Adding Documents to the Identifi Archive

Comparing the Scan Client, Uplink and Add Features

When adding documents to Identifi, there are several options available, depending on the institution's specific needs.

Scan Client

The Scan Client is a separate licensed program downloaded to the workstation PC.   It is used with a dedicated scanner and one license is required for each workstation.

- Offers greatest flexibility to the user. Able to view, rotate, remove, or reorder pages prior to sending them to the Batches queue.
- Opportunity to give the batch a title, making it easier to find in the Batches queue.
- Reads barcodes, making it easy to separate documents in advance for faster indexing or to scan Desktop eSign barcoded documents (if wet signed).
- Ability to add both hard copies as well as electronically-stored documents, including bookmarked .pdfs, to the batch.
- Provides the ability to revise stored documents using the Rescan feature.
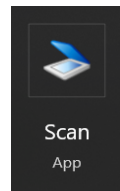
   Note: For more information on using the Scan Client, see this article.

Uplink

Uplink is a service that allows a user to scan directly to network folders from a Multi-Function Printer/Copier. The folders correspond to Applications in Identifi (Deposit, Loan, Customer, etc.), and Uplink sweeps those scanned documents into the Batches queue at regular intervals for indexing.

- Offers scanning to multiple users without the expense of individual licensing.
- If an MFP is already in use, no scanning hardware needs to be purchased.
- Supports multiple MFPs.
- Reads barcodes, making it easy to separate documents in advance for faster indexing and identify which user scanned the batch.
- Ability to scan Desktop eSign barcoded documents (if wet signed).
- Ability to click and drag electronically-stored documents into the network folders directly to create batches for indexing.
- Ability to revise stored documents using the Rescan feature, when used in conjunction with the Scan Client.
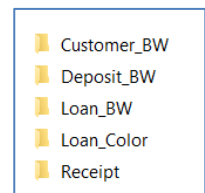
   Note: For more information on using Uplink, see this article.

Add Feature

The Add Feature is used to bring in electronically-stored individual documents or email attachments.

- No special hardware, licensing or configurations necessary.
- Embedded within the Identifi menu. Anyone assigned Add permission can use the feature.
- Drag and drop documents into the Add window from a Windows Explorer folder or directly from an email.
- The system recognizes each document individually (excludes bookmarked .pdf files).
- Barcode breakdocs or cover sheets are not needed.
- Once documents are uploaded, the Indexing Interface opens automatically for indexing. The user is able to exit the Indexing Interface for indexing at a later time, holding the documents in Batches queue.
- Ability to revise stored documents using the Upload feature.
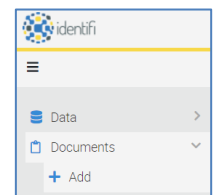
   Note: For more information on using Add, see this article.

   Note: Each feature requires specific roles and/or permissions for User access.