

Version 9/13/2010

Method 1: Scanning Directly Into OnBase

Method 2: Sweeping Images Into OnBase

See Page 2

Method 1 is used for imaging Travel Reports and Expense Statements into SCEIS <u>using a</u> <u>scanner that scans directly into OnBase</u>.

When you have completed Method 1 your travel images will be attached to your trip document in SAP and will be visible to the people that approve your expenses for payment.

See Page 5

Method 2 is used for imaging Travel Reports and Expense Statements into SCEIS <u>using a</u> <u>network copier/scanner or a small desktop</u> <u>scanner that does not scan directly into</u> <u>SCEIS</u>.

Image files are saved in a directory on your workstation and loaded into SCEIS using the "sweep" function in OnBase instead of the scan function.

When you have completed Method 2 your travel images will be attached to your trip document in SAP and will be visible to the people that approve your expenses for payment.

Appendix 1: Reference Slides from Travel Management Training Course TV120

See Page 10

These slides are provided for reference about how to print your Travel Report / Expense Statement in MySCEmployee and how to send your expense report for approval after imaging is completed.

If you send your trip for approval before imaging is complete the images will not be available for the people that approve your trip. Images will attach to your trip when imaging is performed regardless of where the trip is in the workflow approval process.

### Viewing of Travel Images

Images attached to Trips will not be available in the Trip attachment list for the traveler or the travel assistant to see. Images will be available to everyone that has approval responsibility.

Travelers and travel assistants will know that images are successfully attached to a Trip when they receive an email confirmation that scanning is complete. See instructions for Method 1 and Method 2 for more details.



### Method 1: Scanning Directly into OnBase

#### PRINT AND SIGN YOUR EXPENSE REPORT / TRAVEL EXPENSE STATEMENT

Print your Travel Report / Expense Statement from MySCEmployee and sign the certification on the last page. Collect your travel receipts and supporting documentation. (Refer to Appendix 1)

### LOGIN TO THE SCEIS ONBASE CLIENT

Go to the Citrix web interface at https://sceisgateway.sc.gov/vpn/index.html Enter your username & password. Click the Log On button.



You may be required to change your password when you log in for the first time.

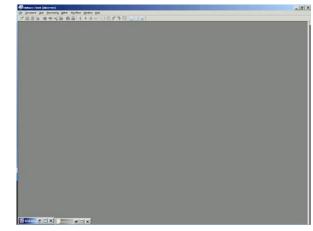
Click on the icon called "Onbase Full Client -Production" to access document imaging.

Applications	Content					
Main					Select v	iew kons 💌 🎯 Retre
BEX Analyzer	Onbase Full Client - Production	Onbase Test SAP Lagon	SAP Logon Pad	5RM Q4 010	Stat Training	SRM Training Internal Link
SRM Training Practice	Taining Onboor			14		

Click the OK button.

ľ	lications - Windows Internet Explorer		1
	pacentiges, ac. gos/Chris/Ner-App/site/def-sult. asp	(	M 🎒 🍕
	es Toole Help		
	att Us + South Caroline O Otro: Herden -	Apple danse 2	
	CITRIX		
	Applications - Messages	veferences +	
	Logged on at: DEND6224	HOTHER	Log Off   Pecor
	BEX. Analyzer Produ	The second data on the system and any set and the set of second s	Select or Parent Star Throng Of Full Car
	Hint: Click Reconnect to resume any	pavied resources. *	
			Change Password Pri

You are now logged into Onbase.





### Method 1: Scanning Directly into OnBase

#### SCAN TRAVEL DOCUMENTATION

Click Processing...Scan/Index



Click Scan Queues.

Double-click on the Scan Queue called 'XXXX HR Travel', where XXXX is your agency number.

Elle Document User Processing Admin			6	<u>''</u> ×
「日田市」 キャベ 留 間 昭	4 • +	3 🖉 🎙 🗖 🛄 🗮 🗎	*	
	Scan Que	les:		
🔯 Scan Queues:	Scan Queue	Scan Format	Scanner Type	
BD (multiple Deparation (0)	F030 HR EPMS	No Format Specified	Unavailable	
a Awaiting Index (0)	F030 HR General	No Format Specified	Unavailable	- 1
Index in Progress (0)	F030 HR Payroll	No Format Specified	Unavailable	
	F030 HR Travel	Kodak i1210	Twain	
Awaiting Commit (0)				
Committed				- 1
Oscheduled Processes				- 1
				- 1
				- 1
Scan Eormat				- 1
Scan Mode  No Index  O Pre-Index  O	-			- 1
Scan Mode @ No Index C Pre-Index C	F.			- 1
Document Type				- 1
Document Date 06/28/2010				- 1
,				- 1
Keywords				- 1
				- 1
Index Append Clear Keys Scan				- 1
				- 1
(in				- 1
				- 11

From the Scan Format drop-down list pick your agency and scanner model.

From the Document Type drop-down list pick the appropriate document type.

**Keyboard Entry of Trip Number:** Enter the HR Trip Number as described below only if you <u>are not</u> using a Kodak or Fujitsu scanner. If you <u>are</u> using a Kodak or Fujitsu scanner then skip to the paragraph labeled 'SCAN' because the scanner will read the trip number from the bar code.

In the HR Trip Number field type the trip number shown under the bar code on your Expense Report / Travel Expense Statement. You do not need to type the leading zeros.

Scan Format F030_Kodak_i1220	-
Scan Mode 🔍 No Index 🔍 Pre-Index 💽 Full Index	
Document Type HR Expenses Claimed Documentation	-
Document Date 06/28/2010	
Keywords	
HR Trip Number 307	
HR Personnel Number	
HR Email Address	
Restrict To Agency 📃 🧃	
Index Append Clear Keys Scan	
	3

Press the Tab key after typing the HR Trip Number.

The system will fill in the HR Personnel Number.

If your agency maintains email addresses in SAP the email address will also be filled in.

**SCAN:** Place the Expense Report / Travel Expense Statement and receipts into the scanner. They should be oriented top-down, print-side down, "Diving in Backwards", like a fax machine.

Click the Scan button.

Scan Format F030_Kodak_i1220
Scan Mode C No Index C Pre-Index 💿 Full Index
Document Type HR Expenses Claimed Documentation
Document Date 06/28/2010
Keywords-
HR Trip Number 307
HR Personnel Number 8994
HR Email Address ALICEINWONDERLAND@
Restrict To Agency 📃 🔒
Index Append Clear Keys Scan



### Method 1: Scanning Directly into OnBase

### Click OK on the Batch Name screen

Batch Name		×
Enter a name to sta	rt a new batch or "Cancel" to YLES	select an existing batch.
<u>0</u> K		<u>C</u> ancel

The paper will feed through the scanner and the last page will appear on the screen with the Scanning Complete screen.

Click the Done button.

Scanning Complete	
Scan More Pages	Continue adding pages to current batch or document
New Document	Create a new document within batch
Change Format	Modify the current format before continuing
Discard Pages	Dispard scapped pages
Done	
Done	Scanning complete
Delete Last Page	Scanning complete

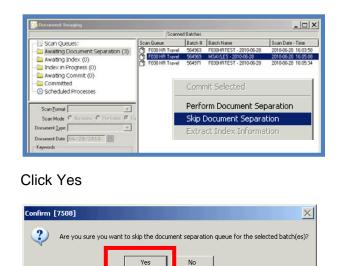
The scanned batch is now in the Document Separation queue.

Click 'Awaiting Document Separation'.

Document Imaging
Scan Queues: Awaiting Document Separation (3) Awaiting Index (0) Multiple Index in Progress (0) Awaiting Commit (0) Committed Committed Scheduled Processes
Scan Format Scan Mode O No Index O Pre-Index © Full In Document Type Document Date 06/28/2010
Index Append Clear Keys Scan

Put the pointer over your scanned batch. Your batch will be labeled with your userid.

Left-Click to highlight the batch...Right-Click to show the menu... Left-Click 'Skip Document Separation'. Note: Select 'Skip' because these instructions are for scanning one trip at a time.



Scanning is complete.

The images are attached to your trip in SAP.

You will receive a mail item confirming that scanning is complete. The mail will arrive in your external email if your agency maintains email addresses in SAP. Otherwise the mail will arrive in your MySCEmployee Universal Work List (UWL).

You should now open the trip in MySCEmployee to "SAVE AND SEND FOR APPROVAL".



Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

#### **ONE-TIME SETUP**

Create a folder directly under your C: drive called '1 SCEIS Sweep'.

Log in to Citrix (sceisgateway.sc.gov) and log in to either SAP or OnBase, it does not matter which one. (See page 6 for logon instructions.)

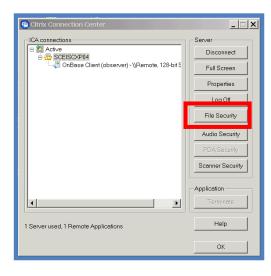
Right-click on the Citrix Connection Center icon in the system tray located in the lower right corner of the screen. (Your icon might have a red dot in the middle depending on your Citrix version.)

💽 🕞 💽 10:33 AM	
----------------	--

Left-click on 'Open Connection Center'



### Click 'File Security'



Click 'Full Access' and 'Never Ask Me Again' then 'OK'

_	CITRIX	C
if access to	ications currently have the sel local client files. To change t al and click OK.	
Access lev	(***	
C No Ac	cess	
C Read	Access	
🖲 Full Ar	ccess	
Do vou wa	nt to be asked again?	
C Alway		
C Never	r ask me again for this site	
	rask me again	

Click 'OK' to close the Citrix Connection Center



Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

#### PRINT AND SIGN YOUR EXPENSE REPORT / TRAVEL EXPENSE STATEMENT

Print your Travel Report / Expense Statement from MySCEmployee and sign the certification on the last page. Collect your travel receipts and supporting documentation. (Refer to Appendix 1)

#### S CAN AND S AVE IMAGES

Scan your travel documentation on your network/copier scanner or desktop device (not connected to SCEIS) and save the file to the 'C:\1 SCEIS Sweep' folder that you created in the One-Time Setup above.

You may name the image file anything that you want to. It must be a file type of .pdf or .tif. Use .tif if your device can do either .pdf or .tif.

#### LOGIN TO THE SCEIS ONBASE CLIENT

Go to the Citrix web interface at <u>https://sceisgateway.sc.gov/vpn/index.html</u> Enter your username & password. Click the Log On button.



You may be required to change your password when you log in for the first time.

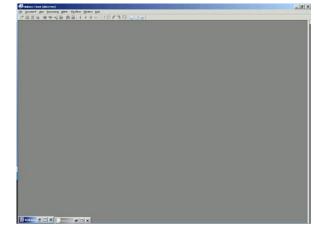
Click on the icon called "Onbase Full Client – Production" to access document imaging

0 1 1 1 L 2						
Applications	Content					
Main					Select v	iem kons 💌 😰 Refin
BEK ANBIJIZEF	Onbase Full Client - Production	Onbase Test SAP Lagon	S4P Logen Pad	5RM QA 010	Site Training	SRM Tokrieg Internal Linit
SRM Training	Travering Onbose Full Client			14		

### Click the OK button.

anceneges ac. gos-fictors/four-Apppluted darf sub es Tools Help act Las = South Canadras (© Clens twee			MA
CITRIX			
Applications Messages	Preferences -		
Logged on all DEN06224	MOTILE	<b>X</b>	Log Off   Red
Main	and the first excision of the judicities down in the state of the provide the state of the state	Ma, Six	Select Training G Full Co
Hint: Click Reconnect to resume	any pauled resources. 🕷	_	_

You are now logged into Onbase.

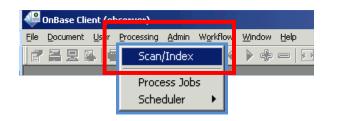




Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

#### SWEEP TRAVEL DOCUMENTATION

Click Processing...Scan/Index

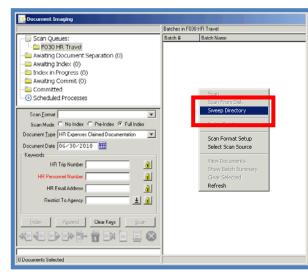


Click Scan Queues.

Double-click on the Scan Queue called 'XXXX HR Travel', where XXXX is your agency number.

🚇 OnBase Client (observer) - [Document Ima 🙀 Ele Document User Processing Admin Y			_ D   _ B	
12日日日 キャイ智 西部	4 > +	630 000	8	
	Scan Queu	ies:		1
	Scan Queue	Scan Format	Scanner Type	
En Ameritian Desument Separation (0)	F030 HR EPMS	No Format Specified	Unavailable	1
🛅 Awaiting Index (0)	F030 HR General	No Format Specified	Unavailable	Ш
- 🔄 Index in Progress (0)	F030 HR Payroll F030 HR Travel	No Format Specified Kodak i1210	Unavailable Twain	
- Awaiting Commit (0)	ruso nn Havel	KUUdK II 210	TWalt	•
- Committed				
Scheduled Processes	1			1
0.001000000				Ш
				Ш
Scan Format	1			Ш
				Ш
Scan Mode  No Index C Pre-Index C F				Ш
Document Type				Ш
Document Date 06/28/2010				Ш
Keywords				Ш
				Ш
Index Append Diear Keys Scan				Ш
Index Append Dear Keys Scan	1			1
	1			1
	1			1
			•	d
				4

Move the mouse to the white space... Right-click to show the menu... Click 'Sweep Directory'



In the Import/Sweep screen Click 'Sweep Directory'

Import / Sweep	×
Choose Sweep Directory to import all image files in a	Sweep Directory
particular directory. Choose Import File to	Import File
import one image file.	Cancel

Type in C:\1 SCEIS Sweep or use the browse button to select the directory from your C: drive

#### Click OK

Sweep Path Dialog
Enter Directory to Sweep
C:\1 SCEIS Sweep
Document Type
HR Expenses Claimed Documentation
Delete Files After Sweep     Sweep Images Only
□ Image Orientation ○ Rotate 90 Left □ Flip X
C Rotate 90 Right Flip Y
C Rotate 180
OK Browse Cancel







Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

It is optional to type the trip number at the end of the Batch Name. If you enter the trip number do not remove your userid and date.

### Click OK

Batch Name	×
Enter a name to start a new batch or "Cance	" to select an existing batch.
F030HRTEST - 2010-06-30 **Trip #401**	
ОК	Cancel

The scanned batch is now in the Awaiting Document Separation queue.

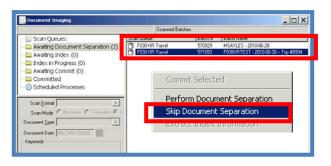
Click 'Awaiting Document Separation'.

Contract Con
🐼 Scan Oueues:
🔄 Awaiting Document Separation (2)
🛅 Index in Progress (0)
🖾 Awaiting Commit (0)
- Committed
Scheduled Processes
Scan Format
Scan Mode O No Index O Pre-Index O Full In
Document Type
Document Date 06/30/2010
Keywords-

Put the pointer over your scanned batch. Your batch will be labeled with your userid.

Left-Click to highlight the batch...Right-Click to show the menu... Left-Click 'Skip Document Separation'.

Note: Select 'Skip' because these instructions are for scanning one trip at a time.



### Click Yes



The batch is now in the Awaiting Indexing queue.

Click 'Awaiting Indexing'

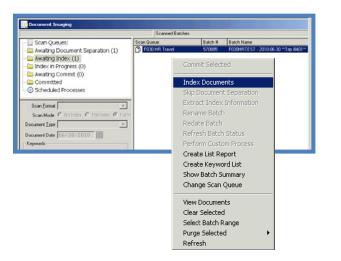
in Document Imaging
Scan Queues: Awaiting Document Separation (1) Awaiting Index (1) Maximum Progress (0) Awaiting Commit (0) Committed Committed Scheduled Processes
Scan <u>F</u> ormat
Scan Mode 🔿 No Index 🔿 Pre-Index 👁 Full In
Document <u>Type</u>
Document Date 06/30/2010 III
Keywords



Method 2: Sweeping into OnBase (images scanned outside of SCEIS)

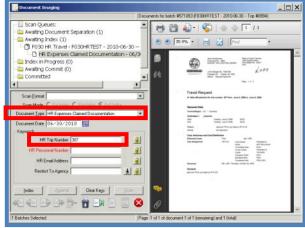
Put the pointer over your scanned batch. Your batch will be labeled with your userid.

Left-Click to highlight the batch...Right-Click to show the menu... Left-Click 'Index Documents'.



From the Document Type drop-down list pick the appropriate document type.

In the HR Trip Number field type the trip number shown under the bar code on your Expense Report / Travel Expense Statement. You do not need to type the leading zeros.



Press the Tab key after typing the HR Trip Number.

The system will fill in the HR Personnel Number.

If your agency maintains email addresses in SAP the email address will also be filled in.

Click the 'Index' button.

Scan Format
Scan Mode O No Index O Pre-Index O Full Index
Document Type HR Expenses Claimed Documentation
Document Date 06/30/2010 🏢
Keywords
HR Trip Number 307
HR Personnel Number 8994
HR Email Address ALICEINWONDERLAND@
Restrict To Agency 📃 🔒
Index Append Clear Keys Scan

Sweeping is complete.

The images are attached to your trip in SAP.

You will receive a mail item confirming that scanning is complete. The mail will arrive in your external email if the system filled in the HR Email Address when you entered the Trip Number. Otherwise the mail will arrive in your MySCEmployee Universal Work List (UWL).

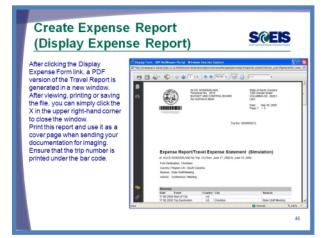
You should now open the trip in MySCEmployee to "SAVE AND SEND FOR APPROVAL".



<u>Appendix 1: Reference Slides from Travel Management Course TV120</u>

If the expense report is not	Change Expense Report ( 212 )
ready for submission because	H-3-3-4
supporting documentation is	Server Cala Drie Teinche Amtern and Serveren
required to be imaged, you	Employee ACCEVICADERCHIC (1000011) Scheme Dovert Critical Start Date 10/11/0018 End Date 10/10/008
should print the report by	A Previous lines (Carose)
clicking the Display Expense	
Form button prior to saving	Elsen Arritere     Elsen     Tank usertiti as a ny expense report arc and it ater
he document. Attach any	C Save and Send for Approval . I want to save ny score report and and it has for further processing
required documents (e.g. receipts) to the printed report and send to the person	I foundly cardiny but differs that the expression is administration in the Threef Remonstratement Reports are actually provided by the as a research transmission of the provided administration along research as independent and anothermore as assometistic registration for the transmission in the reference of the state of the state of the state of the state of the transmission and a software with the insumments of attain large, rules and registration.
designated by your agency to	Summary
perform imaging activities.	Total Usado am Datal 2000 Tatal Usado M. 71 (2000
When imaging is completed,	Tota Indicate Receipta 42.00 UD
ou should receive an email	Total Travel Expenses MS.78 800
notification. Only then should	Amount Reimbursed 952/1 650
	Amount Pald Dat 902.76 800
ou use the Save and Send	

	end) SCEIS
Once all items have been	Change Expense Report ( 212 )
scanned, if appropriate, then	N-3 - 3
should you use the Save and	Germalitate Erter Receipte Merseys and Bend Compilier
Send for Approval button.	Employee ALIC VOIDELAND ( 0000011) Scheme Demots ( Plan Bert Bete (0175000 End Bele (0100000
You will receive a notification	A Revue Tex Text Text to Aurora   (Cene)
by email once your	
	Final Action
documentation is imaged.	Class Long continues and my expense recent and and 1 along
	estually invariant by me as necessary traveless expenses to the performance of my other day makes or holges peckaded in a catemore or catemore merchanness and the second from this house dama, and their this results is how and convert in a were produced memory and other expenses of the other of dama and the and convert in a were produced memory and other expenses of the other of dama and the other and convert in the completence of dama and the other and convert
	Summary
	Total Deals per Dans 20.00.000
	Test Heaps 71.75.VED Total Introduce Revision 40.00.UED
	Total Travel Expenses 182.19.000
	Amount Reinfoursent 161.11.030
	Amount Ped Out INLIN INT
	Cast Assistant
	HE111 USD Company Cole SCO1 (State of Source Caroline), Business Area FEDE (BUDGET AVE) CONTROL 804446); Cole Carter FEDE



est Official Start Date 05/17/2009 End Date 05/15/2009
esto Official Start Date 05/17/2005 End Date 05/15/2005
estic Official Start Date 05/17/2009 End Date 05/15/2009
*
es.
es.