Web Scan Toolkit Basic Installation

1. Initiate Installation



2. Agree to EULA and Install with Admin

e	Perceptive Experience Web Scan Setup	– Web So	can	×
(0)	User snall at all times maintain the confidentiality of Information, using the same degree of care that User confidential information, but in any event not less than reas use (except in performance of this EULA) or disclose to Confidential Information, except as may be required by shall be liable and responsible for any breach of this Section User's employees, agents, consultants, contractors or repre-	uses to prote sonable care; and any third part law or court on n 15 committee esentatives.	onnidentia ct its ow nd shall no y any suc rder. Use d by any c	ai ^n ot h er of
	☑ I agree to the licen	se terms and	condition Clos	e

3. Installation will begin



4. Installation Completion



Toolkit Testing

- 1. Login to the CalSAWS Training environment:
- 2. Click on Imaging in the Utilities bar in the top right.



3. Within the Imaging Solution pop-up, click on Capture and Indexing.

H > Home		۲
Capture and Indexing	Documents	

4. Click on Capture in the top right.

H > Capture and Inde	exing	•
=		😫 Capture
WORKFLOW PROCESSES Barcode Verification Barcode Verification con Cocument Removal Exception Exception Confidential No Case Assigned Person Selection QA & Indexing Reindex All Reindex All Reindex All Confidential 	Select a process or a queue.	

5. From the Capture Profile drop list, select Single Case Scan. Click on Start.

🔢 > Capture and Indexing		0
=	Capture and Indexing 🌣	😂 Capture
WORKFLOW PROCESSES > □ Barcode Verification > □ Barcode Verification Con > □ Document Removal > □ Exception > □ Exception Confidential > □ Person Selection > □ Reindex All □ Reindex Confidential	 capture Profile Single Case Scan Applicable Date Gar08/2022 Received Date Gar08/2022 Bundle ID Origin 36 - San Bernardino - County • OCR8ppass False • OCR8plitoverride True • 	

6. The scanner should initiate, and scan anything in the document feeder.

	Capture and Indexing Status		
NORKFLOW PROCESSES Barcode Verification Barcode Verification Document Removal Dcception Exception Confidentiat No Case Assigned Person Selection QA & Indexing Reindex All Reindex All Reindex All Confidential Reindex Confidential	Cocess or a que SINGLE CASE SCAN SOURCE DPI SIDES PAPER SIZE COLOR	Scanner 300 duplex letter black/white	
	Capturing	Close Open Batch	

After everything is scanned, click on Open Batch.

Capture and Ind	lexing					0.
=		Capture and Indexing Status				関 Captur
WORKFLOW PROCESSES	+ × / /			1		T H B
Barcode Verification Barcode Verification Co		SINGLE CASE SCAN				Search
Document Removal Document Removal	Time In Queu	SOURCE	Scanner		Last Event By	Last Event
Exception Confidential	1 seconds	DPI	300	PM	ITTSME.User12	4/8/2022 12:11 PM
O No Case Assigned O Person Selection	2 days 19 hours	SIDES	duplex	м	ITTSME.User12	4/8/2022 11:26 AM
🝷 🙆 QA & Indexing	2 days 19 hours	PAPER SIZE	letter	M	ITTSME.User12	4/8/2022 11:24 AM
🖸 County (QA - San B	6 days 18 hours			M	ITTSME.User14	4/1/2022 5:31 PM
Office 01 (QA - San Office 02 (QA - San	31 days 22 hours	COLOR	black/white	2M	ITTSME.User3	3/7/2022 1:23 PM
🖸 Office 03 (QA - San	43 days 37 minu	BATCH 000002674		AM.	sanbernardino.use	3/7/2022 10:20 AM
🖸 Office 04 (QA - San	43 days 45 minur			AM.	ITTSME.User17	2/24/2022 10:25 AM
🖸 Office 05 (QA - San		APPLICABLE DATE 04/08/2022				
Office 06 (QA - San	43 days 1 hours		2000au	AM	ITTSME.User17	2/24/2022 10:07 AM
Office 07 (QA - San	43 days 1 hours	RECEIVED DATE 04/08/2022		ADV	ChenP	3/8/2022 2:25 PM
Office 08 (QA - San	43 days 1 hours .	BUNDLE ID		AM.	ITTSME.User8	2/24/2022 10:01 AM
Office 10 (QA - San	43 days 1 hours	CASE UID		304	ITTSME.User16	2/24/2022 10:07 AM
🖸 Office 14 (QA - San						
Office 15 (QA - San	43 days 1 hours			AM	ITTSME.User5	2/24/2022 9:42 AM
🖸 Office 16 (QA - San	44 days 20 hours	Complete. Total pages: 3.	Close Open Batch	>M4	ITTSME.User22	2/22/2022 2:43 PM
🖸 Office 17 (QA - San	44 days 20 hours	31 minutes 36 seconds I I I I 0000002576 I I I I	SME (Iser15 2/22/2022 2:	19 PM	sanhernardino use	3/8/2022 11:04 AM
🖸 Office 18 (QA - San	Juja zo noma	an minimum and associated and associated and	mererer presidenter	ev 10	an merral universiten	STOLENE CITCH MAL
Office 19 (QA - San						247 item

- 0 H > Capture and Indexing • ₽ H+ H Z+ C D+ O+ # Ŧ Submit 👩 😑 0 Batch 0000002674 QUEUE County (QA - San Bernardino) ORIGIN 36 - San Bernardino - County CONTENT 1 document(s), 3 page(s) BUNDLE ID DOCUMENT PROPERTIES **Bank of America** DING OCR CASE/PERSON UID Ē Your Bank of America Business Checking Statement CASE NUMBER/CIN * Q 0669 P P CASE/PERSON NAME ent Period: ugh December 31, 20 t Number BARCODE * Q At Your Service Call: 310.884,1870 n Inquiries of America r City Branch x 37176 FORM NUMBER ritten FORM NAME 6 20, CA 94137-0176 Page 2 -<Pending OCR> Customer since 2010 Bank of America appreciates your business and we enjoy serving you. CUSTOM PROPERTIES APPLICABLE DATE Our Online Banking service allows you to check balances, track account activity and more. With Online B view up to 18 months of this statement online. Enroll at www.bankofamerica.com/smallbusiness. nking you 8 4/8/2022 RECEIVED DATE Page 3 Summary of Your Business Checking Account 4/8/2022 8
 S0.00
 Number of electronic checks paid

 + 3,525.27
 Number of 24 Hour Customer Service Calls Sci 459.57

 Sci 459.57
 Assisted
 Beginning Balance on 12/14/10 0 DOCUMENT TYPE Total Deposits and Credits + 3,525.27 ¥ 00 Ending Balance CAPTURE INFORMATION - + X I H 8 Single Case
- 7. The document(s) scanned should open. The test is considered complete and a success.

Virtual Printer Basic Installation

1. Initiate Installation



2. Select Next

💦 Hyland Virtual Printer Setup	- 🗆 🗙
	Welcome to the Hyland Virtual Printer Setup Wizard
	The Setup Wizard will install Hyland Virtual Printer on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
-	
(J)Hyland	
	Back Next Cancel

3. Agree to EULA and click Next

	End User Lice	ense Agreement READ CAREFU	LY	^
I his End User Lio	ense Agreement ("EUL	A) is made betw	een riyland Softw	vare, inc.
("Hyland"), 28500	O Clemens Road, Westla	uke, Ohio 44145 U	JSA, an Ohio corp	poration,
and the person or e	entity ("User") that has	a submitted to Hy	fland or an applica	ible
Hyland authorized	solution provider writt	ten purchase orde	rs that have been i	accepted
by Hyland or such	solution provider for F	Hyland's propriet	ary software prod	bucts,
including, in each or	ase, third party softwa	re bundled by Hy	land as part of a u	mified
product ("Softwar	e"), that has paid the ar	oplicable Softwar	e license fees for s	uch
Software and that I	has agreed to the terms	of this EULA by	clicking the "I AC	CCEPT
THE AGREEMEN	VT" option that appear	s at the bottom o	f this screen. Unli	ess v

4. Enter the production web app url:

		2	- 0	×
leb Application Server Setup				
Enter the URL for your Perceptive Experi module name.	ience web appl	ication server inc	duding the o	capture
eb Application Server URL				
https://calsaws-cs.hylandcloud.com/conte	ent/#capturein	dexing		

5. Installation will begin

Hylan	d Virtual Printer Setup		-		×
Insta	lling Hyland Virtual Printer	·			
Please	wait while the Setup Wizard insta	lls Hyland Virtual Printer.			
Status	:				
		Back	lext	Cano	el

6. Installation Completion

Click Finish

i 🖉 Hyland Virtual Printer Setup	- 🗆 X
	Completed the Hyland Virtual Printer Setup Wizard
	Click the Finish button to exit the Setup Wizard.
Hyland	
	Back Finish Cancel

Virtual Printer Testing

- 1. Login to the CalSAWS Training environment:
- 2. Open a web page or file. Open the Print dialogue. Select "Hyland Virtual Printer as the printer.



- 3. Click on Print. The Imaging Solution should open in a new tab or window.
- 4. In the Capture Profile drop list, select Single Case Scan. Click on Scan.

121			Difference
WORKFLOW PROCESSES	Select a process or a queue.	Capture and Indexing 🛛 🗘	Second
Bercole Verification Barcole Verification Con., Document Removal Document Re	Source a process of a lippoint.	Careture Profile	

🔢 > Capture and Inc	lexing								0 (1)
									Capture
WORKFLOW PROCESSES	+ + 2 2 1 +	Capture and Indexing Status SINGLE CASE SCAN						T H	1
Barcode Verification Barcode Verification									Search
Document Removal	Time In Queue					Last Event	Bundle ID		
Exception Confidential	1 seconds	source Scanner			4/8/2022 1:07 PM				
No Case Assigned	S5 minutes 1 seconds	DF1 300			4/8/2022 12:20 PM				
Q Person Selection QA & Indexing	2 days 20 hours 20 minutes 29 seconds	sizes duplex				4/8/2022 11:26 AM			
County (QA - San B	2 days 20 hours 21 minutes 57 seconds	PAPER SIZE letter			4/8/2022 11:24 AM				
Office 01 (QA - San Office 02 (QA - San	6 days 19 hours 39 minutes 4 seconds				blackowbite	4/1/2022 5:31 PM			
🚨 Office 03 (QA - San	31 days 23 hours 18 minutes 50 seconds	COLOR			Concert Hinter	3/7/2022 1:23 PM	Quick Tips Video - Q		
Office 04 (QA - San Office 05 (QA - San	43 days 1 hours 33 minutes 39 seconds	BATCH 0000002675				3/7/2022 10:20 AM			
Office 06 (QA - San	43 days 1 hours 41 minutes 56 seconds					2/24/2022 10:25 AM			
🖸 Office 07 (QA - San	43 days 2 hours 7 minutes 29 seconds	APPLICABLE DATE		04/08/2022		2/24/2022 10:07 AM			
Office 08 (QA - San Office 09 (QA - San	43 days 2 hours 13 minutes 14 seconds	RECEIVED DATE 04		04/08/2022		3/8/2022 2:25 PM			
🖾 Office 10 (QA - San	43 days 2 hours 16 minutes 5 seconds	BUNDLE ID				2/24/2022 10:01 AM			
Office 14 (QA - San Office 15 (DA - San	43 days 2 hours 17 minutes 1 seconds	CASE UID				2/24/2022 10:07 AM			
Office 16 (QA - San	43 days 2 hours 31 minutes 37 seconds					2/24/2022 9:42 AM			
Office 17 (QA - San Office 18 (QA - San	44 days 21 hours 26 minutes 39 seconds	Complete. Total pages: 7.			Close Open Batch	2/22/2022 2:43 PM			
Office 19 (QA - San	44 days 21 hours 27 minutes 36 seconds	Idle 0000002576	ITTSME.User15	2/22/2022 2:39 PM	sanbernardino.use	3/8/2022 11:04 AM			
Office 20 (Q4 - San Office 21 (Q4 - San	44 days 21 boars 31 minutes	1dle 0000002567	ITTSME, User 26	2/22/2022 2:35 PM	ITTSME.User15	2/24/2022 9:48 AM			
O Office 22 (OA - San	44 days 21 hours 44 minutes 40 seconds	1die 0000002560	ITTSME.User4	2/22/2022 2:22 PM	ITTSME.User4	2/22/2022 2:23 PM			

5. Wait for the image to process. Click on Open Batch.

6. The document should open. The test is considered complete and successful.

H > Capture and Inc	dexing			(
• 9 H• H 0	S* 0 D* 0* #			Ŧ Submit 🖉	₽			
Batch 0000002675								
QUEUE County (QA - San Bernardino)	ORIGIN 36 - San Bernardino - County	CONTENT 1 document(s), 7 page(s)	BUNDLE ID /					
PENDING DOID	4/0/20 1/00 DM	DOCUMENT PROPERT	TIES					
144 C	4/6/22, 1.00 PM	CASE/PERSON UID						
100 C		CASE NUMBER/CIN *						
7.90.X.)	Kelley	-	Q					
Page 1	Reney			CASE/PERSON NAME				
and the second sec	Knows Cars.	BARCODE *						
alternative Proc.	itile ive edite		Q					
-	From values to repairs, we've got it all	FORM NUMBER						
(FORM NAME				
Page 2	Price New/Used	My Car's Val	ue	<pending ocr=""></pending>	-			
10 m		CUSTOM PROPERTIES						
-		APPLICABLE DATE						
		4/8/2022	8					
Face 3								
	Most Advanced and Luxurious Sierra Ever							
					-			
-				CAPTURE INFORMATION				
				Single Case				
Page 4				CONFIDENTIAL	-			
	4 1 /7 + 56% + 35 T H	D		HEARINGS NUMBER				