

# ATIPXpress

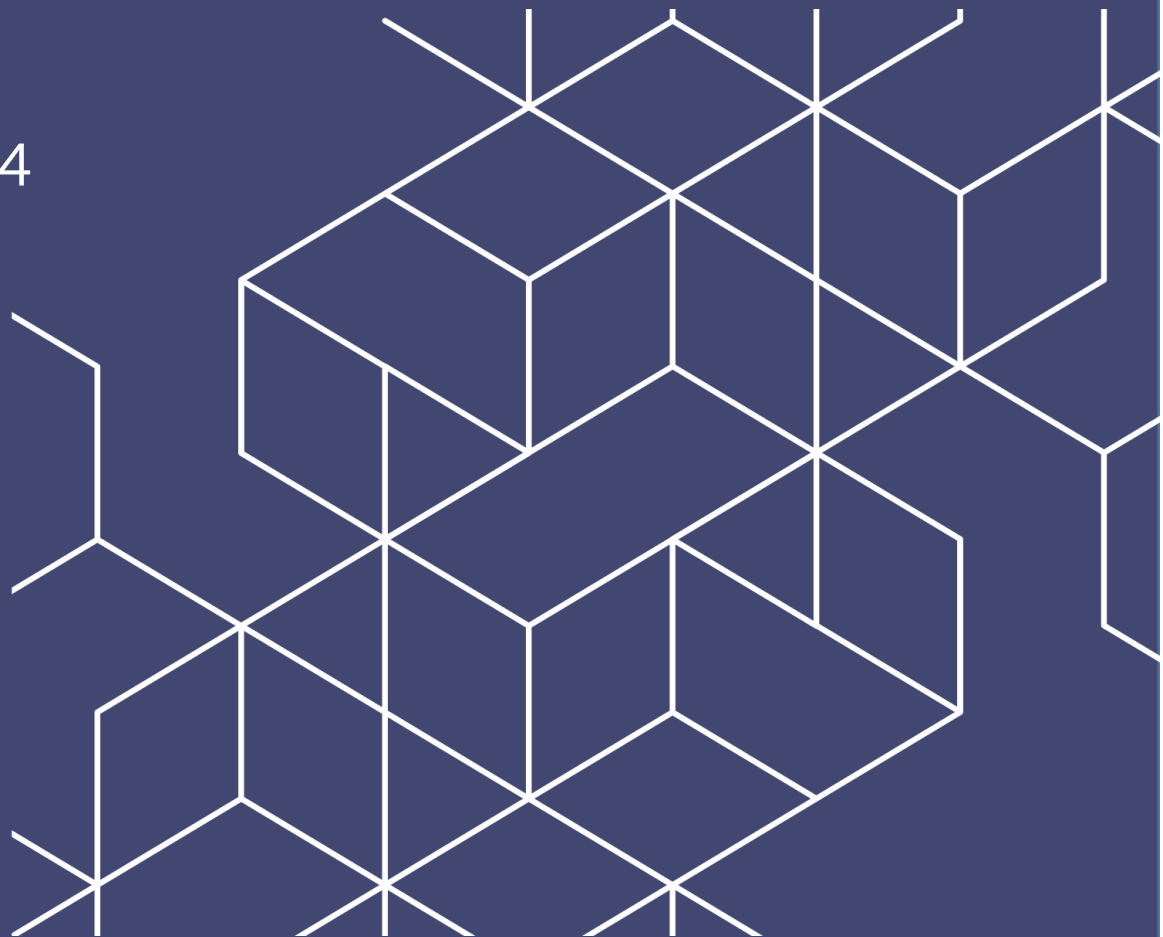


OPEXUS

## Scanned Document Service Manual

v11.7.0

May 2024



# AX 11.7.0 Scanned Document Service Manual

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# 1 Introduction

## 1.1 Scope

The ATIPXpress Scanned Document Service (SDS) Manual provides instructions for installing, configuring, and utilizing the SDS feature for ATIPXpress.

## 1.2 Overview

The ATIPXpress Scanned Document Service provides a link between your local scanner and the ATIPXpress application. By utilizing a barcode system and linked folder directories, you will have the ability to place scanned documents in a specific network location. This network location is periodically scanned and any newly added files are duplicated in ATIPXpress. By reading the associated barcodes, ATIPXpress can automatically associate scanned documents with a specific Request Folder. This provides an easy solution for importing documents into ATIPXpress without the need for manually uploading and associating files.

## 1.3 Prerequisites

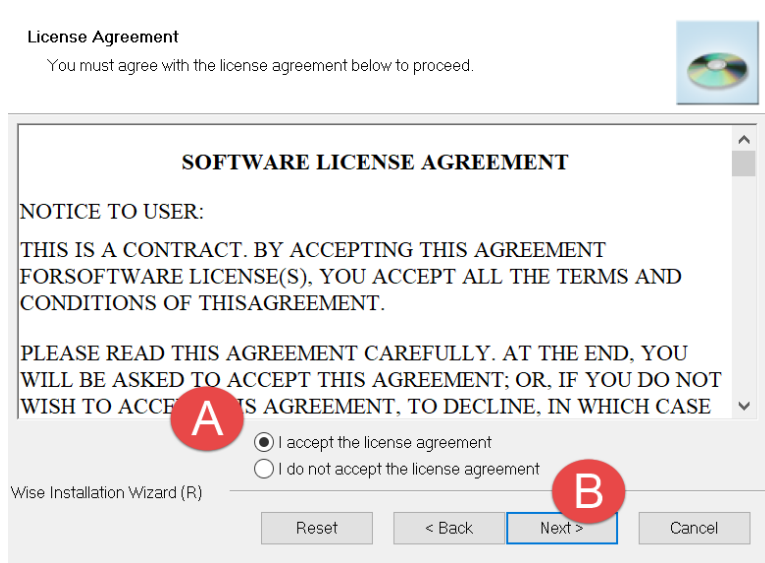
Microsoft .NET Framework 4.8 or later must be installed.



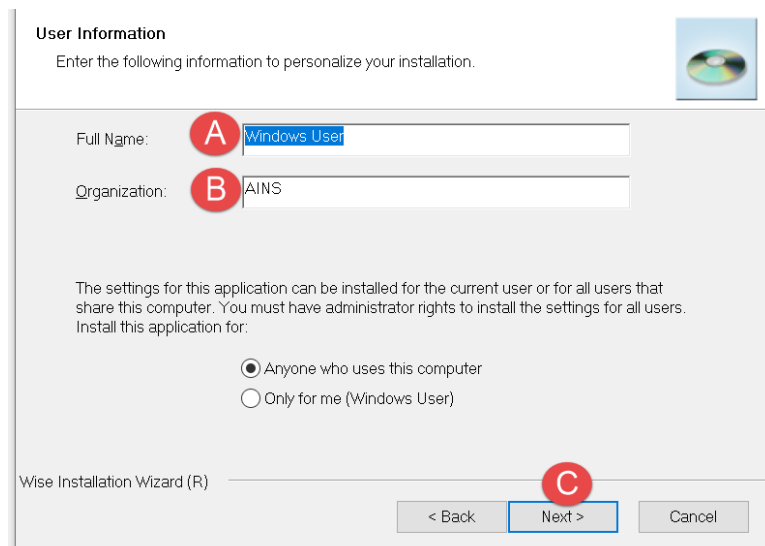
## 2 Installation

This section provides steps for installing the ATIPXpress Scanned Document Service. The Scanned Document Service must be installed on each user's local computer. To install SDS:

1. Right click **SDS.exe** and select **Run as Administrator** to launch the installation wizard. From the *Welcome* screen, click **Next**.
2. The *License Agreement* screen will appear. From this screen, select (A) **I accept the license agreement**, then click (B) **Next**.



3. The *User Information* screen will appear as shown below. Enter the (A) **User Name** and (B) **Organization** in the respective fields and click (C) **Next**.

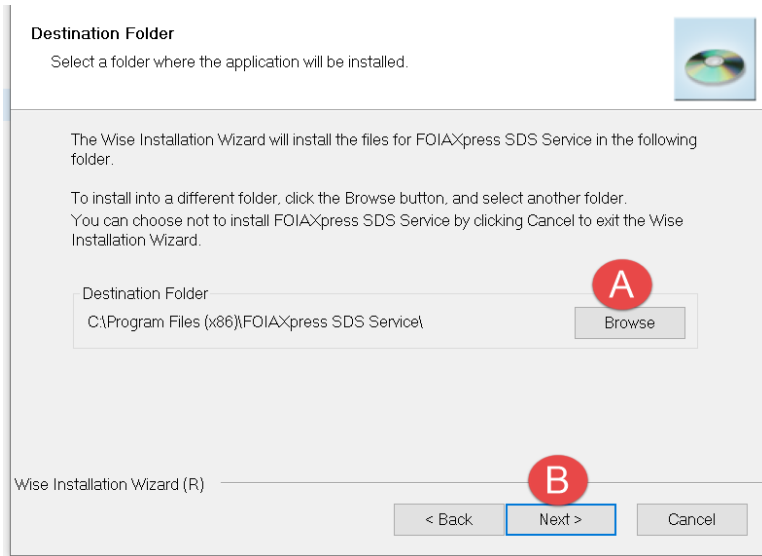


4. On the *Destination Folder* screen, the default drive for ATIPXpress SDS is set as **C:\Program Files (x86)\ATIPXpress SDS Service\**. If you'd like to select a different

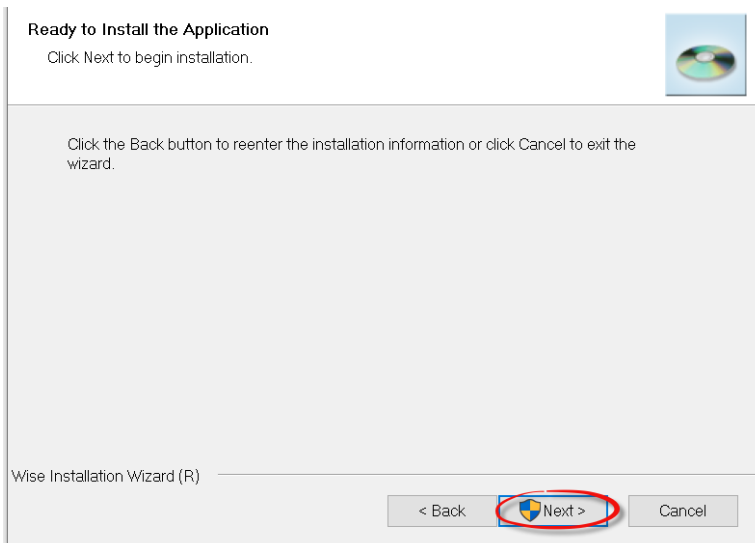


## Installation

directory, click **(A) Browse** to locate and select another directory. After the *Destination Folder* is set, click **(B) Next** to install the files to the selected directory.



5. The *Ready to Install the Application* screen will appear. Click **Next** to start the installation.



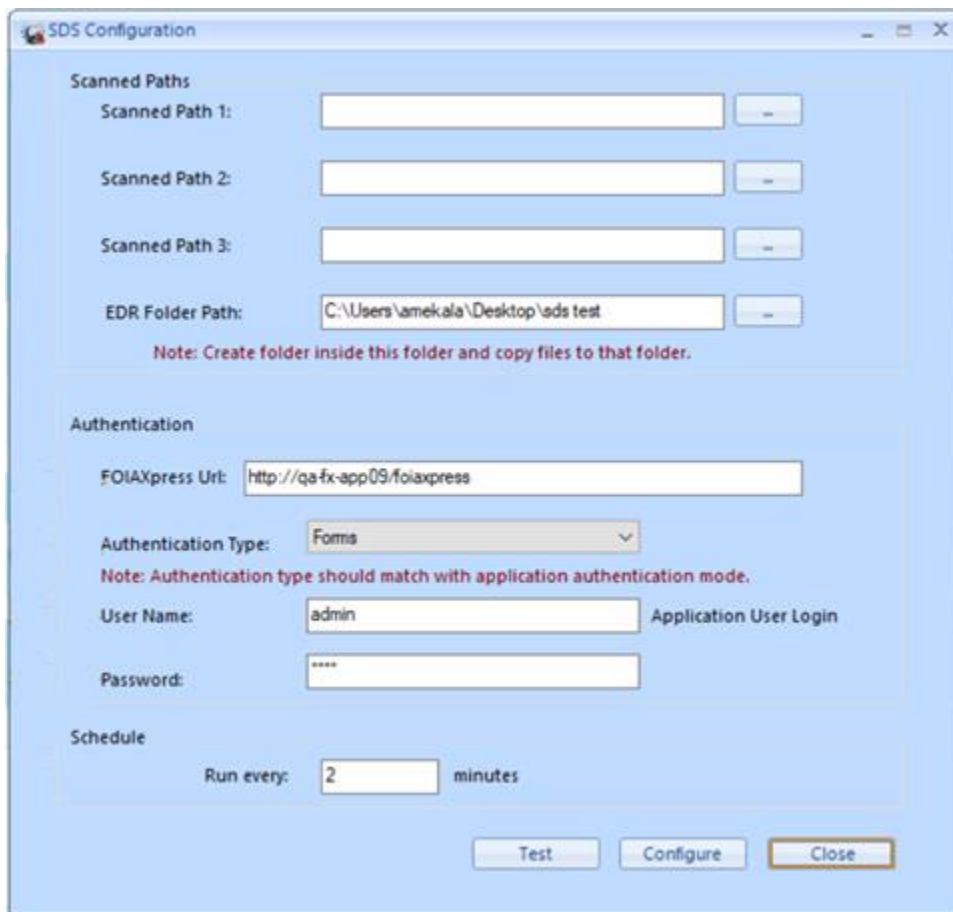
6. Please wait while installation is in progress. Interrupting this process may have adverse effects on the installation.
7. After successful installation of the ATIPXpress SDS, the *Successful Installation* screen appears. Click **Finish** to complete the installation.



## 3 Configuration

This section provides details on configuring the ATIPXpress SDS to automatically upload scanned documents from a local scanner to your ATIPXpress application.

1. To configure ATIPXpress SDS, click **Windows Search** then type **ATIPXpress SDS** in the universal search bar. The *Configuration* option will appear.
2. Right-click **Configuration** and select **Run as administrator**. After running the **Configuration** as an administrator, the *SDS Configuration* screen will appear, as shown below: *Scanned Paths*, *Authentication*, and *Schedule*. Each is outlined in the following steps.



The screenshot shows the 'SDS Configuration' window with three main sections:

- Scanned Paths:** Contains four input fields for 'Scanned Path 1', 'Scanned Path 2', 'Scanned Path 3', and 'EDR Folder Path'. The 'EDR Folder Path' is pre-filled with 'C:\Users\amekala\Desktop\sds test'. A red note below states: 'Note: Create folder inside this folder and copy files to that folder.'
- Authentication:** Contains a text field for 'FOIAXpress Url' (http://qa-fx-app09/foiaxpress), a dropdown for 'Authentication Type' (set to 'Forms'), a red note: 'Note: Authentication type should match with application authentication mode.', a text field for 'User Name' (admin) with a label 'Application User Login', and a password field with four asterisks.
- Schedule:** Contains a 'Run every' field set to '2' minutes.

At the bottom are three buttons: 'Test', 'Configure', and 'Close'.

3. *Scanned Paths*: You must configure at least one scanned path. Scanned documents, along with ATIPXpress Request/Document management barcodes, will be placed in the configured location. The ATIPXpress SDS service will first pick up each document and upload it to the ATIPXpress document cache, then initiate a Process Scanned Documents job in ATIPXpress. After the scanned document is uploaded to ATIPXpress, it will automatically be deleted from the corresponding scanned path. The Process Scanned Documents job splits the document pages from the barcode page, identifies the barcode



details, and uploads the remaining pages (not including the barcode page) to ATIPXpress. An email notification for this job will be sent to the Administrator configured to receive notifications.

**(!!) Note: The path configured within the Scanned Path fields must be either a local or shared location. Shared locations require sufficient permissions to allow access to the machine, as well as disk space for saving files, remote or network location.**

4. *EDR Folder Path*: You must first create the folder on your local computer at the same location as the SDS Scan Location pathways, or alternatively, within the *Browse for Folder* pop-up window, navigate to the desired location and click **Make New Folder**.

**(!!) Note: A barcode is not required to upload documents to the EDR Server.**

5. *Authentication*: The *Authentication* fields allow you to configure the SDS authentication settings. Properly configured, this will integrate with your ATIPXpress application using the chosen method.
  - a. *ATIPXpress URL*: The URL used to access your ATIPXpress Application, for example: <https://ains-dev/ATIPXpress>
  - b. *Authentication Type*: Authentication type to be employed. Note that this type should match the preferred Authentication Mode of the ATIPXpress application.
  - c. *User Name*: Your ATIPXpress Administrator User Name
  - d. *Password*: Your ATIPXpress Administrator Password

**(!!) Note: The SDS Service does not integrate with Single Sign On (SSO). The Authentication Type must be Forms or Windows.**

6. *Schedule*: Determine how often, in minutes, the *Process Scanned Documents* job should occur.
7. When the fields are configured as needed, you can **Test** the configuration, or select **Configure** to save the selected configuration settings.

**(!!) Notes:**

- **After making changes to the configuration, you must restart the SDS service for the changes to take effect in the system. You can restart the SDS service using Command Prompt and entering “Services.msc”. Command Prompt returns FOIAXpress.SDS Service. You can restart the service from this step.**
- **Administrators can view the status of the Process Scanned Documents job in the Jobs list, as well as within the My Jobs list in the FX Dashboard.**





## 4 Using Scanned Document Service

You can use SDS (along with the EDR module) to simplify the process of uploading large data sets to ATIPXpress. The SDS allows for scanning and adding documents in three ways, and each method is described in the following sections:

- Scan and upload files to Document Management
- Scan and upload files to the Correspondence Log of a Request
- Transfer data sets to the EDR file server

### 4.1 Scanning to Document Management

To use the SDS to add files to DM, you will first acquire a barcode from the folder where you would like the scanned documents uploaded. This can be done through *Document Management*, and each Document Management folder/section and Request has a unique barcode that can be scanned along with the document set (barcode first, followed by the documents for scanning). Using the barcode reference, the SDS automatically uploads the scanned files to the DM folder/section associated with that barcode.

**(!!) Note: Documents cannot be added to folders that already contain sections.**

Follow the steps below to automatically scan documents to a specific Document Management folder/section using SDS. These steps assume creating a new folder/section in DM to capture scans; however, documents can also be scanned to an existing folder/section.

The steps below detail the process for scanning documents into document management:

1. In the ATIPXpress application, click **Document Management > Create New Folder**.

**(!!) Note: In addition to adding a new folder, you can also open any previously created folder that doesn't contain pages, then skip to Step 5 below.**

2. Enter a **(A) Folder Name** and click **(B) Create Folder**.

**(!!) Note: Optionally, you can also enter information/change a drop-down menu selection for any other available field.**



Create Folder

File Cabinet Name\* :

Folder Name\* :

Document Format :

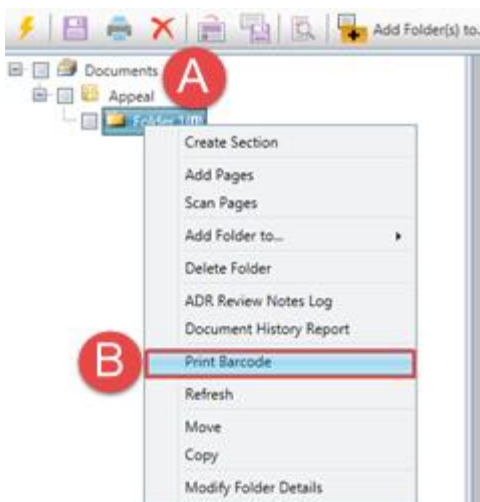
+ Bates Information

+ Folder Declassification Information

Create Folder

3. A verification message displays. Click **OK**.
4. Select the checkbox next to the folder you created, and then click **Open Folders**. The newly created folder will open in *Document Management*.
5. From the left-hand navigation in *Document Management*, right-click the (A) folder level, and then click (B) **Print Barcode**.

**(!!) Note: Optionally, you can also print a barcode from a section to upload documents to a specific section within the folder.**



6. Select a printer and click **Print**.
7. Attach the printed barcode to the front of the documents you want to scan, and then scan the documents using your scanning application.

**(!!) Note: Documents must be scanned in PDF format or TIFF format.**

8. Save the documents to one of the *Scanned Paths* configured for SDS.
9. The documents initially display in the selected *Scanned Path* before being transferred to the folder associated with the scanned barcode.

**(!!) Notes:**

- The SDS Service will not transfer the documents if they are open.



- This process may take several minutes depending on the size of the scanned documents.

## 4.2 Scanning to a Request Correspondence Log

To use the SDS to add files to a Request Correspondence Log, you will first acquire a barcode from the Request where the scanned documents should be uploaded. Each Request has a unique barcode that can be scanned along with the document set (barcode first, followed by the documents for scanning). Using the barcode reference, the SDS automatically uploads the scanned files to the Request Correspondence Log associated with that barcode.

Follow the steps below to automatically scan documents to a Request Correspondence Log using SDS.

1. In ATIPXpress, open the Request where you want to add scanned documents.
2. Click **(A) More Actions > (B) Print Barcode Page**.

The screenshot shows the ATIPXpress interface for a request with ID FOIA-24-FOI-00001. The status is 'Assigned' and there are 238 remaining days. The sidebar on the left contains various navigation options, with 'More Actions' highlighted at the bottom and marked with a red circle 'A'. The main area displays a 'More Actions' panel with several options: 'Change Review Status', 'Change Action Office', 'Change Request Number', 'Delete this Request', 'Copy this Request', 'Print Barcode Page' (marked with a red circle 'B'), 'Record Search Processing Costs', and 'Staff Processing Costs'.

3. The *Barcode Details* window will be displayed. Select or enter a **Subject** and modify any other fields as necessary.

**(!!) Note:** To upload documents as an **Expedite Description**, **Fee Waiver Description**, or **Request Description**, select the corresponding options from the **Attachment Type** drop-down menu.



Barcode - 24-FOI-00001

**Barcode Details**

Request#: 24-FOI-00001

Request Type: FOIA

Attachment Type\*: Other

Subject\*:

Received Mode\*: Other

User: Admin, Admin

Created Date: 10/13/2023

Print Barcode Close

4. When complete, click **Print Barcode**.
5. Select a printer and click **Print**.
6. Attach the printed barcode to the front of the documents you want to scan, and then scan the documents using your scanning application.

**(!!) Note: Documents must be scanned in PDF or TIFF format.**

7. Save the documents to one of the *Scanned Paths* configured for SDS.
8. The documents initially display in the selected *Scanned Path* before being transferred to the folder associated with the scanned barcode.

**(!!) Notes:**

- **The SDS Service will not transfer the documents if they are open.**
- **You can check the progress of the job by logging into FOIAXpress and checking the My Jobs queue.**

My Work Summary	
Primary Assignments	640
Secondary Assignments	7
Requests I Own	762
Pending Requests for Documents	31
Pending Consultations	8
Pending Expedite Determination	74
My Jobs (2 Pending 9 Failed)	

## 4.3 Transfer Data Sets to EDR Server

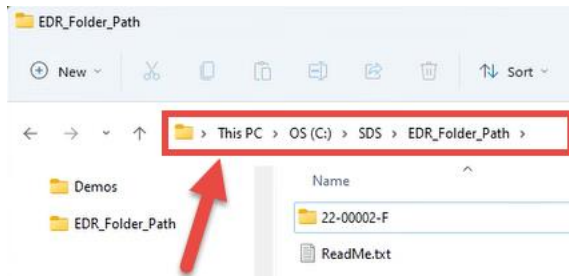
SDS allows you to transfer scanned data sets to your EDR file server.



**(!!) Note: EDR can only be accessed by organizations that have purchased EDR licenses, and the license has been assigned to a user.**

Follow the steps below to create a location for a data source to transfer the data sets to the EDR File Server:

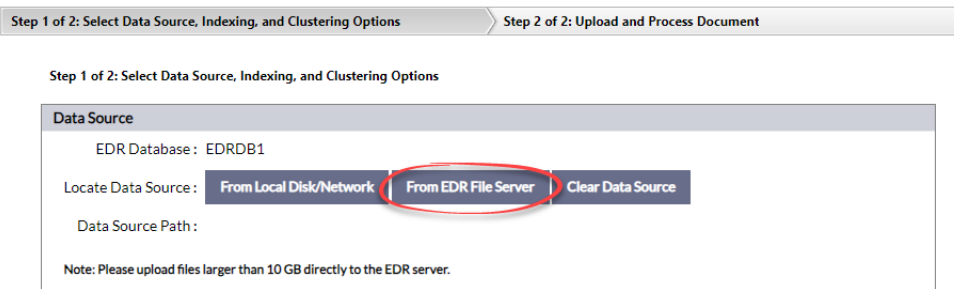
1. Navigate to the *EDR File Path* configured for SDS (see the Configuration section for details):



2. In the toolbar, click **New Folder**.
3. Rename the folder to include the Request Number.

**(!!) Notes:**

- The EDR File Path must be local to your computer and cannot be a network location.
  - If you are making an addition to a previous data set, add it as a new folder with a unique name. Reusing folder names creates issues with data quality and retention.
  - Do not use ZIP folders when creating the data source location, ZIP folders will not transfer to the EDR server.
4. Copy the data source or files and paste them in the newly created folder.
  5. Next, the application locates the folder during its next configured sync timeframe. After the application picks up the folder it is removed from the EDR File Path location and placed in the EDR File Server.
  6. Return to the application and open the request.
  7. Navigate to the *Electronic Document Review (EDR)* tab and click the **EDR File Server** button to retrieve the folder containing your data source.



8. The *Browse Folder* pop-up window appears. Expand the folder tree until you locate the desired folder path, then select it.



## Using Scanned Document Service

