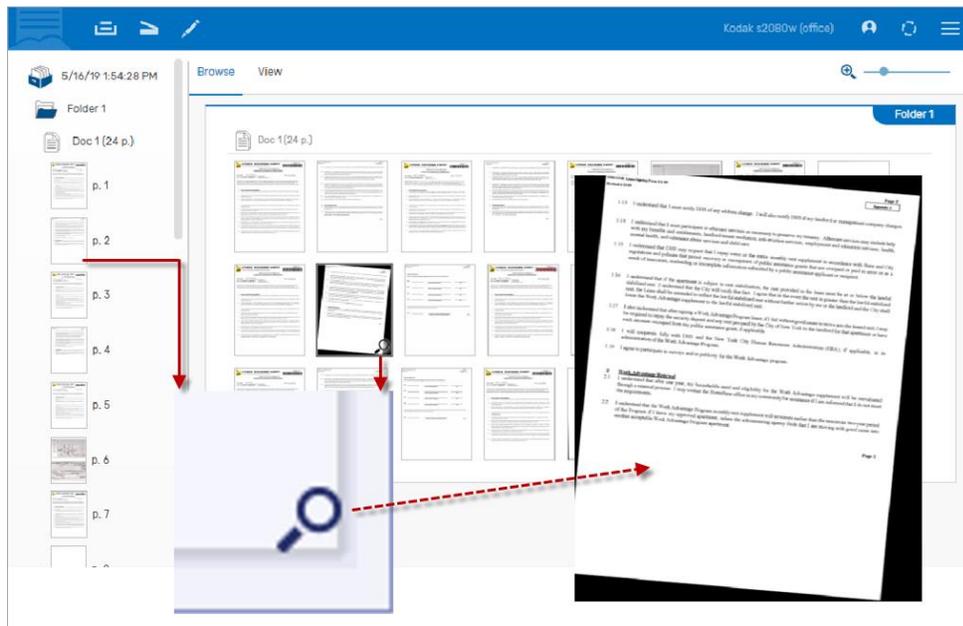
2. Select “Split” from the drop-down menu to split the document.

Working with Pages

Inspect, Move, Rotate, Replace Pages

Inspect Page

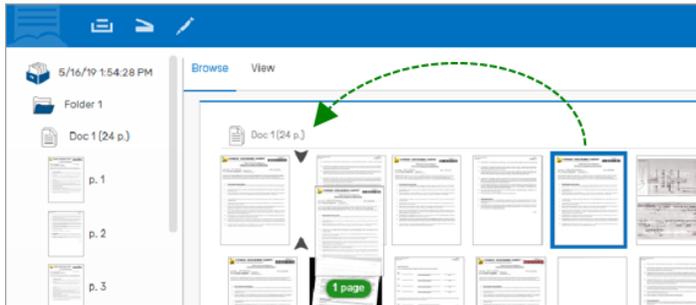
1. To inspect a page from either the Document Treeview or the Document Overview section of the screen, hover the mouse pointer over a document. A magnifying glass icon will appear.



2. Hover mouse over the magnifying glass icon and the document will fly out for closer inspection.

Move Page

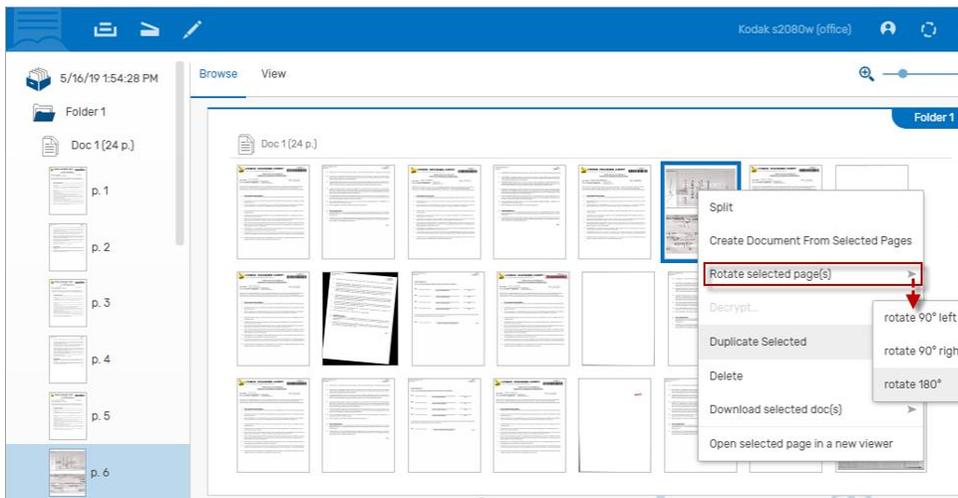
1. To move a page, select the page and hold left mouse button down.



2. Drag page to desired location.

Rotate Page

1. To rotate a page, select the page and right-click to open drop-down menu.



2. Select “Rotate selected page(s)” from menu and then select the desired rotation direction.

Replace Page

1. To replace page(s), select the page(s) to be replaced and click on the Scan icon to open a drop-down menu.



2. Select “Scan and replace pages” from the drop-down menu. Page(s) that are scanned or imported will replace the selected highlighted page(s).

Inserting/Replacing Pages within a Document

Inserting/replacing pages within a document can be done from both the Document Treeview and the Document Overview sections of the screen.

While Scanning or Importing

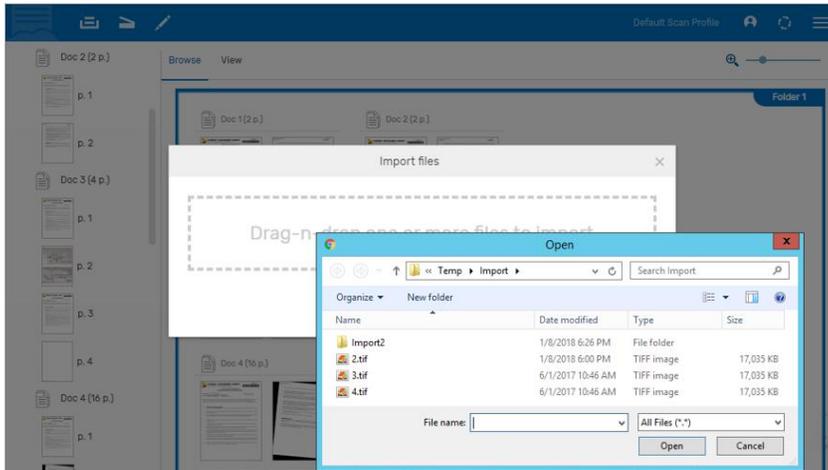
1. Select the page where the replaced or the inserted page will be in front of.
2. Select the Scan icon from the toolbar to open a drop-down menu.



3. For a single page, select “Scan single and insert” if inserting a page, or “Scan and replace pages” if replacing a page. For multiple pages, select “Scan all and insert” if inserting pages, or “Scan and replace pages” if replacing pages.

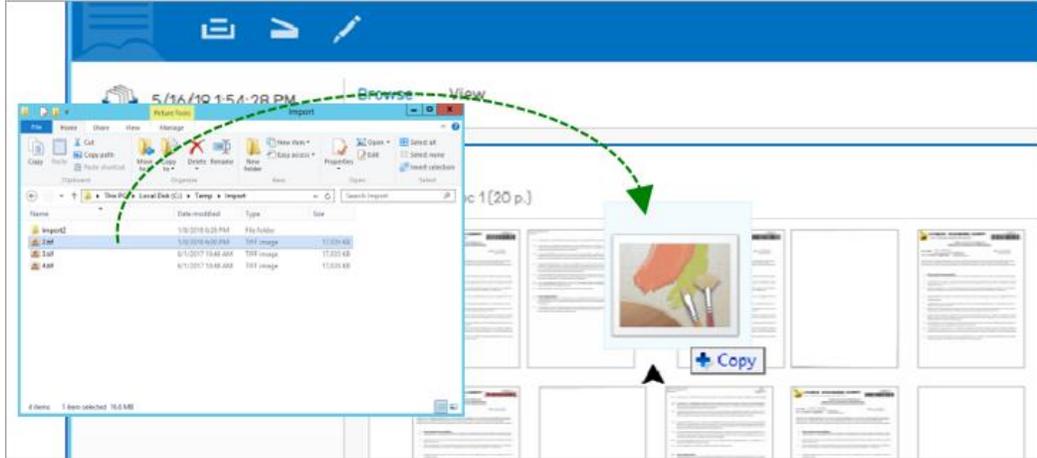
NOTE: If scanning, place page(s) in scanner first. Follow the procedures described above. Pages will be scanned and will replace page(s) or inserted in front of the highlighted page.

If importing, after selecting pages in Step 1, an Open pop-up window will appear. Browse to the folder/file(s) to be inserted. Select the files, then select [Open].



Drag and Drop – Insert Only

1. Browse to the desired file(s) to be inserted.



2. Drag and drop the file(s) to the desired location within the document. An insert guide will appear to help visually guide the process.

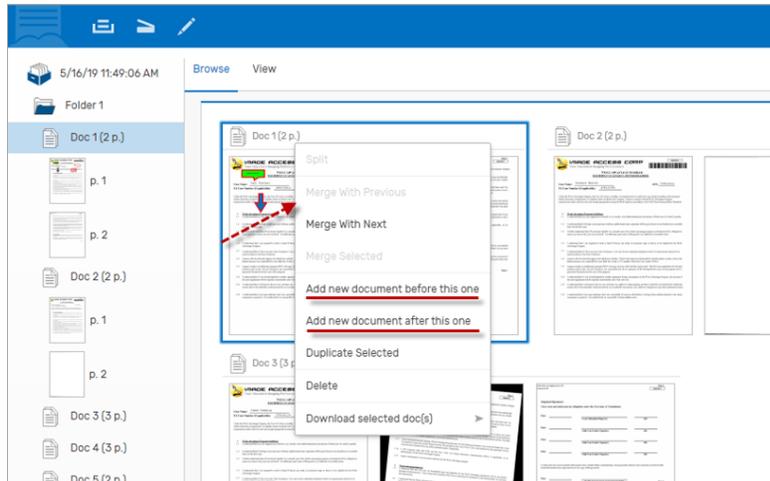
Working with Documents

Inserting Documents within a Batch

Inserting documents in a batch can be done from both the Document Treeview and the Document Overview sections of the screen.

While Scanning or Importing

1. Select the document where the inserted document will be inserted and right-click to open the drop-down menu.
2. In the drop-down menu, select “Add new document before this one” or “Add new document after this one”.



3. A blank document appears where the new document will be inserted. Select the Scan icon from the toolbar to open the drop-down menu. If inserting a single document, select “Scan single and insert”. If inserting multiple documents, select “Scan all and insert”.



NOTE: If scanning, place page(s) in scanner first. After completing selection process in Steps 1-2, the new document(s) will be scanned and inserted in the highlighted blank document.

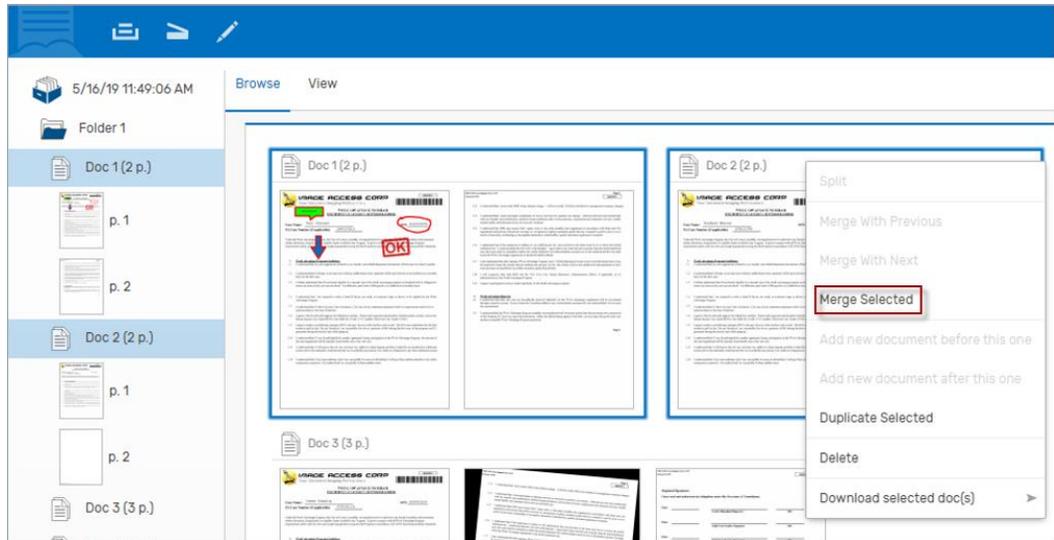
If importing, after completing selection process in Steps 1-2, an Open pop-up window will open. Browse to the folder/file(s) that will be inserted. Select the files, then select [**Open**].

Merge/Split/Move Documents in a Batch

Merging/splitting/moving documents in a batch can be done from both the Document Treeview and the Document Overview sections of the screen.

Merge documents

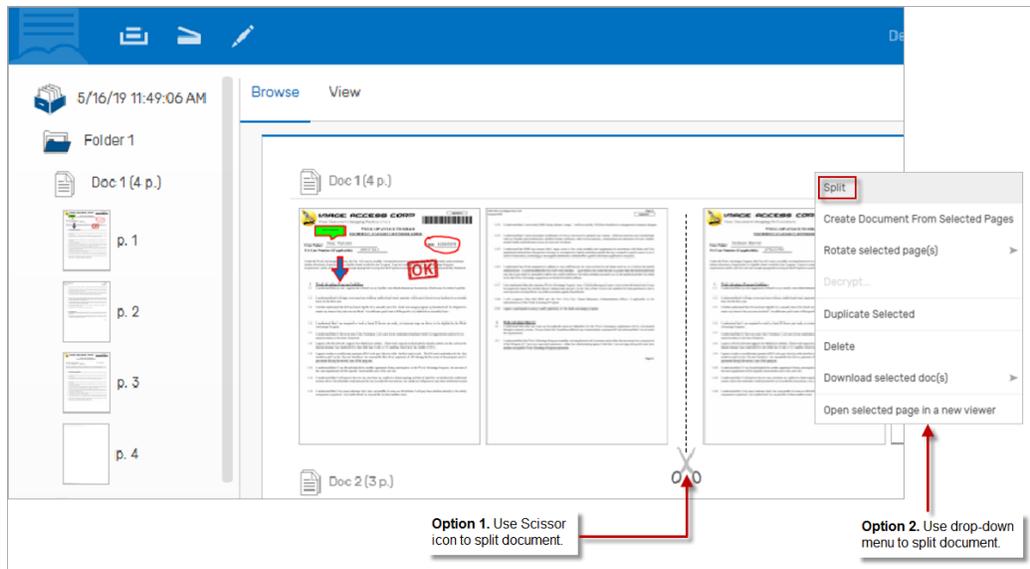
1. Select the documents to be merged.
2. Right-click to open the drop-down menu and select “Merge Selected” to merge the selected documents.



Split a Document

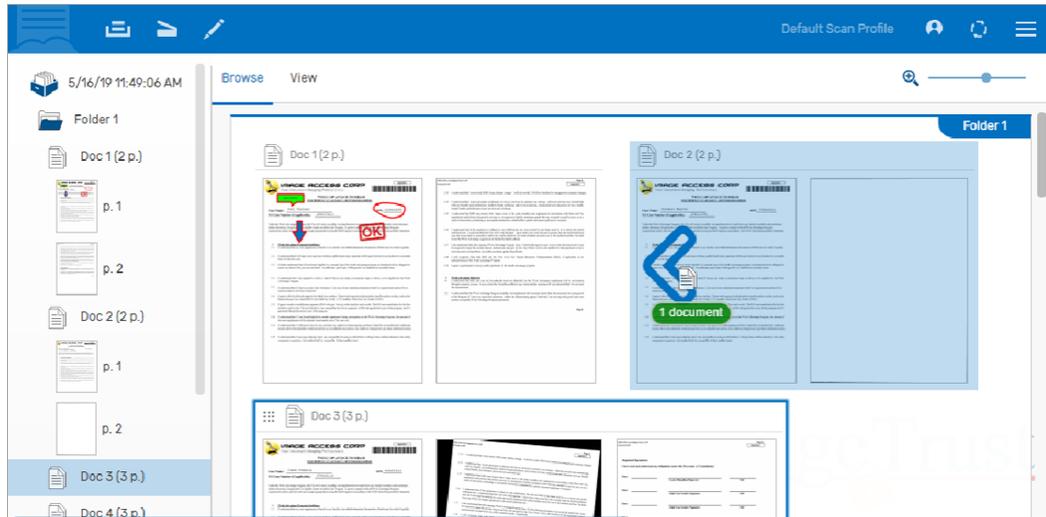
There are two options for splitting a document.

1. The first option is to select the page that will be the first page of the new document and right-click to open a drop-down menu and select “Split”.
2. The second option is to place the mouse pointer where the document break is required and when the Scissor icon appears, click the icon to split the document.



Move a Document

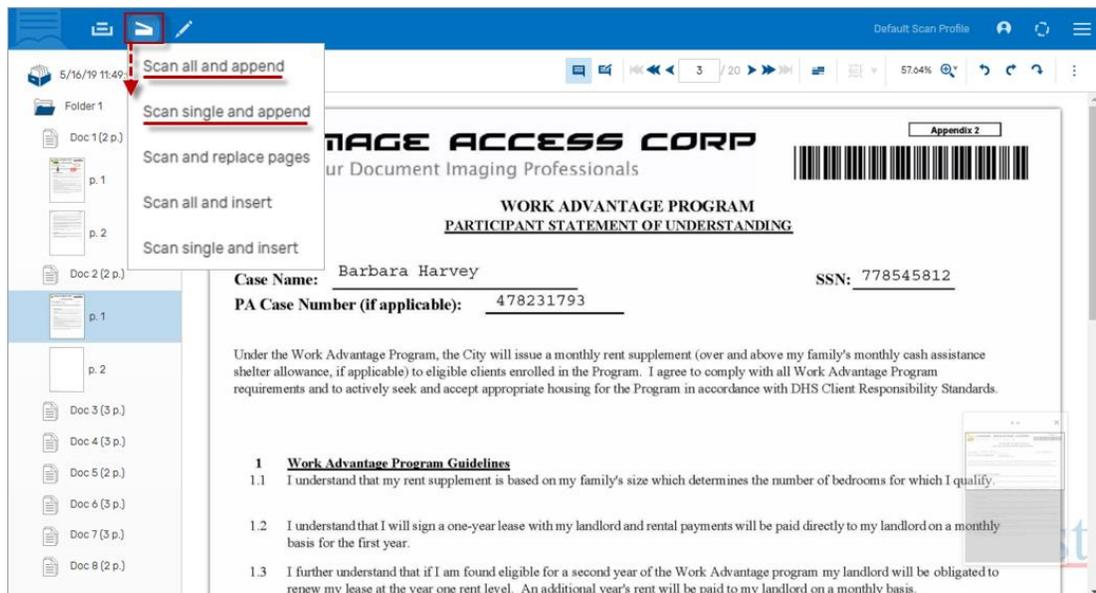
1. Highlight the document(s) to be moved.
2. Drag document(s) to desired location. An insert guide will appear to help visually guide the process.



Adding Documents to a Batch

Documents can be added to a batch from both the Document Treeview and the Document Overview sections of the screen. This process is performed after a batch has been started. Multiple documents can be added to a batch when either scanning or inserting files.

1. Select the Scan icon from the toolbar to open the drop-down menu.



2. For a single page, select “Scan single and append”. For multiple pages, select “Scan all and append”. New documents will be added to the end of the batch.

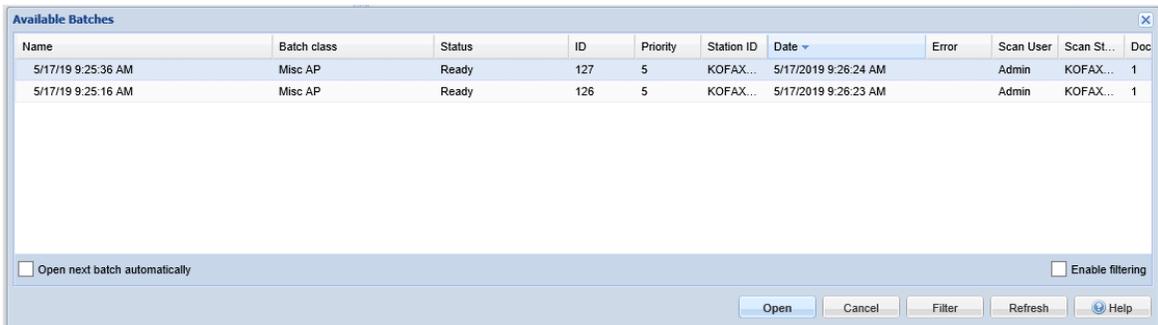
CMiC Cloud OCR Validation

This section of the guide briefly describes how to use the Validation module to review and index documents.

Validation

While testing, open a web browser and go to <https://testvalidation.cmiccloud.com/ThinClientServer/ValidationLogin.aspx>. Log in with your credentials.

A list of available batches will be displayed.

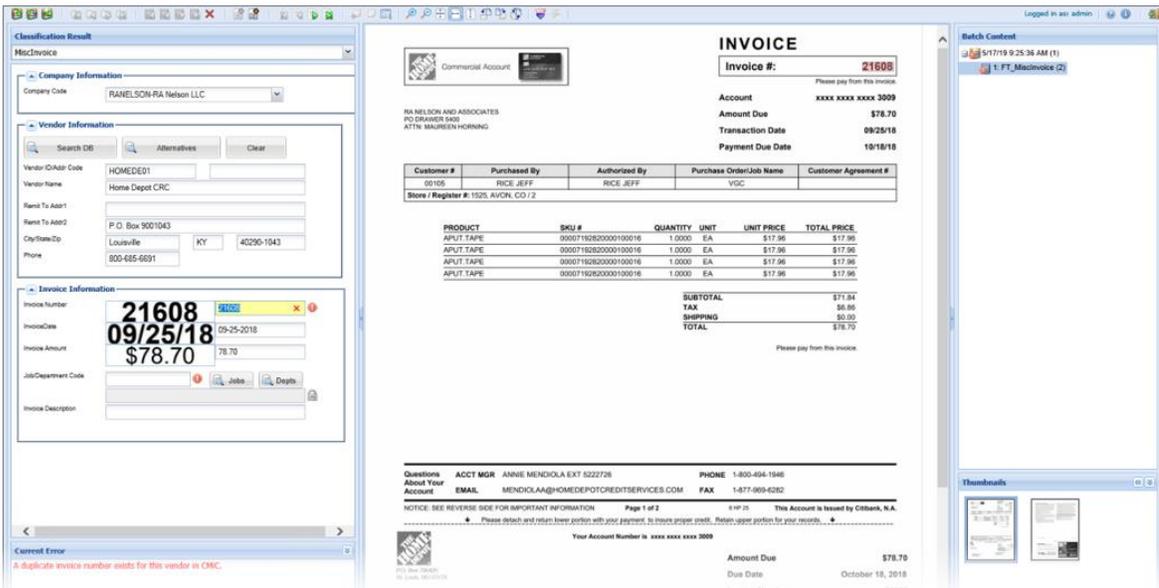


Name	Batch class	Status	ID	Priority	Station ID	Date	Error	Scan User	Scan St...	Doc
5/17/19 9:25:36 AM	Misc AP	Ready	127	5	KOFAX...	5/17/2019 9:26:24 AM		Admin	KOFAX...	1
5/17/19 9:25:16 AM	Misc AP	Ready	126	5	KOFAX...	5/17/2019 9:26:23 AM		Admin	KOFAX...	1

Open next batch automatically Enable filtering

Open Cancel Filter Refresh Help

Double-click the desired batch, and the Validation screen will appear.



Classification Result
Misc Invoice

Company Information
Company Code: RANELSON-RA Nelson LLC

Vendor Information
Vendor Code: HOMEDE01
Vendor Name: Home Depot CRC
P.O. Box 9001043
Louisville, KY 40290-1043
Phone: 800-485-5691

Invoice Information
Invoice Number: 21608
Invoice Date: 09/25/18
Invoice Amount: \$78.70

INVOICE
Invoice #: 21608
Account: xxxx xxxx 3009
Amount Due: \$78.70
Transaction Date: 09/25/18
Payment Due Date: 10/18/18

Customer #	Purchased By	Authorized By	Purchase Order/Job Name	Customer Agreement #
90106	RICE, JEFF	RICE, JEFF	VSC	
Store / Register #: 1525, AVON, CO/2				

PRODUCT	SKU #	QUANTITY	UNIT	UNIT PRICE	TOTAL PRICE
APUT TAPE	90007192820000100016	1.0000	EA	\$17.96	\$17.96
APUT TAPE	90007192820000110016	1.0000	EA	\$17.96	\$17.96
APUT TAPE	90007192820000110016	1.0000	EA	\$17.96	\$17.96
APUT TAPE	90007192820000100016	1.0000	EA	\$17.96	\$17.96

SUBTOTAL: \$71.94
TAX: \$6.86
SHIPPING: \$0.00
TOTAL: \$78.70

ACCT MGR: ANNE MENDIOLA EXT 5222726
PHONE: 1-800-494-1946
EMAIL: MENDIOLA@HOMEDEPOTCREDITSERVICES.COM
FAX: 1-877-969-6282

Amount Due: \$78.70
Due Date: October 18, 2018

Any values found by KTM Extraction will already be populated in the fields.

Data Entry

There are three ways data can be entered into the index fields: Manual Entry, Single Click Entry, and Lookup windows.

Manual Entry

Once a field is clicked on or tabbed into, data can be manually entered into the Edit Window:

Invoice Information

Invoice Number: [Field]

InvoiceDate: **09/25/18** 09-25-2018

Invoice Amount: **\$78.70** 78.70

Job/Department Code: [Field] Jobs Depts

Invoice Description: [Field]

Single Click Entry

An alternative to manually typing in the data is using Single Click Entry. Click on the field to be indexed and then locate the word on the page. Move the mouse over it and then click on the word. The word will automatically be placed in the index field. Press Enter to confirm.

The screenshot shows a software interface with a 'MiscInvoice' form on the left and a detailed invoice document on the right. The form includes sections for Company Information (RANELSON-RA Nelson LLC), Vendor Information (Home Depot CRC), and Invoice Information (Invoice Number: 21608, Invoice Date: 09-25-2018, Invoice Amount: \$78.70). The invoice document on the right shows the invoice number 21608, the vendor RA NELSON AND ASSOCIATES, and a table of items including APUT TAPE with a total amount due of \$78.70.

Lookup Windows

The address fields can be automatically populated by using the custom search address forms. This will be explained in greater detail in the next section.

Fields – Miscellaneous AP Invoices

Vendor Information

The values for the Vendor Information section come from a fuzzy database lookup on the vendor flat file generated by CMiC. The document will be OCR'd, vendor name and address information will be searched, and a lookup will be performed in the fuzzy database for that information. If a match is found above a configurable confidence percentage, then fields in this section will be automatically populated:

Vendor Information

Search DB Alternatives Clear

Vendor ID/Addr Code: HOMEDE01

Vendor Name: Home Depot CRC

Remit To Addr1:

Remit To Addr2: P.O. Box 9001043

City/State/Zip: Louisville KY 40290-1043

Phone: 800-685-6691

If no match is found or if a match is found but does not meet the confidence threshold, two buttons are available to help locate the correct information. The first button is the **[Search DB]** button (can also press F6). This will search the Oracle database. The best way to search is to hit the **[Clear]** button (or F9) first, enter the search parameters right on the form, then press the **[Search DB]** button. The Vendor Lookup pop-up window will then appear with the search results:

Vendor Information

Search DB Alternatives Clear

Vendor ID/Addr Code: HOMEDE01

Vendor Name: Home Depot

Remit To Addr1:

Remit To Addr2:

City/State/Zip: Louisville KY 40290-1043

Phone: 800-685-6691

Vendor Lookup

Enter one or more search keywords or phrases here:
Home Depot

Confidence	BP Code	BP Name	Address Code	Address 1	Address 2	Address 3	Regions/State	Postal Code	Phone N
100.00 %	HOMEDE01	Home Depot CRC			P.O. Box...	Louisville	KY	40290-1043	800-6
50.00 %	EAGLEV07	Eagle Valley Home Builders		P.O. Box...		Eagle	CO	81631-3550	970-3
50.00 %	MURDOC01	Murdoch's Ranch & Hom...		P.O. Box...		Dillon	CO	80435	970-5
50.00 %	COMPLE01	Complete Home Electronics		P.O. Box...		Tabernash	CO	80478	970-2
50.00 %	TRUENO01	True North Hearth & Hom...		120 Midla...	#210	Glenwood...	CO	81601	970-2
50.00 %	HOMEHE01	Home & Hearth Outfitters		286 S. Lo...		Denver	CO	80209	303-7

Press "Enter" or "Ctrl + Enter" to select the highlighted record and close the results window.

21 results (0.197 seconds)

Search OK Cancel Help

Double-click the appropriate result to populate the form.

The second button is the **[Alternatives]** button. This launches the Vendor Alternatives pop-up window, which will display a more extensive list of all the records the system located with correct vendor information during the initial extraction process. The most confident one is displayed first, followed by the remaining alternatives:

Vendor Information

Search DB Alternatives Clear

Vendor ID/Addr Code: HOMEDE01

Remit To Addr1:

Remit To Addr2:

City/State/Zip: Louisville KY 40290-1043

Phone: 800-685-6691

Vendor Alternatives

Confidence	BP Code	BP Name	Address Code	Address 1	Address 2	Address 3	Regions/State	Postal Code
89.55 %	HOMEDE01	Home Depot CRC			P.O. Box...	Louisville	KY	40290-1043
67.96 %	1000DO01	1000 Dolores Way #A L...		P.O. Drawer 5400		Avon	CO	81620
67.96 %	51EAGL01	51 Eagle Road, LLC		P.O. Drawer 5400		Avon	CO	81620
67.96 %	UPPERB01	Upper Basin Excavating...		P.O. Drawer 5400		Avon	CO	81620
66.88 %	HORNIN01	Maureen Horning		P.O. Box 1152		Edwards	CO	81632
60.40 %	YOUNGS01	Young Services		P.O. Box 944		Glenwood...	CO	81602
58.67 %	MOUNTA31	Mountain Temp Service...		P.O. Box 20		Aspen	CO	81612-0020
58.08 %	PAINTB01	Paint Bucket, The		P.O. Box 963		Avon	CO	81620

Press "Enter" or "Ctrl + Enter" to select the highlighted record and close the results window.

34 results (0.094 seconds)

OK Cancel Help

Double-click the appropriate result to populate the form.

Invoice Number

This field should be automatically populated by the OCR engine. In cases where it is blank, the invoice number will have to be populated manually or by using Single Click Entry.

Invoice Date

This field should also be automatically populated by the OCR engine in most cases. In cases where it is blank, the invoice date will have to be populated manually or by using Single Click Entry.

Invoice Description

This field should also be automatically populated with the invoice description and can be updated during validation.

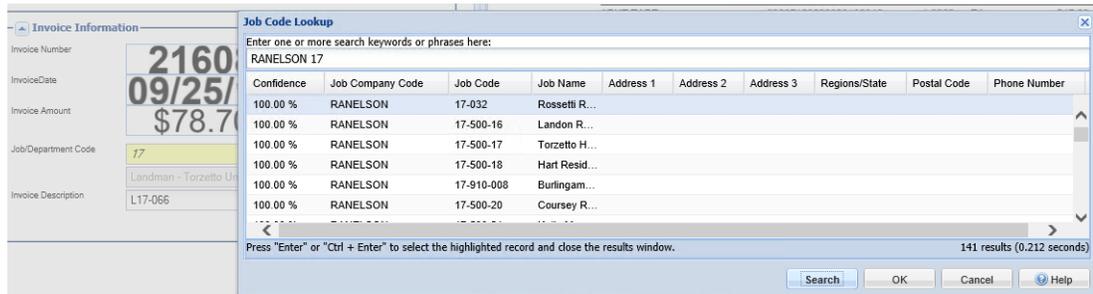
Job/Department Code

In most cases, this field will be automatically extracted by the OCR engine. It will be validated against the CMiC database. In cases where it could not be OCR'd, it can be found by either manually typing it, or using one of the lookup buttons. If manually typed, just press enter to validate it against CMiC. Alternatively, the [Jobs] button can be used to bring up a list of jobs or the [Depts] button can be used to bring up a list of departments from which to choose.



The screenshot shows a text input field labeled 'Job/Department Code' with a yellow highlight. To the right of the field are two buttons: 'Jobs' and 'Depts', each with a magnifying glass icon.

A search parameter can also be entered in the Job/Department Code field to search for a job code. The results will be displayed in the Job Code Lookup pop-up window.



The screenshot shows a 'Job Code Lookup' pop-up window. The search field contains 'RANELSON 17'. Below the search field is a table with the following columns: Confidence, Job Company Code, Job Code, Job Name, Address 1, Address 2, Address 3, Regions/State, Postal Code, and Phone Number. The table contains several rows of results, all with a confidence of 100.00%.

Confidence	Job Company Code	Job Code	Job Name	Address 1	Address 2	Address 3	Regions/State	Postal Code	Phone Number
100.00 %	RANELSON	17-032	Rossetti R...						
100.00 %	RANELSON	17-500-16	Landon R...						
100.00 %	RANELSON	17-500-17	Torzetto H...						
100.00 %	RANELSON	17-500-18	Hart Resid...						
100.00 %	RANELSON	17-910-008	Burlingam...						
100.00 %	RANELSON	17-500-20	Coursey R...						

Invoice Amount

The invoice amount must be entered manually or by Single Click Entry if not already populated by extraction.

Fields – Subcontract Request for Payments via SC

Vendor Information

The values for the Vendor Information section come from a fuzzy database lookup on the vendor flat file generated by CMiC. The document will be OCR'd, vendor name and address information will be searched, and a lookup will be performed in the fuzzy database for that information. If a match is found above a configurable confidence percentage, then fields in this section will be automatically populated:

Vendor Information

Search DB Alternatives Clear

Vendor ID/Addr Code: TWISTE01

Vendor Name: Twisted Tree Landscape Construction

Remit To Addr1: P.O. Box 740

Remit To Addr2:

City/State/Zip: Basalt CO 81621

Phone: 970-927-5025

If no match is found or if a match is found but does not meet the confidence threshold, two buttons are available to help locate the correct information. The first button is the **[Search DB]** button (can also press F6). This will search the Oracle database. The best way to search is to hit the **[Clear]** button (or F9) first, enter the search parameters right on the form, then press the **[Search DB]** button. The Database Lookup pop-up window will then appear with the search results:

Vendor Information

Search DB Alternatives Clear

Vendor ID/Addr Code: TWISTE01

Vendor Name: Twisted Tree

Remit To Addr1: P.O. Box 740

Remit To Addr2:

City/State/Zip: Basalt CO 81621

Phone: 970-927-5025

Database Lookup

Enter one or more search keywords or phrases here:
Twisted Tree

Confidence	BP Code	BP Name	Address Code	Address 1	Address 2	Address 3	Regions/State	Postal Code	Pho
100.00 %	TWISTE01	Twisted Tree Landscape C...		P.O. Box...		Basalt	CO	81621	9
50.00 %	ASCENT02	Ascent Tree Services, LLC		P.O. Box...		Dillon	CO	80435	9
50.00 %	ASPENT01	Aspen Tree Service, Inc.		1111 Villa...		Carbondale	CO	81623	9
50.00 %	PREVEN01	Preventive Tree Spraying		P.O. Box...		Dillon	CO	80435	9
50.00 %	OLDGRO01	Old Growth Tree Service		P.O. Box...		Eagle	CO	81631	9
43.36 %	TRUENO01	True North Hearth & Home...		120 Midla... #210		Glenwood...	CO	81601	9

Press "Enter" or "Ctrl + Enter" to select the highlighted record and close the results window. 7 results (0.088 seconds)

Search OK Cancel Help

Double-click the appropriate result to populate the form.

The second button is the **[Alternatives]** button. This launches a pop-up window which will display a more extensive list of all the records the system located with correct vendor information during the initial extraction process. The most confident one is displayed first, followed by the remaining alternatives:

Vendor Information

Search DB Alternatives Clear

Vendor ID/Addr Code: TWISTE01

Vendor Name: Twisted Tree Landscape Construction

Remit To Addr1: P.O. Box 740

Remit To Addr2:

City/State/Zip: Basalt CO 81621

Phone: 970-927-5025

Database Lookup

Enter one or more search keywords or phrases here:
Twisted Tree

Confidence	BP Code	BP Name	Address Code	Address 1	Address 2	Address 3	Regions/State	Postal Code	Phor
87.19 %	TWISTE01	Twisted Tree Landsc...		P.O. Box 740		Basalt	CO	81621	9
64.67 %	VENZOR01	Venzor Construction,...		P.O. Box 73		Eagle	CO	81631	9
63.44 %	ARRIOS01	AR Rio's Construction		P.O. Box 860		Avon	CO	81620	9
60.81 %	S2MCON01	S2M Construction Co...		P.O. Box 1578		Glenwood...	CO	81602	9
60.44 %	ATZREC01	A to Z Recreation		P.O. Box 626		Littleton	CO	80160	3
58.72 %	RANELS01	RA Nelson LLC		P.O. Drawer 5400,...		Avon	CO	81620	9
58.64 %	TCCROO01	TCC Contractors, Inc.		P.O. Box 2123		Eagle	CO	81631	9
57.96 %	BYDRIL01	B & Y Drilling		P.O. Box 1878		Rifle	CO	81650	9

Press "Enter" or "Ctrl + Enter" to select the highlighted record and close the results window. 43 results (0.098 seconds)

OK Cancel Help

Double-click the appropriate result to populate the form.

Invoice Number

This field should be automatically populated by the OCR engine. In cases where it is blank, the invoice number will have to be populated manually or by using Single Click Entry.

Invoice Date

This field should also be automatically populated by the OCR engine in most cases. In cases where it is blank, the invoice date will have to be populated manually or by using Single Click Entry.

Invoice Description

This field should also be automatically populated with the job description.

Work Completed this Period

Must be entered manually or by Single Click Entry if not already populated by extraction.

Materials Presently Stored

Must be entered manually or by Single Click Entry if not already populated by extraction.

Invoice Amount

The values in the Work Completed this Period field and the Materials Presently Stored field are automatically added up and placed in this field. Alternatively, this field can be manually populated.

Subcontractor Number

Must be entered manually or by Single Click Entry if not already populated by extraction. If not found, then the lookup button can be used to perform a database lookup in CMiC to get the subcontract code. If multiple results are returned, a table will be displayed to select the correct one.

Contract Number	<input type="text" value="17-067.015"/>	
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Job Code

Must be entered manually or by Single Click Entry if not already populated by extraction. If not found, then the lookup button can be used to perform a data base lookup in CMiC to get the subcontract code. If multiple results are returned, a table will be displayed to select the correct one.

Job Code	<input type="text" value="17-067"/>	
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