

## ADDITIONAL SCANNING PROCEDURES

### HOW TO ADD PAGES TO AN EXISTING DOCUMENT

- ✚ View document first (insert #15 next to the document)
- ✚ Go to last page by selecting the # of pages of document on the right hand side of keyboard.
- ✚ Go to Documents to scan pages
- ✚ A separate document will be created.
- ✚ Hit cancel.
- ✚ Select the number one on the right hand side of keyboard.
- ✚ This will take you to the first page of new document.
- ✚ Hit Enter.
- ✚ Go to Edit.
- ✚ Go to Remove page and select left arrow next page then hit insert. This will insert the first page.
- ✚ To insert pages in between you must hit the Down Page, Delete, Up Page, and Insert.
- ✚ To insert the last page you must hit Down Page, Delete, and Insert.
- ✚ Go back to Documents and select Store Notes, Highlights, and Masks.
- ✚ Hit Enter.
- ✚ Your documents will be inserted into the original document.
- ✚ To add pages to another document just repeat same steps.
- ✚ To get back to the Main menu just hit F12.

## HOW TO SCAN DOCUMENT CONTAINING 100 OR MORE PAGES

*Documents that have over 100 or more pages need to be scanned in increments of 100 and indexed by sections. **F9** is used to refer back to the original index screen and record the section number for consecutive pages of 100.*

1. Scan the first 100 pages of document, store and index.
2. When indexing complete Section Line starting with 01 for first 100 pages.
3. When you scan the next 100 pages (if the document has) you will need to store and index using the **F9** key. It will take you back to the original index screen from the previous scan. All information on the original index screen will be the same.
4. Repeat the same procedure for consecutive 100 pages of document by indexing the sections with 02, 03, etc.

\*\*\*\*\* If the document second section is not quite 100 pages then scan as one document. If document section is close to 100, then index by separate sections.

## **HOW TO TRANSFER AN AWARD TO A DIFFERENT PI**

If a Principal Investigator (PI) leaves the University or responsibilities for an award are transferred to another Principal Investigator for any other reason, this should be reflected in the scan system. Changing the scan system must be done in addition to the normal procedures for changing a PI in the University SPM system.

Use the attached transfer form or create a note with a brief description of the transfer. Name both the initial Investigator and the successor Investigator so that it is very clear to others what occurred; include the date the action took place. Scan the information and add it as the **first** page in the Proposal file in front of the Proposal Transmittal form. Scan the documentation approving the change and add to the end of the file. Change the Investigator name on the index name field. Repeat the same steps on the Award Notice file. Although it would be easy to just change the Investigator's name on the index name field this would cause confusion to others when a search is performed for award or proposal in the future.

Please do not forget to verify that all changes were updated correctly in the scan system. The verification should be done at least one hour after you made the changes, as the system stores scans in batch mode and the changes are not immediate.

**The sample form is on the next page.**

## **PI Transfer**

Original PI: \_\_\_\_\_

New PI: \_\_\_\_\_

Date of Change: \_\_\_\_\_