

SIS FinAid/BusOps – new process

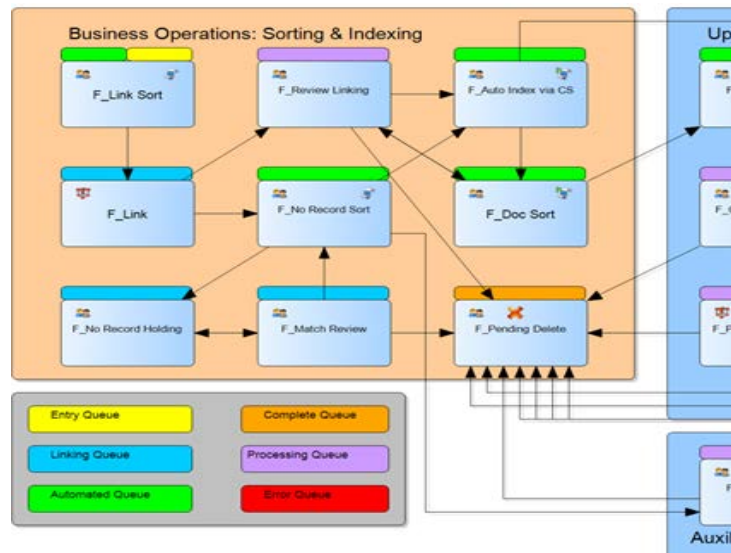
Background

As part of the new SIS FinAid implementation, the BusOps part of the process has changed. This is the new way BusOps will be capturing and linking scanned documents.

Assumptions

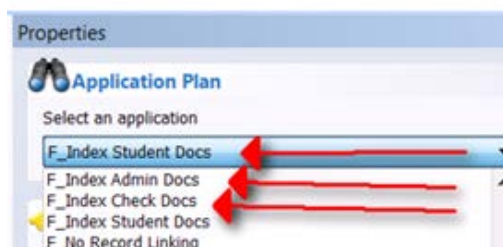
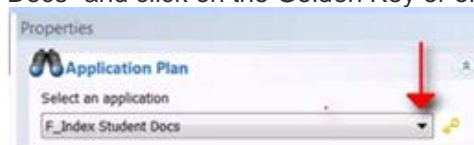
- User Account Control is turned down in the linking computer station to avoid error messages such as “Active X component can’t create object”.
- Green patchcodes sheets are used as separators (if this fails, please note the capture profile that uses these sheets and submit a ticket to imaginehelp@lists.berkeley.edu).
- The user must be a member of the appropriate group to be able to process batches.
- Log onto the ImageNow Prod environment (**img-pa01.ist.berkeley.edu**).
- After a document has been scanned, Batches may be processed on any workstation logged onto Prod.

Workflow Diagram – Financial Aid (BusOps portion)



Process

1. **Scan documents.**
2. **Batches Grid. Ready for QA.** QA all scanned documents as you normally would, marking the pages as OK or deleting them as is appropriate.
 - a. If **both** barcodes are successfully read, the document will leave the QA Batches area and go into workflow (F_Link (Processor) workflow queue **with the least amount of items in it**).
 - b. If there is an error in reading either of the barcodes (the field will display <<barcode fail>>), **the document will be sent to Ready for Linking** and it will not enter workflow.
 - c. This is a **change** to the current process. This is **not automatic so click on Commit Batch** so that the documents move to Ready for Linking.
3. **Workflow queues.** If both barcodes are successfully read go to the respective workflow queue (i.e. **F_Link Processor**), link the document (see point 5 below) and **Route the document forward** (no need to save it).
4. **Batches Grid. Ready for Linking.** If there is an error in reading either of the barcodes (for documents with <<barcode fail>> in fields 3 and 4) go to the **Ready for Linking** area.
 - a. When the document first arrives, its Step will be "QA" and its State will be "Complete". You will not be able to process it.
 - b. After a minute or so, the Step will changed to "Link" and the State to "Suspended". You may now open the document.
 - c. **Note:** when working with documents with errors in the barcodes and thus, while in the **Ready for Linking area**, click on **Save this Page** on every page on the batch. The documents will be then routed to the appropriate queues automatically.
5. **Linking documents** (For documents with 2 successfully processed barcodes/non-barcode documents).
 - a. Verify that the correct "F_Index" application plan is selected, i.e. "F_Index Student Docs" and click on the Golden Key or on the actual app plan.



- b.
- c. Click on the application plan only once (**clicking more than once will cause errors**).
- d. Enter the SID in Field 1 and Academic Year **if not already populated from the barcode** (for example 2015-2016) in Field 3 only. **Note** that the system will populate the Student Name through an iScript in a workflow queue later in the process.
- e. Choose appropriate doc type (**if not already populated**).