

Steps to Scan Records

The **Scanning Wizard** will guide you through the scanning process, which is essentially the same for each type of record scanned. However, it is important to note subtle differences in allowing specific records to import and populate your account.

Step	Screen	Description
1.		<ul style="list-style-type: none"> • From the Menu bar at the top, <ul style="list-style-type: none"> ○ Click Tools. ○ Click Scanning Wizard.
2.		<ul style="list-style-type: none"> • The Scanning Wizard opens with two choices for how you want to proceed. <ol style="list-style-type: none"> 1. Run a New scanning session. 2. Return to a previous scanning session to continue with data correction or import operation of the scanned records.
3.	<p>Note! For scanner installation, refer to the instructions that came with the scanner. You may also contact Scantron or CASAS Tech Support for assistance.</p>	<ul style="list-style-type: none"> • On the Scanner Settings window, it is necessary to ensure scanner settings are correct for the type of Scanner your program uses before scanning any new data into TE. • Scanner Settings will change depending on the Scanner Type selected. • To begin the scanning process, <ul style="list-style-type: none"> ○ Click Next.

Step	Screen	Description
4.		<p>Note! For training purposes,</p> <ul style="list-style-type: none"> ○ Select Simulate Scanning. • This disables Hardware Control settings, so TE looks for a scanning file instead of an actual scanner. • Use this setting when training on the Simulation Server using Scanner Simulation Files (*.zip folder contains five sets of Entry, Update, and Test records). <ul style="list-style-type: none"> ○ Click Next.
5.		<ul style="list-style-type: none"> • On the Answer Sheet Selection window, <ul style="list-style-type: none"> ○ Identify the type of record(s) you are scanning. 1. For single-sided OMR scanners, <ul style="list-style-type: none"> ○ Select a Front Side option only. 2. For dual-sided OMR scanners, <ul style="list-style-type: none"> ○ Select Front Side and Back Side options. • Click Next.
6.		<p>Note! For simulated scanning,</p> <ul style="list-style-type: none"> • Use the Front Side for training with Scanner Simulation Files. <ul style="list-style-type: none"> ○ Select Entry, Update, or Test. • Leave selection to None for Back Side.

Step	Screen	Description
7.		<ul style="list-style-type: none"> The Scanning Wizard is ready to scan. <ol style="list-style-type: none"> Click Scan. When all records are scanned, <ol style="list-style-type: none"> Click Stop.
8.		<p><i>Note!</i> For simulated scanning,</p> <ul style="list-style-type: none"> Click Scan. Locate Scanner Simulation Files on the local machine. <ul style="list-style-type: none"> Select Entry, Test, or Update. This initiates the scanning part of simulated scanning. The simulated scan will load quickly! <ul style="list-style-type: none"> Click OK.
9.		<ul style="list-style-type: none"> The total number of sheets scanned will be displayed at the top right of the Scanning Wizard window. <ul style="list-style-type: none"> Click Next. Continue with Override Scanning Options.

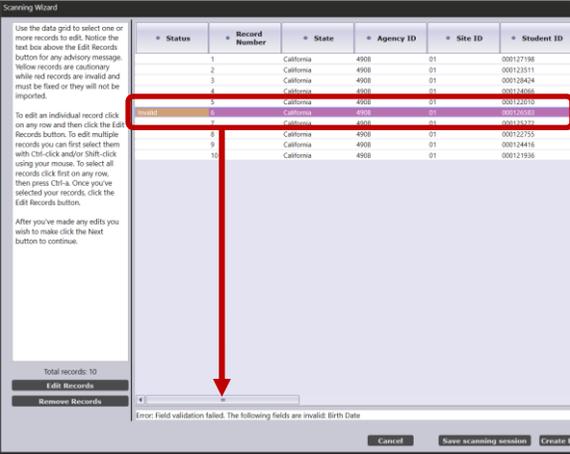
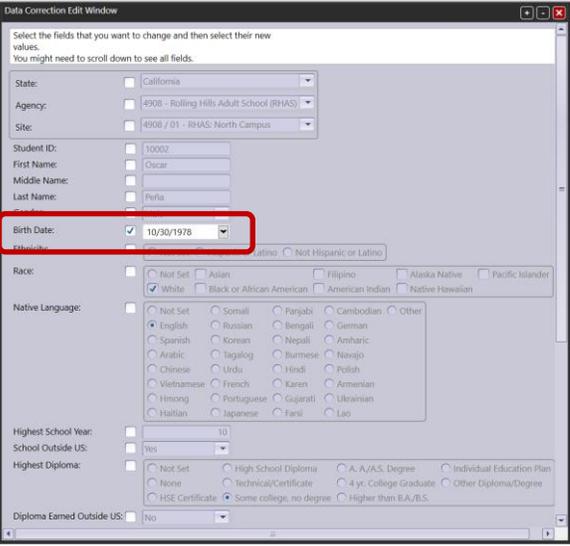
Steps to Override Scanning Options

Override scanning is a unique feature of TE. This feature can save time by entering an override value that will replace the information for that data field. Override options will differ depending on the type of form you are scanning.

Step	Screen	Description
1.		<ul style="list-style-type: none"> • After records are scanned, • Use the data field Overrides to apply to all records in the scanned batch. • Use data field Defaults to apply only when a data field is empty. <p>Note! For simulated scanning, keep the Select field overrides selected.</p> <ul style="list-style-type: none"> ○ Click Next.
2.		<ul style="list-style-type: none"> • From the Front Overrides window, <ul style="list-style-type: none"> ○ Use drop-down arrows next to each field to choose an Override value option. • A second window for Back Overrides will display with dual-sided scanning. • After applying Override values, <ul style="list-style-type: none"> ○ Click Next
3.		<ul style="list-style-type: none"> • The Scanning Wizard is ready to process the raw data. <p>IMPORTANT! Before you proceed, pay close attention to information about the options and default settings on this window, as they will vary depending on the type of record you are scanning.</p> <ul style="list-style-type: none"> • Click Next.

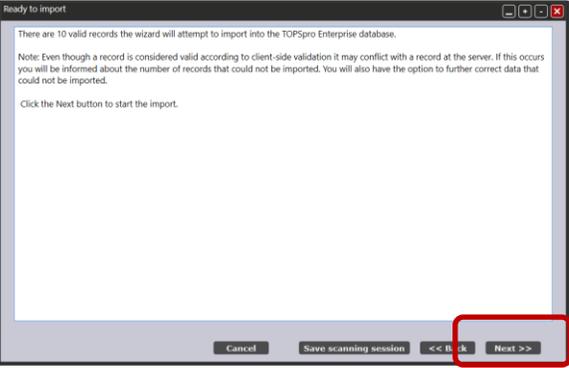
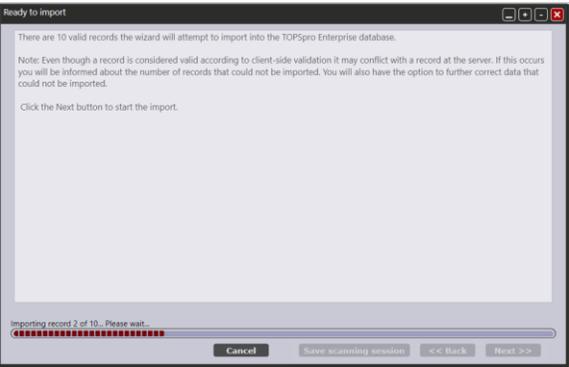
Steps to Edit Scanned Data

After you complete simulated or regular scanning, the **Scanning Wizard** preview window appears. You should always preview what you scanned before importing the data in your account. You may also want to review your scanning information from a paper copy.

Step	Screen	Description
1.	 <p>Note! You can Save the scanning session to continue later with any data correction.</p>	<ul style="list-style-type: none"> • The Scanning Wizard window opens with the list of scanned records. • The Data Grid at the left of the list provides directions for editing records if needed. <ul style="list-style-type: none"> ○ Yellow records are cautionary. ○ Red records are invalid. • Click on a color record to display an advisory message about the record at the bottom of the list. • With the color record highlighted, <ul style="list-style-type: none"> ○ Click Edit Records. ○ Or double-click to open the Data Correction Grid.
2.	<ul style="list-style-type: none"> • To edit multiple records, select them with Ctrl + click and / or Shift + click. • To select all records, click first on any row, then press Ctrl + a. • After selecting records, click Edit Records. 	
3.		<ul style="list-style-type: none"> • The Data Correction Edit Window opens to, <ul style="list-style-type: none"> ○ Edit individual records. ○ Apply a global override to all records. ○ Correct invalid records. • Check fields to change and then select their new values. • You may need to scroll down the grid to see all data fields. <p>Note! Data fields will vary based on the type of records you are scanning.</p>

Step	Screen	Description
4.		<ul style="list-style-type: none"> • After editing all fields as needed or necessary for the appropriate action, <ul style="list-style-type: none"> ○ Click Save at the bottom of the grid.
5.		<ul style="list-style-type: none"> • When returned to the Edit Records window, <ul style="list-style-type: none"> ○ The list of records should be clear of any color records to indicate that all records are 'cleared' for importing into the database. • When you are ready to import the records, <ul style="list-style-type: none"> ○ Click Next.
6.	<p>Additional Button Options:</p> <ul style="list-style-type: none"> ○ Remove Records – eliminates a record from being imported. ○ Cancel – ends the import session without importing records. ○ Save scanning session – creates a file of the scan session so you can continue later with data correction. ○ Create Data Report – will save a PDF report showing a breakdown of the records in the scan session. ○ Load Existing Data – will auto-populate existing student information. ○ Back – will take you to each previous window. 	
		<ul style="list-style-type: none"> • Continue with Importing Scanned Records

Steps to Import Scanned Records

Step	Screen	Description
1.	 <p><i>Note!</i> You may Save [the] scanning session and continue later with the import operation of the scanned records.</p>	<ul style="list-style-type: none"> The Ready to import window indicates the number of Valid records the wizard will attempt to import. <ul style="list-style-type: none"> Click Next. <p><i>Note!</i></p> <ul style="list-style-type: none"> Even though a record is considered Valid according to your TE Client, it may conflict with a record at the CASAS server. If this occurs, the system will inform you about the number of records that could not be imported. You will also be able to correct data that could not be imported.
2.		<ul style="list-style-type: none"> The time to import records varies depending on the type of record and the number of records being imported. You will have another opportunity to Save [the] Import Session and return later to finish. You may also Cancel importing records. Depending on when you cancel, records may have already been imported.
3.		<ul style="list-style-type: none"> The Scanning Wizard ends with a Scanning results window indicating the number of records that were imported or were not imported successfully. You have the open to Save [the] scanning session so that you can continue later with data correction or the import operation of the scanned records. To end the scanning session, <ul style="list-style-type: none"> Click Finish.