# **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 <u>https://testscanner.cmiccloud.com/client-html/</u>.

	Login	×
C	MiC	
Username:		
Password:		
Remember me		
	Login	
	powered by	Image Trust

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 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.

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- 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.

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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

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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.

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#### 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 dropdown 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.

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P. 6		Open selected page in a new viewer

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 dropdown menu.

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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.

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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**].

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#### Drag and Drop - Insert Only

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

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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".

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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.

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#### 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 rightclick 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.

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#### 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.

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# 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.

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p. 1	PA Case Nu	mber (if applicable): 470231793
p. 2	Under the Work shelter allowand requirements an	: Advantage Program, the City will issue a monthly rent supplement (over and above my family's monthly cash assistance e, if applicable) to eligible clients enrolled in the Program. I agree to comply with all Work Advantage Program d to actively seek and accept appropriate housing for the Program in accordance with DHS Client Responsibility Standards.
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Doc 6 (3 p.)	1.2 I unde basis	rstand that I will sign a one-year lease with my landlord and rental payments will be paid directly to my landlord on a monthly for the first year.
Doc 8 (2 p.)	1.3 I furth renew	er understand that if I am found eligible for a second year of the Work Advantage program my landlord will be obligated to my lease at the year one rent level. An additional year's rent will be paid to my landlord on a monthly basis.

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 <u>https://testvalidation.cmiccloud.com/ThinClientServer/ValidationLogin.aspx</u>. Log in with your credentials.

A list of available batches will be displayed.

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

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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 Inform	ation		
Invoice Number		1	0
InvoiceDate	09/25/18	09-25-2018	
Invoice Amount	\$78.70	78.70	
Job/Department Code		🗟 Jobs 🗟 Depts	
Invoice Description			

#### 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.

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#### **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:

C Search DB	Altern:	atives	Clear
Vendor ID/Addr Code	HOMEDE01		
/endor Name	Home Depot CRC		
Remit To Addr1			
lemit To Addr2	P.O. Box 9001043		
City/State/Zip	Louisville	KY	40290-1043
Phone	800-685-6691	1	

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:

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p	Press "Enter" or	r "Ctrl + Enter" to se	elect the highlighted record	and close the results win	dow.				21 results (0.1	97 seconds)
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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:

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C	67.96 %	51EAGL01	51 Eagle Road, LLC	)	P.O. Drawer 5400		Avon	со	81620	6
P	67.96 %	UPPERB01	Upper Basin Excave	ating	P.O. Drawer 5400		Avon	CO	81620	6
	66.88 %	HORNIN01	Maureen Horning		P.O. Box 1152		Edwards	CO	81632	6
_	60.40 %	YOUNGS01	Young Services		P.O. Box 944		Glenwood	CO	81602	0
In	58.67 %	MOUNTA31	Mountain Temp Ser	vice	P.O. Box 20		Aspen	CO	81612-0020	
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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.



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.

- 🔺 Invoice Informa	tion ———	Job Code Look	up									×
Invoice Number	0400	Enter one or me	ore search keywords or ph	rases here:								
interest interest	2160	RANELSON 1	7									
InvoiceDate	00/25/	Confidence	Job Company Code	Job Code	Job Name	Address 1	Address 2	Address 3	Regions/State	Postal Code	Phone Number	
Invoice Amount	031231	100.00 %	RANELSON	17-032	Rossetti R							
	\$78.7	100.00 %	RANELSON	17-500-16	Landon R						· · · · · · · · · · · · · · · · · · ·	
Job/Department Code	17	100.00 %	RANELSON	17-500-17	Torzetto H							
	17	100.00 %	RANELSON	17-500-18	Hart Resid							
		100.00 %	RANELSON	17-910-008	Burlingam							
Invoice Description	L17-066	100.00 %	RANELSON	17-500-20	Coursey R							
											>	~
		Press "Enter" or	"Ctrl + Enter" to select th	e highlighted reco	ord and close the	results window	и.			141	results (0.212 second	ls)
									earch O	K Can	cel 🕢 Help	

#### **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	tion —					
C Search DB	Alternativ	/es	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						Phone: 970-9 Fax: 0	27-5025			Email: mgwosl	@ranison.c
Can Search DB		Alternatives Clear			Email: carvn@hotmail.com Application is made for payment, as shown below, per the S the Subcontractor Application for Payment Continuation Sho			he Subcontract Agreen Sheet (CS) is attache	Subcontract Agreeme and belief, the W heet (CS) is attached here previous Certific		
Vendor Name		Twiste	d Tree	•••••••••••••••••••••••••••••••••••••••		1. ORIGINAL SL	IBCONTRACT AG	REEMENT SUM	\$	curr 59.000.00	ent payment
Remit To Addr1	Remit To Addr1 Database Lookup							×			
Remit To Addr2	To Add2 Enter one or more search keywords or phrases here:										
Chaldman Zim Twisted Tree											
oily/olate/2.p	Confide	ence	BP Code	BP Name	Addres Code	Address 1	Address 2	Address 3	Regions/State	Postal Code	Pho
Phone	100.00 %		TWISTE01	Twisted Tree Landscape C		P.O. Box		Basalt	со	81621	9
50.00		6	ASCENT02	Ascent Tree Services, LLC		P.O. Box		Dillon	со	80435	9
Invoice 1	- A Invoice 1 50.00		ASPENT01	Aspen Tree Service, Inc.		1111 Villa		Carbondale	CO	81623	9
Invoice Number	50.00 9	6	PREVEN01	Preventive Tree Spraying		P.O. Box		Dillon	co	80435	9
50.00 9		6	OLDGR001	Old Growth Tree Service		P.O. Box		Eagle	CO	81631	9
Involcedate	43.36 9	6	TRUENO01	True North Hearth & Home		120 Midla	#210	Glenwood	CO	81601	s۲
Work Completed	<u> </u>			- · - ···							>
Materials Present	Press "Enter" or "Ctrl + Enter" to select the highlighted record and closent		ne highlighted record and close th	ne results window.					7 results (0.088 s	econds)	
Invoice Amount							s	earch	ок	ancel	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						Phone 970/927-5025 Email: mgwosl@ranison.c					
Clear				The undersign					undersigned		
Vendor ID/Addr Code TWISTE01				Application is made for payment, as shown below, per the Subcontract Agreeme and belief, the V the Subcontractor Application for Payment Continuation Sheet (CS) is attached here previous Certific							
Vendor Name Twisted Tree Landscape Construction				1 ORIGINAL R		DEEMENT OUM		CUT	ent payment		
Remit To Addr1	Remit To Addrt Database Lookup							×			
Remit To Addr2	Confide	ence	BP Code	BP Name	Addres Code	Address 1	Address 2	Address 3	Regions/State	Postal Code	Phor
City/State/Zip	87.19 9	%	TWISTE01	Twisted Tree Landsc		P.O. Box 740		Basalt	CO	81621	9
Phone	64.67 9	%	VENZOR01	Venzor Construction,		P.O. Box 73		Eagle	со	81631	9
	63.44 9	%	ARRIOS01	AR Rio's Construction		P.O. Box 860		Avon	CO	81620	9
	60.81 9	%	S2MCON01	S2M Construction Co		P.O. Box 1578		Glenwood	CO	81602	9
	60.44 9	%	ATZREC01	A to Z Recreation		P.O. Box 626		Littleton	со	80160	3
Invoice Number	58.72 9	%	RANELS01	RA Nelson LLC		P.O. Drawer 5400,		Avon	со	81620	
InvoiceDate	58.64 9	%	TCCROO01	TCC Contractors, Inc.		P.O. Box 2123		Eagle	CO	81631	9
	57.96 9	%	BYDRIL01	B & Y Drilling		P.O. Box 1878		Rifle	CO	81650	~
Work Completed	<									2	>
Materials Present	rais Preset Press "Enter" or "Ctrl + Enter" to select the highlighted record and close the results window. 43 results					3 results (0.098 s	econds)				
Invoice Amount									ок Са	ancel 🛛 🕑 I	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	17-067.015	<b>.</b>

#### 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	17-067	<b>a</b>