

Journal Vouchers to BDMS Notes:

Journal Voucher documents will be routed and signed and eventually end up at Accounts Payable. The formatting on these documents require some cleanup on the scanning side. Documents will need to be in PDF format AND searchable once in BDMS. Documents should be accessible from FGIDOCR.

Below are the steps for scanning into BDMS in the proper format:

1. Load document to be scanned to scanner (one complete journal voucher at a time)
2. In VCDemo (Kofax VRS software)
 - a. Click on Source
 - i. Click on Scanner
 - ii. Click on OK to accept the default
 - b. After scanner icon turns green, Click on File
 - i. Click on Load Settings
 1. Select path (c:\images??\
 2. Select journal_vouchers.ini (this file is currently on lex under erpteams-share\Document Imaging and should be copied to the local directory before use)
 3. Click on OK
 - c. Click on File
 - i. Click on Multi-page Settings
 - ii. Click on Append
 - d. Click on File
 - i. Click on Storage Format
 - ii. Click on PDF from the file type dropdown
 - iii. Click on OK
 - e. Click on File
 - i. Click on Save Files To
 - ii. In the Save in: dropdown, navigate to shared drive to save PDF's to (such as x:\acctpay-share or x:\proff-share)
 - iii. Accept default file name and click Save
 - f. Click on Source
 - i. Click on Process Batch
 - g. After all pages are scanned, click on cancel
 - h. Click on File
 - i. Click on Close
3. Open scanned document in Adobe Acrobat (not the just the reader software)
 - a. Click on Document
 - b. Click on OCR Text Recognition
 - c. Click on Recognize Text Using OCR
 - d. Make sure All Pages is selected and downsample is at least 300 dpi (use Edit to change if it is lower)

- e. Click on OK
 - f. Wait for document to finish processing
4. Import into WebXtender to B-F-Docs as usual

To search existing documents for text such as index codes or invoice numbers:

1. Open the document as usual
2. Click on the binoculars
 - a. Under Scope, make sure Doc is selected to search entire document
 - b. Check the Fuzzy checkbox
 - c. Enter the desired text in the Find Text box and click OK.