

Scanning to Prevail

Prevail 7

If you have a TWAIN-compliant scanner, Prevail allows you to scan directly on the History or Medical tab for a prospect or matter.

1. Navigate to the correct matter.
2. To scan into the Employment, Medical, Evidence, Photo, Notes or History tabs, click 'Add' to open a new entry, then go to the "Attachments" option in the lower left corner of your window. Use the dropdown and select "Scan Document".
3. A *Select Source* window displays, listing all of the TWAIN-compliant devices to which your computer is either directly connected or connected via network. Click once on the appropriate scanner source, and then click 'Select'. If your scanner is listed twice, choose the one that begins with the TW prefix.
4. Your scanning software will launch. Adjust the settings for the document or picture to be scanned, if necessary, and then click 'Start' or 'Scan' (depending on your scanning interface).
5. A *Reading from the device* window will display throughout the scanning process, indicating the progress of the scan.
6. When the scan is complete, a Prevail window will prompt you to indicate whether there are additional pages to scan, or if you are finished. Click on the appropriate button in this window.
7. Your scanned image will automatically display as an Adobe PDF file. After viewing, you may close the PDF file. It is *not* necessary to save the file, as Prevail has already automatically saved it for you in the correct location.
8. At this point, complete any other desired information in the entry, and then click 'Save'. Please note that you are *required* to enter a subject for the new entry in the "Subject" field.
9. To view the scanned image in the future, click on the appropriate entry and then click on 'View'.