



WinTen

TenDocs

End User Manual

User Manual Edition:

7/2010

Making Your Job Easier!

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WinTen TenDocs End User Manual

User Manual Edition: 7/2010

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OVERVIEW

TENDOCS

TenDocs is a Web-based document imaging and archiving program integrated with the WinTen suite of programs. With this program, you have the ability to scan all your agency's files and documents into a secure archive. When TenDocs is launched, you can scan, print, and/or e-mail all your agency's stored documents, document images, records, reports, etc. that you use in WinTen or any of your daily work processes.

TENDOCS QUICK LOAD

TenDocs Quick Load is a stand alone Windows application that is used for scanning and archiving "non-Tenmast" electronic files/documents that you want to store in the TenDocs archive, but are not associated/linked with any record in your Tenmast system (WinTen). With TenDocs Quick Load, you do not need to be working in WinTen programs to scan/archive a document.

What TenDocs Does:

With TenDocs, you have the ability to:

- *Scan documents/image documents and store them in a secure, off-site archive.*
- *Archive documents/document images from any other software that has printing capabilities, such as Word or Excel.*
- *View/Print/E-mail/Fax/Scan/Archive image documents.*
- *Print/E-mail/Fax/Scan/Archive a batch of image documents.*

Note: Only agencies with a fax license have the ability to use the fax option.

What TenDocs Does For You:

Advantages of the TenDocs tool:

- *No extra software to deal with: TenDocs and TenDocs Quick Load works with all WinTen programs.*
- *No timely conversion processes: No changes or conversion is needed for WinTen to WinTen.*
- *Security and peace of mind: Since TenDocs works on a separate server from your Tenmast software, TenDocs provides a secure, off-site storage area for your agency's documents. Disaster recovery? No problem!*
- *Easy access: TenDocs has remote access availability.*
- *Usability and ease of use: Access points into TenDocs are logical and easy to find; also, the TenDocs archive screen is simple and easy to navigate.*

Document Categories

TenDocs files documents under document categories, which are groupings of information (or “tags”) that can be associated with a document, such as “Household,” “Asset,” and “Work Order.” These categories are then broken down even further into document types; for example, the “Household” category can be filtered down into types such as “Birth Certificate,” “Driver’s License,” or “Lease.” Thinking of the TenDocs archive as a boundless online filing cabinet, Tenmast software modules and the document categories they encompass are the file drawers and folders, and document types are the documents located within.

For example: ORC module (file drawer) > Tenant’s file folder > Household category > Birth Certificate document type.

The default categories, provided at setup, are:

- **Administrative:** *This category should be used for documents related to the administrative functions of your agency.*
- **Asset:** *This category is used for documents related to fixed asset inventory items.*
Note: Only available when archiving documents using Quick Load.
- **Board:** *This category is used for documents associated with your board of directors, such as board minutes and resolutions.*
- **Contracts:** *This category should be used for documents related to any of your agency’s outside contracts.*
- **Employee:** *This category is used for documents related to a single payroll employee.*
- **Executive:** *This category is used for documents pertaining to your agency’s executive-level of business.*

- **Financial:** This category is for documents related to accounts payable information, such as invoices.
- **History:** This category is for bulk archiving old documents for which additional tagging is unnecessary.
- **Household:** This category is used to track any documents related to a household, family member, or anything to do with a certification or tenant.
- **HUD:** This category is for HUD correspondence documents unrelated to WinTen data, such as audit-related documentation.
- **Public Housing Unit:** This category is used for documents related to a single public housing unit.
- **Other:** This category is only used for those miscellaneous documents that cannot be easily categorized in any other category.
- **Report:** This category is used to archive reports in each WinTen program.
- **Vendor:** This category is used to for documents related a specific vendor. It can also be used to scan a document related to a single invoice or purchase order.
- **Work Order:** This category is used for documents related to a single work order.
Note: Only available when archiving documents using Quick Load.
- **Section 8 Property:** This category is used for documents related to a single Section 8 property.

Note: Inspections should be considered PH Unit or Section 8 Property documents.

Programs and Screens where TenDocs is accessible:

- **Administrative Document Category**
 - Available only through Quick Load.
- **Asset Document Category:**
 - Fixed Assets: Maintain Assets screen > Main tab
- **Board Document Category**
 - Available only through Quick Load.
- **Contracts Document Category**
 - Available only through Quick Load.
- **Employee Document Category:**
 - Payroll: Maintain Employee screen > General tab
- **Executive Document Category**
 - Available only through Quick Load.
- **Financial Document Category:**
 - Available only through Quick Load.
- **History Document Category**
 - Available only through Quick Load.
- **Household Document Category:**
 - Applicant List: Maintain Applicants screen > Applicant tab
 - Occupancy and Rent Calculation: Tenant Detail screen > Main tab
 - Section 8 Tenant & Landlord: Maintain Tenants screen > Tenant Data tab
 - Tenant Accounts Receivable: Tenant Edit/Review screen > Tenant Data tab
- **HUD Document Category**
 - Available only through Quick Load.
- **Other Document Category:**
 - Available only through Quick Load.
- **Public Housing Unit Document Category:**
 - PHAS: Add/Edit Cumulative Data Records screen
- **Report Document Category:**
 - All programs: Reports screen
 - Occupancy and Rent Calculation: Tenant Detail screen > Reports menu icon > Tenant Reports screen
 - Section 8 Tenant & Landlord: Maintain Tenants screen > Reports menu icon > Tenant Reports screen

- **Section 8 Property Document Category:**
 - *Section 8 Tenant & Landlord: Maintain Housing Unit screen > General tab*
 - *Rent Reasonableness: Maintain Housing Unit screen > General tab; Maintain Housing Unit for Comparisons screen > General tab*
- **Vendor Document Category:**
 - *Accounts Payable: Invoice Detail screen*
 - *Accounts Payable: Vendor Information screen > General tab*
- **Work Order Document Category:**
 - *Available only through Quick Load.*

Document Types

Document categories are then broken down even further into user-defined **document types**. You are then able to filter a table of documents from these variables. For example, common document types in the Household category are:

- *Asset Verification*
- *Income Verification*
- *Birth Certificate*
- *Drivers License*
- *Lease*
- *Release of Information*

VALUABLE VOCABULARY

Archive: Storing document images in a secure, off-site browser location.

Archive Browser: The archive browser is the hub for all your document archive activity where you view/sort your current archived documents, search for specific documents, print a document/batch of documents, e-mail a document/batch of documents, and/or fax a document/batch of documents (if applicable).

Archive Time: System time/date a document image was archived.

Document Category: A document category is the name given to a group of similar documents, such as “Household,” “Asset,” or “Work Order.” **Note:** Document categories are NOT user-defined (document categories are set up and defined only before implementation of the TenDocs system).

Document Tag: Document tags are units of information automatically “assigned” to a document once it is given a document category. These “tags” can then be used as search criteria when locating a document in the archive. For example, the Household document category includes documents that have some of the following “tags” that

people can use to locate a household document in the future: head of household first name, last name, SSN, etc.

Document Type: Method of organizing scanned/archived documents so you can find and access them later; for example, the birth certificate document type. **Note:** Document types are user-defined (HAs can add document types as they wish).

Duplex scanning vs. simplex scanning: Duplex scanning automatically scans both the front and back of a document; simplex scanning only scans one side of a document. **Note:** all duplex scanners are able to scan in simplex mode, while simplex scanners can only scan one side at a time.

Central Scanning: One primary area/scanner is used for multiple users.

Local Scanning: Each user has their own scanner.

Non-Tenmast Document: “Non-Tenmast” documents are a broad range of electronic files/documents that you want to store in the TenDocs archive, but are not associated/linked with any record in your Tenmast system (WinTen).

Note: *In most cases, Quick Load is used to archive “non-Tenmast” documents. However, because of the type of database that certain WinTen programs are built upon, you must use the TenDocs Quick Load tool to archive “Tenmast documents” found in those programs. For more information, please see [Printing/Archiving Tenmast Documents in Maintenance Programs/Fixed Assets/Purchase Orders Using Quick Load on page 2.15](#).*

Quick Load: Stand alone Windows application that is used for the quick scanning and archiving of “non-Tenmast” documents. With TenDocs Quick Load, you do not need to be working in WinTen programs to scan a document.

Scan: Using a scanner to create a digital image of a document.

TenDocs: Document imaging and archiving tool that has been built into the WinTen suite of programs.

Tenmast Document: “Tenmast documents” are any electronic files/documents that you want to associate/link with a record in your Tenmast system (WinTen).

TASKS

This chapter provides an overview of the tasks you can perform with the TenDocs Archive screen and Quick Load scanning applications.

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ARCHIVING WITH TENDOCs ARCHIVE SCREEN

When working with TenDocs, documents you want to archive are separated into two categories: Tenmast documents and non-Tenmast documents. “Tenmast documents” are documents that exist in Tenmast’s WinTen software programs and therefore are automatically tagged/associated to records in WinTen; “Non-Tenmast” documents are documents that exist outside of Tenmast’s WinTen software programs and therefore are not automatically tagged/associated to records in WinTen.

The TenDocs Archive screen, when accessed from a WinTen² program, can scan, archive, and tag/associate Tenmast documents. See “The TenDocs Archive Screen” on page 3.


The TenDocs Quick Load tool can scan, archive, and tag/associate non-Tenmast documents.

Accessing the TenDocs Archive Screen


Note: For more information on accessing TenDocs in WinTen Maintenance programs/Fixed Assets program/Purchase Orders program, please see *Printing/Archiving Tenmast Documents in Maintenance Programs/Fixed Assets/Purchase Orders Using Quick Load* on page 2.15.

From **Maintenance screens:**


Example: The Tenant Detail screen in Occupancy and Rent Calculation (if the screen has multiple tabs, the icon is usually found on the first tab).

1. Double-click or edit a line item on the appropriate Browse screen. The corresponding Maintenance screen appears.
2. On the first tab of the Maintenance screen, click  on the toolbar. The **TenDocs Archive screen** opens.

From **Reports screens:**

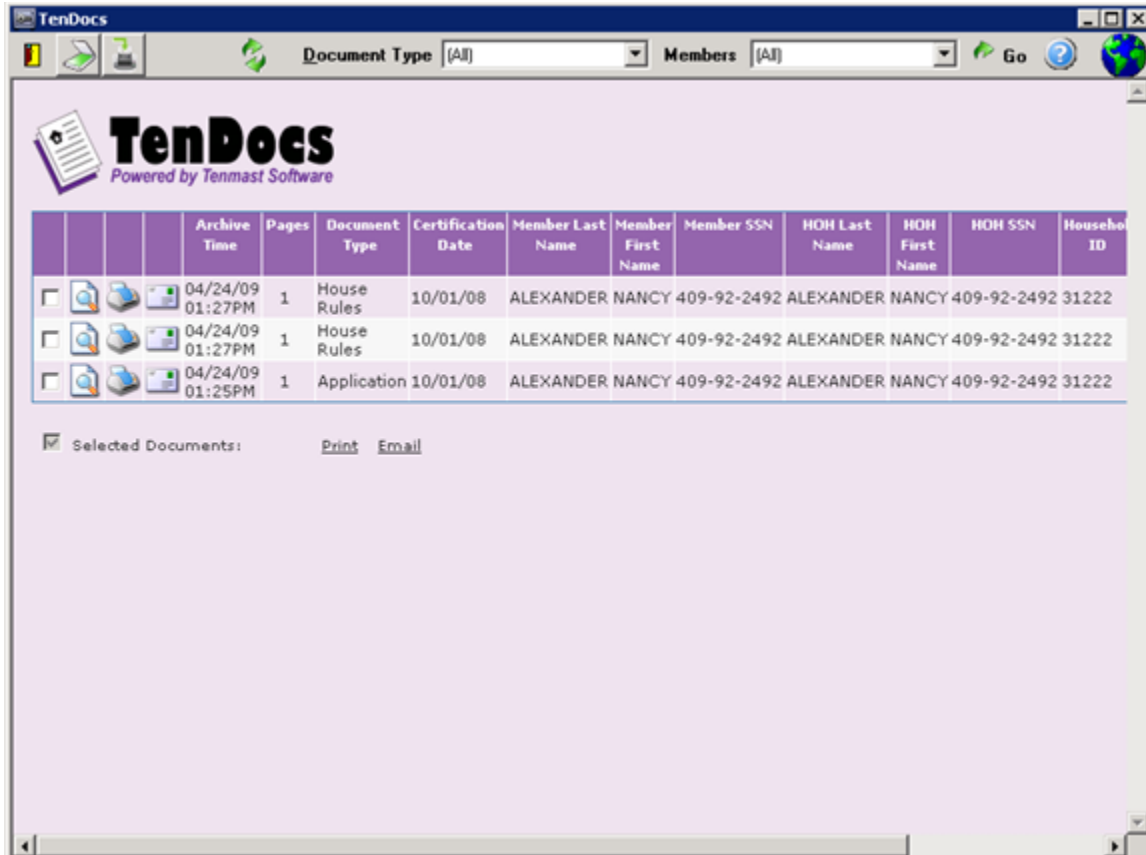
1. Click  on the toolbar and select “View Archived Report” from the menu that appears. The **TenDocs Archive screen** appears.





OR

From Tenant Maintenance screens where the Reports Menu icon is available (such as Occupancy and Rent Calculation), click  on the toolbar, and then

click  **Archive** on the **Tenant Reports screen** that appears. The **TenDocs Archive screen** appears.

The TenDocs Archive Screen



- Use the green navigation arrows on the toolbar   to go backwards or forward in the sequence of TenDocs screens in which you have been working.
- Use  to refresh the data on the screen. For example, if you have just scanned a document and want to view its information as soon as possible in the document table.
- Click  to exit out of the **TenDocs Archive screen** and return to the WinTen screen from which you accessed the TenDocs.


From this screen, you can:

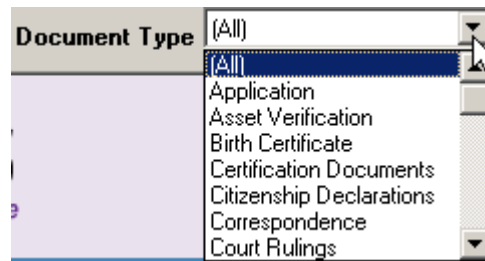
1. View/sort your current archived documents.
2. Scan Tenmast documents into the archive.
3. Print a document/batch of documents.

4. E-mail a document/batch of documents.
5. Fax a document/batch of documents (if your agency has a fax license).

Viewing/Sorting Documents

Once on the **TenDocs Archive screen**, you will see your archived documents in a table. To filter the table to only show certain document types, use the **document type** drop-down list at the top of the screen. The document types displayed in the list depend on the program from which you accessed TenDocs, and what document category is represented. For example, if you accessed TenDocs from the **Tenant Management screen** in Tenant Accounts Receivable, the Household document category is represented in that area of that program. Therefore, only document types pertaining to that category will be available to sort with.

- ✓ Select a **document type** from the drop-down list and click  **Go**. All archived documents that match the specified document type will display in the table below.




- ✓ You have the choice to organize the document table to your individual preferences by sorting any, or all, of the table's columns. To sort the table columns, click the column header link(s). The table will then sort the list of documents accordingly, alphabetically or by date. For example, if you click the Document Type column header, the table will sort alphabetically by the document type's first letter (A-Z).

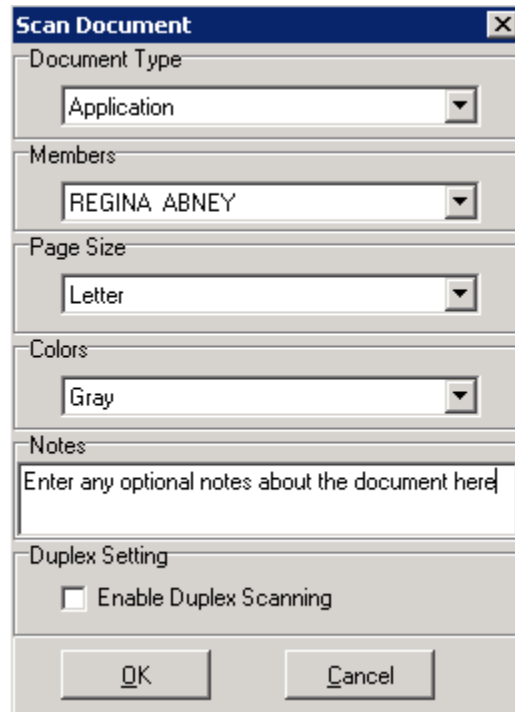
Scanning Tenmast Documents Into the Archive

“Tenmast documents” are any electronic files/documents that you want to associate/link with a record in your Tenmast system (WinTen). For electronic Tenmast documents/files found IN WinTen programs that you want to associate/link with a record in your Tenmast system (WinTen²), use the Scan Document feature.

For Tenmast files/documents NOT found in WinTen² programs that you want to associate/link with a record in your Tenmast system (WinTen²), use the Print to Archive feature. See “Printing Tenmast Documents Into the Archive” on page 6.

1. Access the **TenDocs Archive screen**.
2. Click  on the toolbar and select “Scan Document” from the menu that appears. A **Scan Document box** opens.



3. Select the **document type** of the document you want to scan/archive from the drop-down list.
4. If you have selected a document type categorized under the household document category, please specify the household **member** to whom the document pertains.



5. Choose the **page size**, letter or legal, of the document you want to scan/archive.
6. Select the **color** scheme for the scanned document: BlackWhite, Gray, or Color.


Note: The “gray” color scheme is best for documents with signatures, as well as most scanned documents.

7. Enter any optional **notes** about the document in the textbox.
8. If the document you are scanning has information you want to archive on both sides, check the checkbox to **enable duplex scanning**.
9. Click OK to begin the scan. A preview screen appears where you can view the document as it will be scanned/archived.

Note: If the document was accidentally scanned upside down, you can rotate and correct it before saving it to the archive. Click  at the bottom of the preview screen to rotate the document 90 degrees. If the scanned document has more than one page, click  to rotate every page in the scanned document 90 degrees.

10. To accept the scan and archive the document, click SAVE at the bottom of the screen. To cancel the scan and not archive the document, click DISCARD. You are returned to the **TenDocs Archive screen** to scan another document, if


necessary. Also, after saving on the preview screen, the document is now stored and available to work with in the TenDocs archive.

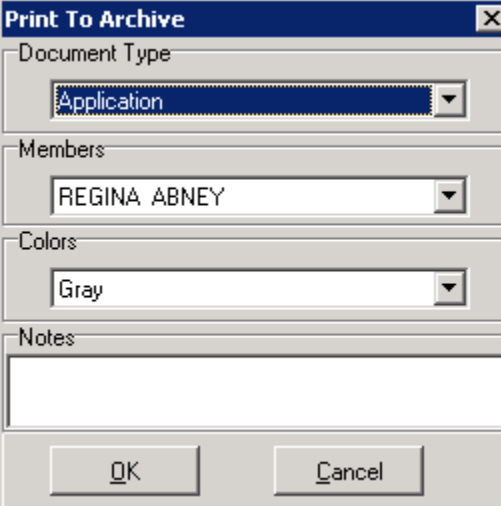
Note: After scanning, the document may take a few minutes to appear in the archived document table. Click  periodically to refresh the data on the screen and display recently scanned document(s).

Printing Tenmast Documents Into the Archive

For Tenmast documents/files NOT found in WinTen programs that you want to associate/link with a record in your Tenmast system (WinTen), use the Print to Archive feature. The Print to Archive option allows you to tag AND archive this type of document without having to physically print the document.

For Tenmast files/documents found IN WinTen programs that you want to associate/link with a record in your Tenmast system (WinTen), use the Scan Document feature. See “Scanning Tenmast Documents Into the Archive” on page 4.

1. Access the **TenDocs Archive screen**.
2. Click  on the toolbar and select “Print to Archive” from the menu that appears. A **Print to Archive box** opens:



The image shows a dialog box titled "Print To Archive" with a close button (X) in the top right corner. It contains four sections: "Document Type" with a dropdown menu showing "Application"; "Members" with a dropdown menu showing "REGINA ABNEY"; "Colors" with a dropdown menu showing "Gray"; and "Notes" with an empty text box. At the bottom are "OK" and "Cancel" buttons.

3. Select the **document type** of the document you want to scan/archive from the drop-down list.
4. If you have selected a document type categorized under the household document category, please specify the household **member** to whom the document pertains.
5. Select the **color** scheme for the scanned document: BlackWhite, Gray, or Color.


Note: The “gray” color scheme is best for documents with signatures, as well as most scanned documents.

6. Enter any optional **notes** about the document in the textbox.

7. Click OK to begin the scan. A message appears stating that you can now print the non-tenmast document you want archive using the TenDocs printer.
8. Open the document you want to archive in any program with printing capability (such as Microsoft Word/Excel or Adobe Acrobat), and print the document using the TenDocs printer. The document will then be placed in the archive and tagged with the document information you previously set up on the **Print to Archive screen**.

Hint: You also have the ability to print multiple documents, in succession, to the archive. After entering the document's type, color, and notes and then clicking OK on the Print to Archive screen, a message will appear asking if you have more documents to archive. Selecting YES will bring up the Print to Archive screen again in order to archive additional documents.

After scanning, the document may take a few minutes to appear in the archived


document table. Click  periodically to refresh the data on the screen and display recently scanned document(s).

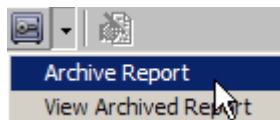
Archiving WinTen Reports

With the TenDocs tool, you can archive WinTen reports quickly and easily.

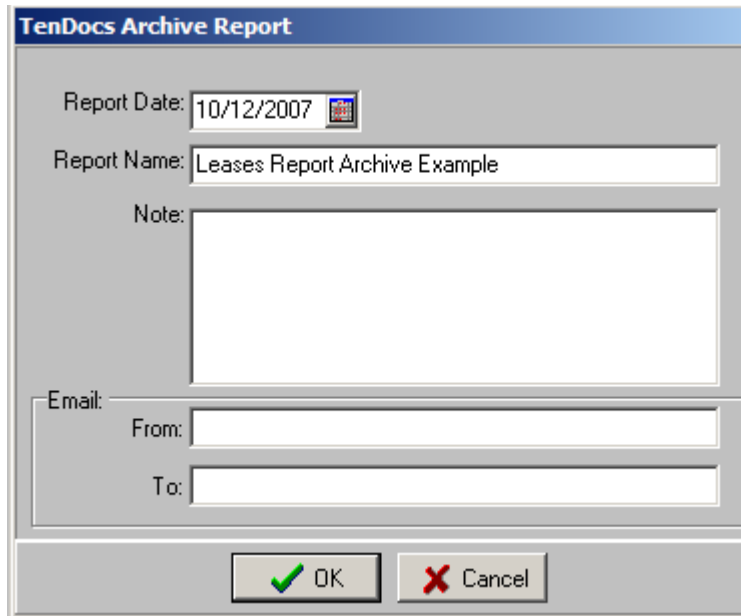
Note: For more information on archiving reports in the WinTen Maintenance programs/Fixed Assets program/Purchase Orders program, please See "Printing/ Archiving Tenmast Documents in Maintenance Programs/Fixed Assets/Purchase Orders Using Quick Load" on page 15.

From Reports screens:

1. Access a WinTen program's **Reports screen**.
2. Specify the report's criteria/options.
3. Click  to preview the report for accuracy.
4. Click the TenDocs icon drop-down list on the toolbar and select "Archive Report" from the menu that appears:



The **TenDocs Archive Report screen** opens:



TenDocs Archive Report

Report Date: 10/12/2007

Report Name: Leases Report Archive Example

Note:

Email:

From:

To:



OK Cancel

5. Edit the **report date** and **report name**, if necessary.
6. Enter an optional **note** about the report in the space provided. To **e-mail** the report, enter the appropriate e-mail addresses in the **From:** and **To:** fields.

Note: The TenDocs e-mail tool is NOT integrated with Microsoft Outlook so you must type out the full e-mail address(es)!

7. Click OK to archive the report. If you have entered e-mail information, the report will be e-mailed. The report is now available to work with in the **TenDocs Archive screen**.

From the Reports Menu icon:


1. From Tenant Maintenance screens where the Reports Menu icon is available (such as Occupancy and Rent Calculation), click the icon . The **Tenant Reports screen** appears.
2. Check the checkbox of the report you want to archive and then click  Archive. The report is automatically archived and viewable from the **TenDocs Archive screen**.

Note: Since the reports accessed from the Reports Menu icon are all tenant/household document types, they do not need to be tagged and/or labeled as such before archiving. Therefore, the archive screen is not needed/does not appear here.

Note: For more information on the "Waiting for other documents to finish archiving..." message that may appear when archiving WinTen reports, please See "Resetting an Interrupted Scan" on page 9.

Viewing Archived Reports

After archiving a report, you can then view and work with the report on the **TenDocs Archive** screen.

- ✓ On any WinTen program's **Reports screen**, click  on the toolbar and select "View Archived Report" from the menu that appears. The **TenDocs Archive screen** opens. You can then preview, e-mail, print, or fax the archived reports.

Resetting an Interrupted Scan


If you are scanning/archiving multiple page documents, or scanning/archiving documents in quick succession, you will sometimes receive a message that states: "Waiting for other documents to finish archiving..." This message indicates that there are other documents in your printer queue that are waiting for their turn to archive. In most instances, the message will disappear quickly as the other documents complete the archive process. However, if the message stays present on the screen, and there are no other documents/printer jobs displayed in your printer queue, your archive attempt has been interrupted and you will need to reset your scan.

1. Click CANCEL to clear the message (and to cancel the archiving of the other non-existent documents).
2. Open Quick Load (*Accessing TenDocs Quick Load* on page 2.11) and select "Reset Interrupted TenDocs Scan" from the File menu. The archiving of the other non-existent documents has been cancelled and your scanned document is now successfully archived.


Hint: You can check your printer queue by either double-clicking on the printer icon in your System tray, or by navigating to the TenDocs - Archive printer settings (Start menu > Printers and Faxes > TenDocs - Archive printer).

Printing Documents


To Preview a Document

- ✓ In the document table, click  in the row of the document you want to preview as it will be printed. A **Preview screen** will appear with the first page of the document displayed.
 - Use the **view settings** to zoom in/out of the document page.
 - To fax, print, or e-mail the document page from this screen, use the links at the top of the screen. Please note that you can only e-mail/print/fax the one page of the document displayed on the screen.

Note: The fax option is only available if your agency has a fax license.

- Use the page navigation options to select a specific page of the document to view. You can select a specific page from the **select page** drop-down list; or, click the **Next** and **Prev** page links.
- Click  to return to the **TenDocs Archive screen**.

To Print an Individual Document

- ✓ In the document table, click  in the row of the document you want to print.


To Print Multiple Documents

1. In the document table, check the checkboxes in the rows of the documents you wish to print.
2. Click the **Print** link at the bottom of the screen.


E-mailing Documents

You have the ability to e-mail documents from the TenDocs archive.

Note: The *TenDocs e-mail tool is a stand alone tool and does not interface with Microsoft Outlook or any other e-mail application so must type out the full e-mail address(es)!*

1. In the document table, click  in the row of the document you want to e-mail. An **E-mail screen** will appear.
2. Enter the appropriate information in the **e-mail document** fields, such as “To,” “From,” “Subject,” etc.



Hint: If you'd like to keep a history of all e-mails you send from TenDocs, make sure to carbon copy (“cc”) your own e-mail address on every TenDocs e-mail you send.

3. Click SEND to send the e-mail; or, click CANCEL to cancel the e-mail and return to the **TenDocs Archive screen**.
4. Click  to return to the **TenDocs Archive screen**.

Note: To e-mail multiple documents, check the checkboxes of the documents you wish to e-mail, and then click the **E-mail link** at the bottom of the screen.

Faxing Documents

For agency's that have a fax license, you have the ability to fax documents from the TenDocs archive.

1. In the document table, click  in the row of the document you want to fax. A **Fax screen** appears.
2. Enter the appropriate information in the **fax document** fields.
3. Click SEND to send the fax; or, click CANCEL to cancel the fax and return to the **TenDocs Archive screen**.
4. Click  to return to the **TenDocs Archive screen**.

Note: To fax multiple documents, check the checkboxes of the documents you wish to fax, and then click the Fax link at the bottom of the screen.

ARCHIVING WITH TENDOCs QUICK LOAD

The purpose of Quick Load is to quickly scan and archive “non-Tenmast” documents that you want to store in the TenDocs archive, but are not associated/linked with any record in your Tenmast system (WinTen). **Note:** “Tenmast documents” are any electronic files/documents that you want to associate/link with a record in your Tenmast system (WinTen).

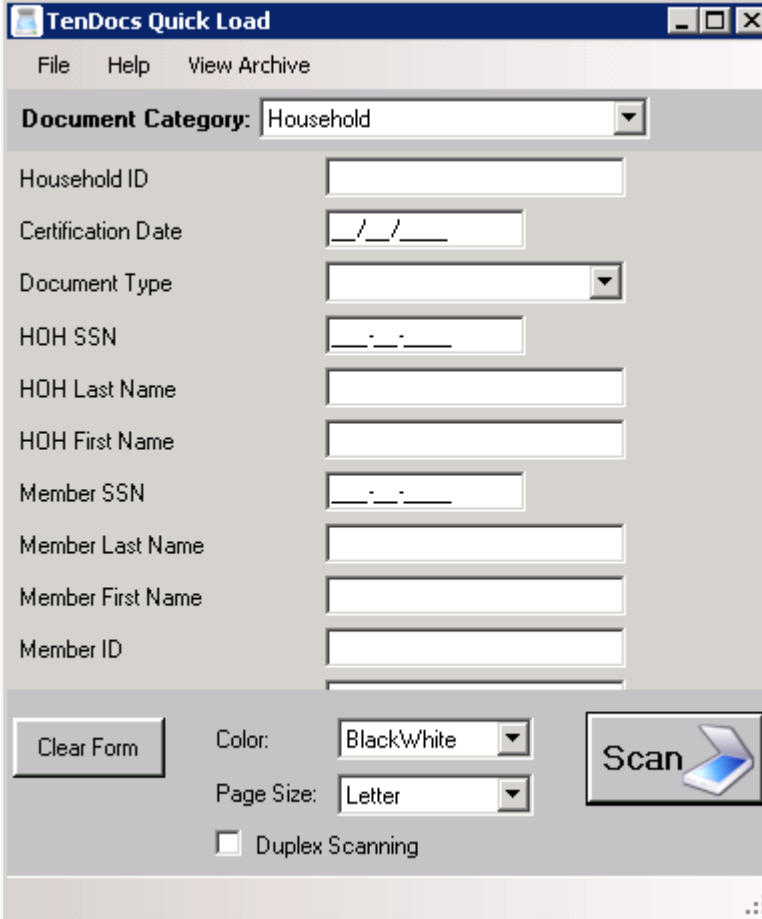
Note: In most cases, Quick Load is used to archive “non-Tenmast” documents. However, because of the type of database that certain WinTen programs are built upon, you must use the TenDocs Quick Load tool to archive “Tenmast documents” found in those programs. See “Printing/Archiving Tenmast Documents in Maintenance Programs/Fixed Assets/Purchase Orders Using Quick Load” on page 15.

Hint: Use Quick Load to archive all those “non-Tenmast” documents clogging up your filing cabinets; and after scanning these documents into the archive, you can shred them and throw them away!


Accessing TenDocs Quick Load

1. Double-click the TenDocs Quick Load desktop icon. The **TenDocs Quick Load screen** opens.

The TenDocs Quick Load Screen



You can only scan documents with the Quick Load tool. The documents you scan here will then be stored in the TenDocs document archive.

- ✓ To access the TenDocs document archive, click **View Archive** on the toolbar. The **TenDocs Archive screen** opens.
- ✓ To work with Quick Load settings, click the File menu and select “Settings” from the menu that appears.
- ✓ To exit out of Quick Load, click the File menu and select “Exit” from the menu that appears; or, click .
- ✓ To clear the fields and begin a new scan, click CLEAR FORM.

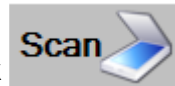
Scanning/Archiving Non-Tenmast Documents

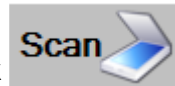
1. Select the **document category** of the document you want to scan from the drop-down list. The fields displayed on the screen will depend on the chosen category.
2. Specify the document’s information, as necessary.


3. Select the **color** scheme for the scanned document: BlackWhite, Gray, or Color.

Note: The “gray” color scheme is best for documents with signatures, as well as most scanned documents.

4. Choose the **page size**, letter or legal, of the document you want to scan/archive.
5. If the document you are scanning has information you want to archive on both sides, check the checkbox to enable **duplex scanning**.



6. Click . A preview screen appears where you can view the document as it will be scanned/archived.

Note: If the document was accidentally scanned upside down, you can rotate and correct it before saving it to the archive. Click  at the bottom of the preview screen to rotate the document 90 degrees. If the scanned document has

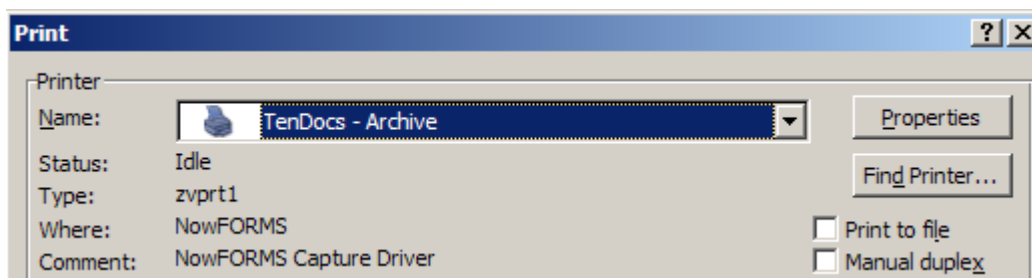
more than one page, click  to rotate every page in the scanned document 90 degrees.

7. To accept the scan and archive the document, click SAVE at the bottom of the screen. To cancel the scan and not archive the document, click DISCARD. You are returned to the **TenDocs Quick Load screen** to scan another document, if necessary. Also, after saving on the preview screen, the document is now stored and available to work with in the TenDocs archive.

Printing/Archiving Non-Tenmast Documents from Word/Excel/Adobe Acrobat

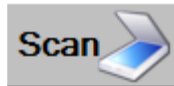
If you are working with a “non-Tenmast” document in Microsoft Word, Excel, or Adobe Acrobat, you have the option to archive that document into TenDocs directly from the Word/Excel/Acrobat interface.

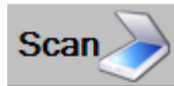
1. In Word/Excel, save the document you want to archive.
2. Click the File menu and select “Print.” The **Print window** appears.
3. Select your TenDocs Archive printer from the **printer name** drop-down list:



4. Click OK. The **Quick Load screen** opens.

5. Select the **document category** of the document you want to scan from the drop-down list. The fields displayed on the screen will depend on the chosen category.
6. Enter the document's information, as necessary.
7. Select the **color** scheme for the scanned document: BlackWhite, Gray, or Color.
8. Choose the **page size**, letter or legal, of the document you want to scan/archive.
9. If the document you are scanning has information you want to archive on both sides, check the checkbox to enable **duplex scanning**.



10. Click . A message box, pertaining to your specific scanner, appears to finish the scanning process. You are then returned to the **TenDocs Quick Load screen** to scan another document, if necessary. Also, after scanning, the document is now stored and available to work with in the TenDocs archive.

Resetting an Interrupted Scan

If you are scanning/archiving multiple page documents, or scanning/archiving documents in quick succession, you will sometimes receive a message that states: "Waiting for other documents to finish archiving..." This message indicates that there are other documents in your printer queue that are waiting for their turn to archive. In most instances, the message will disappear quickly as the other documents complete the archive process. However, if the message stays present on the screen, and there are no other documents/printer jobs displayed in your printer queue, your archive attempt has been interrupted and you will need to reset your scan.

1. Click CANCEL to clear the message (and to cancel the archiving of the other non-existent documents).
2. Access Quick Load and select "Reset Interrupted TenDocs Scan" from the File menu. The archiving of the other non-existent documents has been cancelled and your scanned document is now successfully archived.

***Hint:** You can check your printer queue by either double-clicking on the printer icon in your System tray, or by navigating to the TenDocs - Archive printer settings (Start menu > Printers and Faxes > TenDocs - Archive printer).*

Editing Default Settings

You have the ability change the Quick Load screen's default settings to tailor the interface to your specific needs.

1. Click the File menu and select "Settings" from the menu that appears. The **Settings window** appears.
2. The **default document** is the document category that is automatically displayed in the **document category** drop-down list on the **Quick Load screen**. What you enter here should be the document category you work with the most.

3. Check the **clear after scan** checkbox if you want the fields on the Quick Load screen to automatically clear after a successful scan.
4. Enter a different **field width**, if necessary. This is the amount of characters allowed to be typed into a text box.
5. In the **archive URL** text box, enter the URL of your TenDocs archive web browser. This allows the Quick Load tool to send scanned document information to the TenDocs archive tool.
6. Click SAVE to save and apply your changes to the Quick Load interface. Click CANCEL to cancel your changes and return to the **TenDocs Quick Load screen**.

Printing/Archiving Tenmast Documents in Maintenance Programs/Fixed Assets/Purchase Orders Using Quick Load

In most cases, Quick Load is used to archive “non-Tenmast” documents. However, because of the type of database that certain WinTen programs are built upon, you must use the TenDocs Quick Load tool to archive “Tenmast documents” found in those programs. Use Quick Load to archive Tenmast documents found in the following WinTen programs:

- *Consumable Inventory*
- *PH Desktop Inspections*
- *S8 Desktop Inspections*
- *Work Orders*
- *Fixed Assets*
- *Purchase Orders*

Note: “Tenmast documents” are any electronic files/documents that you want to associate/link with a record in your Tenmast system (WinTen).

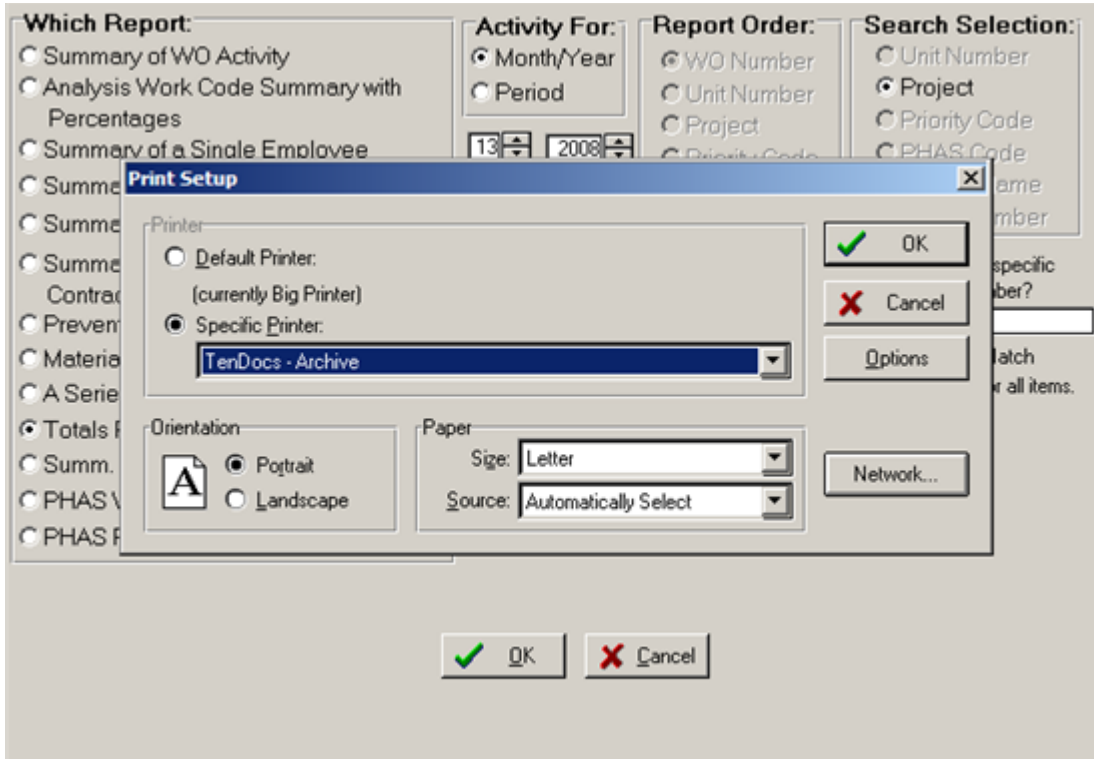
There are two ways you can use Quick Load to archive documents in the aforementioned WinTen programs:

- ✓ Physically print a hard copy of the document you wish to archive and then scan the document into the TenDocs archive using Quick Load. For more information, please see *Scanning/Archiving Non-Tenmast Documents* on page 2.12.
- ✓ Print/Archive the document into the TenDocs archive using Quick Load. See steps below:
 1. Access a WinTen program’s **Reports screen** or any screen where a print option is available.
 2. Specify the report’s criteria/options, click OK, select to **print to** the printer option, and click OK again. The **Print Setup screen** appears.

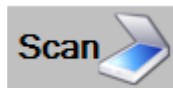
OR

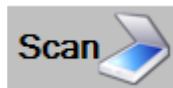
Select to print (for example, by clicking  on the toolbar) and the **Print Setup screen** will appear.

3. In the **specific printer** drop-down list, select your TenDocs archive printer:



4. Click OK. The **Quick Load screen** opens.
5. Select the **document category** of the document you want to scan from the drop-down list. The fields displayed on the screen will depend on the chosen category.
6. Enter the document's information, as necessary.
7. Select the **color** scheme for the scanned document: BlackWhite, Gray, or Color.
8. Choose the **page size**, letter or legal, of the document you want to scan/archive.
9. If the document you are scanning has information you want to archive on both sides, check the checkbox to enable **duplex scanning**.



10. Click . A message box, pertaining to your specific scanner, appears to finish the scanning process. You are then returned to the **TenDocs Quick Load screen** to scan another document, if necessary. After scanning, the document is now stored and available to work with in the TenDocs archive.