Scanning and Indexing Supporting Documents for New Student Hires in DocFinity

This document provides instructions on how to submit completed pre-hire packet and foreign national information documents to the Human Resources Department using DocFinity.
Contents
Step 1: Login to DocFinity ........................................................................................................................................ 1
Step 2: Fill in Scan Configuration information .................................................................................................. 2
Step 3: Scan Pre-Hire Packet documents ............................................................................................................. 4
Step 4: How to make changes to your scanned documents ................................................................................... 5
Step 5: Scan Foreign National documents if applicable .......................................................................................... 7
Step 6: Name your Batch and select your Index Group ............................................................................................ 8
Step 7: Send your Batch to the Indexing queue ..................................................................................................... 9
Step 8: Go to the Indexing Workspace .................................................................................................................... 10
Step 9: Select the Batch to Index .......................................................................................................................... 11
Step 10: Index your documents ............................................................................................................................ 12
Step 11: Send your Batch to Human Resources ................................................................................................... 14
Step 12: Logout of DocFinity ..................................................................................................................................... 15
Step 1: Login to DocFinity

For all new student hires, the New Hire Packet forms that are available in the LUC Human Resources website need to be completed:

http://www.luc.edu/media/lucedu/hr/forms/New%20Hire%20Packet%20UPDATED%201.8.2015.pdf

Completed pre-hire packet documents then need to be submitted to the Human Resources Department using DocFinity, a web-based Enterprise Content Management system at the University.

To log into DocFinity, open the following web link using either Internet Explorer or Chrome:

https://docfinity10.luc.edu

Enter your UVID (in all lower cases) and password then click on the ‘Submit’ button:
Step 2: Fill in Scan Configuration information

Upon successful login, the following Welcome Screen will appear. Click on ‘Scanning’ to open the Scanning Workspace:

The Scan Panel will appear as follows:

Note: Aside from the Welcome Screen, you can also navigate to other workspaces by clicking on the Workspace menu at the top and selecting the workspace you want to be in:
In the Scan Configuration section, select the following options unless otherwise noted:

- **Scanner**: PaperStream IP fi-7180
- **Paper source**: ADF
- **Category**: HUMAN RESOURCES
- **Document Type**: PRELIM PRE-HIRE PACKET
- **Scan profile**: BW_Multi_300
- **Blank pages**: delete
- **Scanner interface**: display

You may have Kofax VRS instead of PaperStream IP as your scanner option.

If you are scanning using a flatbed scanner, please select that option.

You can optionally pre-select your document category & document type at the time of scanning. Choose “HUMAN RESOURCES” & “PRELIM PRE-HIRE PACKET” for scanning a pre-hire packet. If you select your document type, the “BW_Multi_300” Scan profile option will get populated automatically for you.

Note: Required fields are marked by an asterisk (*). If you don’t want to select the Category and Document Type of the documents you are about to scan at this stage in the process, you can wait to make these selections in the Indexing Workspace. The last-used settings are saved per user.
Step 3: Scan Pre-Hire Packet documents
Place your completed pre-hire packet documents in the feeder of the scanner with the first page of your document and header (top part of the sheet) both facing down.

Once the documents are ready to be scanned, click on the ‘Start Scanning’ menu option located near the top of the Scan Panel in DocFinity:

The folder and individual page icons that appear in the Scan Progress section of the Scan Panel are an indication that your documents have been scanned successfully:

**Scan Progress**
Pages are listed as they are scanned and organized as documents. Select a page to view and adjust it.

The first page of your document will also automatically appear in the Document Preview Panel.
Step 4: How to make changes to your scanned documents

To confirm that all the pages in your document have been correctly scanned, double-click on each page as it is listed in the Scan Progress section. Doing so will open up the page in the Document Previewer Panel:

If you need to delete and rescan a document or a page from a document, first select it:

1) Select the document or the page you want to delete.

Then click on the ‘Delete’ menu option:

2) Click here to delete.

The Delete Confirmation window will appear as shown below. Click on the Delete button:
If you need to **combine** two or more documents, select the folders/documents you want to combine while holding the Shift key on your keyboard:

![Combine Pages](image1)

1) Select the folders you want to combine.

Then click on the ‘Combine Pages’ menu option:

![Combine Pages Option](image2)

2) Click here to combine the selected documents.

To **move a page** from one folder to another, click on the page you want to move, then drag it to its new location:

![Move Page](image3)

This black line indicates the new location of the page you selected to move.

To **re-arrange the order of the pages** in a folder, click on the page you want to move, then use the up and down arrows in the menu bar to move it:

![Re-arrange Pages](image4)

To **rotate** a page, select the page you want to rotate, then click on the ‘Rotate Clockwise’ and ‘Rotate counterclockwise’ menu options accordingly:

![Rotate Pages](image5)
Step 5: Scan Foreign National documents if applicable

All international new student hires also need to complete and submit the Foreign National Information Form that is available in the LUC Human Resources website: [http://luc.edu/media/lucedu/hr/forms/Foreign%20National%20Information%20Form%20revise%20d%2011%20%2014%20%20(2).pdf](http://luc.edu/media/lucedu/hr/forms/Foreign%20National%20Information%20Form%20revise%20d%2011%20%2014%20%20(2).pdf)

In the Scan Configuration section, select the ‘Prelim Foreign National’ document type:

![Scan Configuration](image)

If you would like to optionally pre-select your document category & document type at this time, choose “HUMAN RESOURCES” & “PRELIM FOREIGN NATIONAL INFORMATION” for scanning a foreign national information document.

Please refer to the scanning instructions in Step 3 and instructions on how to make changes to your scanned documents in Step 4.
Step 6: Name your Batch and select your Index Group

A batch refers to the set of documents that have been scanned and appear in the Scan Progress section of the Scan Panel. A batch can consist of a single document or a group of documents.

When you are ready to save your batch for indexing, you can scroll down to the Batch Properties section of the Scan Panel and create a customized name for it. In the screenshot below, the user created a batch out of the Pre-Hire Packet and Foreign National Information documents of an international student worker named Bettina Santos:

**Scan Progress**

Pages are listed as they are scanned and organized as documents. Select a page to view and adjust it.

- PRELIM PRE-HIRE PACKET 1 - 8 Pages
- PRELIM FOREIGN NATIONAL INFORMATION 2 - 8 Pages

**Batch Properties**

Select the groups whose members can access this batch for indexing and save the scanned batch.

* Batch name: Bettina Santos

* Batch access:

<table>
<thead>
<tr>
<th>Assigned</th>
<th>Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CON_ITS_INDEX_SEC</td>
</tr>
<tr>
<td><strong>X</strong></td>
<td>CORE_USER1_SEC</td>
</tr>
<tr>
<td></td>
<td>CORE_USER1_FR</td>
</tr>
</tbody>
</table>

The batch in this example consists of 2 documents: Bettina Santos’s Pre-Hire Packet and Foreign National Information documents.

Each batch name includes the scan date/time and the operator username by default. You can add your custom text to your batch name. In this example, the name of the student worker was added.

Check the box that pertains to your Index Group.
Step 7: Send your Batch to the Indexing queue

Click the ‘Save’ menu option to save your batch for indexing:

Click on the ‘Save’ menu option to send your batch to your indexing queue.

After clicking on the ‘Save’ button, the batch should disappear from the Scan Progress section of the Scan Panel as follows:
Step 8: Go to the Indexing Workspace

Navigate to the Indexing Workspace by clicking on the Workspace menu at the top and selecting 'Indexing':

1) Click on ‘Workspace’

2) Click on ‘Indexing’
Step 9: Select the Batch to Index

Once you are in the Indexing Workspace, you will see a list of all the batches assigned to your group for indexing. Select the batch you are ready to index by double-clicking on it:

Alternatively, you can also click on the ‘Check out batch’ menu option while the batch is selected:

1) Select the batch you want to index.

2) Click on the ‘Check out batch’ menu option.

Double-click on the batch you want to index.
Step 10: Index your documents

Once you have selected or ‘checked out’ the batch for indexing, the Batches Panel will show the documents in your batch and the Document Previewer will show the first page of the first document in the batch by default:

![Image showing the Batches Panel]

To start indexing, select the Category and Document Type first (if you haven’t already done so in the Scanning Workspace). Then, enter the new hire’s UVID and press either the Tab key or the Enter key on your keyboard. The name fields will get populated automatically:

![Image showing the Indexing Panel]

- If you pre-selected the Category and Document Type of your documents in the Scanning Workspace, your selections will automatically appear in the Indexing Panel.
- Please verify the auto-populated name to ensure it matches the document.
- The received date defaults to the current date but it can be edited if needed.
Next, select an option for the Status field. If this is the first time you are submitting this document, choose the “INITIAL SUBMISSION – TO BE REVIEWED” option. If you are re-submitting, then choose the “RESUBMITTED – TO BE REVIEWED” option:

Click on the ‘Save’ menu option to save the indexing work you have done for this document:

If you have more than one document in your batch, you can start indexing the next document by selecting it in the Batches panel.
Step 11: Send your Batch to Human Resources

Once you are done indexing the documents in your batch, click on the ‘Commit Batch’ menu option:

After clicking the ‘Commit batch’ menu option, a confirmation window will appear as follows:

Click ‘Commit’ and your documents will be sent to Human Resources for their review. Only the documents that contain all required metadata will be committed. Any incomplete documents will remain in your batch.

If all the documents in your batch have been committed successfully, DocFinity will take you back to the batches queue as shown below:
Step 12: Logout of DocFinity

To logout of DocFinity, click on the ‘Logout’ menu option at the upper right corner:

Click here to logout of DocFinity.