

# GDMA SCANNING AGENT (GSA) USER GUIDE

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## APPLICATION PURPOSE

To provide software that is installed on a server to process scanned documents that have special barcodes on them called QR Code, for linking into GPro/GDMA.

## PROCESS OVERVIEW

- The QR Code is created in GDMA
  - o The QR Code contains information such as the Shareholder ID, document date and what the document is for (such as a succession document, for example)
  - o The QR Code's information is used to name the scanned file and the filename is used to link the file to GDMA.
- QR Code printed onto an adhesive label
- The QR Code label placed on the document
- The document is scanned
- The scanner renames the document according to the QR Code and places the document into a predefined area for processing
- The GSA (GDMA Scanning Agent software) processes the documents, according to its filename, and links it to the appropriate shareholder(s) records.

## SCANNERS

Some scanners are intelligent enough to allow for naming of files during the scanning process with a predefined name format. The scanner will process a special barcode (called a QR Code) placed on the file and name the file accordingly.

The Kodak scanner range is best suited to the requirements. Although there are many cheaper scanners available they do not include the file renaming process that is essential to this system.

If your scanner does not have this facility, we offer another package that will do this for you which is discussed in this document. However using this additional package will add another step to the overall process.

## RECOMMENDED HARDWARE

The recommended scanner is the Kodak i2400 which has recently replaced the Kodak i1220. The i2400 scans at a rate of 30 pages per minute (slightly slower than the i1220)

The printer recommended is the Brother P-touch QL500. This is a small label printer – similar to receipt printers used in shops.

These recommendations are based on current installation successes.

We can price these or they can be independently purchased.

## QR CODE PRINTING

In order to print the QR code labels, a new screen is added to GDMA. This will populate and print the QR code label that can be applied to the front page of documents to be scanned.

The screenshot shows the 'Generate QR Code' application window. It features several sections for data entry:

- Shareholder(s):** A text box containing '8419' and buttons for 'Add Shareholder', 'Succession Source ID', and 'Get SH ID from Main Screen'.
- Trust(s):** A list box with options from 'B Trust' to 'I Trust', with 'A Trust' selected.
- Document Type:** A list box with options like 'Form', 'Letter in', 'Email', 'Fax', 'Letter out', and 'Legal', with 'Legal' selected.
- Document Description:** A list box with options like 'Will', 'Letter-Admin', 'Birth-Certificate', 'Power-of-Attorney', 'Copy-of-Probate', 'Mamage-Cert', 'Baptismal-Papers', 'Whakapapa', and 'Succession', with 'Succession' selected.
- Organization:** A list box with options like 'Maori-Land-Court', 'Registrar', 'IRD', 'Work-And-Incom', and 'Other-Organization', with 'Maori-Land-Court' selected.
- Author:** A list box with options like 'Shareholder', 'Other Author 01', 'Other Author 02', and 'Other Author 03'.
- Date:** A 'Select Date' button followed by '2015-08-06' and an 'Add' button.
- Additional Text:** A large empty text box with an 'Add' button below it.
- Data:** A text box containing the string 'SH8419-2015-08-06-A Tr-Legal-Succession-MLC'.
- QR Code:** A large QR code is displayed on the left side of the bottom section.
- Buttons:** 'Generate QR Code' (highlighted), 'Print', and 'Clear' buttons are located to the right of the QR code.
- Width/Height:** Input fields for 'Width' and 'Height' are located below the 'Clear' button.
- Data Length:** A text box containing '43' and the text 'Max. 180 characters' is located to the right of the 'Width' and 'Height' fields.

## PROCESS

1. A form is received by post, email or in person.
2. The QR Code (a type of barcode) is created in GDMA, printed onto an adhesive label and then placed on the form. The barcode contains information to name the file.

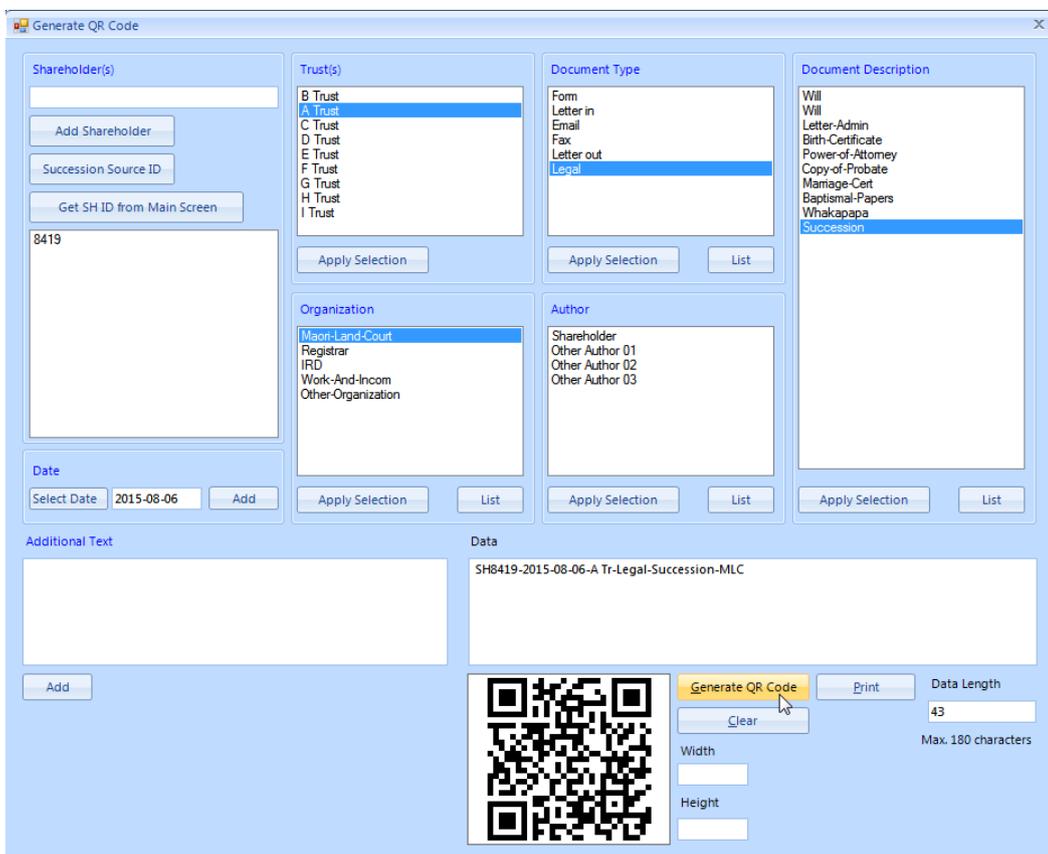
This is an example of a QR Code



In the following example, a succession form is received for SHID 8419, dated 06 Aug 2015 for “A Trust”. The QR Code will contain all the information as shown in the data textbox being SH8419-2015-08-06-A Tr-Legal-Succession-MLC. That is:

- SH ID 8419
- Succession date 06-Aug-2015
- Trust being “A Tr”, abbreviated form of “A Trust”
- A legal document from Maori Land Court, being a succession

The QR Code is used to name the file during the scanning process.



The screenshot shows a software window titled "Generate QR Code" with a light blue background. It contains several input fields and lists:

- Shareholder(s):** A text box containing "8419" and buttons for "Add Shareholder", "Succession Source ID", and "Get SH ID from Main Screen".
- Trust(s):** A list box with options B Trust, A Trust (selected), C Trust, D Trust, E Trust, F Trust, G Trust, H Trust, and I Trust. Below it is an "Apply Selection" button.
- Document Type:** A list box with options Form, Letter in, Email, Fax, Letter out, and Legal (selected). Below it are "Apply Selection" and "List" buttons.
- Document Description:** A list box with options Will, Letter-Admin, Birth-Certificate, Power-of-Attorney, Copy-of-Probate, Marriage-Cert, Baptismal-Papers, Whakapapa, and Succession (selected). Below it are "Apply Selection" and "List" buttons.
- Organization:** A list box with options Maori-Land-Court (selected), Registrar, IRD, Work-And-Incom, and Other-Organization. Below it are "Apply Selection" and "List" buttons.
- Author:** A list box with options Shareholder, Other Author 01, Other Author 02, and Other Author 03. Below it are "Apply Selection" and "List" buttons.
- Date:** A text box containing "2015-08-06" and buttons for "Select Date" and "Add". Below it are "Apply Selection" and "List" buttons.
- Additional Text:** A large empty text box with an "Add" button below it.
- Data:** A text box containing the string "SH8419-2015-08-06-A Tr-Legal-Succession-MLC".
- QR Code:** A large QR code is displayed in the bottom left.
- Buttons:** "Generate QR Code" (highlighted in yellow), "Print", "Clear", "Width", and "Height" (with input boxes).
- Data Length:** A text box containing "43" and the label "Max. 180 characters".

3. The form is scanned and the scanning software names the scanned file based on the QR Code that is on the form.
  - a. In our example, the scanned file will be named SH8419-2015-08-06-A Tr-Legal-Succession-MLC.
  - b. Depending on the scanner, it may come with scanning software that names the scanned file according to the information on the QR Code.
  - c. If your scanner does not have this facility, we offer another package that will do this for you.
  
4. The scanned file is placed into a predetermined location on a file server (again, done by the scanner software) which GSA software will process and link to the appropriate shareholder records in GDMA/GDPro.

**8419 Test Record**

Shareholder Info   Financial Transactions   Share Transactions   Reference   Misc

Card Status    MLC Ref    Shareholder Status

Debtor    Code 2    Last AG

Mother    Code 3

Father    Reject Bnk Acct#

Sharing of Data Status    Reg Form Sent

Registration Date    Stat ID Sent

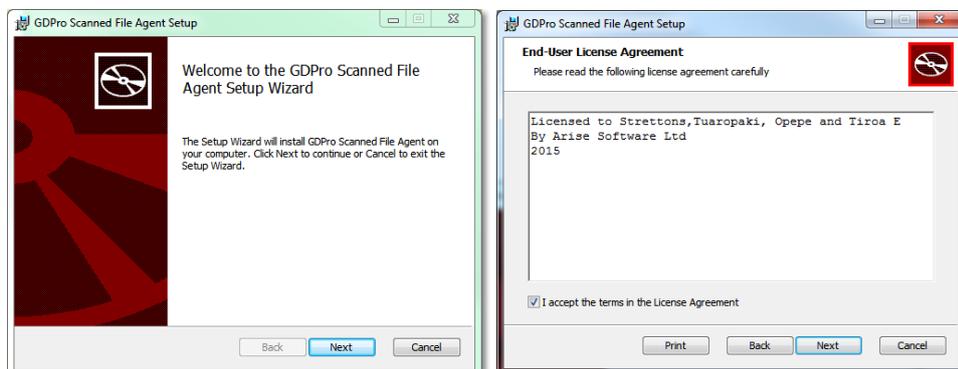
Mail Returned Date    Oseas

Catchup Date    AGM Apologies

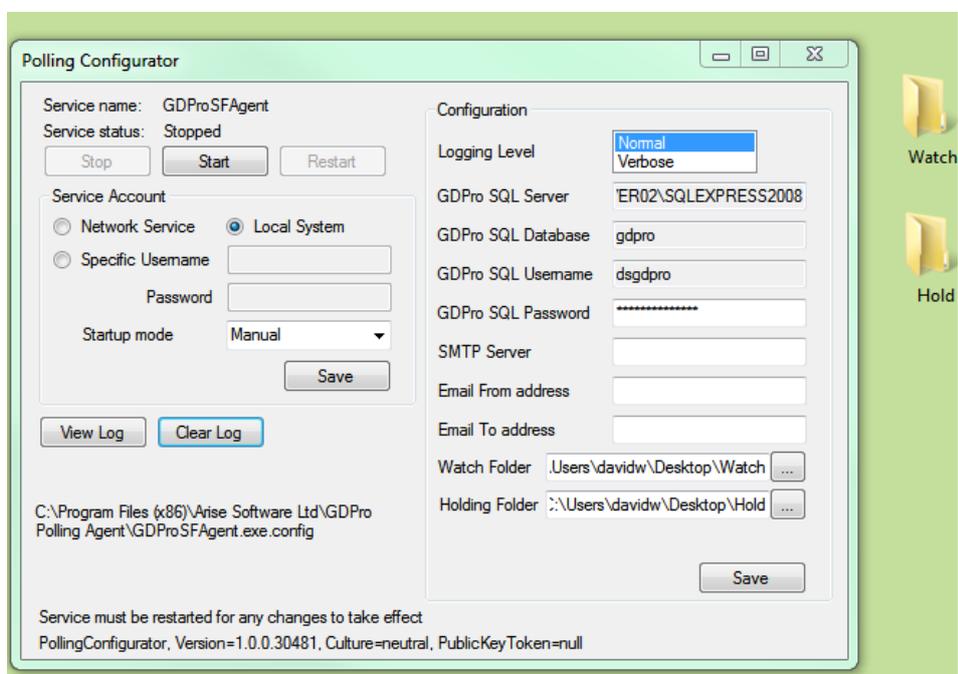
Path	Date Modified
* Click here to add a new row	
→ ... \\MyServerScans\SH8419-2015-05-21-M26N-Form-IRD-Form-Returned-IRD-Shareholder.pdf	

# GSA INSTALLATION

After installing GSA...



...GSA configuration will appear



The package you will receive is specifically created for your server. There SQL Server, SQL database and SQL username are locked in.

## WATCH FOLDER

This is where the scanned files are to be placed so they can be processed by GSA for linking into GDMA.

## HOLDING FOLDER

This is where all GSA processed files are placed.

## USAGE SCENARIO

This section is to guide through the process from start to finish.

### FORM RECEIVED

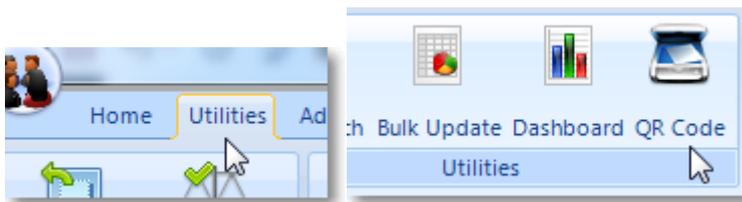
A succession form has come in for SH 8419.

The screenshot shows the 'Shareholder Search (Ctrl F)' window. The search criteria are 'Name/No test'. The results list includes 'Test', 'test1 test', 'test2 test', and 'test3 test'. The 'Test' entry is selected, showing details for '8419 Test'. The 'Shareholder Info' tab is active, displaying fields for First Name (Test), Surname, Address (Cheques), Address (Notices), Post Code, Payee 8, IRD (111-111-111), NRWT (checked), Bank Country (NZ), Pay (None), Bank (11-1111-1111111-111), Sex (Female), Bank Account Details (Closed), DOB (10/11/2012), Imimest, Code, and Dec'd (Dec'd). A table at the bottom shows the shareholder's details:

Trust	Shares	Balance
A Trust	0.000054	Balance \$3.60

### CREATE QR CODE IN GDMA

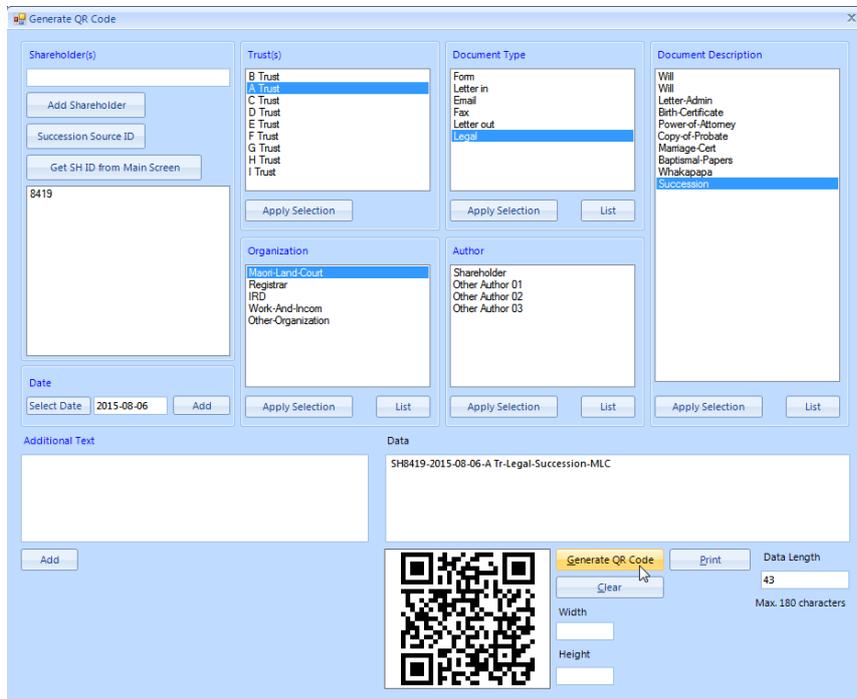
First, we will create a QR Code to place on the succession form:



The screenshot shows the 'Generate QR Code' dialog box. It has a 'Shareholder(s)' field with '8419' entered. There are buttons for 'Add Shareholder', 'Succession Source ID', and 'Get SH ID from Main Screen'. A mouse cursor is pointing at the 'Get SH ID from Main Screen' button.

Clicking on "Get SH ID from Main Screen" will automatically set the QR Code with the current SH ID.

Selecting other information in the screen and clicking on Apply Selection buttons, will add to the Data textbox which will form the QR Code and subsequently forms the name of the filename of the scanned file.



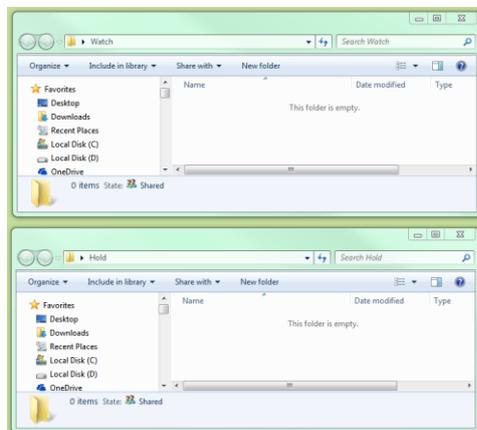
## PRINT QR CODE AND PLACE ON FORM

The QR Code is printed and placed on the form.

## Review Watch and Holding folders

There are two folders used by GSA. The Watch folder is where the scanned files are to be placed to be processed by GSA. The holding folder is where GSA processed files are placed. The processed files are linked in GDMA.

In the example below, it can be seen both folders are currently empty.



## SCAN FORM

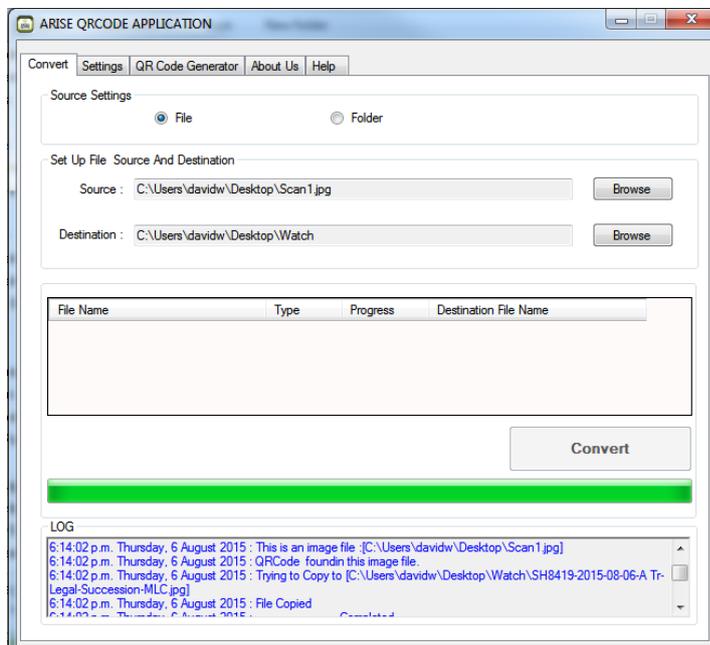
The form is then scanned.



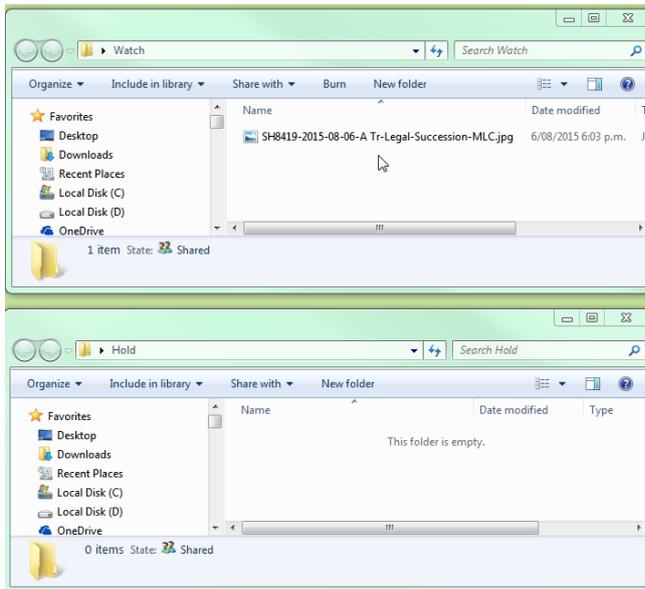
If the scanner does not have the capability to scan the QR Code (which is on the document) and automatically rename the scanned file, another package – called Arise QR Code Application - is provided by us to allow this.

The following is an example of Arise QR Code Application that will rename the scanned file based on the QR Code.

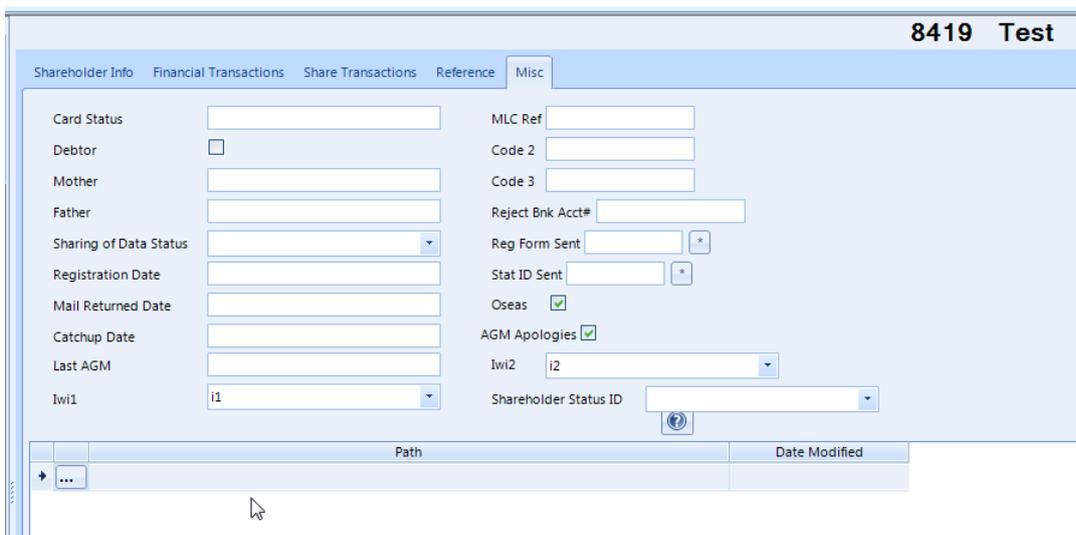
The scan file is selected as the source file and the destination set to the Watch folder. It's files in the Watch folder that will be processed by GSA.



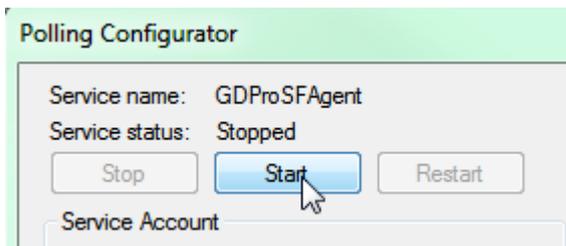
In the example below, it can be seen the scanned file renamed and placed into the Watch folder:



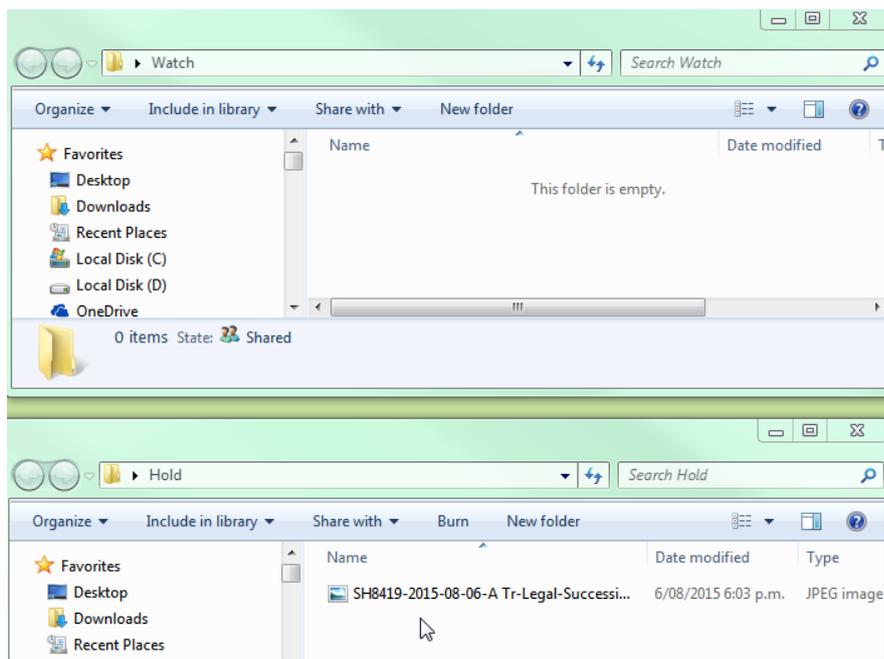
This is the GDMA misc tab before GSA processed the scanned file:



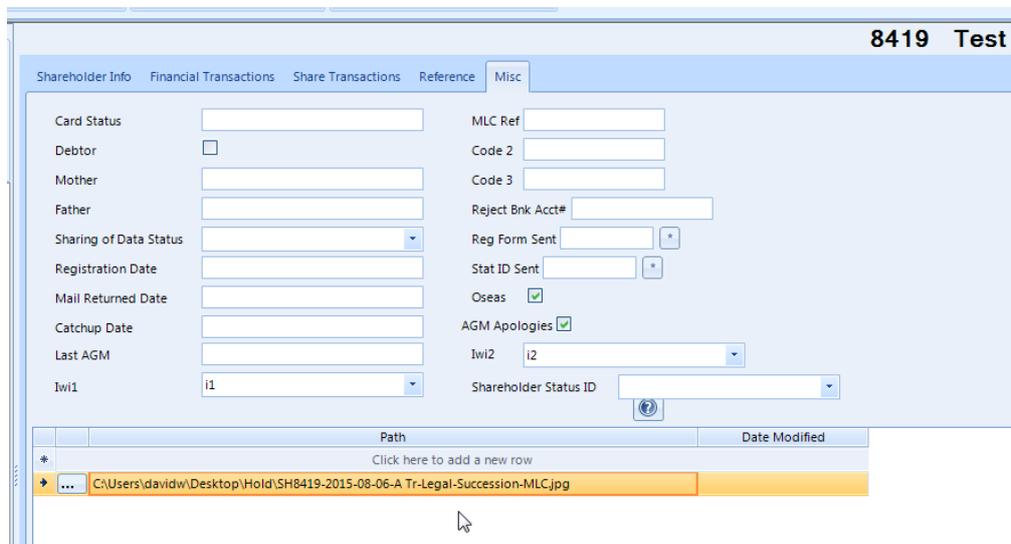
Starting GSA:



GSA processed the file and moves it to the Hold folder:



Now it can be seen the processed file linked into the GDMA Misc tab. Notice the folder being the Hold folder:



# GSA TECHNICAL OUTLINE

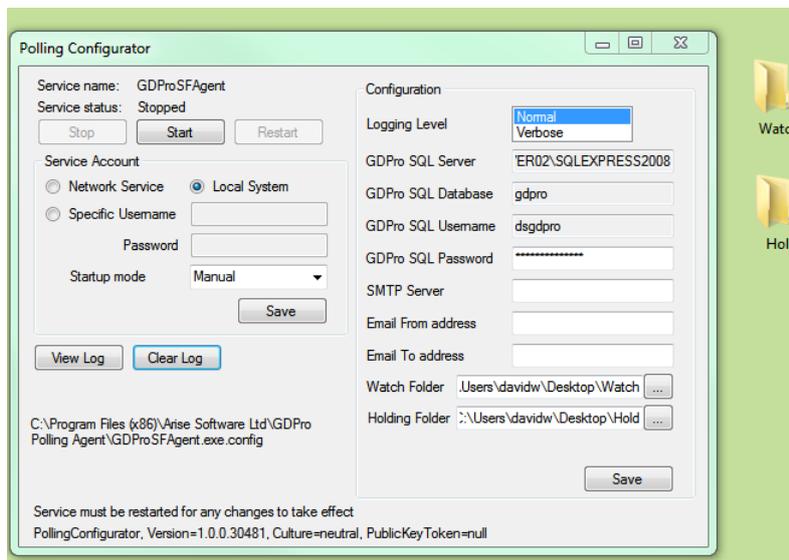
## OVERVIEW

GSA is a background service application. At the end of the predefined time interval, GSA will request from the operating system a count of the files in the specified folder. If the count is greater than the last time it ran then it will process all files with a date/time stamp greater than the time of the last file processed.

If new files have been added then GDPro/GDMA shareholder records will be updated with links to files.

GSA is created for a specific SQL Server and database. GSA administrators can define other aspects as below:

## GSA CONFIGURATION SCREEN



Documents will be scanned, automatically named (if scanner supports it) and stored in one specific folder for these scanned files.

Sub-folders are not used.

GSA will look for new files and add them to the appropriate SH record in GDPro/GDMA. GSA will scan through a specified folder (as specified in GSA configuration screen) for new files.

This assumes that only one network directory needs to be polled.

The SH ID will be extracted from the start of the file name.

All filenames will have the prefix of "SH?????- "

The link to the file will be created in the GPro/GDMA Misc Tab with the path and filename to allow GPro/GDMA users to open and view the file.

GSA operates as a service on the server so that it is always running and will be a background process - no human intervention required.

The tool will keep an activity log and an error log - both as txt files.

- 1 The files will be moved by GSA to a Working folder (specified in the GSA configuration screen) once they have been linked. The path specified in the link will be to the working folder.
- 2 The barcode printing function in GDMA allows for the selection of multiple shareholder ids for the file name. This will typically be used to link a single succession document to more than one shareholder record.

## CONDITIONS

The following points apply:

- 1 The standard software restrictions will apply with this software (the Polling Agent or Tool)
  - a. It must be installed on a server
  - b. It will only be licensed to operate on one network
  - c. It operates independent of client/user machines as it is a background process (although the means will be provided to manually initiate an update)
- 2 The existing support agreement for GPro/GDMA will also allow for support of the Agent
- 3 There will be no on-going costs associated with the agent apart from any functionality changes that are outside of the present scope.