MY303.NET – 303 Computers Corporation
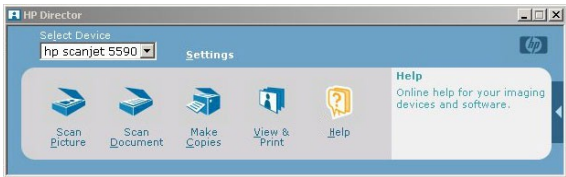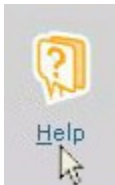all your technology done right™

121 – DOCUMENT ARCHIVAL

303 Computers keeps invoices and other important business documents on the computer as PDF files. To generate those files, you must scan the documents using the HP scanner on top of the accounting computer, and the HP Director Software application that runs the scanner.

Setting up the Scanner

Before you scan a document, you must make certain the scanner is set up to produce a PDF file. You can find instructions for setting up the scanner in the HP Director Help.

To access Help, do the following:

Action	Result
1. From your PC desktop, click the HP Director icon on the Quick Launch toolbar:	
2. Click the **Help** icon:	The system displays the Help window.

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How to Scan a Document

To scan a document, perform the steps in the following table:

Action	Result
1. Load the document to be scanned by placing it on the feed mechanism face up and "head first" (the top closer to the scanner).	
2. From your PC desktop, click the HP Director icon on the Quick Launch toolbar:	
3. Click **Scan D̲ocument:**	

4. Select the following option values:

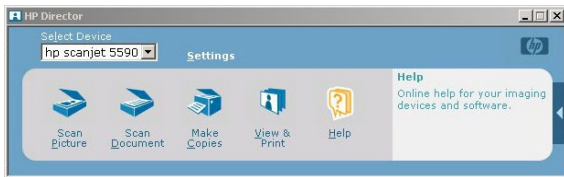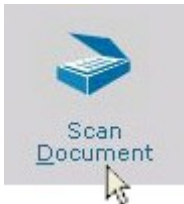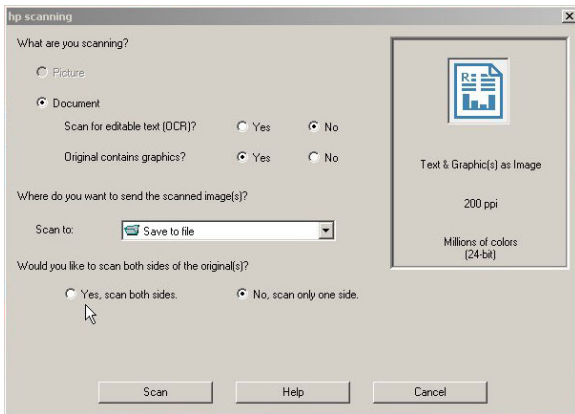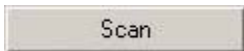|	
What are you scanning?	**Document**
Scan for editable text (OCR)?	**No**
Original contains graphics?	**Yes** for a color invoice (e.g. a Sprint or Qwest bill). Otherwise, **No**.
Where to send the scanned image?	**Save to file.**
Scan both sides of the original(s)?	**Yes** for a document printed on both sides. Otherwise, **No**.

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121 – DOCUMENT ARCHIVAL (cont')

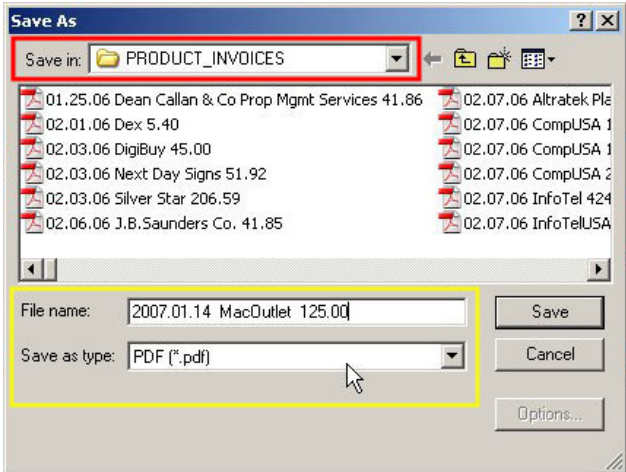| Action	Result
5. Click **Scan:** Scan * Note: This is handy when receipts need to be scanned.	HP Director may open a window allowing you to resize the scanning area around the document. If so, resize the scan area as needed and click the green **"Accept"** button. As the document is scanned, the system displays a "scanning" message. When the scan completes, the system displays the **HP Scan Picture** dialog box: **HP Scan Picture** Do you want to scan another picture? If so, load the next picture and then click Scan. Otherwise, click Done. Scan Done
6. If there are more pages to scan into the document—enclosures, packing slips, or register receipts, for example—click **Scan** and return to step 4.	
7. After all pages have been scanned, click **Done**. The document will be ready to save.	

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Saving the Scanned Document

After scanning, save the document by performing the steps in the following table:

Action	Result
8. The Save dialog will appear after scanning all pages in the current document. Be sure to select *where* the file goes (in the red box at right) so it saves to the file server	
9. Navigate to the office document file server using the Save In: dropdown (as noted in the red box in step #8 above). Resource should be located at: **\\192.168.10.2\303DATA** (for pc) **Afp://192.168.10.2** (for mac) There should be a shortcut on your desktop named **303DATA** that allows you to directly access that location. There should also be links on the desktop to most frequently used folders like SCANZONE and PACKING_SLIPS as well as 303DATA. Use "303 Billing Reference" as a guide appropriate document saving locations on the server.	

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Action	Result

10. Type the document name using the following naming convention:
 	
    yyyy. mm. dd **bb** *company* **bb** *amount***.pdf**
 	
    yyyy = the four-digit year
    mm = the two-digit month
    dd = the two-digit day of the month
    bb = two blank spaces
    company = the name of the company
    amount = the full amount of the invoice
	For a $169 invoice from Z Tech, for example, dated 1/31/07, the file name would be:
	
	    2007.01.31 Z Tech 169.00.pdf"
	
	Be sure there are two spaces between the date and the company name, and between the company name and the amount.

11. Click **Save.** Be sure the file type is "PDF" (as noted in the yellow box in step #8 above)	The system saves the document in the location specified.
12. Highlight date on hard copy in yellow, and then file the hardcopy of the document just scanned in the manila folder in the wire bin rack labeled **Scanned.**	