

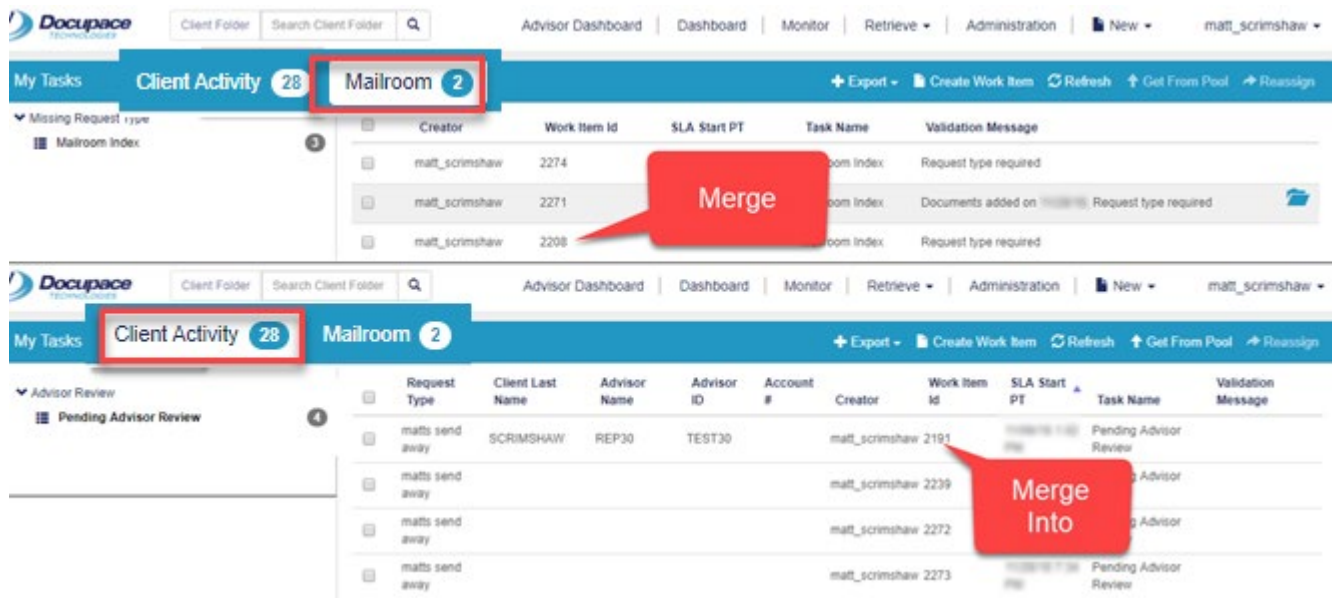
Merging Work Items and Work Item Documents

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There are two scenarios where merging is utilized within Docupace: 1) merging two active and different Work Items into one Work Item and 2) merging two documents within the same Work Item.

Merging Two Active and Different Work Items into One Work Item

Write down the two Work Item IDs, keeping track of the one you want to merge and the one you want to merge into.



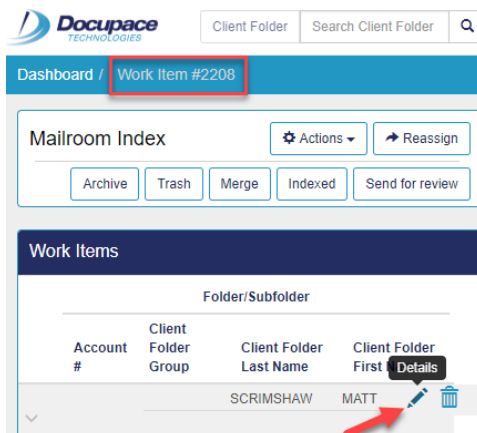
The top screenshot shows the 'Mailroom' task with the following table:

Creator	Work Item Id	SLA Start PT	Task Name	Validation Message
matt_scrimshaw	2274		Room Index	Request type required
matt_scrimshaw	2271		Room Index	Documents added on 10/10/18. Request type required
matt_scrimshaw	2208		Room Index	Request type required

The bottom screenshot shows the 'Pending Advisor Review' task with the following table:

Request Type	Client Last Name	Advisor Name	Advisor ID	Account #	Creator	Work Item Id	SLA Start PT	Task Name	Validation Message
matts send away	SCRIMSHAW	REP30	TEST30		matt_scrimshaw	2191	10/10/18 11:00 AM	Pending Advisor Review	
matts send away					matt_scrimshaw	2239	10/10/18 11:00 AM	Pending Advisor Review	
matts send away					matt_scrimshaw	2272	10/10/18 11:00 AM	Pending Advisor Review	
matts send away					matt_scrimshaw	2273	10/10/18 11:00 AM	Pending Advisor Review	

Click on the Work Item you want to merge and click on the pencil icon to view the Work Item Details page.



The screenshot shows the 'Work Item #2208' details page. The 'Work Items' table is as follows:

Account #	Client Folder Group	Client Folder Last Name	Client Folder First	Details
SCRIMSHAW			MATT	Details

In the 'Merge into Request #' field, type in the Work Item ID of the Work Item you want to merge into. Then, click the 'Save and Close' button.

The screenshot shows the Docupace interface with the 'Merge into Request #' field highlighted in red. The field contains the value '2191'. Other fields include 'SLA Status', 'SLA Start Time (PT)', 'SLA Stop Time (PT)', 'Escalation Date' (MM/DD/YYYY), and 'Escalation Time' (Escalation Time). The breadcrumb trail is 'Dashboard / Work Item #2208 / Work Items #2208 / Details'.

Click the 'Merge' button to complete the task. The first Work Item has now been merged into the second Work Item.

The screenshot shows the Docupace interface with the 'Merge' button highlighted in red. The breadcrumb trail is 'Dashboard / Work Item #2208'. The 'Mailroom Index' section contains buttons for 'Archive', 'Trash', 'Merge', 'Indexed', and 'Send for review'. There are also 'Actions' and 'Reassign' buttons.

Merging Documents Within the Same Work Item

Open the Work Item and select the document records to merge within the Work Item Documents section and click the 'Merge' button.

The screenshot shows the Docupace interface with the 'Merge' button highlighted in red. The table below shows document records with columns for 'Pages', 'Creation Date/Time (PT)', 'Document ID', and 'Batch ID'. The first two rows are selected, and the 'Merge' button is highlighted.

	Pages	Creation Date/Time (PT)	Document ID	Batch ID
<input checked="" type="checkbox"/>	3		8885	
<input checked="" type="checkbox"/>	1		8883	716

Showing 1 to 2 Previous Next

The Documents Merge screen will appear. After making your selections, click the 'Save' button.

Documents merge [X]

Merge files in that order

Documents
8885
8883

Document used as a source for indexing is

8885

References to original documents need to be replaced

Cancel Save

Your results are visible in the Work Item Documents section.

Note: Because we did not check the 'References to original documents need to be replaced' statement (see step C in above screenshot), the original documents (8883 and 8885) were not deleted. If we had checked this box, both original documents would have been removed and the Work item would only reflect the new document ID 8886.

Add New Stamp Barcode Combine & Print

Merge Create WI

	Pages	Creation Date/Time (PT)	Document ID	
<input checked="" type="checkbox"/>	4		8886	New
<input checked="" type="checkbox"/>	3		8885	Old
<input checked="" type="checkbox"/>	1		8883	

Showing 1 to 3 Previous Next