

B. Scanning – Tests

Separate tests out – one sided completed, two sided completed

- a. Open Fortis
- b. Open trn_2000_2 Database
- c. Choose Scan
- d. Choose Open Script
- e. For 1 sided test choose SITE TEST
- f. Place documents on tray of scanner
- g. Choose Start
- h. Choose Done when completed
- i. For 2 sided test, choose BASIC TESTS
- j. Repeat steps g-i, they will be placed in the TESTS in basket also
- k. Go to In Basket
- l. Choose TESTS in basket
- m. Highlight the documents to index
- n. Choose Index
- o. In Folder Screen highlight TESTS
- p. In Document Type Screen highlight TESTS
- q. Click Okay
- r. Fill in requested information, name, date, social security number
- s. Ctrl+S to save indexed document

C. Scanning and Indexing Membership Applications

Membership Applications are filed in “Accounting” Database

- a. Open Fortis
- b. Click on scan
- c. Open script
- d. Scan Membership Application – okay
- e. Single document
- f. Place document in scanner tray – start – preview off
- g. Remove document – place next document on tray (for multiple pages)
- h. Click new document
- i. Remove document from tray
- j. Repeat steps for each document – done – close
- k. Click on in-basket
- l. Scroll down to appropriate document
- m. Highlight document
- n. Click index
- o. Double click on appropriate folder
- p. Type in name - enter

D. Scanning – Company Name/Address Changes

(Receivable name/address changes go into Company Name Change Folder – Payables name/address changes go into the Payable Name Change Folder)

- a. Open Fortis
- b. Open New2001 database
- c. Choose Scan
- d. Choose Open Script
- e. Choose the correct folder
- f. Choose Start
- g. Once all have been scanned, choose Done
- h. Open In Basket
- i. Go to the correct folder

- j. Highlight all documents to be indexed
- k. In Folder Screen highlight the correct Name Change Folder
- l. In Document Type Screen highlight the correct Name Change Folder
- m. Click Okay
- n. Fill in requested information (Name, Client/Vendor ID number, Date)
- o. Ctrl+S to save indexed document
- p. Close In Basket

F. Scanning and indexing On-Line Scheduling Agreements

These agreements are filed in "OFFDOCS" database

- a. Open Fortis
- b. Click on scan
- c. Open script
- d. Scan Electronic Registration – okay
- e. Single document
- f. Place document in scanner tray – start – preview off
- g. Make sure each page was scanned
- h. Remove document from tray
- i. Repeat steps b-h for each document – done – close
- j. Click on in-basket
- k. Scroll down to appropriate document
- l. Highlight document
- m. Click index
- n. Double click on appropriate folder
- o. Type in date on document – enter
- p. Type in name - enter
- q. Type in client or vendor number – save - close
- r. Open database – click yes
- s. Click database to be worked in

G. Scanning – On-Line Mandatory P.O. Agreements/ Changes

- a. Open OFFDOCS Database
- b. Choose Scan
- c. Choose Open Script / choose ONLINE P.O.AGREEMENTS
- d. Choose Start
- e. When all documents have been scanned, choose Done
- f. Open In Basket
- g. Choose ONLINE P.O.AGREEMENTS
- h. Highlight all documents to index
- i. In Folder Screen highlight ONLINE P.O. AGREEMENTS
- j. In Document Type Screen highlight ONLINE P.O.AGREEMENTS
- k. Click Okay
- l. Fill in requested information, Name, Client ID number and Date
- m. Ctrl+S to save indexed document
- n. Close In Basket when completed
- o. Paper to shred box

H. Scan / Index Checks

- a. Open New2001 database
- b. Choose Scan
- c. Choose open Script
- d. Choose Checks
- e. Take the singles and scan separately as Multiple Documents / pages per document 1

- f. For those with more than 1 page, scan as Single Document
- g. Choose Start
- h. Choose Done
- i. Close
- j. Open In Basket / choose Checks
- k. Highlight checks to work with
- l. Choose Index
- m. In Folder Screen highlight Checks
- n. In Document Type Screen highlight Checks
- o. Click Okay
- p. Fill in Date, invoice number(s) [put all invoice numbers listed on credit card/check copies] and Client ID number
- q. Ctrl+S to save the index
- r. When all are done, close

I. Scanning – Payables

Separate into stacks of 1 page/1sided, 2 or more pages, 1 page/double sided, 2 or more double sided

- a. Open Fortis
- b. Open New2001 database
- c. Choose Scan
- d. Choose Open Script / Choose PAYABLES
- e. Choose Start
- f. Once all have been scanned, choose Done
- g. Open In Basket
- h. Choose PAYABLES
- i. Highlight all documents to index
- j. In Folder Screen highlight PAYABLES
- k. In Document Type Screen highlight PAYABLES
- l. Click Okay
- m. Fill in requested information, date (this will be the check date written on the payable), Vendor name, Vendor ID number
- n. Ctrl+S to save indexed document
- o. Close In Basket when completed
- p. Paper to shred box

K. Scanning – CARS

Cars are only scanned in when completed and closed.

- a. Open Forts
- b. Open New2001 database
- c. Choose Scan
- d. Choose Open Script / Choose CARS
- e. Scan all pages of the CAR
- f. When all pages have been scanned, choose Done
- g. Open In Basket
- h. Go to the CARS
- i. Highlight the documents to be indexed
- j. In Folder Screen highlight CARS
- k. In Document Type Screen highlight CARS
- l. Click Okay
- m. Fill in required information, CAR number, Date, Name
- n. Ctrl+S to save in indexed document
- o. Close In Basket
- p. CARS complete are placed in box in File Room – they are not to be shredded.