Instructions for Sweeping images into SCEIS/OnBase

"Sweeping" is used to image documents into SCEIS using a network copier/scanner or a small desktop scanner that does not scan directly into OnBase.

From your network copier/scanner or desktop scanner you will save image files in a directory on your workstation. You will then log in to OnBase and use the "sweep" function to browse to the directory and upload images instead of scanning them.

Use the following instructions to image documents into SCEIS.
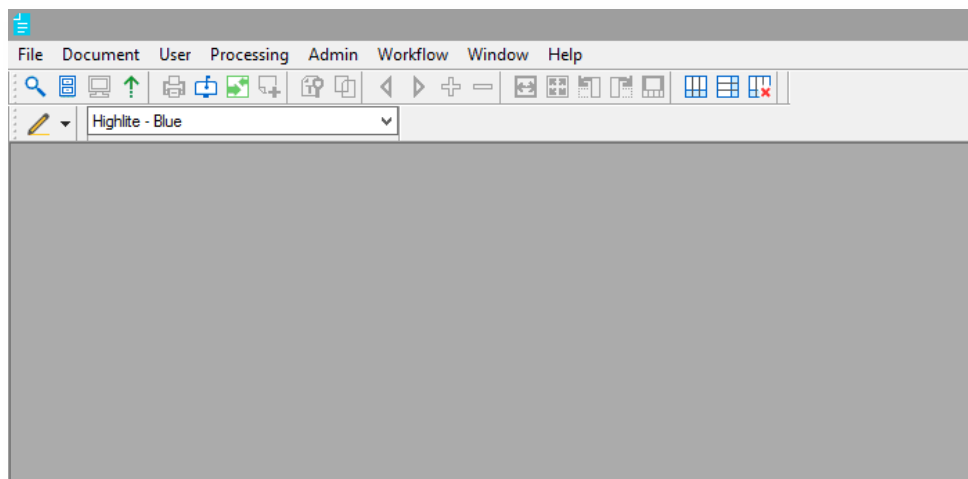
A. One-time Setup
If you have not completed the setup for scanning into SCEIS using OnBase, complete the setup instructions in the appendix beginning on page 9.

B. Scan and Save Images
1. Scan your documentation on your network/copier scanner or desktop device (not connected to SCEIS).
2. Save the file(s) to the "C:\SCEIS" folder that you created in the One-Time Setup. You may also save attachments that have been sent to you. You may create any name that you wish to use for the image files.

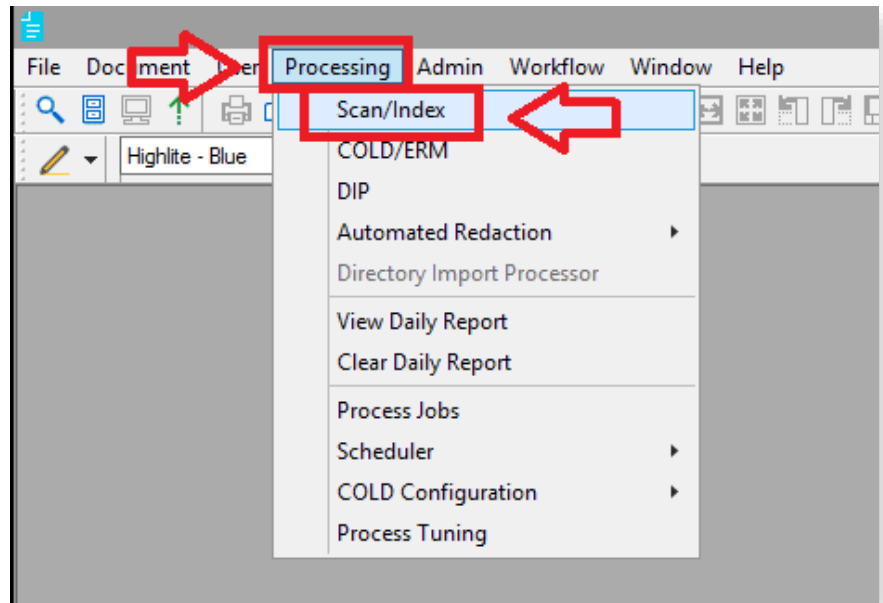## C. Log in to the SCEIS Onbase Client
1. Log in to SCEIS.
2. Open OnBase Full Client Production. When you open OnBase, the below screen will appear.
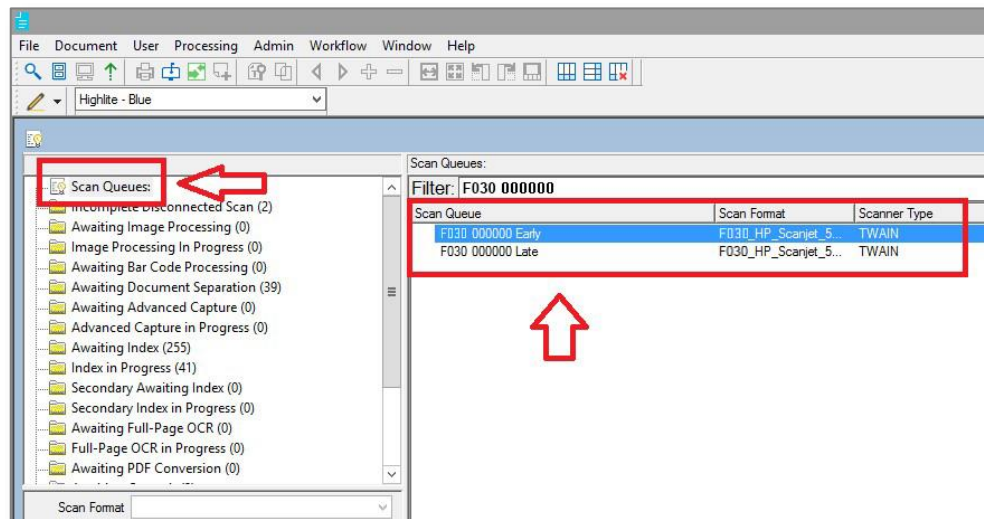
D. Sweep

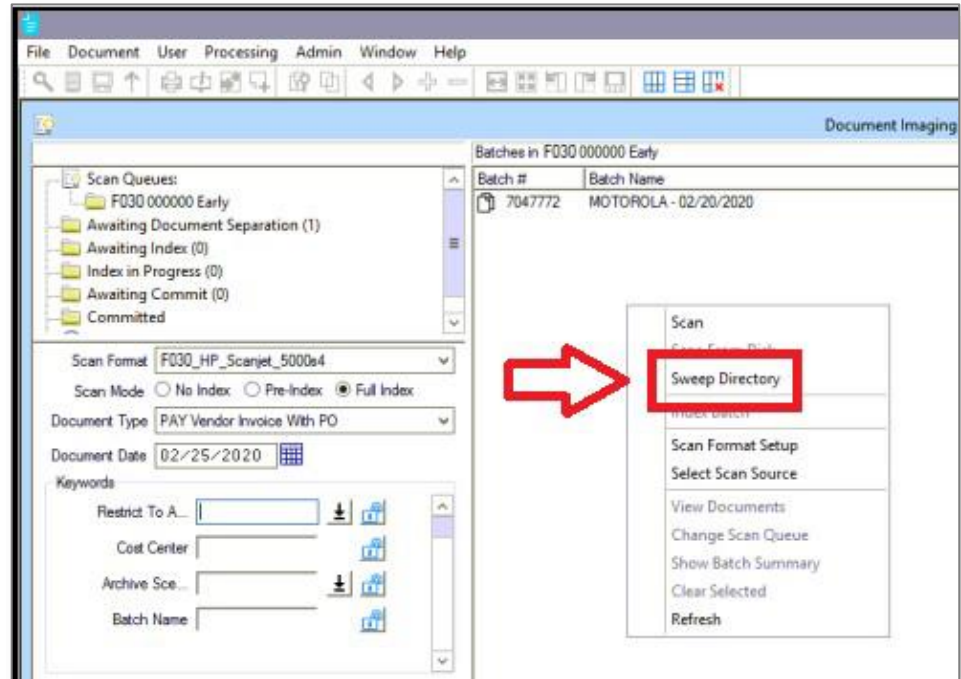1. Select Processing, then Scan/Index.

2. Click Scan Queues.

3. Double-click on the appropriate Scan Queue. Early indicates that the document does not exist in SAP and the process will create the SAP document. Late indicates that the SAP document exists, and you are attaching an image after it has been created in SAP.
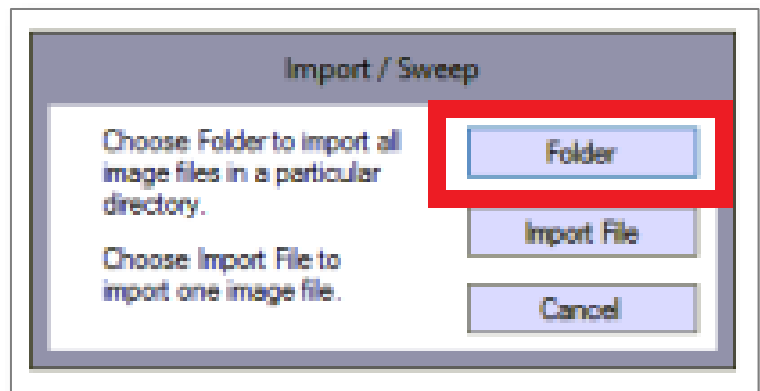
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4. In the white space on the lower right side of the screen, RIGHT click and select "Sweep Directory."

5. Click the "Folder" option.
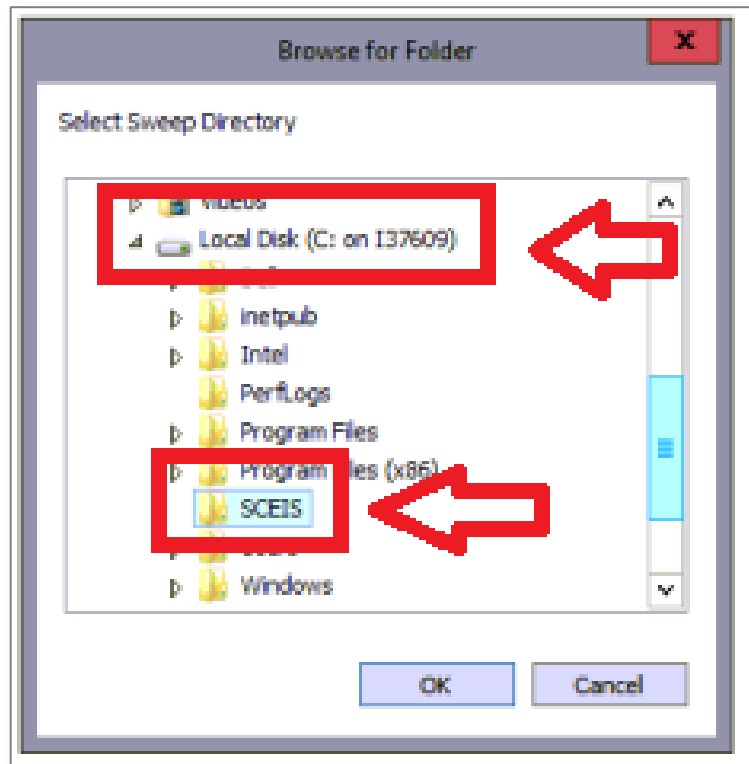
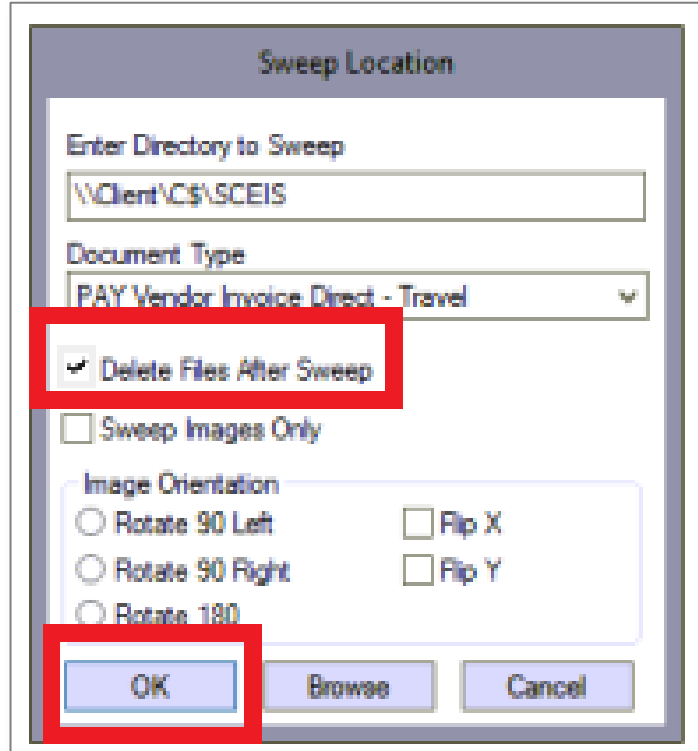6. Select the Document Type. Then click on "Browse."
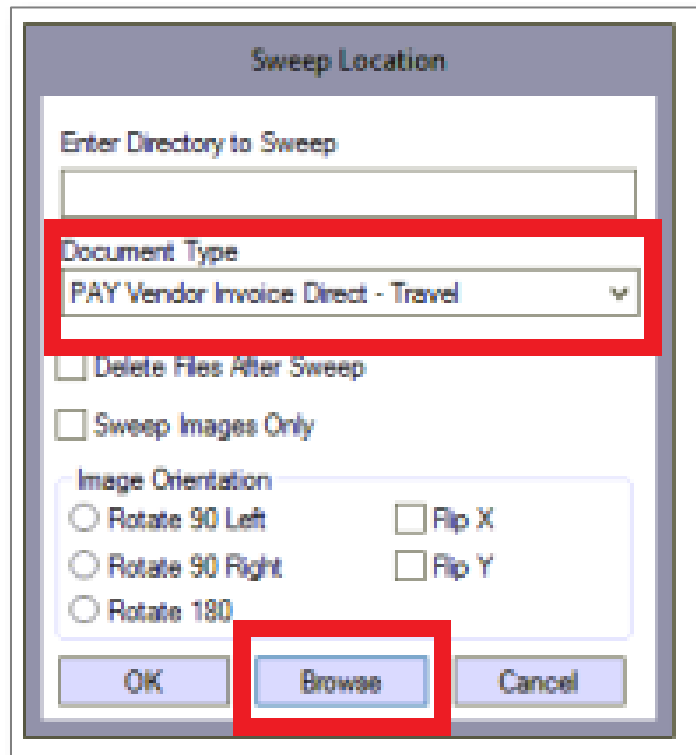
7. Search for the folder where the images were saved. This folder will be located on the Local Disk drive (C:) for your computer name in the SCEIS folder. Select the folder, then "OK."

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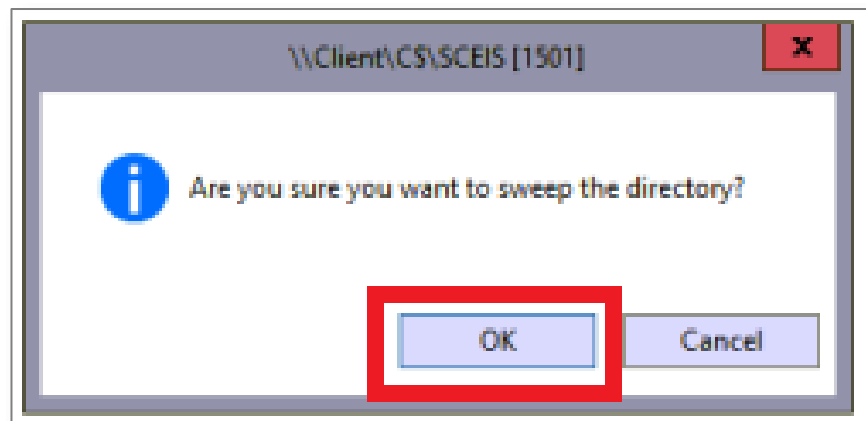THE SOUTH CAROLINA DEPARTMENT OF ADMINISTRATION

8. Make sure the "Delete Files After Sweep" box is checked, then click "OK."

9. Click "OK."

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10. Leave your username in the batch name, and at the end you can add a description of the document scanned. In this example it is named "TEST." The text of the Batch Name will appear in the SAP Workflow inbox when images are workflowed to SAP.

Batch Name

Enter a name to start a new batch or "Cancel" to select an existing batch.

KAT63572 - 02/25/202 | TEST

OK   Cancel
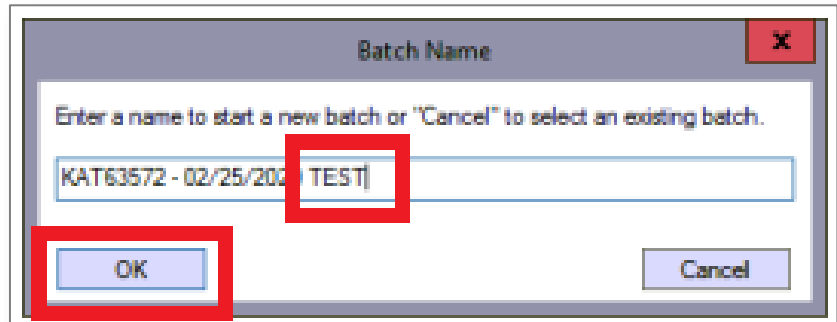
11. All the files that are in the C:\SCEIS Sweep directory have now been swept into OnBase as one batch. The batch is now in the Awaiting Document Separation queue. The remainder of the process is the same as scanning directly into OnBase. Click "Awaiting Document Separation."

Scan Queues:
- Awaiting Document Separation (5)
- Awaiting Index (0)
- Index in Progress (0)
- Awaiting Commit (0)
- Committed
- Scheduled Processes

Scan Format   ⌄

Scan Mode   ○ No Index   ○ Pre-Index   ● Full Index

Document Type   ⌄

Document Date   03/20/2020   ⊞

Keywords

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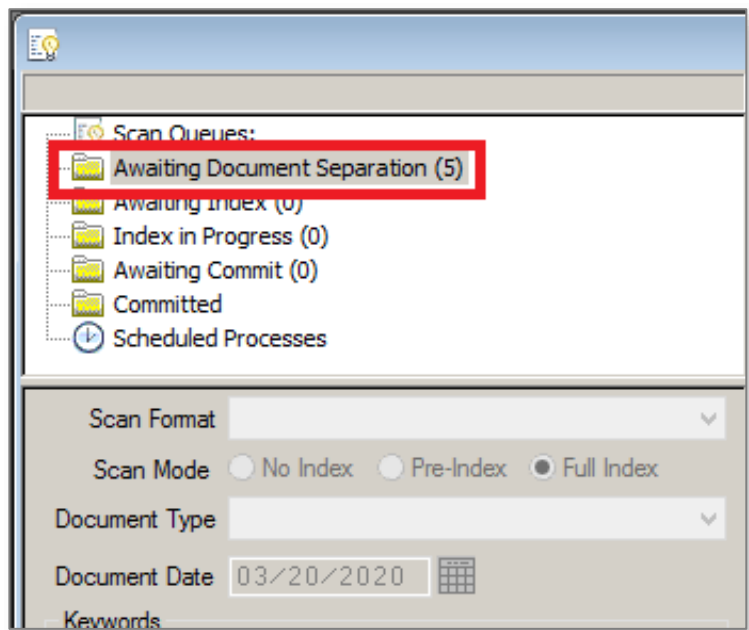
12. All pending batches for your agency will appear. Hover your cursor over the file name for your scanned batch. Your batch will be labeled with your user id.
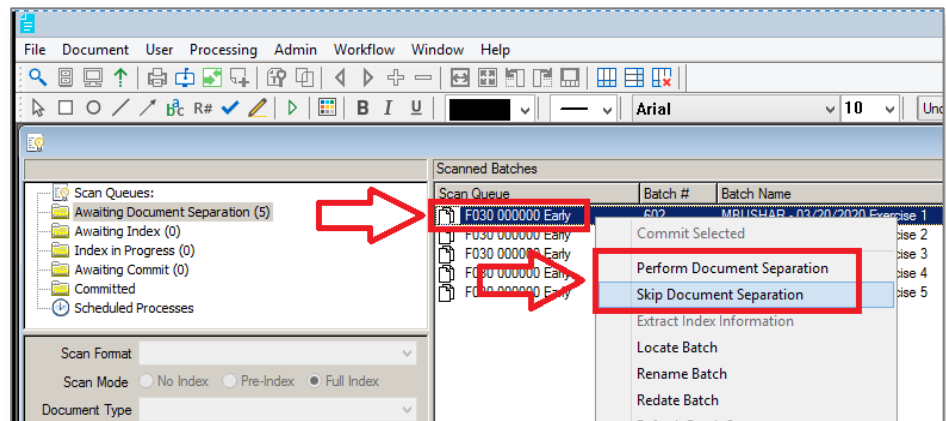
Left-click to highlight the batch file. Right-click and select "Skip Document Separation" or "Perform Document Separation." Skip Document Separation will send the document to SCEIS. Perform Document Separation will allow you to split it into separate documents as needed.
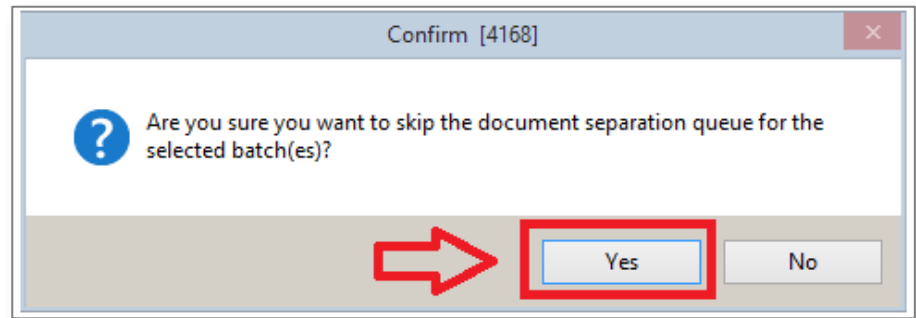
NOTE: You will not be able to perform document separation on pdf file types. A pdf is protected and will remain as one document. If you need documents broken up, scan them separately or scan them as a tif file type.

Below is a close-up view.
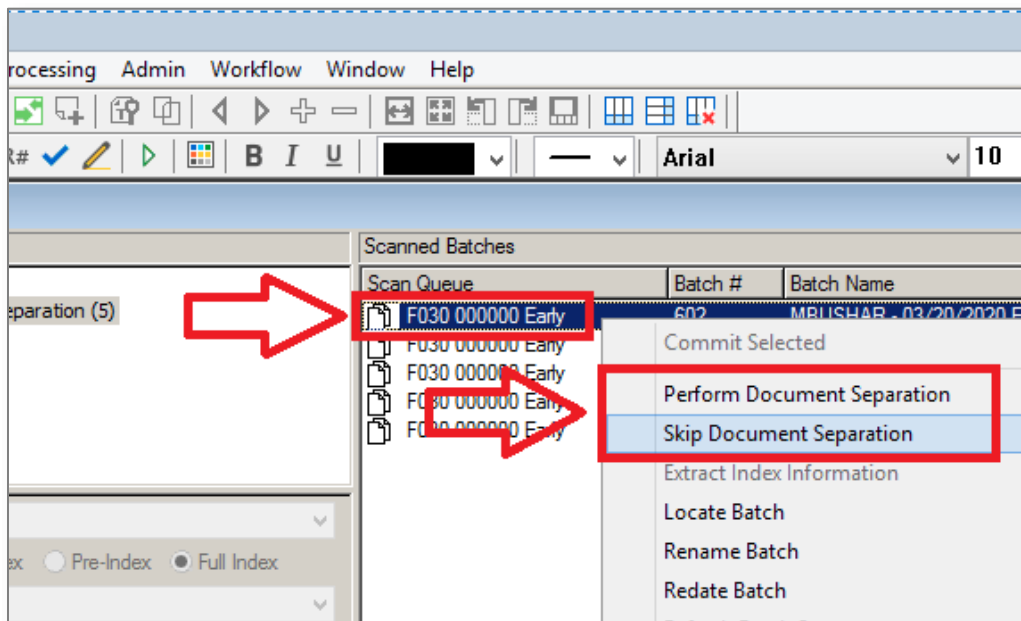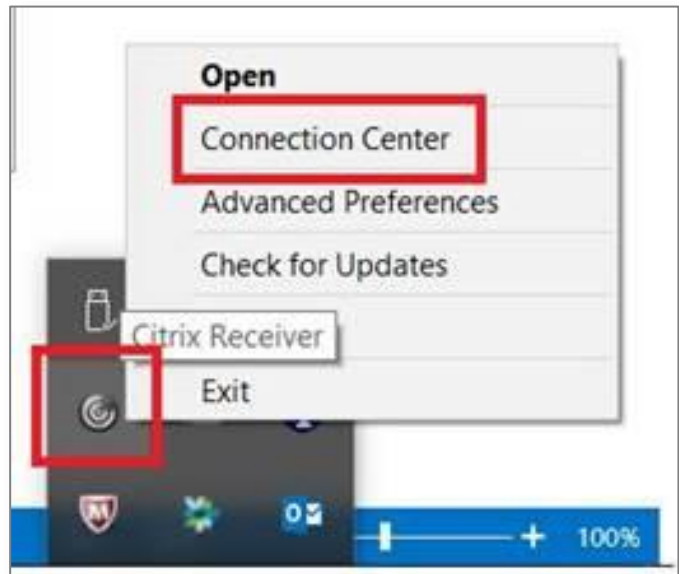
13. If you have selected "Skip Document Separation," select "Yes."

The sweeping process is complete.
Imaging items are in the SAP Workflow inboxes for the appropriate recipients.
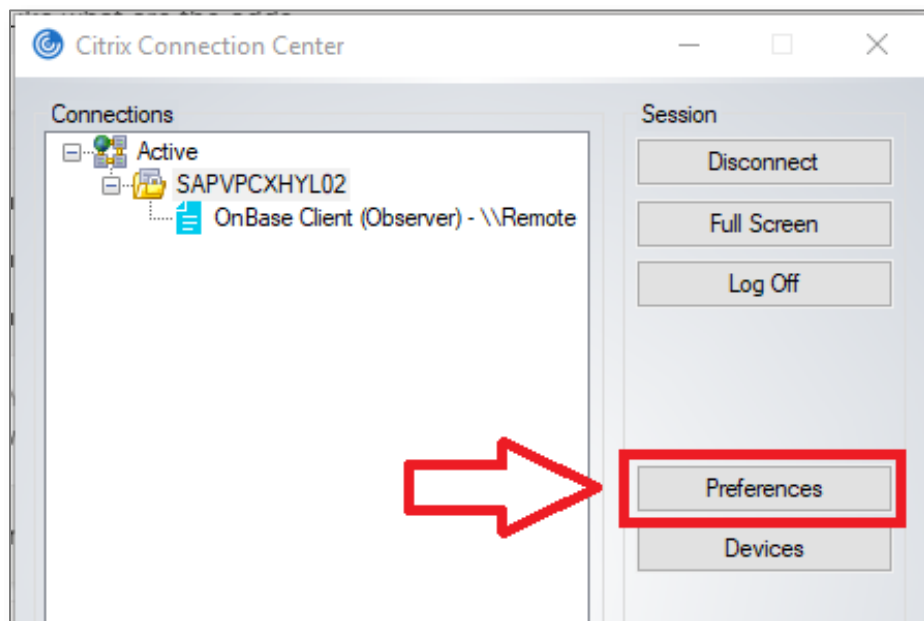
Appendix: One-time Setup Instructions

1. Create a folder directly under your C: drive called "SCEIS" on your local machine.

2. Log in to Citrix (sceisgateway.sc.gov) and log in to OnBase.

3. Right-click on the Citrix Receiver icon (the icon could say Citrix Workspace and be a different color) in the system tray located in the lower right corner of the screen near the date and time. Select the "Connection Center."

4. Click "Preferences."

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5. On the "File Access" tab, verify that the "Read and write" option is selected. Then click "OK."

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