User Guide

IRIS | Scanning Solution

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1 Introduction

Iris is a scanning and processing solution that is easily configurable to meet a wide range of business requirements. Iris provides a straightforward and user-friendly interface to classify, and process scanned items as part of a business process.

An Item is a document which is added to an Item Type. The Item Type defines the process users must follow to complete the processing of an Item.

Commonly the document in an Item will be intelligently scanned and automatically delivered to Iris. Items can be added by other processes and the Iris interface allows users to add new Items directly to Iris.

Iris provides a fully secure environment for processing Items where users can:

- Add new process items
- View processed or in progress items
- Search and browse items
- Edit process metadata on an item
- Add process notes to an item
- Add supporting documents to an item
- Approve or reject items at the various steps in the workflow

An Item's Type will define what activities a user can perform on it at various points in the process.

1.1 Item Process Type

Iris can be easily configured to work with any number of business processes.

Out the box, Iris supports two example Item Types that support common processes. These definitions cover:

- Invoice processing
- Expense claims

2 Processing an Item

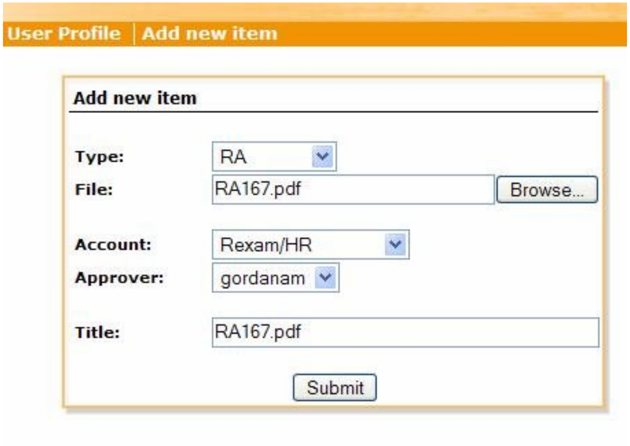
This section describes a number of common actions you can perform on an Item.

2.1 Adding a new item

There are two ways to register an item in Iris. The first way is to simply scan a document and it will automatically be added to the system.

The second way is performed manually and the user has to fill in the necessary information (metadata) about the item, choose the type of item to be checked-in, account, approver, and provide the file on the *Add new item* page (see the figure below).

By default, the title is the name of file. This is usually changed by the user. The list of approvers is dependent on the chosen Account.



When a new Item is added it is automatically assigned an Item Reference number.

2.2 Searching, editing and viewing Items

After a document has been checked in, either by scanning and automatically checking it into the system or manually by registering it on the *Add new item* page, it should appear on the *Items Listing* page on Iris.

It can take a while until the item appears in the list, and the new item is usually placed on the top of the list. It is sometimes necessary to refresh the page few times before the new Item appears.

2.3 Search, sort and filter result list

The *Item Listing* page shows all items that are checked into Iris.

It is possible to filter the result list by:

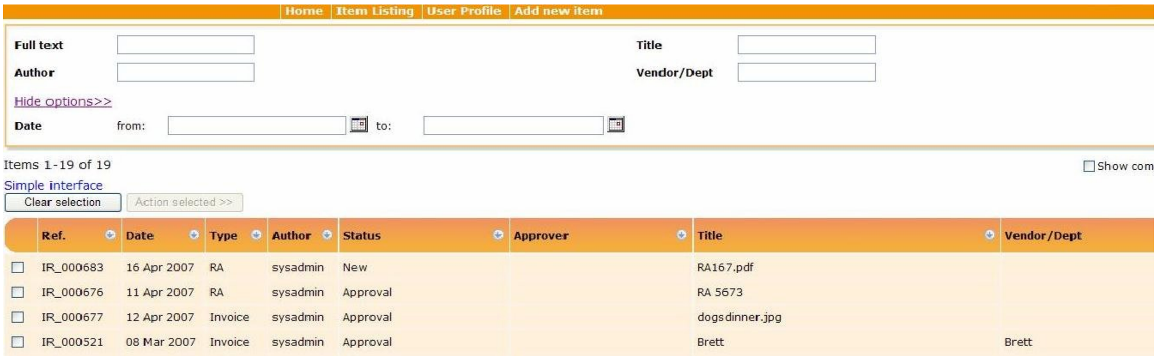
- Reference number
- Date (when the Item was checked-in into Iris)
- Item Type
- Author
- Status
- Title
- Vendor/Department
- Total amount.

It is also possible to see Items that have been processed by checking the *Show completed* checkbox when performing a search.

There is an option to perform an *Advanced Search* which allows a search by:

- Full text
- Author
- Title
- Vendor/Dept
- Date from/to when a file was checked-in into Iris

The Advanced Search screen is illustrated below:

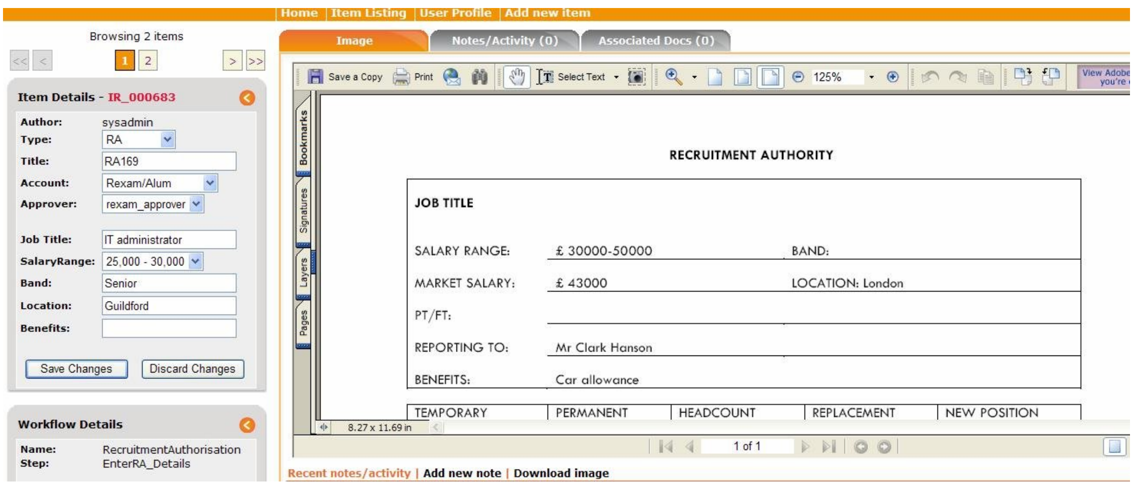


2.4 Browse items

To open and view items in Iris, select one or more items by checking the checkboxes and press the button *Open selected*.

If more than one item is selected, there is a possibility to jump between pages in the item browser window by choosing the page number above the *Item details* section.

On the left side of the item browser are the item details and workflow details sections. On the right side by default an image of the file is shown though by clicking on the appropriate tabs notes/activities and associated documents can be viewed as well.



2.5 Update Item metadata

When an item is added to Iris it gets the status ‘New’. It is possible to edit *Item details* at this point when browsing the item. One can edit and change details as long as the item has status ‘New’ (and/or some other status, depending on the item type).

2.6 Enter workflow details

Below Item details, in the item browser, there is a Workflow details section.

Information about the workflow and which workflow step the item has entered is provided here. When a user has finished entering details about the item they submit it by clicking on the *Submit for approval* button in the Workflow details section. There is a comment field here where the user has an option to add a note.

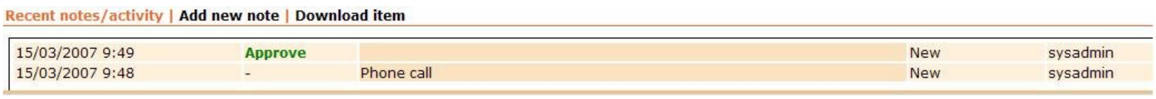
Once the an Item has been submitted, it enters the next workflow step, and the person that is selected as the approver for this step can approve or reject the item (Approve and Reject buttons appear in the Workflow details section).

2.7 Notes & Activities

Each Item has a number of activity entries attached to it which are generated automatically by Iris whenever the Item moves through the workflow process. In addition users can add their own notes which are added to the Item activity list.

2.7.1 Viewing Notes/Activity

After an Item is submitted for approval a new status appears on the item listing page. In the Item browser below the Item image the most recent Notes and Activities are shown. By clicking on the Notes/Activity tab all the notes are displayed.



The Notes/Activity tab always displays the number of notes/activities attached to an Item next to the tab title.

2.7.2 Adding Notes

New notes can be added to an Item by choosing the Add new note option below the Item image.

2.8 Download Item

Click on Download item option below the Item image to download the Item file.

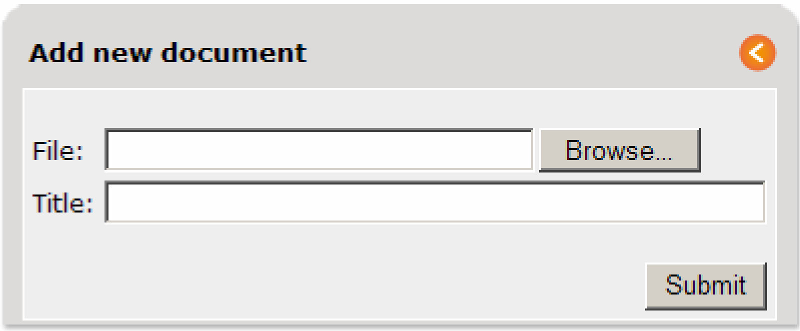
2.9 Associated Documents

Any documents associated with an Item can be viewed from the *Associated Docs* tab. The tab title always displays the number of Associated Docs on an Item so the user can tell the number of documents without opening the tab.

The associated documents are listed on this tab.

2.9.1 Attaching Documents

From the *Associated Docs* tab new documents can be associated with the Item. At the top of the *Associated Docs* tab is an *Add new document* form. Attach a file and assign it a title in this form the click *Submit* to attach the document.



2.9.2 Deleting Documents

If the user has sufficient right associated documents can be deleted from the *Associated Docs* tab by selecting the *Delete* option from the actions menu to the right of each document.

3 Example – Processing an Invoice in Iris

This section gives an example of an invoice that is processed in Iris.

User A has received an invoice No. IN 2003/00645 and must get it approved by User A's manager, User B and the company accountant, User C before sending it to the customer.

The invoice is illustrated below.

INVOICE

Invoice No: IN 2003/00645
Invoice Date: 2003-02-25
TaxPoint: 2003-02-25
Delivery Doc: DEL-03/55-712

Buyer: Jerry Builder plc
Marsh Lane
Nowhere
Norfolk
NR18 4XX

Seller: Specialist Windows plc
Snowhill Works
Little Snoring
Whereshire
SM2 3NW

Your Order No: S03-034257
Issue Date: 2003-02-03

Contact: Eva Brick

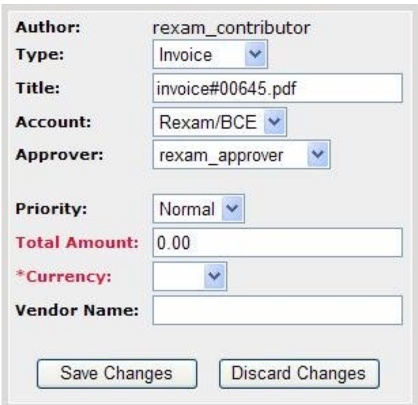
AccountsContact: Paul Carpenter

Delivery on 2003-02-24 Confirmed

Line	*Item*	*Hand*	*Qty*	*Measure*	*Measured*	*Wood*	*Finish*	*Fittings*	*Glazing*	*Price ea. £.p*	*Tax Category*	*Gross Price Extension £.p*	
A	236WV		2			Soft	Prime	Satin	Single	102.50	A	205.00	
B	340TW	RH	3			Hard	Stain	Brass	Double	240.00	A	720.00	
C	340TW	LH	3			Hard	Stain	Brass	Double	240.00	A	720.00	
D	FDDR15	RH	1	6ft 6in 3ft 0in	Height Width	Hard	Stain	Brass	Safety	110.00	A	110.00	
E	HW100X50		30 ft	6ft	Length	Hard	Stain			2.50/ft	A	75.00	
												1830.00	Gross Total
												1372.50	Less 25% discount
											A	25.00	Delivery charge
												1397.50	Total Lines+Charges
											A	238.45	VAT at 17.5%
												1635.95	TOTAL DUE

User A scans the invoice and the invoice appears in Iris on the Item Listing page. The status of the invoice appears as "New", and the title is "invoice#00645.pdf" (the file name). The invoice gets a random reference number, IR_000794, and is of item type Invoice.

User A must add some extra information about the invoice before sending it for approval. Some of this information might already have been captured automatically when the invoice was scanned however User A must check and if necessary add the total amount and currency which are mandatory invoice-specific metadata fields. User A may also change the title of the Item and other fields, and save these changes.



When User A is satisfied that all Invoice details have been correctly set they submit the Item for approval.

The list of approvers is shown below the Workflow details section.

User B picks up the Invoice as the first approver and opens the Item. User B checks the Invoice details captured in Iris and approves the document. Because of the value of the invoice is high the Invoice must then be approved by User C.

Once the Invoice has been approved by Users B and C it enters the Process Payments step. The user must now enter the required payment fields of payment reference and payment date. Once this information is completed and saved the document is submitted for the last time and moves to a 'Completed' status.

At this point the invoice is no longer visible on the Item Listing page but it will appear in the result list if the Show Completed box is selected.