

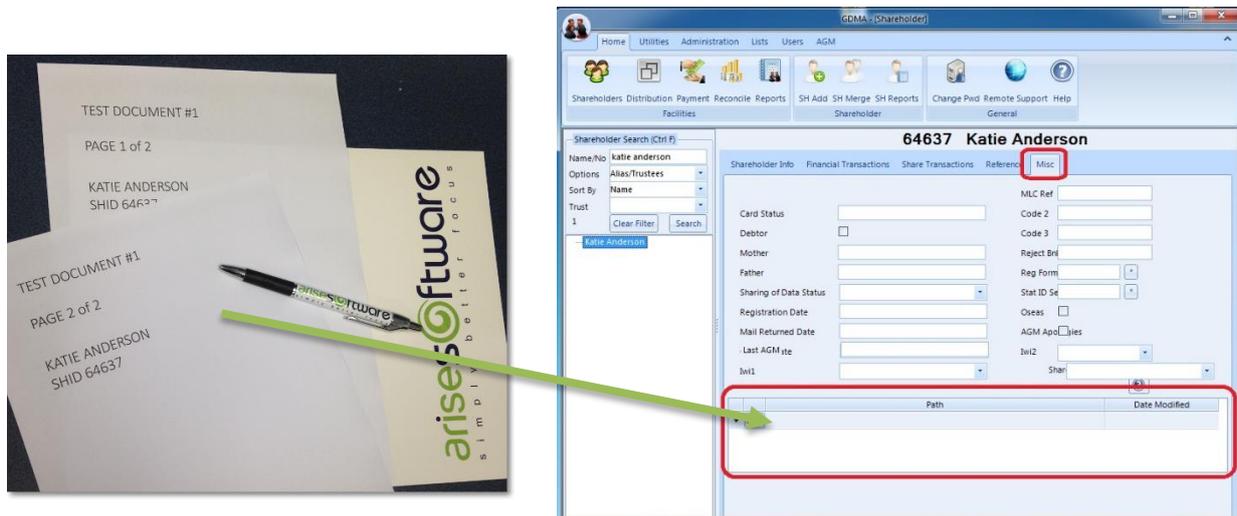
# QR CODE APPLICATION

## MANUAL SEPTEMBER 2015

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## ARISE QR CODE APPLICATION PURPOSE

The purpose of the application is to link scanned documents to GDPro/GDMA application in the Misc tab files grid as shown below.



The linking is possible using a special barcode called a QR Code sticker.

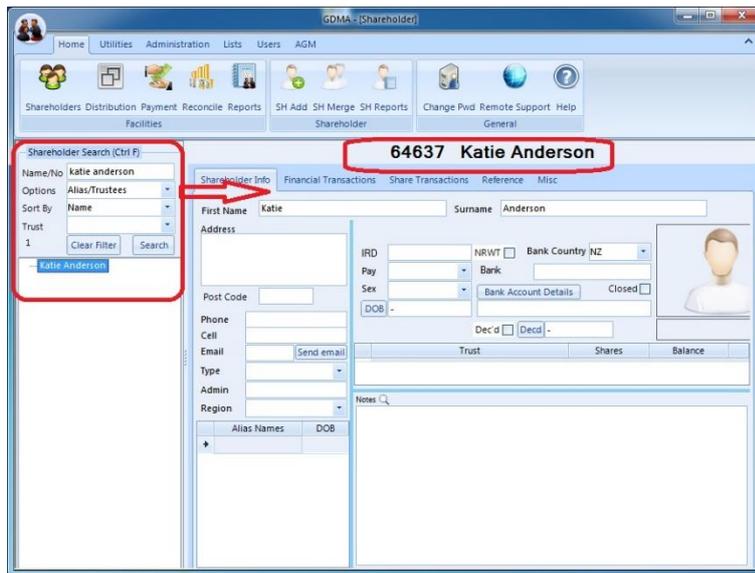
1. The QR Code sticker is **Created** in GDMA,
2. The QR Code sticker is **Printed** and put on the document,
3. The document is **Scanned**,
4. The scanned document is **Processed** to link it to GDPro/GDMA shareholder / owner records.

## CREATE THE QR CODE

### RUN THE GDMA APPLICATION

- Locate the application
- Double click to open the application

### SELECT THE SHAREHOLDER



The SH ID (in this example it is 64637) is used to create the QR Code.

- Type in the shareholders name or SH ID in the Name/No text box in the Shareholder Search section.

- Click Search.

### SELECT THE QR CODE UTILITY



- Click Utilities Tab

- Click QR Code

## GENERATE THE QR CODE

The QR Code screen creates the QR Code sticker. It also allows selection of other optional information to be included in the QR Code, as well as the SHID. The optional information is used to form the name of the file that is to be linked back into GPro/GDMA.

The screenshot shows the 'Generate QR Code' application window. The 'Shareholder(s)' section includes a button 'Get SH ID from Main Screen' and a text box containing '64637'. The 'Trust(s)' section lists various trusts, with 'KOKAKO TRUST' selected. The 'Document Type' section lists 'Form', 'Letter in', 'Email', 'Fax', 'Letter out', and 'Legal', with 'Letter out' selected. The 'Organization' section lists 'Maori-Land-Court', 'Registrar', 'IRD', 'Work-Arid-Incom', and 'Other-Organization', with 'Work-Arid-Incom' selected. The 'Author' section lists 'Strettons', 'Shareholder', 'Other Author 01', 'Other Author 02', and 'Other Author 03', with 'Other Author 02' selected. The 'Date' section shows 'Select Date' as '2015-09-10'. The 'Data' section contains the text 'SH64637-KOK-Letter-out-OAT02-WIN'. A QR code is displayed in the bottom right, with a 'Generate QR Code' button and a 'Print' button next to it. The 'Data Length' is shown as '32' with a note 'Max. 180 characters'. The 'Width' and 'Height' of the QR code are both set to '80'.

## SHID

SHID's are added either in the Shareholder(s) textbox and clicking Add Shareholder or by clicking Get SH ID from Main Screen.

The close-up screenshot shows the 'Shareholder(s)' section of the application. It includes a text box, an 'Add Shareholder' button, a 'Succession Source ID' field, and a 'Get SH ID from Main Screen' button. Below the button is a text box containing '64637'.

## OPTIONAL INFORMATION

Such information (as well as the SHID) is trust, document type, organisation, author and document description.

The screenshot shows a software interface with four panels for selecting optional information:

- Trust(s):** A list of trusts including ARAKARI, HAUMINGI 1A2 INC., HAUMINGI NO. 3 LANDS TRUST, KAPENGA M TRUST, KARATIA 3B2A2B2B TRUST, POTAKAKURATAWHITI 3A & 3B2 TF, KOKAKO TRUST (highlighted), PAEHINAHINA MOUREA TRUST, and MFAHIIMGA TRUST. Below the list are 'Apply Selection' and 'List' buttons.
- Document Type:** A list of document types including Form, Letter in, Email, Fax, Letter out (highlighted), and Legal. Below the list are 'Apply Selection' and 'List' buttons.
- Organization:** A list of organizations including Maori-Land-Court, Registrar, IRD, Waka-land-Income (highlighted), and Other-Organization. Below the list are 'Apply Selection' and 'List' buttons.
- Author:** A list of authors including Shareholders, Other Author 01, Other Author 02 (highlighted), and Other Author 03. Below the list are 'Apply Selection' and 'List' buttons.

A large empty box labeled 'Document Description' is located to the right of the other panels.

Select an item in the list and click Apply Selection, to have it added to the QR Code. The item will be added here:

The screenshot shows a 'Data' field with the following text:

```
SH64637-KOK-Letter-out-OA702-WIN
```

## GENERATE QR CODE

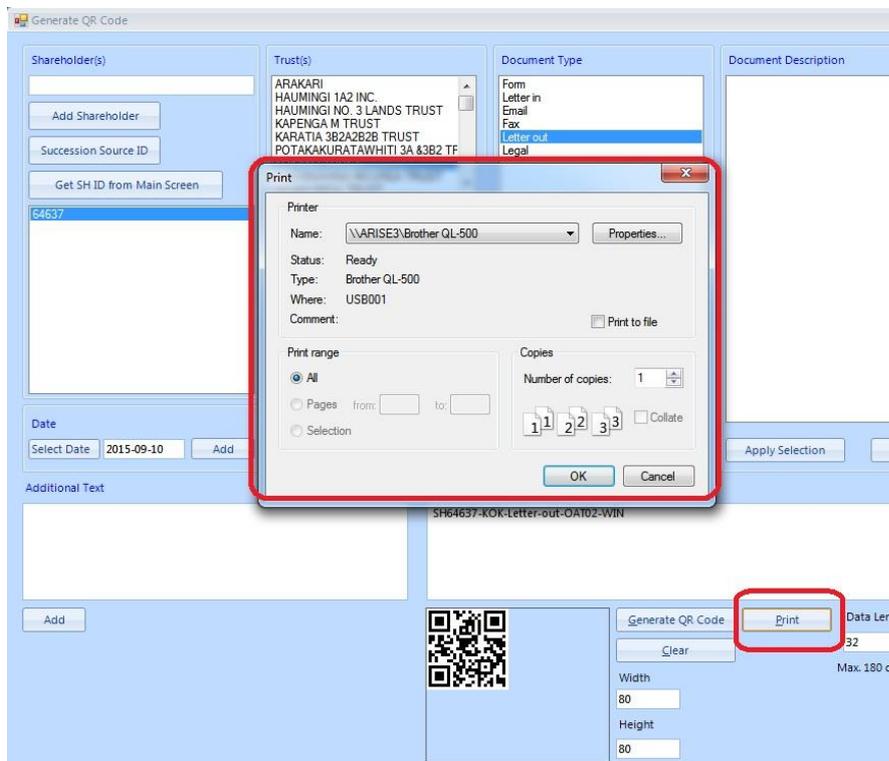
Clicking Generate QR Code will produce the QR Code based on the information in the Data textbox.

The screenshot shows a QR code generation interface with the following elements:

- A QR code on the left side.
- A control panel on the right side containing:
  - 'Generate QR Code' button
  - 'Print' button
  - 'Clear' button
  - 'Width' input field with the value '90'
  - 'Height' input field with the value '80'

## PRINT THE QR CODE

Click Print, select the label printer then click OK to produce the QR Code.



The QR Code sticker will then produce.



## PLACE QR CODE ON THE DOCUMENT

The printed QR Code sticker is placed on the associated document that is to be scanned.



- Peel back off the sticker
- Place at the top of the document

## SCAN DOCUMENT

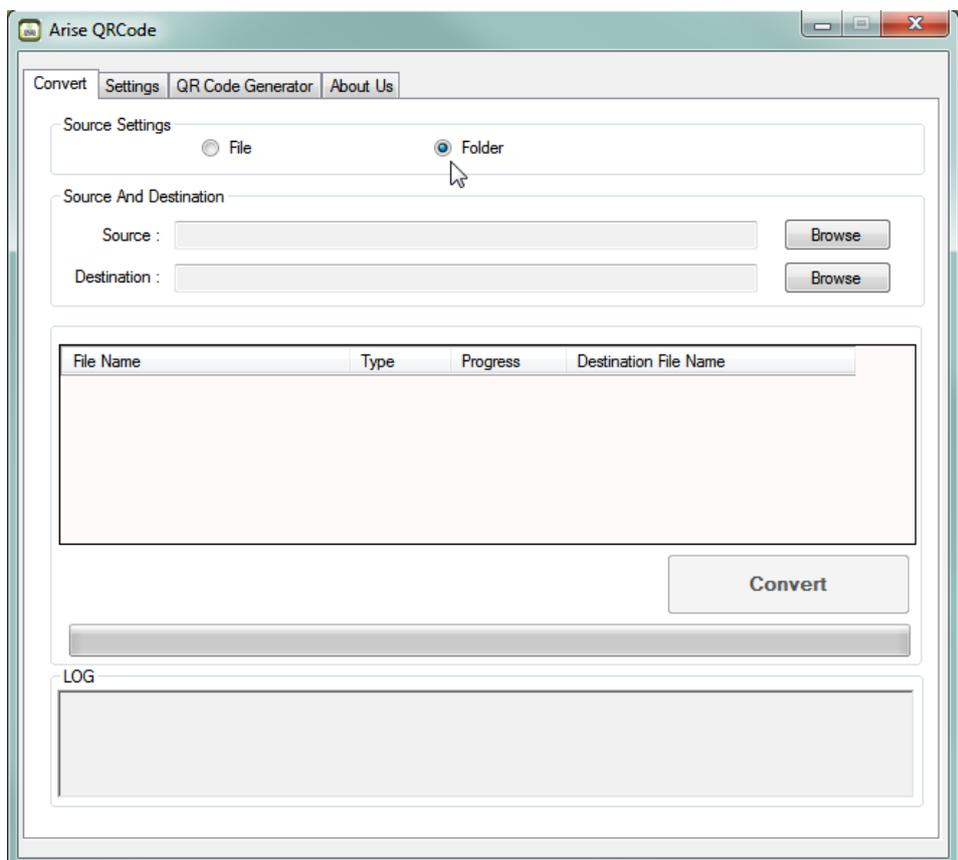


## PROCESS SCANNED FILE

The QR Code application will be specifically made for your organisation and have a download link for it. For example:

<http://packages.arisesoftware.co.nz/files/AriseQRCodeTiroaE/>

After the install and opening it, a screen will display as follows:



There are two ways to process the scanned documents. Either by one file at a time or a batch of files in a folder.

The following will go through the steps to import a scanned document for SH ID 8419.

A scanned document for SH ID 8419, that has the QR Code placed on it, is placed into a folder called "From"

Name	Date modified	Type	Size
SH ID 8419 Page 1.pdf	25/09/2015 9:04 p...	PDF Document	85 KB

### SELECT SOURCE FOLDER

Source And Destination

Source :

Destination :

The source folder in our example is C:\Users\dauidw\Desktop\From

After selecting the source folder, a list of files to be processed will display:

File Name	Type	Progress	Destination File Name
C:\Users\dauidw\Desktop\From\SH ID 8419 Page 1.pdf	.pdf	Pending	

### SELECT DESTINATION FOLDER

Source And Destination

Source : C:\Users\dauidw\Desktop\From

Destination :

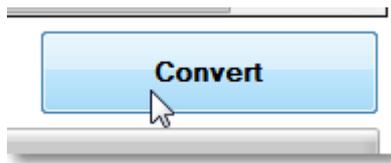
This folder should be a central location that is accessible by all in your organisation that needs to be able to open the documents.

Source And Destination

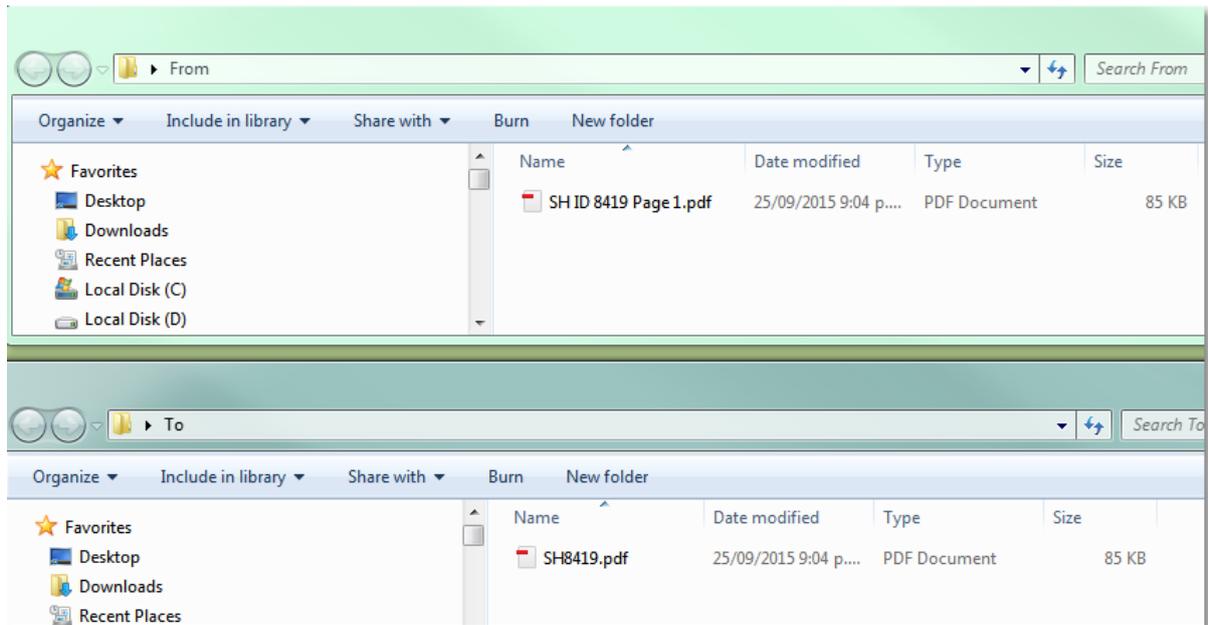
Source : C:\Users\dauidw\Desktop\From

Destination : C:\Users\dauidw\Desktop\To

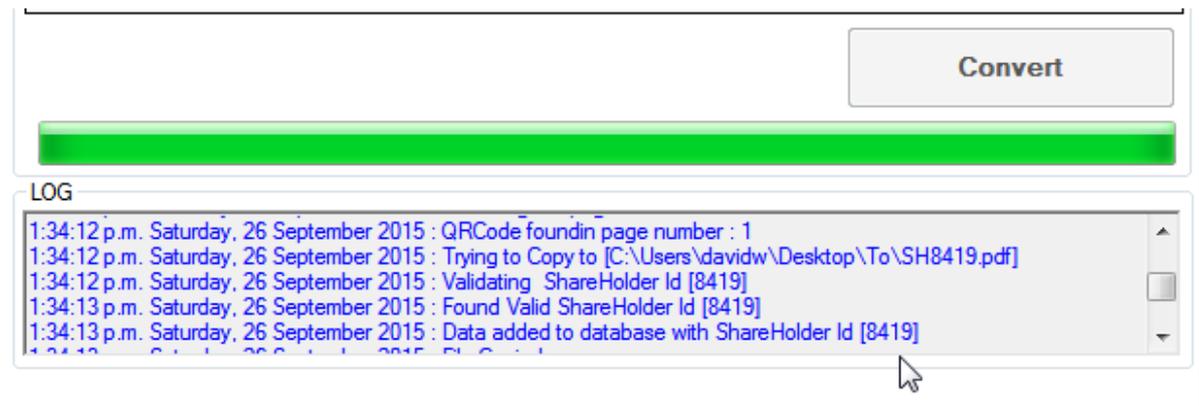
## PROCESS



Clicking Convert will process the files in the source directory, rename the file according to the QR Code, and copy the file to the destination directory.



A log will show the progress.



## CHECK LINK

The sample below shows the Misc Tab for SH ID 8419.

Before the QR Code application process:

8419 Test

Shareholder Info Financial Transactions Share Transactions Reference Misc

Card Status  MLC Ref

Debtor  Code 2

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

Last AGM  Iwi2  i2

Iwi1  i1 Shareholder Status ID

Path	Date Modified
...	

After the QR Code application process:

Path	Date Modified
* Click here to add a new row	
... C:\Users\dauidw\Desktop\To\SH8419.pdf	26/Sep/2015