**How to...**

**Scan and Re-process documents with Chronoscan**

**Version 1. 0**

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# Introduction

## Documentation Overview

This document explains how to use utilize Chronoscan for automate scanning documents into Chronoscan. The process uses *Hot folders* to accomplish full task automation.

This document will also explain the steps to correct documents with errors. How to correct the error and re-process the batch.

# Steps to process scan BOLs document and the additional documents.

## Find the “Scan to Folder” on the Scan Snap application

This folder has already been mapped to the hot folder:

* mkt-files\data\Operations\Chronoscan
* The BOL document MUST be the first page in the stack of documents.
* Only scan the set of documents associated with the BOL document
* Place the documents in the scanner and following steps on scanner
  + Documents will be load and map using the associated BOL template, if there are no errors, the PDF will be imported to M-Files.

## Verify the documents were processed without errors

There are two ways to verify the documents processed.

* Sign into M-Files and search for document using: BOL#, Sales Order, Carrier description or Date
  + Find and select the M-Files icon from your desktop

Graphical user interface, text, application, Teams

Description automatically generated

* + Next the user sign-on screen will appear, enter your credentials, and click ok. Graphical user interface, application

    Description automatically generated
  + The following screen will appear, key your criteria in the search box click the search symbol

Graphical user interface, text, application

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* + The document will appear in the list if it was exported to M-Files

A picture containing application

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* The other option is to sign-in to Chronoscan web
  + From a web browser, enter **MFILES:10000** in the search engine and press enter.

Graphical user interface, text, application

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* + The User sign-on screen will appear, enter your Chronoscan credentials. These credentials may be different than your M-Files credentials. Click Login.

**NOTE: The password provided to you will need to be changed once you sign-in for the first time**

Graphical user interface

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* + Home page will appear. Select tabs to view documents or batches.

Graphical user interface, text, application, email

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* + Select the batch tab and the following screen will appear.

Graphical user interface, text, application, chat or text message

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* + Batches with a GREEN check mark in the batch column processed without errors.

Graphical user interface, text, application, chat or text message

Description automatically generated

## Re-processing a batch in error (*sign in to Chronoscan Web, steps in 2.20)*

Batches with errors can be located on the Batch tab and identified with a RED X in the batch column

Graphical user interface, text, application

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* Open indexing window by clicking the *Open Batch* button Graphical user interface, text, application, chat or text message

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* The indexing windows allows the Indexer Role to finish the data capture process by going through the documents where data is missing and keying the value in the data entry panel.

Graphical user interface, application, table

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 Press this option to set status to *Needs Validation* in the Data Panel

 Enter the missing information

 Press Finishing indexing & go to next batch, then select finish and exit

Graphical user interface

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Press the Back button to return to Batch tab

Batch has a GREEN check mark. Repeat steps for batch error

Graphical user interface, application

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## Understanding the Tab options.

[6.3. Documents Tab (chronoscan.org)](https://chronoscan.org/wcidoc/documents_tab_1.htm?ms=AAAA&st=MA%3D%3D&sct=MTQ0OQ%3D%3D&mw=NDk1)

Graphical user interface, text, application

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