



Table of Contents

Document Imaging Instructions.....	4
I. Required Equipment.....	4
II. Scanning, Recognizing and Saving.....	4
A. Scan.....	4
B. Convert.....	5
C. Recognize.....	6
D. Upload.....	7
III. Scanner Settings.....	8
IV. PC Settings.....	8
A. Scanner Options.....	8
B. Image Options.....	9
C. Barcode Options.....	9
D. Upload Options.....	10
E. Adding New Document Types.....	11
Adding Scanned Documents to DIMS.....	12
I. Pre-Work: Scanning, Recognizing and Saving.....	12
II. Procedure.....	12
A. Open DIMS.....	12
B. Log In.....	12
C. Add Documents.....	13
D. Add Documents (cont).....	13
E. Testing Documents.....	14
F. E-Mailing Documents.....	15
G. Printing Select Documents.....	18

Document Imaging Instructions-Scanning, Recognizing & Saving

I. Required Equipment

Scanner/Copier and desktop computer with Pentad DIMS software.

II. Procedure

Please note that although the imaging software has one button labeled "Begin convert, Recognize and Upload", this should not be utilized. It will not work for manifest documents. In addition, when you go to rename any BOL's and DR's that have unreadable PRO numbers, you will not have any documents in the recognized folder to compare names against. It is recommended that you use the manual "Quick Scan" buttons.

A. Scan Documents

1. **Open** the desktop folder "Scanned" (folder C:\Program Files\Pentad Systems\Imaging\DR Scanner). Make sure it is empty. If it is not, you will need to go through the recognition procedure for documents in this folder so they are removed(see part C below).
2. On the scanner control panel **click** on the '**Fax/Scan**' button.
4. Load the documents to be scanned face up in the scanner feed tray.
 - a. Note that documents to be scanned in as a group should all be of one type.
 - b. The documents should all be loaded for one date. The date groups for each document type are as follows:
BOL – date the customer was billed,
DR – date the material is delivered, and
MANIFEST – date the material was picked up.

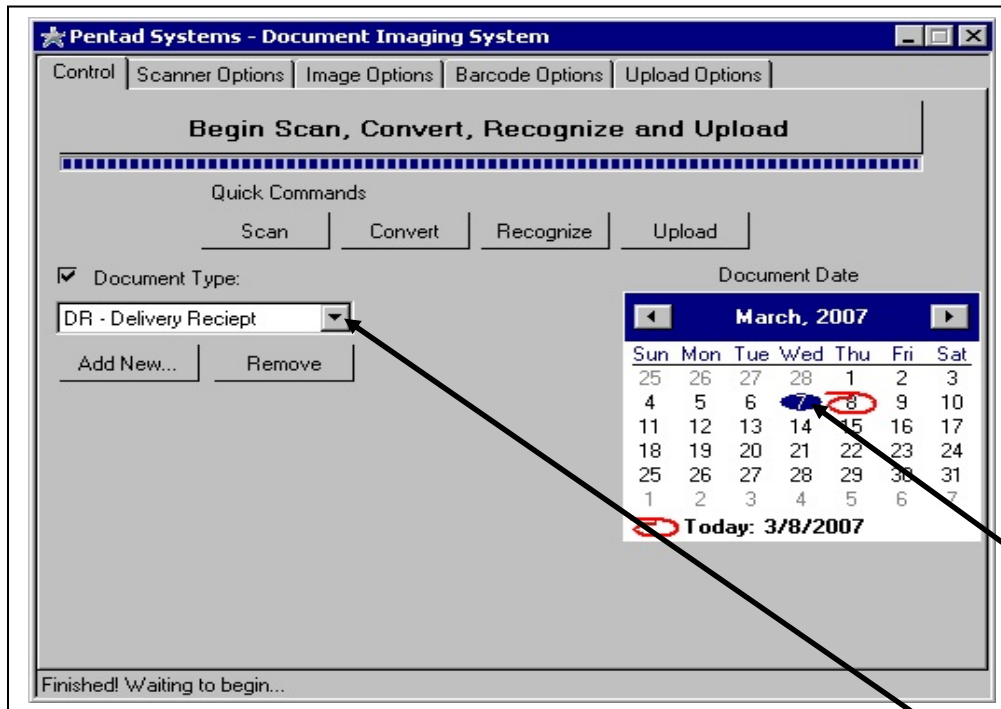
Also note that document types for a certain date should only be uploaded as a group once per day. This avoids the problem of manifests replacing what has been uploaded earlier.

5. On the scanner control panel, **click** the '**Start**' button.
6. Once the documents finish scanning, they will all be loaded as images in the desktop folder "DR Scanner". (This is also the folder C:\Program Files\Pentad Systems\Imaging\DR Scanner).



B. Convert Documents

1. On the computer, **open** the desktop icon '**Shortcut to Imaging**'. The application file "Imaging" that this activates is also located in desktop folder "Imaging2". The following screen will appear:



2. Select document type and date
- Select** the document type that has been scanned using the drop down list above.



Note that all document types need to be converted to the correct size and type of *.tif document for storage and viewing. However, they are handled differently after that point, so selecting the correct type of document is important at this stage.

- Select** the correct date for these documents(see A5 above) by clicking on the date in the calendar shown above. Note that today's date is always highlighted with the red circle shown.

3. **Click** on the 'Quick Commands' button above labeled '**Convert**'. No matter whether it is a BOL, DR or Manifest, they will all be downsized slightly as *.tif drawings and stored in a "Converted" folder.



C. Recognize Documents

It is during this process that files are checked for a scannable bar code number. Those files that have one are renamed utilizing this code in the new name. Those not recognized are placed in a separate folder to be examined/worked on manually.

1. **Click** on the 'Quick Commands' button labeled '**Recognize**'. All of the *.tif files in the "Converted" folder are examined for a bar code. If the bar code is recognized, the file will be renamed using that bar code and transferred to the "Recognized" folder. In addition, BOL files with the same PRO number will be renamed with a "-1", "-2", "-3", etc. at the end of the name (example "LEW-498447_BOL-1.tif"). The same occurs with DR's.

2. Files that do not have a recognizable bar code will all be placed into a folder labeled "NoBarCode". Since manifests do not contain bar codes, all manifests will be transferred to this file. In addition, BOL or DR documents missing a bar code or having one that is not readable by the computer software will end up here as well.

3. Manifest documents at this stage have been renamed by the computer using the date selected in B2. above. Name formats will be 20061201_Manifest_001.tif , _002.tif, _003.tif, etc. Any of these manifests transferred from an advance carrier need to be renamed at this time to reflect that carrier's name. To do this,

- a. **Open** the "NoBarCode" folder.
- b. **Open** each file one at a time. View the file to determine the advance carrier name.
- c. **Close** the file and **Rename** it to the name 'XXXX-MANIFEST.tif' using your own abbreviations for XXXX
- d. Repeat steps b through c above until all manifests are renamed.
- e. Once you have renamed every file, **Select All** of the files.
- f. **Cut** the renamed files from the "NoBarCode" folder.
- g. **Open** the "Recognized" folder and paste all the cut files into that folder. If you use the copy function instead of cut, you will need to go into the "NoBarCode" folder and delete the remaining files.
- h. You are now ready to proceed with uploading Manifest files.

4. If BOL and DR documents have been recognized, check the "NoBarCode" folder. If this folder is empty, then all the document bar codes were successfully recognized and you can proceed to uploading those documents. If there are any files in "NoBarCode", use the following procedure to correct their name and transfer them.

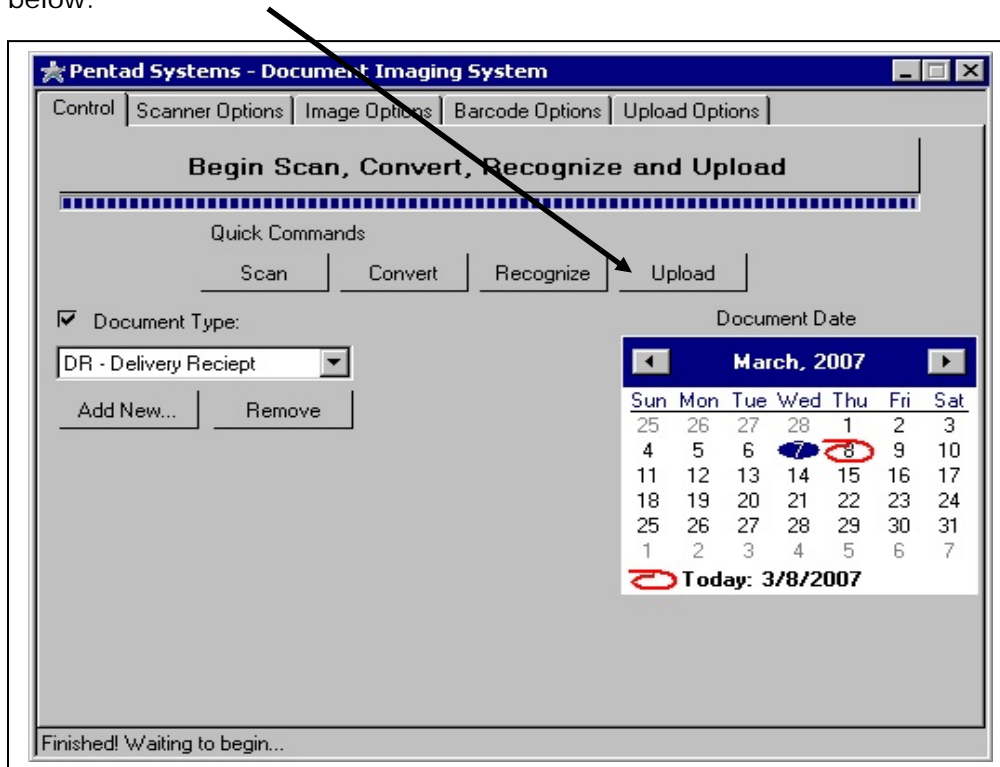
- a. **Open** the "NoBarCode" folder.



- b. **Open** each file one at a time. View the barcode. If it is readable to you or someone has written the number on the document, then note that barcode number, close the file and rename the file using the barcode number.
- c. In the case where there is already a file in the "Recognized" folder with that barcode number in its name, then rename it with a "-1", or "-2", etc as needed.
- c. **Select** and **cut** the renamed file from the "NoBarCode" folder.
- d. **Open** the "Recognized" folder and paste the file into it. Repeat steps a through d for all files in the "NoBarCode" folder.
- e. You are now ready to proceed with uploading BOL or DR files.

D. Upload Documents

1. **Select** the correct date (see B2b above) from the calendar.
2. Click on the 'Upload' button on the Quick Commands as shown in the picture below.



All files in the "Recognized" folder have now been transferred to the server. At this point you can access the DIMS menu on the website and add documents, view, print or email documents as required.



III. Scanner/Copier Settings

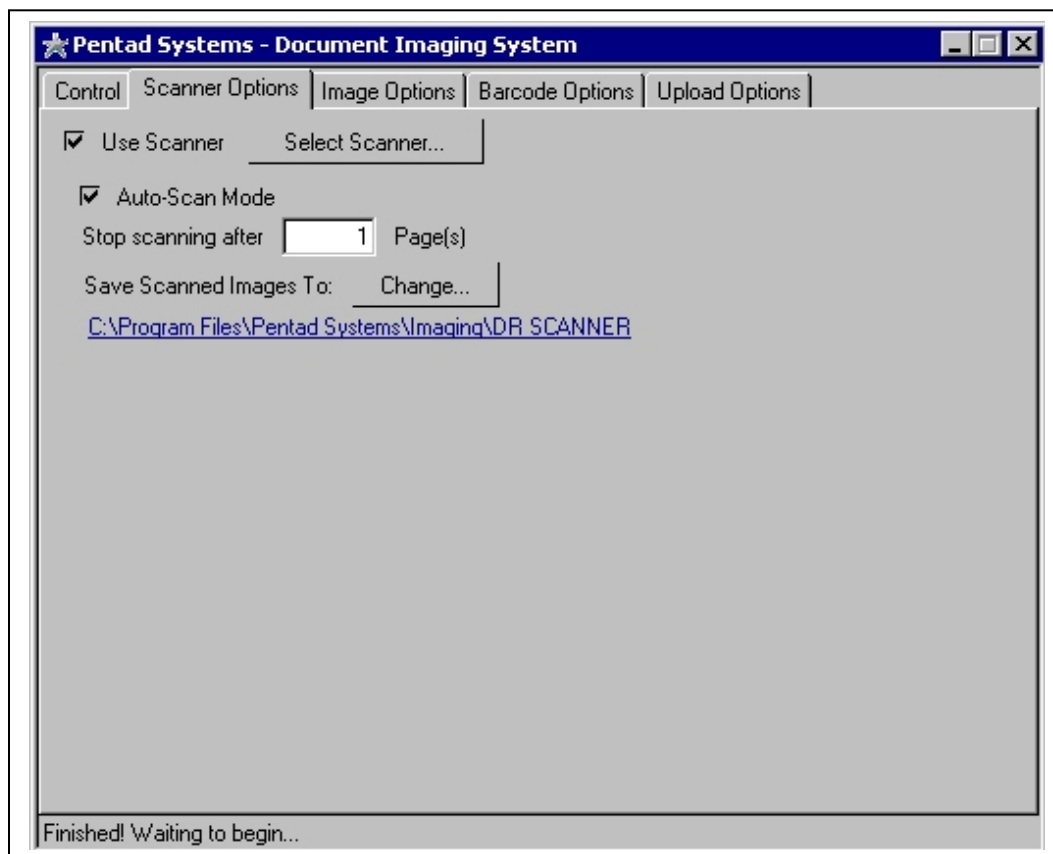
Make sure your scanner has been setup to direct all documents scanned using the Scan button on the copier to the following folder:

C:\Program Files\Pentad Systems\Imaging\Scanned.

IV. PC Settings

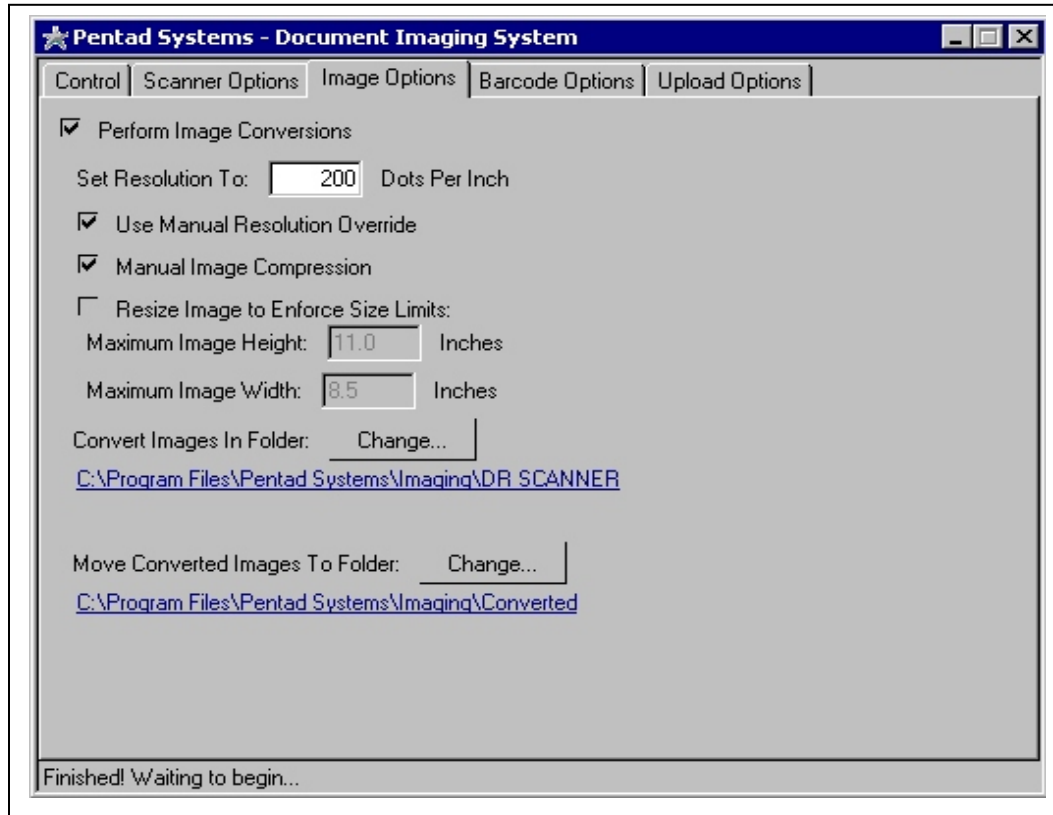
The following screens show settings for document resolution, file size and folder destinations. Settings for the PC that is connected to the scanner are noted on the PC desktop file 'Imaging'.

A. Scanner Options – Note that for the scanner, the settings over-ride any settings that are noted here.

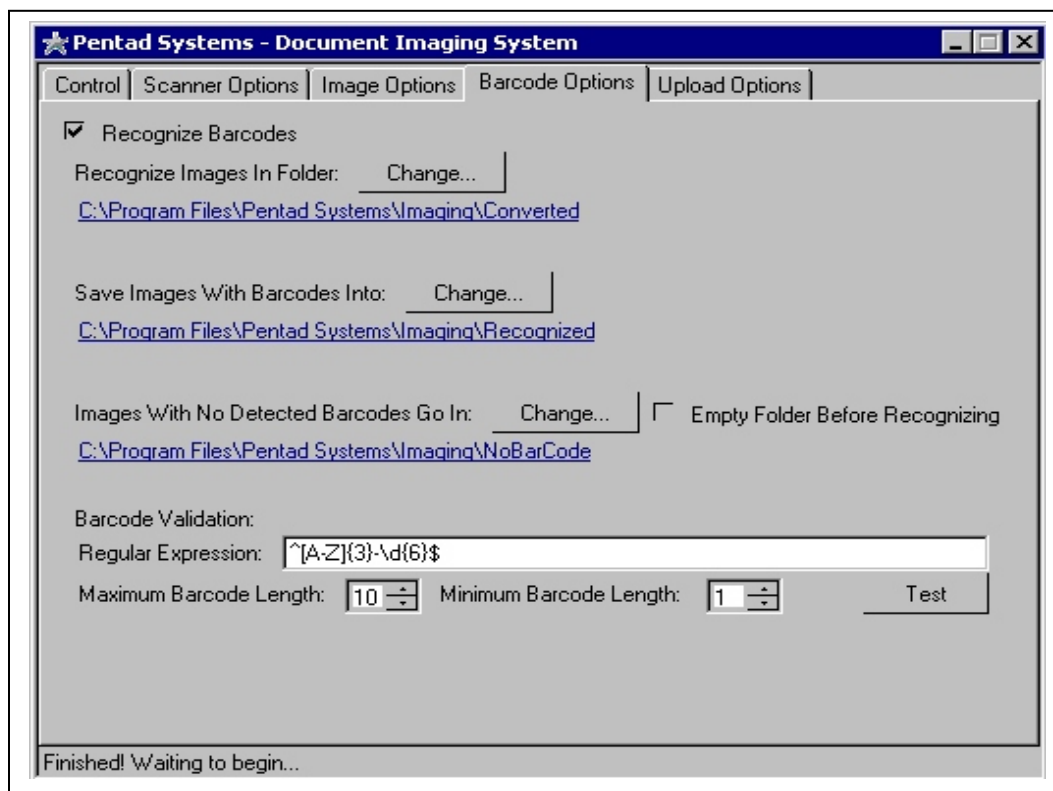




B. Image Options



C. Barcode Options





D. Upload Options

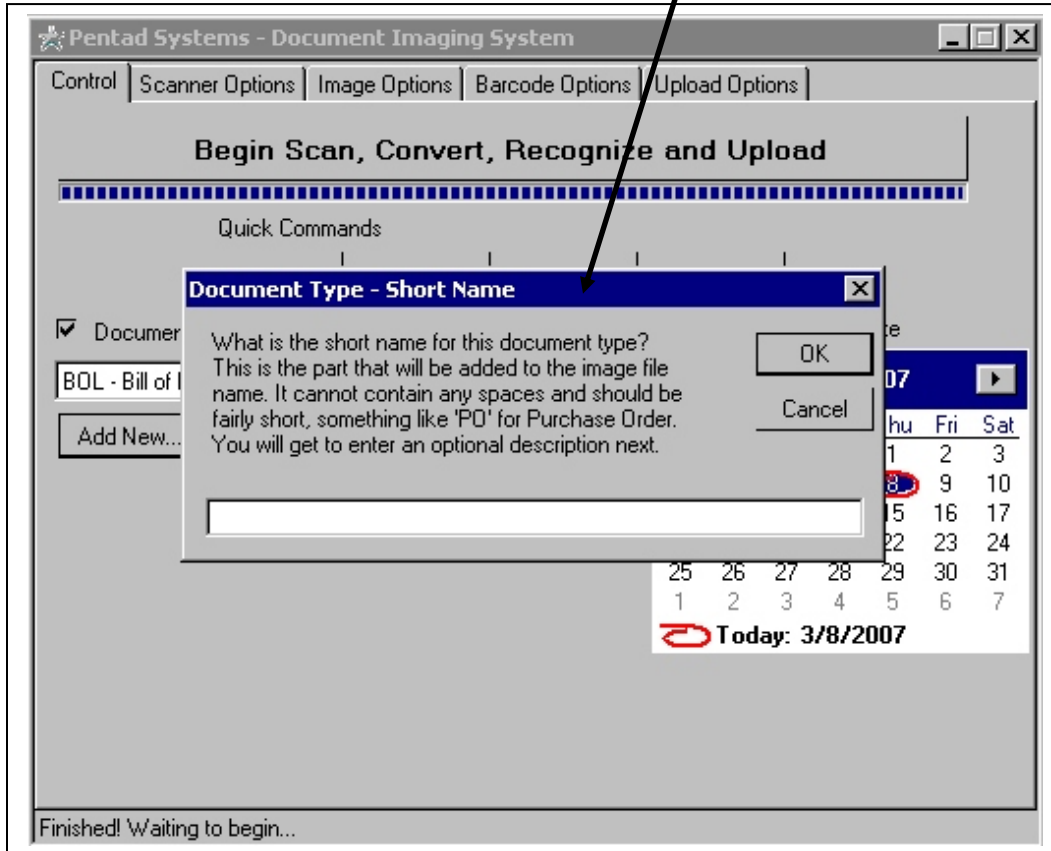
The screenshot shows a window titled "Pentad Systems - Document Imaging System" with a tabbed interface. The "Upload Options" tab is selected. The window contains the following elements:

- Upload Images To Web
- Upload Images From Folder: [C:\Program Files\Pentad Systems\Imaging\Recognized](#)
- FTP Site: ftp://
- Imaging Directory:
- Login Name:
- Password: Save Password?

At the bottom of the window, a status bar displays the text: "Finished! Waiting to begin..."



E. Adding New Document Types – As manifests were recently added to imaging, this version of the software allows for any other document type to be added. You can do so on the “Control” page of the imaging software by clicking on the ‘Add New’ button under the “Document Type” heading. The Pop-Up window shown below comes up to allow entry of a new name. Existing document types can also be removed by clicking on the ‘Remove’ button.





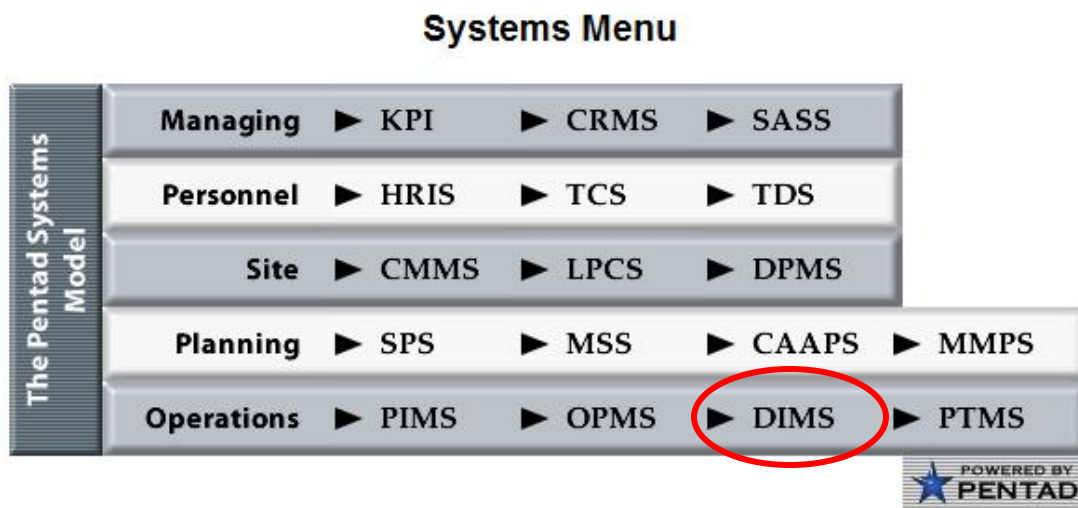
Adding Scanned Documents To DIMS

I. Pre-Work: Scanning, Recognizing and Saving Documents

Follow the instructions to successfully upload all necessary images.

II. Procedure

- A. Open the **Systems Menu** as below and click on the “DIMS” button.



- B. The login screen will appear as shown below. Type in your user name and password and click on the “LOGIN” button.

Document Imaging Management System Main Menu

Log In, Please.

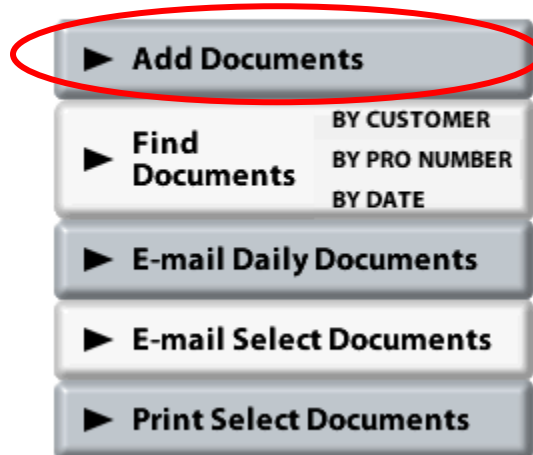
Username:

Password:

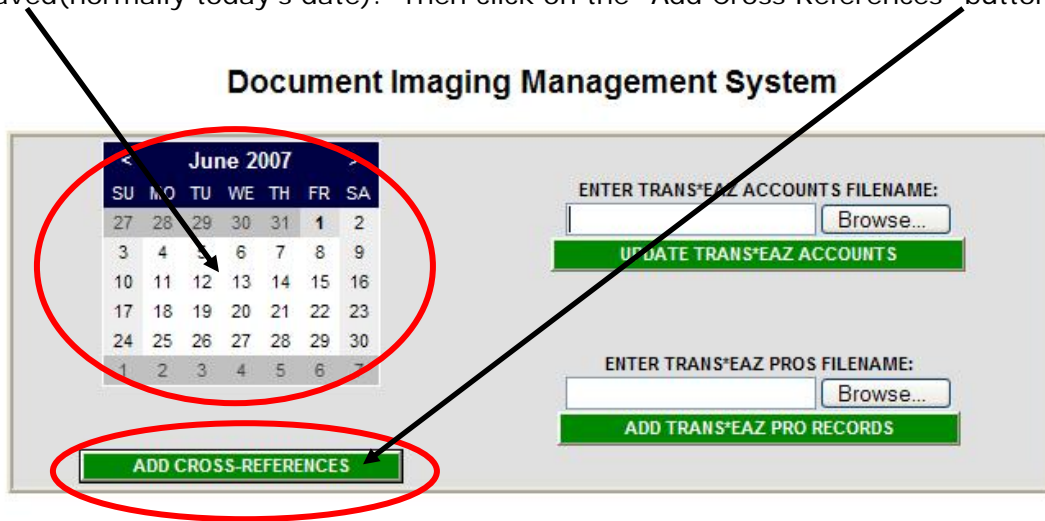


C. On the resulting Document Imaging Management System Main Menu click on the "Add Documents" button.

Document Imaging Management System Main Menu



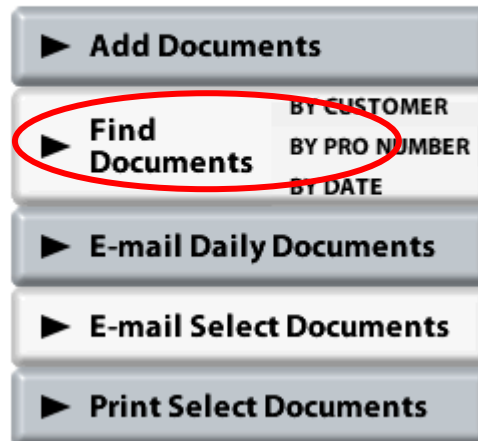
D. On the resulting Document Imaging Management System screen shown below, select the correct date for the documents that have been scanned in, recognized and saved (normally today's date). Then click on the "Add Cross References" button.





- E. Test to insure that documents have been correctly added:
1. Return to the **Document Imaging Management System Main Menu** shown below and click on the "Find Documents" button.

Document Imaging Management System Main Menu



2. On the resulting **Document Imaging Management System** screen type in the number of one of the documents scanned in today in the center box and click on the green "Get Documents" button.

Document Imaging Management System

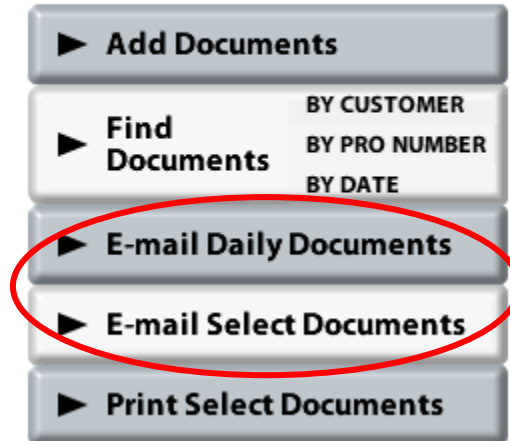
Assuming that the image number document is successfully retrieved you are done.

If the message "**Pro Image(s) not found**" is returned then this PRO number was not successfully loaded. Verify that the number you tested was correct and repeat the test of necessary. If the document is still not shown you will need to return to step C above and repeat this procedure from that point.



F. If you desire to E-Mail your uploaded Documents to the Customer that you scanned for, click on either E-Mail Daily Documents (to send the day's documents to the e-mail addresses, or E-Mail Select Documents (to send documents you select to the e-mail addresses).

Document Imaging Management System Main Menu



1. Type in a name or company inside the Text Box to get results.

Document Imaging Management System

Select an Account

Company Name	Companies
<input type="text" value="peninsula"/>	<ul style="list-style-type: none">PENINSULA GATEWAY, GIG HARBOR, PENI3555PENINSULA TRANSPORTATION & LOG, MILWAUKIE, PENI6566PENINSULA TRUCK LINES, SPOKANE, PENS1001PENINSULA TRUCK LINES, SPOKANE, PENS



2. Select a name in the Companies pane.

Document Imaging Management System

PENINSULA TRUCK LINES
SPOKANE WA

RECIPIENT'S E-MAIL ADDRESS (REQUIRED)

CUSTOM MESSAGE (OPTIONAL)

< June 2008 >						
SU	MO	TU	WE	TH	FR	SA
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

[SELECT NEW CUSTOMER](#)

3. Type in the e-mail addresses that the documents will go to. Keep in mind that these are only the documents that were scanned for that company.
4. Type in a message for your recipients if required.
5. Select a Date in the Calendar to send the documents from that date.

Document Imaging Management System

PENINSULA TRUCK LINES
SPOKANE WA

RECIPIENT'S E-MAIL ADDRESS (REQUIRED)
pentad@pentadsys.com

CUSTOM MESSAGE (OPTIONAL)
Testing

< June 2008 >						
SU	MO	TU	WE	TH	FR	SA
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

RECORDS FOUND FOR 2008-06-02.

[SEND THIS MESSAGE](#)

[SELECT NEW CUSTOMER](#)

6. Click "Send This Message" to send the message to the recipients you specified.



7. Clicking on "E-Mail Select Documents" allows you to type in the numbers of the documents you wish to send.

Document Imaging Management System

RECIPIENT'S E-MAIL ADDRESS (REQUIRED) <input type="text"/>	ENTER PRO NUMBERS
CUSTOM MESSAGE (OPTIONAL) <input type="text"/>	1. <input type="text"/>
	2. <input type="text"/>
	3. <input type="text"/>
	4. <input type="text"/>
	5. <input type="text"/>
	6. <input type="text"/>
	7. <input type="text"/>
	8. <input type="text"/>
	9. <input type="text"/>
	10. <input type="text"/>
	<input type="button" value="VERIFY"/>

Click on "Verify" to verify the numbers that you entered. Type in a recipient's e-mail address and a custom message if needed. The system will tell you if your document number is correct before you can send the e-mail:

Document Imaging Management System

RECIPIENT'S E-MAIL ADDRESS (REQUIRED) <input type="text" value="pentad@pentadsys.com"/>	ENTER PRO NUMBERS
CUSTOM MESSAGE (OPTIONAL) <input type="text" value="Testing"/>	1. <input type="text" value="12345 *"/>
	2. <input type="text"/>
	3. <input type="text"/>
	4. <input type="text"/>
	5. <input type="text"/>
	6. <input type="text"/>
	7. <input type="text"/>
	8. <input type="text"/>
	9. <input type="text"/>
	10. <input type="text"/>
<p>12345 is not a valid Pro number.</p> <p>Found 0 of 1 Pros specified.</p>	<input type="button" value="VERIFY"/>



Document Imaging Management System

RECIPIENT'S E-MAIL ADDRESS (REQUIRED) pentad@pentadsys.com	ENTER PRO NUMBERS
CUSTOM MESSAGE (OPTIONAL) Testing	1. SPO-624850
	2.
	3.
	4.
	5.
	6.
	7.
	8.
	9.
	10.
Found 1 of 1 Pros specified.	
SEND THIS MESSAGE	VERIFY

CLEAR FORM

Click "Send This Message" to send the e-mail.

- G. Click "Print Select Documents" from the Main Menu.

Document Imaging Management System Main Menu

- ▶ **Add Documents**
- ▶ **Find Documents** BY CUSTOMER
BY PRO NUMBER
BY DATE
- ▶ **E-mail Daily Documents**
- ▶ **E-mail Select Documents**
- ▶ **Print Select Documents**



1. Enter in the document numbers you wish to print in the screen displayed. Choose between document types or search through them all.

Document Imaging Management System

ENTER PRO NUMBERS

1.	<input type="text"/>	<div style="border: 1px solid gray; padding: 5px;"><p style="text-align: center; margin: 0;">DOCUMENT TYPE(S)</p><p><input checked="" type="radio"/> All</p><p><input type="radio"/> DRs</p><p><input type="radio"/> BOLs</p></div>
2.	<input type="text"/>	
3.	<input type="text"/>	
4.	<input type="text"/>	
5.	<input type="text"/>	
6.	<input type="text"/>	
7.	<input type="text"/>	
8.	<input type="text"/>	
9.	<input type="text"/>	
10.	<input type="text"/>	

1. VERIFY LIST

CLEAR FORM

2. Click on "Verify List" to verify the document numbers you typed into the list.

Document Imaging Management System

ENTER PRO NUMBERS

1.	<input type="text" value="SPO-624850"/>	<div style="border: 1px solid gray; padding: 5px;"><p style="text-align: center; margin: 0;">DOCUMENT TYPE(S)</p><p><input checked="" type="radio"/> All</p><p><input type="radio"/> DRs</p><p><input type="radio"/> BOLs</p></div>
2.	<input type="text"/>	
3.	<input type="text"/>	
4.	<input type="text"/>	
5.	<input type="text"/>	
6.	<input type="text"/>	
7.	<input type="text"/>	
8.	<input type="text"/>	
9.	<input type="text"/>	
10.	<input type="text"/>	

2. PREPARE LIST

Found 1 of 1 Pros specified.

CLEAR FORM



3. Click on "Prepare List" to prepare the documents for printing.

Document Imaging Management System

ENTER PRO NUMBERS

1.	SPO-624850
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

DOCUMENT TYPE(S)

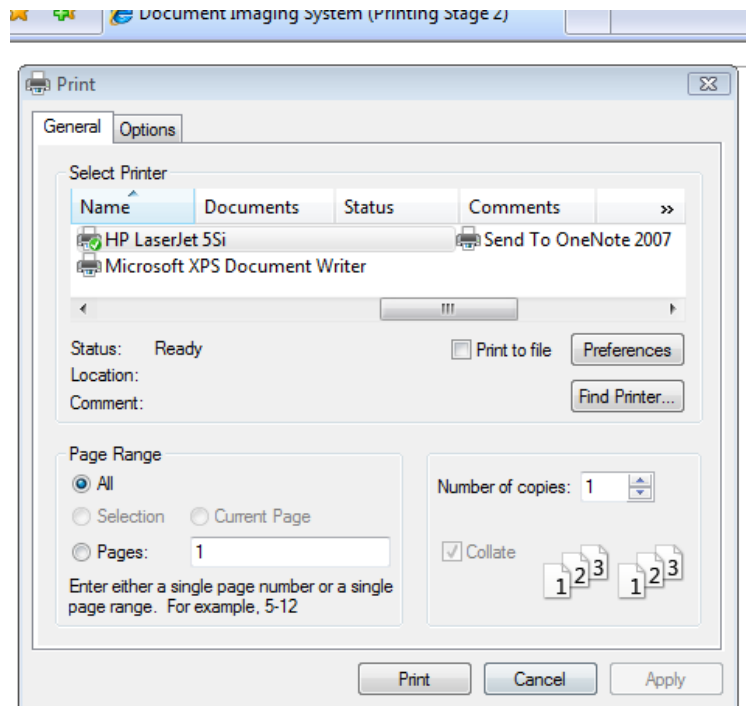
All
 DRs
 BOLs

3. SHOW IMAGES

Found 1 of 1 Pros specified.

CLEAR FORM

4. Click on "Show Images" to print the documents from your computer. The print dialogue box will display automatically.



5. Click "Print" to print the documents.