



**ScanFile<sup>®</sup>**

Document Management System

**8**

# **Manual for ScanFile** **Version 8**

## **Installation, Licensing & Configuration**

ScanFile

ScanFile WebServer

ScanFile RemoteStation

ScanFile Remote Services

ScanFile Connector for ShareScan

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# ***Welcome to ScanFile***

---

# Introduction

Thank you for purchasing ScanFile, the fast, secure and user-friendly solution to your document management requirements. ScanFile offers a stable and flexible platform for the storage, referencing and retrieval of your organisations documents. ScanFile supports a vast range of black and white and colour document scanners, and includes several options to make the storage of electronic format documents, such as word processing and spreadsheet format files a straightforward task, including integration with Microsoft Office.

ScanFile is a multi-user document management system that uses a concurrent licensing system, allowing you to maximize your investment in the product.

## What is ScanFile?

The ScanFile solution incorporates three applications:

- ScanFile
- ScanFile WebServer
- ScanFile RemoteStation

ScanFile is the core application and is a full 32bit application that is optimised to run on Microsoft Windows ME, NT4, 2000 and XP Professional based workstations. ScanFile can also be installed on Novell Netware and Microsoft Windows NT4, 2000 and 2003 servers.

With ScanFile WebServer, you can give anyone, anywhere in the world access to your document libraries. ScanFile WebServer is an Internet server based application that allows the retrieval of documents using just a web browser. Whether you wish to make documents available over the Internet or an Intranet, ScanFile WebServer is the fast, secure, reliable and easy way to do it.

ScanFile RemoteStation is a client-server application that allows you to send documents to a central ScanFile store from any location. Using TCP/IP connectivity, combined with ScanFile security, client workstations can send documents to the RemoteStation server, which will then store them to the selected ScanFile document folders. In addition, the RemoteStation Client can be used for the retrieval from your ScanFile document store.

## Important – Please Read

ScanFile, WebServer and RemoteStation cannot be run without a valid software license. The license is contained on a hardware dongle. Once ScanFile has been installed, it can be started, and will immediately inform you that it is not licensed, and will then open the licensing window.

### *Upgrades*

ScanFile 2000 and ScanFile 2002 use a software license called Crypkey. This license must not be deleted before installing ScanFile. This also applies to WebServer and RemoteStation.

## ScanFile Features

ScanFile is a very straightforward and easy document management system to use and manage, but has all the features required for serious document management applications.

- Intuitive user interface
- Black & white and colour scanner support
- Import any electronic format document such as MS Word/Excel files
- Integration with Microsoft Office 97/2000 and XP
- Comprehensive document referencing and retrieval features with user-defined index fields, keywords and full text search.
- Full document display features including zoom, rotate and enhance. View multiple documents
- Inbuilt document viewer that supports over 200 document types including MS Office and PDF documents
- Automatic barcode indexing\*
- COLD data import\*
- TIFFWriter\*
- Zone and Full text OCR\*
- Forms Recognition\*
- Document Routing\*
- Audit Trail\*
- Full network and jukebox support

\* Features marked with an asterisk are additional purchases to the ScanFile core application

# ScanFile Options

The basic ScanFile system comes complete with everything you need to create folders and scan and import documents into them. The following options can be purchased to enhance the functionality of your ScanFile document management solution.

## ***Global Index***

This adds support for Libraries into ScanFile.

## ***Barcode***

This allows ScanFile to automatically read and index bar-coded documents

## ***Keywords***

This allows keyword lists to be applied to ScanFile folders and libraries

## ***Export***

The Export option allows you to export complete folders/libraries to a selected drive and directory. All documents will be exported and a data file will be created with the index information associated with the documents

## ***OCR***

The OCR module has two functions. Zone OCR can automatically index scanned documents from data contained within the page of a document. Full Text OCR creates a searchable word list from scanned documents, allowing you to search the contents of documents

## ***Forms Recognition***

This option enhances the Zone OCR and allows different forms to be scanned into the same folder, and by configuring Forms templates, different index zones can be applied for each form.

Please note: The OCR option is also required if Forms Recognition capability is required.

## ***TIFFWriter***

TIFFWriter is a printer driver that allows you to 'print' from any Windows application into a ScanFile folder. The 'print' will be converted to TIFF format

## ***COLD***

This module adds support for importing computer generated spool data, which might otherwise be output to Microfiche, or held in printed form

## ***Auditing***

With the optional Audit feature, every event performed by all users can be logged to a central database and then reviewed and printed. The events to be viewed can be selected by folder or library, user and within a given date range

## ***Document Routing***

Documents can be assigned to pre-defined routes that will send documents to specific users and/or folders for viewing/commenting and approval. Each route can have multiple steps and documents can be sent from route to route

## ***LuraDocument***

The LuraDocument file format compresses image files to a higher degree than TIFF or JPEG, whilst preserving the quality of the document

## ***Kofax***

With the Kofax option, support is added to ScanFile for any scanner which works with the Adrenaline Image processing board and ImageControls V3.0

## ***Virtual Printing (VNP)***

With ScanFile VNP, you can create up to 8 virtual printers which allow you to 'print' documents, which are converted to TIFF format and saved to specified directories, and can then be automatically imported into ScanFile folders

# New in Version 8

## ***New Appearance***

A modern toolbar was added as alternate appearance of ScanFile. The classic look is still available.

## ***Impersonation***

ScanFile Account enabled ScanFile to use a windows account for impersonation. Data secured with that windows account can be protected from illegal access.

## ***Audit Trail Management***

Audit Trail Management offers an export function for Audit Trail data. The exported files can be merged in ScanFile to a temporary search database to retrieve exported data.

## ***View User***

ScanFile View User. It is possible to license an amount of users who are only allowed to view documents. These users do not block a full user licence and their rights cannot be altered.

## ***User Time Out***

A Time Out User functionality was added to ScanFile. A user licence can be set free after a certain timespan to avoid license blocking by a user who doesn't work with ScanFile for a longer time period while being logged in.

## ***Field property ,External list'***

New field property ***External list***. The property allows you to assign index fields from an index file to the folder fields in ScanFile. When typing in index information, a list will pop up for fast selection and – when possible – the index field used will try to complete the entry with the next matching index from the external list.

## ***Keyword Export***

Keywords can now be exported as additional index field. If a document has more than one keyword assigned to, it will be exported as many times as keywords are assigned to it. Every time with a different keyword.

## ***Mandatory Keywords***

Extended Folder setting Mandatory Keywords forces the user to select keywords before an index is successfully saved

## ***Auto Open***

ScanFile Auto Open allows the user to

- select a folder or library that will be opened automatically right after ScanFile startup
- select a setting that will automatically reopen the folder or library that was open before the program was closed

## ***Copy Index Information***

The functions ***Move to*** and ***Send to ScanFile folder***, as well as the field property ***Copy Index***, offer extended settings to change the order of the index information in the target folder.

## ***Input assistance***

A thesaurus list can be updated via file import

Input assistance for Thesaurus linked index fields: a word list generated from assigned Thesaurus will pop up below the index field for fast selection

Input assistance for Date fields: a calendar will pop up below the index field for fast selection

## ***Advanced Email Support***

Email attachments can be displayed in an additional window

## ***Windows Service***

Remote Services: have been split into a RS Configuration Tool and a RS Service (true windows service)

# ***System Requirements***

---

## Operating Systems

ScanFile is designed to run as a full or client installation on the following operating systems:

- Microsoft Windows ME
- Microsoft Windows NT4 Workstation
- Microsoft Windows 2000 Professional
- Microsoft Windows XP Professional
- Microsoft Windows 2003 Server

As a network installation ScanFile can be installed on the following server operating systems:

- Microsoft Windows NT4 Server
- Microsoft Windows 2000 Server
- Microsoft Windows 2003 Server

Additionally, ScanFile can be installed onto Novell systems with restrained capabilities (no Remote Services).

### Service Packs

Please ensure that you keep your operating system up to date with the latest service packs.

## Server

ScanFile is not a client server application and therefore it normally uses only storage resources on a server. All important application files are located on a server and shared by all ScanFile clients. The server itself – as long no client installation is performed – only provides storage resources.

*If the **Remote Services** are to be run on a server, an additional client installation is needed to register all required files on the server.*

## ScanFile Requirements

ScanFile is a 32 bit application designed to require only the least amount of resources on server and workstations. The nature of the application requires additional storage space to store your documents. In addition the specification of a ScanFile workstation has to meet the requirements of every

day use, attached scanners, type of scanning you are performing and the type of documents you work with.

## **Hard Disk Space**

A full installation of ScanFile will require around 100 Megabytes of hard disk space. This will decrease to less than 10 Megabytes if a Client install is performed. The majority of the Client install consists of common Windows components that may already be installed on the workstation. In this case the Client install may take up only an additional 5 Megabyte of disk space.

Additional to the storage space that is needed for the application itself, sufficient storage space is needed for your documents. Please ensure that you have the correct amount and type of storage for your documents. The storage used may be a mix of hard disk space and CD's, DVD's and optical disk, either using single drives or jukeboxes.

The amount of storage you might need is the result of a combination of factors, such as

- Are the documents completed or are they still being updated?
- How many existing documents?
- What is the average document size on disk?
- How many documents are created within a period?
- At what document age does the retrieval rate decrease?
- Is there a retrieval time requirement?
- How many retrievals are required per hour/day?
- How many different applications does a customer have?
- What index information is used?

Taking these factors into account you can approximate the amount of storage space for a given period and put in place your on-line and off-line storage.

*You need to ensure that whatever method of storage is used, adequate and regular backups are taken.*

## **RAM**

Typically, the ScanFile program itself requires between 30 and 60 Megabytes of RAM to run. This is dependant upon what operations are being performed within ScanFile. When viewing a document, the amount of memory used will increase by the requirements of the document and can differ greatly.

When viewing a scanned or imported image, the compressed file is read from disk and then uncompressed into the workstations memory. For a black & white A4 document scanned at 300dpi, the uncompressed size will be about

1 Megabyte. For a 24bit colour A3 document, scanned at 400dpi, the uncompressed size will be just under 100 Megabytes.

Electronic format documents, such as MS Word or Excel are displayed with a multi functional viewer within ScanFile and the memory that is required is depend on file type and size.

The specification for a scanning workstation will be broadly similar to that required for viewing the documents scanned. The way a scanner works must be taken into account as they do vary in the way images are presented to the workstation.

As an example, The Canon DR-3020 scans A4 black & white documents at a maximum resolution of 300dpi. The DR-3020 has inbuilt image compression, and will therefore typically send over 35-50k of information to the workstation for each page scanned. The DR-5080c however, can scan 24bit colour documents up to a maximum of A3 at 400dpi. As the DR-5080c has no onboard compression, this can mean that up to 98MB of information can be sent from the scanner to the workstation for each A3 colour page scanned. This must then be compressed and saved to disk. The size of the saved image can range from 2k to 100Mb, depending upon the type of image, and the compression levels that are used.

When calculating the amount of memory a workstation should have, the requirements of the operating system need to be taken into account. Additionally, the amount of memory used by other applications that are operating simultaneously need to be considered.

*If there is insufficient RAM in the workstation, the operating system will use the hard disk as virtual memory. This will dramatically affect the performance of the workstation.*

## Minimum Requirements

The following workstation specification is recommended as a minimum requirement

- PC using a 2GHz Pentium 4 Processor
- 256 MB RAM
- 17" Display
- CD-ROM Drive
- 100 MB Hard Disk Drive
- MS Windows 2000 Professional

## Dongle

ScanFile products are protected from illegal use by utilising a hardware dongle. The dongle can be supplied as a USB device or one that attaches to the workstation or servers parallel printer port. The parallel port must be set to ECP.



# ***Installing ScanFile***

---

## Overview

ScanFile can be installed as a standalone system or on a network file server. Please read the installation instructions carefully before installing to ensure that you fully understand what will be installed, and what needs to be prepared prior to installation.

ScanFile is a networkable program, in that each workstation on a network will run ScanFile, and can share common data. The workstations will load ScanFile from a common directory on a network server drive. This has the advantage of making ScanFile easier to maintain when updates become available.

The installation procedure will be dependent upon which network operating system, the server ScanFile is to be installed to, is running. ScanFile can be installed on to Microsoft Windows 2000 and 2003 servers and Novell Netware servers. Additionally, a workstation running Microsoft Windows 2000 or XP Professional can be used as a small workgroup server serving up to ten connections.

### ***Important***

*Please do NOT attach the dongle to the workstation before installing ScanFile for the first time. The Installation program will install the dongle device drivers and utility software.*

### ***Upgrades***

*If you are upgrading from ScanFile 2000 or ScanFile 2002 you must not uninstall or delete your previous installation or transfer out the existing ScanFile license .*

# Standalone Installation

To install ScanFile, select **Run** from the Start Menu and then choose **SetupSF.exe** from the **Software** directory on the ScanFile CD.

## **Location**

After you have chosen the language, you will be asked to choose the drive and directory that ScanFile will be installed into. A default of **C:\Programs\ScanFile** will be offered and this should normally be accepted.

The Destination directory selection dialogue will also display the available disk space on the chosen drive, as well as the space available after ScanFile has been installed. Once you have chosen the drive and directory, press the **Next** button.

## **Backup**

You will then be asked whether the install program should backup any files that the ScanFile installation process will replace. These can be older versions of ScanFile components - if you are installing over an existing installation - and common Windows components. If you choose to backup these components, you will be offered to create a **Backup** folder in the previously selected installation location.

*Please note that the ScanFile Installation process will only replace older versions of common Windows components.*

## **Components**

The next step is to choose the ScanFile components to be installed. The core ScanFile program will be installed automatically, but you must select the additional options individually. Please note that if you have not purchased the TIFFWriter, OCR or the Virtual printing option, ScanFile VNP, these will not function.

| Option/Module         | Description   |
|-----------------------|---|
| MS-Office Integration | <p>This option will add <b>Send to ScanFile</b> and <b>Print and Send to ScanFile</b> options into Microsoft Office 2000 or XP. The Version Microsoft Office 97 only supports Word and Excel.</p> <p>To use the Microsoft Office Integration a Version of Microsoft Office must be installed.</p> |
| ScanFile CD           | <p>This facility allows you to create data CDs, which have retrieval software copied to the CD. This allows retrieval of document from the CDs using any PC.</p>  |
| ScanFile TIFFWriter   | <p>This option installs a special printer driver, which allows you to print documents from any windows application as TIFF G4 or JPEG files directly into a selected ScanFile folder.</p>   |
| ScanFile OCR          | <p>This option offers two facilities. Documents can be automatically indexed by the Zone OCR function. Additionally, Full Text OCR can be performed allowing you to search the documents for specific text.</p>   |
| Extensions            | <p>Currently the Extension consist of an Exception Report utility. This can check the existence of numbers of a defined range in a ScanFile folder. A log will be created reporting missing numbers and numbers that are present several times.</p>   |
| ASPI Layer            | <p>This option will install the latest release of Adaptec's ASPI drivers for their range of SCSI cards. This will be required if you intend to perform scanning on the workstation using a scanner attached to a SCSI card.</p>   |
| ScanFile VNP          | <p>With ScanFile VNP, you can create up to 8 virtual network printers which allow to you 'print' documents, which are converted to TIFF format and saved to specified directories, and can then be automatically imported into ScanFile folders.</p>  |

*If TIFFWriter was selected to be installed, and the operating system on the PC is Microsoft Windows NT4, you will be asked to insert the NT4 CD. ScanFile needs to install files that are on the NT4 disc.*

## **Personal Hitlist**

You will then be asked to select the directory to be used to store the User Personal Hitlist files. The default value will be a directory called **Data** which will be created in the ScanFile program directory. Once the directory is selected, press the **Next** button. ScanFile will now be ready to be installed.

## **Licensing**

Once the ScanFile installation is complete, the dongle can be attached to the workstation, and then licensed. Please see the **Licensing** chapter for instructions on how to do this.

# **Microsoft Server**

ScanFile can be installed onto Microsoft Windows NT4, 2000 and 2003 servers. Please ensure that the server operating system has been updated with the latest Service releases prior to installing ScanFile.

The ScanFile installation must be performed directly on to the server, not from a workstation, as Windows services will be installed.

## **Installation**

To install ScanFile to the server select **Run** from the Start Menu and then choose **SetupSF.exe** from the **Software** directory on the ScanFile CD. Before pressing the **OK** button, add the switch **/U** to the end of **SetupSF.exe**. Please ensure that the switch is entered in uppercase:

```
<CD-ROM Drive>\Software\SetupSF.exe /U
```

The first step is to choose the language that you wish ScanFile to be in. Choose the desired language and press **OK**.

## **Location**

After you have chosen the language, you will be asked to choose the drive and directory that ScanFile will be installed into. A default of

**C:\SFNet\ScanFile** will be offered, this can be changed to the server location you wish to install ScanFile to. Once you have chosen the drive and directory, press the **Next** button.

*When installing to a server drive, ScanFile should be installed to a server Applications directory (e.g. SFNET), not to the root of a server drive. The Applications directory is subsequently shared for client use. This is so that when a server location is mapped by a client, the ScanFile program directory is not the root of the mapped drive.*

## **Backup**

You will then be asked whether the install program should backup any files that the ScanFile installation process will replace. These can be older versions of ScanFile components - if you are installing over an existing installation - and common Windows components. If you choose to backup these components, you will be offered to create a **Backup** folder in the previously selected installation location.

*Please note that the ScanFile Installation process will only replace older versions of common Windows components.*

## **Personal Hitlist**

You will then be asked to select the directory to be used to store the User Personal Hitlist files. The default value will be a directory called **Data** which will be created in the ScanFile program directory. Once the directory is selected, press the **Next** button. ScanFile will now be ready to be installed.

## **Licensing**

Once the ScanFile server installation is complete, the dongle can be attached to the Server. The Wibu-Key Server service must then be started. This can be done manually, or it will be done automatically when the Server is rebooted. If you wish to activate the dongle from the server directly, you must perform a Client installation to install the required files. Please see the **Licensing** chapter for instructions on how to activate the dongle.

After this the server installation is complete and you can go on to install the ScanFile clients.

*If you wish to use the **Remote Services** a client installation has to be performed on the server to install the necessary components.*

## Novell Netware Servers

ScanFile can be installed on to a Netware server, but unlike Microsoft server operating systems, it cannot be run on the server. In addition, the Remote Services are unable to run on Netware servers, although they can be configured to run on a client. The installation must be performed from a network client running Windows 98, Me, NT4, 2000 or XP.

Please also note that the license dongle cannot be activated on the Novell server. This can be performed on a client workstation after the server and client installation. Once the dongle has been activated, it can be attached to the Novell server.

From a network client with Supervisor rights on the Netware server, select **Run** from the Start Menu and then choose **SetupSF.exe** from the **Software** directory on the ScanFile CD. Before pressing the **OK** button, add the switches **/U /NOVELL** to the end of **SetupSF.exe**. Please ensure that the switches are typed in uppercase:

```
<CD-ROM Drive>\Software\SetupSF.exe /U /NOVELL
```

The first step is to choose the language that you wish ScanFile to be in. Choose the desired language and press **OK**.

### **Location**

After you have chosen the language, you will be asked to choose the drive and directory that ScanFile will be installed into. A default of **C:\SFNet\ScanFile** will be offered, this can be changed to the server location you wish to install ScanFile to. Once you have chosen the drive and directory, press the **Next** button.

*When installing to a server drive, ScanFile should be installed to a server Applications directory (e.g. SFNET), not to the root of a server drive. The Applications directory is subsequently shared for client use. This is so that when a server location is mapped by a client, the ScanFile program directory is not the root of the mapped drive.*

### **Backup**

You will then be asked whether the install program should backup any files that the ScanFile installation process will replace. These can be older versions of ScanFile components - if you are installing over an existing installation - and common Windows components. If you choose to backup these components, you will be offered to create a **Backup** folder in the previously selected installation location.

## ***Personal Hitlist***

You will then be asked to select the directory to be used to store the User Personal Hitlist files. The default value will be a directory called **Data** which will be created in the ScanFile program directory. Once the directory is selected, press the **Next** button. ScanFile will now be ready to be installed.

## ***Dongle License Files***

Once the installation has completed, you must edit the file **WibuNov.ini**, which is in the **Dongle** directory, located off the ScanFile program directory. This file is used by the dongle NLM when controlling the ScanFile licensing.

**WibuNov.ini** contains references to the location of four license files which the dongle NLM interacts with. The four Files are:

These files in the same directory as the **WibuNov.ini**, the Dongle directory, located off the ScanFile program directory. Open **WibuNov.ini** in a text editor and look for the following sections:

### **[WkLAN]**

IpPort=22347

### **[WKNet 818:1000]**

serverFile<ScanFile-Folder>\Dongle\WKNetSF.dat

RefreshTime=10

TimeOut=30

Selection=1234

### **[WKNet 818:2000]**

serverFile=<ScanFile-Folder>\Dongle\WKNetTic.dat

RefreshTime=10

TimeOut=30

Selection=1234

### **[WKNet 818:3000]**

serverFile=<ScanFile-Folder>\Dongle\WKNetSWS.dat

RefreshTime=10

TimeOut=30

Selection=1234

**[WKNet 818:4000]**

```
serverFile=<ScanFile-Folder>\Dongle\WKNetSRS.dat  
RefreshTime=10  
TimeOut=30  
Selection=1234
```

The **serverFile** parameter within each section needs to contain the path to the relevant application file. The value of the parameter needs to contain the Novell Volume name, and directory name. For example, If ScanFile has been installed into a directory called ScanFile, within the Apps directory on the SYS volume, then the path would be as follows:

**SYS:\Apps\ScanFile\Dongle\<Filename>**

The section for ScanFile would therefore be changed, as shown below:

**[WKNet 818:1000]**

```
serverFile=SYS:\Apps\ScanFile\dongle\WKNetSF.dat  
RefreshTime=10  
TimeOut=30  
Selection=1234
```

Once you have changed the serverFile values in all four sections, you can save and close the **WibuNov.ini** file.

## **Dongle NLM**

For ScanFile to be able to find the dongle once it has been activated, the dongle Netware Loadable Module (NLM) needs to be loaded. The Dongle cannot be activated from the Novell Server, this must be done at a Client, before attaching it to the server and starting the NLM. Please see the chapter **Licensing** on how to activate the dongle.

Before loading the NLM copy it from the Dongle directory into the System directory on the Novell server. You can then load the NLM at the Novell server Console by typing **LOAD WKSVNW.NLM** followed by the complete path to **WibuNov.ini** as the parameter:

```
LOAD WKSVNW.NLM SYS:APPS\SCANFILE\DONGLE\WIBUNOV.INI
```

This should also be add to the servers **Autoexec.ncf**, so that it will automatically load if the server has to be rebooted.

The Installation will now be complete, and Clients will be able to run ScanFile.

## Network Client Installation

To perform a Network Client Installation select **Run** from the Start Menu and then choose **SetupSF.exe** from the ScanFile server installation directory. Before pressing the **OK** button, add the switch **/N** to the end of **SetupSF.exe**. Please ensure that the switch is entered in uppercase:

<ScanFile directory on the server>\Software\SetupSF.exe /N

The first step is to choose the language that you wish ScanFile to be in. Choose the desired language and press **OK**.

### Components

The next step is to choose the ScanFile components to be installed. The core ScanFile program will be installed automatically, but you must select the additional options individually. Please note that if you have not purchased the TIFFWriter, OCR or the Virtual printing option, ScanFile VNP, these will not function.

| Option/Module         | Description  |
|-----------------------|--|
| MS-Office Integration | This option will add <b>Send to ScanFile</b> and <b>Print and Send to ScanFile</b> options into Microsoft Office 2000 or XP. The Version Microsoft Office 97 only supports Word and Excel.<br><br>To use the Microsoft Office Integration a Version of Microsoft Office must be installed. |
| ScanFile CD           | This facility allows you to create data CDs, which have retrieval software copied to the CD. This allows retrieval of document from the CDs using any PC.  |
| ScanFile TIFFWriter   | This option installs a special printer driver, which allows you to print documents from any windows application as TIFF G4 or JPEG files directly into a selected ScanFile folder.   |
| ScanFile OCR          | This option offers two facilities. Documents can be automatically indexed by the Zone OCR function. Additionally, Full Text OCR can be performed allowing you to search the documents for specific text.   |

|              |   |
|--------------|---|
| Extensions   | Currently the Extension consist of an Exception Report utility. This can check the existence of numbers of a defined range in a ScanFile folder. A log will be created reporting missing numbers and numbers that are present several times.  |
| ASPI Layer   | This option will install the latest release of Adaptec's ASPI drivers for their range of SCSI cards. This will be required if you intend to perform scanning on the workstation using a scanner attached to a SCSI card.                      |
| ScanFile VNP | With ScanFile VNP, you can create up to 8 virtual network printers which allow to you 'print' documents, which are converted to TIFF format and saved to specified directories, and can then be automatically imported into ScanFile folders. |

*If TIFFWriter was selected to be installed, and the operating system on the PC is Microsoft Windows NT4, you will be asked to insert the NT4 CD. ScanFile needs to install files that are on the NT4 disc.*

## **Personal Hitlist**

You will then be asked to select the directory to be used to store the User Personal Hitlist files. The default value will be a directory called **Data** which will be created in the ScanFile program directory. Once the directory is selected, press the **Next** button. ScanFile will now be ready to be installed.

## **Remote Service**

The Remote Service is available after a Standalone or Client/Server installation on the same machine. The service is not started automatically when the installation has finished. If you want to use the functionalities of the Remote Service, please go to chapter 'Remote Services' for further information about setting up and starting of the service.

## **Removing ScanFile**

ScanFile can be removed from a workstation or server by selecting **ScanFile** in the **Add/Remove Programs** option in the Control Panel.

If you installed a ScanFile Client and a ScanFile Server on one machine, the de-installation from above will only remove the Client. To de-install the Server, go to **Start -> Run** and enter <ScanFile Folder>\Unwise.exe <ScanFile Folder>\ScanFile\_uninstall.log.

When ScanFile is installed, whether on a server, or on a networked PC as a client, an installation log is either created or updated in the ScanFile program directory. This details exactly which elements of ScanFile and common Windows components have been installed, as well as any Windows Registry entries that have been updated or created. The uninstall program uses the information in this file to remove only the elements that were added when ScanFile was installed. It is very important that this file is never deleted.

The ScanFile uninstall program will not delete the following:

- Folders
- Libraries
- User database
- Audit databases
- Document routing databases
- COLD Template database
- OCR and Forms Recognition template databases
- Personal Hitlist folders

# Summary

## ***Installation Type***

|                  |                        |
|------------------|------------------------|
| Standalone       | SetupSF.exe            |
| Microsoft Server | SetupSF.exe /U         |
| Novell Server    | SetupSF.exe /U /NOVELL |
| Client           | SetupSF.exe /N         |

## ***Install Location***

|                         |                      |
|-------------------------|----------------------|
| Standalone Installation | C:\Programs\ScanFile |
| Server Installation     | C:\SFNet\ ScanFile   |

## ***Backup Location***

For installation rollback

## ***Components***

|                    |                                     |
|--------------------|-------------------------------------|
| Office Integration | MS Office 97, 2000, XP & 2003       |
| ScanFile CD        | CD Folder Retrieval Application     |
| TIFFWriter         | Print to ScanFile Folder            |
| OCR                | Zone, Full Text & Forms Recognition |
| Extensions         | Exception Report                    |
| ASPI Layer         | For Adaptec SCSI cards              |
| ScanFile VNP       | Print to specified Locations        |

## ***Personal Hitlist***

Private document store for each user. Used for sending documents to users, and by the Document Routing option.

## ***Remote Service***

Is available after a Standalone or Client/Server installation and has to be configured. Please see the ***Remote Services*** chapter for more information.

## ***Removing ScanFile***

Always use Control Panel – Add/Remove Programs  
Client and Server on one machine, go to **Start -> Run** and enter <ScanFile  
Folder>\Unwise.exe <ScanFile Folder>\ScanFile\_uninstall.log.

*Removing ScanFile does not delete data*

# *Licensing*

---

## Overview

This chapter describes the necessary steps to license ScanFile. The licensing system is a hardware dongle you received with the program. This dongle is normally delivered in an unlicensed state, and must be activated before ScanFile can be run.

If you have WebServer and/or RemoteStation in addition to ScanFile, the licensing for these is held on same dongle as for ScanFile. When installing these applications, you will be asked for the ScanFile application path, and from this, WebServer and RemoteStation Server will be able to find the dongle

### ***What is the Serial Number?***

The serial number is needed to identify the dongle. The number is engraved on the hardware dongle and is needed to download the license key via the Internet.

No new update request is needed, if you mistype your serial number when you try to collect a dongle activation key via the Internet.

### ***What is the Pick Up Code?***

When a ScanFile system is purchased, or when an update to an existing installation has been purchased, a Pick Up code is needed. This code in conjunction with the serial number is used to license the hardware dongle. A Pick Up code will be issued after you ordered a new license or a license update.

### ***How is the license controlled?***

The way the licensing is controlled will depend upon which operating system the server or workstation is using. When ScanFile is installed, a directory called **Dongle** will be created in the ScanFile program directory, holding various dongle configuration and information files

*Please note that TCP/IP is the only protocol supported by the dongle, when used in a network environment.*

### **Windows NT4, 2000 and 2003**

When a ScanFile Server installation is performed on Windows NT4, Windows 2000 or Windows 2003 servers, the service **WIBU-KEY Server** will be

installed, and configured to start automatically. Without this service, Clients will not be able to find the ScanFile dongle.

For standalone installations, no service is installed or required.

### Novel Network

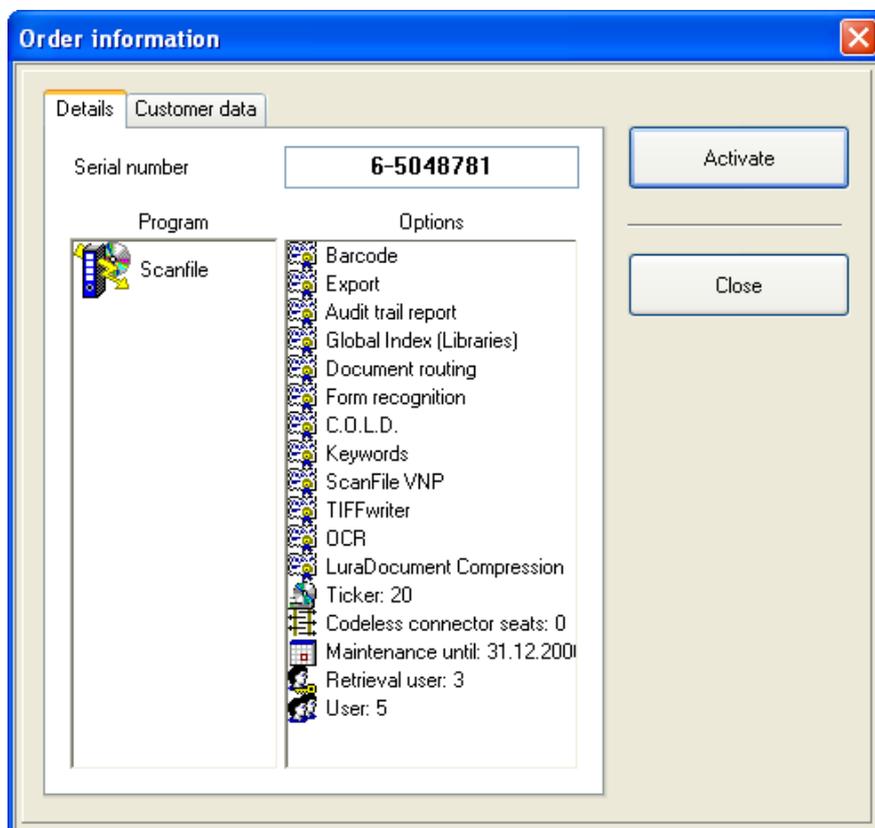
The Netware Loadable Module (NLM) **WKSVDW.NLM** that is supplied with ScanFile and copied to the **Dongle** directory during installation must be loaded on the Netware server. This can be copied to the Netware SYSTEM directory.

*Without this NLM loaded, ScanFile will not find the dongle!*

## Licensing

When ScanFile is installed and then run for the first time, it will report that it is not licensed, and will then open the License Manager. When opened after the first installation, the License Manager will only show the dongle serial number.

This can also be run from the **License Manager** option in the ScanFile program group whenever you are updating the license.



After a successful update or if your dongle is already activated, all licensed programs and options will be displayed.

The dongle can be activated on a Microsoft Windows server or workstation once a ScanFile client has been installed. For Novell NetWare server installations, the dongle can only be activated when connected to a Microsoft Windows workstation, after a ScanFile Client install has been performed.

There are two methods of activating the ScanFile Dongle via the Internet using the License Manager when purchasing a new ScanFile system, or upgrading an existing ScanFile installation. Either you update your dongle directly via the Internet or you just download a license file. In both cases the License Manager is used.

A Pick up Code which enables you to activate the ScanFile Dongle will have been issued when ScanFile was purchased, and this allows you to collect the license. Please ensure that the Dongle is attached to the server or workstation that you are using, and then run the ScanFile License Manager.

*After the start of the License Manager a password is required unless the user login has been switched off. A user needs ScanFile administrator rights to be able to update the license.*

*If you start ScanFile for the first time and haven't setup any users yet enter the default ScanFile user login:*

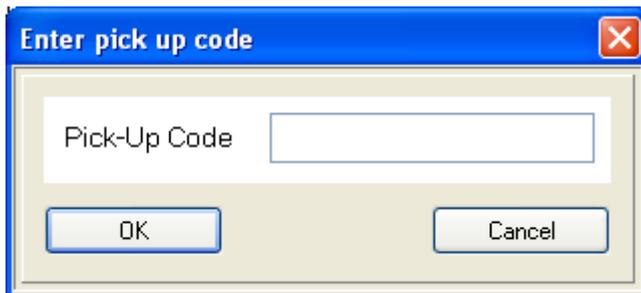
**User name: admin**  
**Password: admin**

*Please note: the password is case sensitive!*

## ***Internet Licensing***

If you have started the License Manager you can start a license update via the internet by clicking on the button ***Internet License***. For this option to work the server or workstation you started the License Manager on must have Internet access.

After selecting the ***Internet License*** option, you will be asked to enter the Pick Up Code that you have been supplied with.



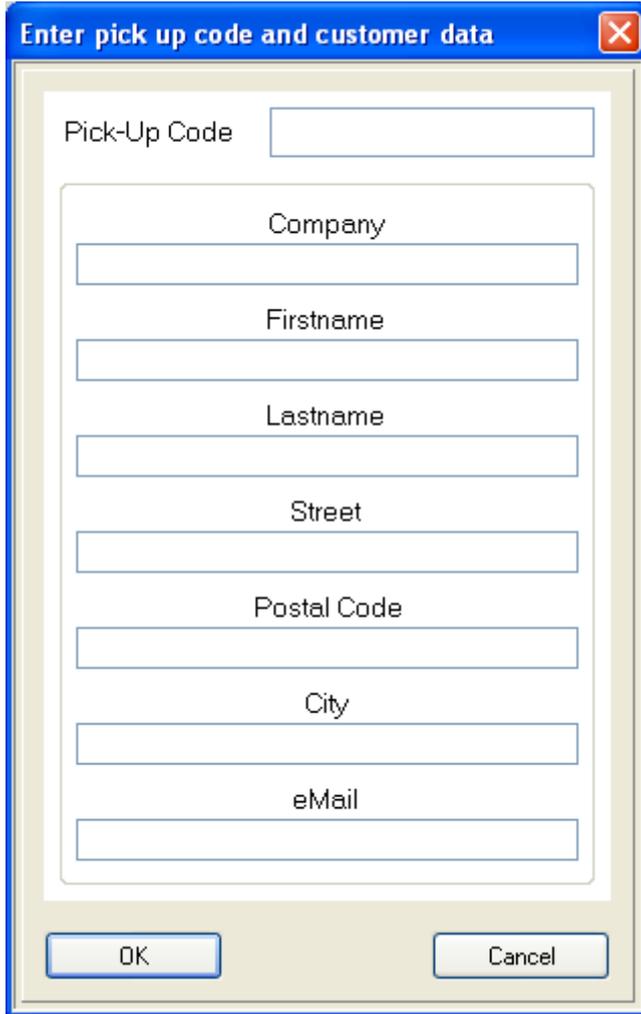
Once you have entered this and pressed OK, the License manager will connect and verify the dongle and pickup code. A confirmation screen will be displayed showing your details and the options purchased. If these are correct, press the Activate button to license the dongle.

Once activated, the License Manager will return to the main License Screen, and the programs and program options will be listed. The License Manager can then be closed.

### ***Save to / Load from File***

If an Internet connection is not available, a dongle status file can be saved to disk and then uploaded to the ScanFile License site, and a dongle activation file will then be returned, which can be loaded, and the dongle activated.

After starting the Licence Manager, click to ***Save to file***. You will be asked to enter the Pick-Up code you have been supplied together with your company details .A screen appears, where the Pick-Up code and the contact details should be entered:



Enter pick up code and customer data

Pick-Up Code

Company

Firstname

Lastname

Street

Postal Code

City

eMail

OK Cancel

Once you have entered this and pressed **OK**, the License manager will open a window, allowing you to save your license file. The name of the file is your serial number, the file extension is `.dsc`.

- Transfer the `.dsc` file to a workstation that has internet access
- go to the following site using your internet browser:  
[www.scanfile.com/dongle](http://www.scanfile.com/dongle)
- Enter or browse to the path where you saved the `.dsc` file and then click on **OK**.
- An activation file with the extension `.dsl` will then be returned to you. Select the Save option and then browse to the location where you wish to save the file
- Transfer the `.dsl` file to the workstation connected to the dongle
- In License Manager, select the Load from File option and then browse to the location where you saved the `.dsl` file, Highlight the file and then click **OK**.

Now the License Manager updates the dongle with the latest license information. Once activated, the License Manager will return to the main

License Screen, and the programs and program options will be listed. The License Manager can then be closed.

## Upgrades

If you are upgrading from ScanFile 2000 or ScanFile 2002 to ScanFile, it is very important that your existing ScanFile installation is NOT uninstalled, deleted or the license transferred out prior to licensing your ScanFile dongle.

When you attempt to license your ScanFile dongle, the License Manager will search for your existing Crypkey License, and if this is not found, the license attempt will fail. In addition, the Crypkey license serial number will be validated against the dongle upgrade information, and if these do not match, the dongle licensing will fail.

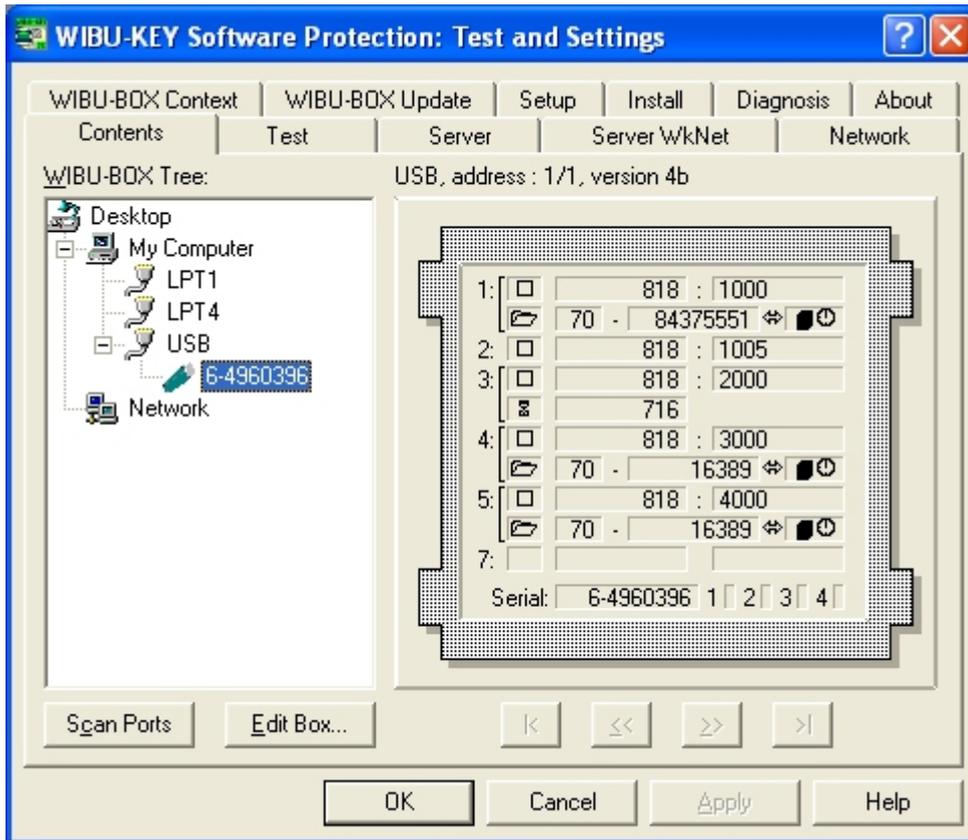
If the License Manager finds the Crypkey license, the dongle will then be activated, and the Crypkey license will be deleted, and your previous installation removed.

A running ScanFile 2003 installation has to be completely uninstalled before installing ScanFile V8. The license is updated with the Pick-Up code after installing ScanFile V8.

## Dongle Applet

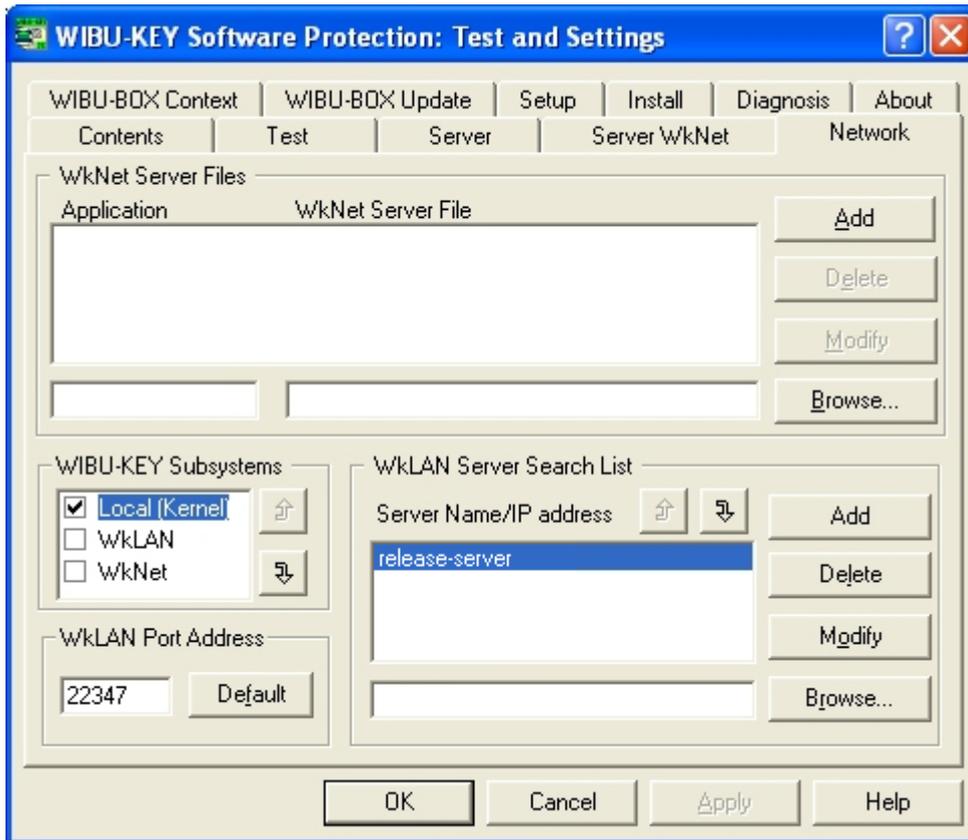
When a Server or Client installation is performed, a dongle applet will be added to the Windows Control Panel. This can be used to check that the dongle can be found by the workstation or server, and can also be used to direct ScanFile to use a dongle attached to a specific server or workstation.

To start the applet open the Windows Control Panel, and select the **Wibu-Key** applet, and the following screen will be displayed.



Selecting the Scan option on the default **Wibu-BOX Content** Tab will scan the workstation or the network for dongles, depending upon whether **My Computer** or **Network** is selected. This enables you to confirm that the workstation is finding the dongle.

You can force ScanFile to only look for a dongle on a specific workstation or server by selecting the **Network** tab and entering the Computer Name or IP address of the dongle server in the Server Search List. In the example below, ScanFile will use the dongle attached to **release-server**.



**Please note:**

*On a server in a network installation the **WIBU KEY Subsystem “Local”** should be switched off. Otherwise the server could approach the dongle via local drivers and block the network clients. In this case the network clients could report **“No valid license file”**.*



# *First Steps*

---

## Overview

This section describes the first steps after the installation of ScanFile. It leads you through the first start-up of ScanFile, the licensing process and informs you about important general settings.

## Starting ScanFile

During the installation process a ScanFile program group is created in the start. Start ScanFile by selecting **Programs -> ScanFile -> ScanFile**. The login dialog of ScanFile is displayed on the screen.



Enter your user name and password in order to continue. The first time you start ScanFile login as the pre-installed user **admin**, password **admin**. With this pre-installed user you can enter all necessary settings and have full access to every licensed option.

***Login at first start:***

***User name: admin***

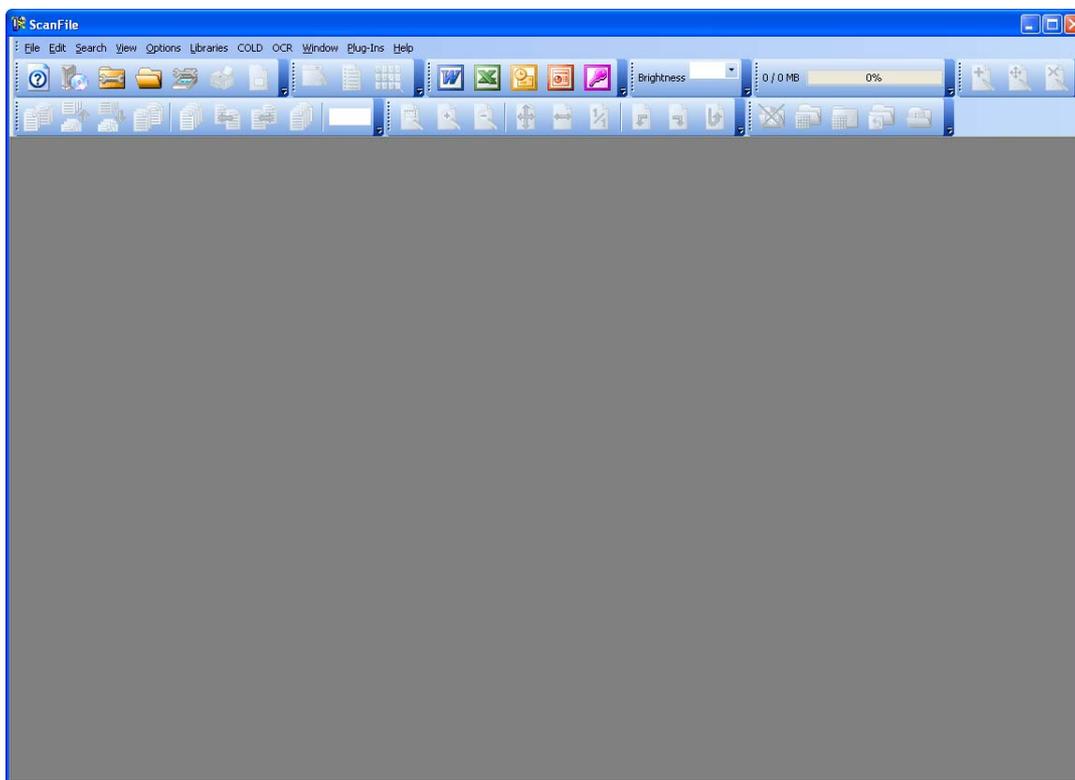
***Password: admin***

*The password entry is case sensitive!*

*The user **admin** has all rights within ScanFile. Therefore the pre-installed password should be changed after the first start, in order to prevent unauthorized access.*

## ScanFile Main Screen

After logging in successfully, the main window will be displayed. If you haven't licensed ScanFile yet, the License Manager will open automatically. Please see the **Licensing** chapter on how to activate your ScanFile dongle



This window will have a standard Windows Menu bar and Toolbars for quick access to the applications functions.

When running ScanFile for the first time, default settings should be applied to enable the application to know what input device to use, and where you want to store the documents. A short description how to apply these settings follows.

## Search Drives

Before folders and libraries can be created, search drives for ScanFile to work on have to be defined. Selecting **Choose search drives** from the File menu allows you to specify the locations which can be anywhere on the workstation, mapped drives or UNC paths. Within the Search Drives window, a list of drives and paths that have been added will be displayed. When ScanFile is first started, the Search Drives selection screen will be automatically displayed, and will list the available drives on the workstation.

The list of search drives is stored centrally and shared with all workstations. If a user does not have rights to access certain paths defined, then those paths will appear empty.

To add a storage location to the list, press the **+** button on the top right of the display. A window will then be displayed where you can select the drive or UNC path that you want to add. To remove a storage location, highlight it on the list and press the **-** button on the top left of the display.

## Scanner Selection & Setup

Before any scanning can be done, the scanner must be selected. Select **Choose Scanner** from the **File** Menu, and select the appropriate scanner. Then select **Scanner Settings** from the **Options** menu to apply default settings for the selected scanner. These can be for scan resolution, paper size, single/double-sided scanning, brightness, contrast etc.

A full description of the options for all scanners is given in the **Scanner Setup** chapter.

*The scanner settings are saved for every single user and folder. Please note: by selecting **Options -> Scanner Settings** the settings for the opened folder are changed. If no folder is open, the scanner settings are saved as a default for the logged in user. This default will be copied into every new folder that is created by the logged in user.*

## Next Steps

Before you can store any documents to ScanFile you must first create ScanFile folders to store the documents in your selected locations. Creating folders is fully described in the **Folders** chapter. Once you have created a folder and stored your documents the searching and viewing options are described in the chapter named **Searching & Viewing**.

Please also read the General Settings chapter, as this describes the options available that will affect how the ScanFile main screen, ScanFile folders and libraries will be displayed as well as affecting the actions of keyword searches and the display of hit lists. Many other settings influencing the behaviour of ScanFile are described in that chapter, too.

It is very important that you read and understand the **General Settings** chapter to ensure that you get the best from your ScanFile solution.

# ***Folders***

---

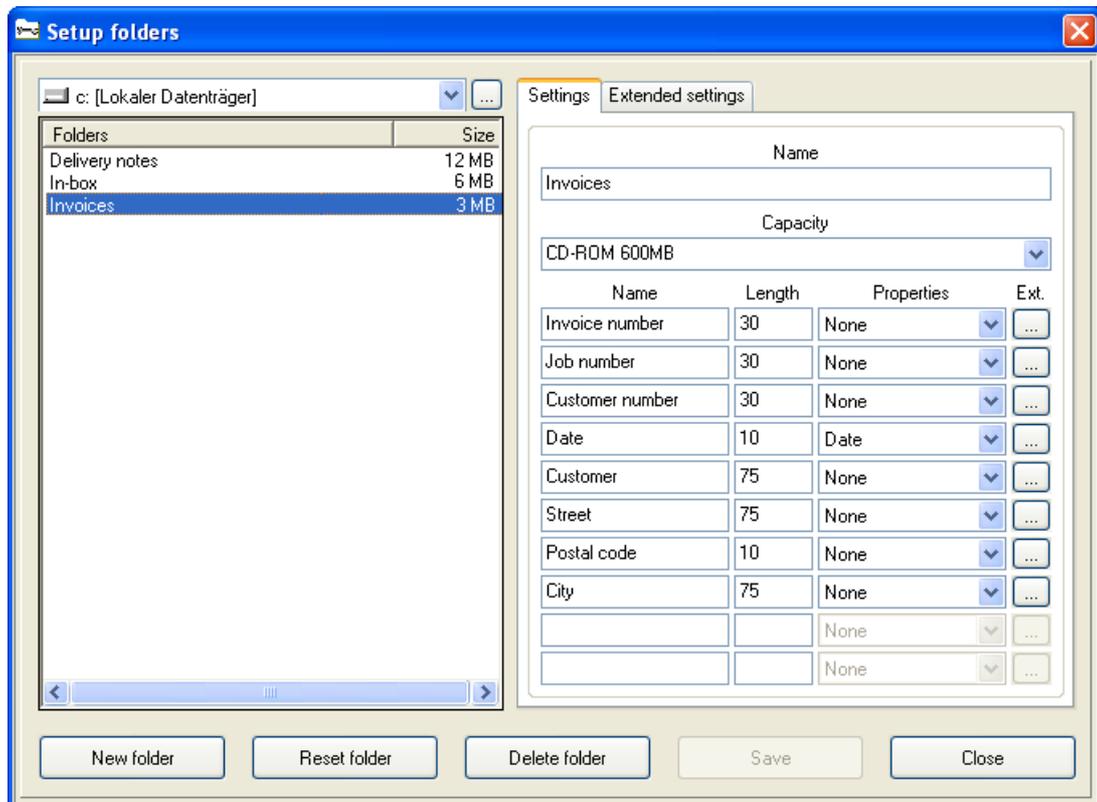
## Overview

All documents either scanned or imported into ScanFile will be held in ScanFile Folders. Folders not only hold the images, but also the indexing information and annotations associated with the images. If using the optional OCR module, the OCR full text tables are also held in the folder.

Folders can be created on any rewriteable media available to the PC as a drive reference. This includes network drives. It is always a good idea to have separate drives for storing folders and for programs. When creating a folder, you can give it a name of up to 32 characters, and specify up to ten fields with a maximum length of 255 characters per field. Field functions can be applied to these fields providing rapid automatic indexing during scanning or post-indexing.

## Create Folder

To create a folder, select **Setup Folders** from the **File** menu, and the Folder configuration will be displayed.



From the **Setup folders** screen, a folder can be created or modified. First of all, you must choose which drive or UNC path the folder is to be created in,

and you can then give the folder a name. You can also specify a capacity for the folder. In this example, it has been set for 600Mb for a CD.

Once this has been reached, no further scanning into the folder will be allowed, and you will be prompted to archive the folder to CD's or DVD. A user-defined capacity can be defined in megabytes, as well as options for various other media types. An unlimited option is also available for network Drive or RAID arrays.

The fields for the folder can then be defined. A folder can have up to 10 fields, with a maximum length of 255 characters, and **Field properties** and **Extended Field properties** can be applied to them. The field names, lengths and functions can be modified at any time without any loss of existing data.

## Field Properties

Each field can be set with a property value, depending upon the entry requirements for that field. The available properties are listed below.

### ***None***

No auto indexing or field formatting property has been applied.

### ***Duplicating***

An entry typed into the field will be kept and passed on to all subsequent records created until the entry is amended.

### ***Counting***

The field content is automatically incremented by one (digit or character). The " " option will left fill the field with blanks, the "0" will left fill with 0's.

### ***Date***

The system date will be entered into the field automatically. Please note that the date format will be taken from the operating system Short Date Format.

## ***Long Date***

The system date will be entered into the field automatically. This is taken from the system Long Date Format.

## ***Barcode***

A barcode will be read from the scanned document and entered into the field. The type of barcode must be set from the ***options*** menu.

## ***Checksums***

These options will check entries for errors via the use of check digits included in the value being entered.

## ***Thesaurus***

A predefined list of words and their associated synonyms can be applied to a field. If the synonym is typed in when indexing, the word will be shown.

## ***External List***

The field property ***External List*** allows you to connect ScanFile index fields with fields in an index file. Later on you will be able to fast index your documents with index data from this file.

From the ***Field property*** combo box, select ***External list***, and then select the data file that holds the index information. Then a window is displayed, where you have to enter the number of fields, field separator, field delimiter and the text mode. Click on ***Read line*** to read the first line of the file. The index fields from the file will be displayed on the left, and the fields from the folder can be matched to these. It is very important that the settings are correctly set. Once the field assignment has been set up, click on ***OK*** and the settings are saved.

*The folder field that is set to ***External List*** will be the connect field for this functionality.*

If you open a folder, the connect field will be equipped with a list containing data from the index file. If you start to enter characters into the index field, the list will appear below the field. Additionally the function tries to complete your entry with matching index data from the list.

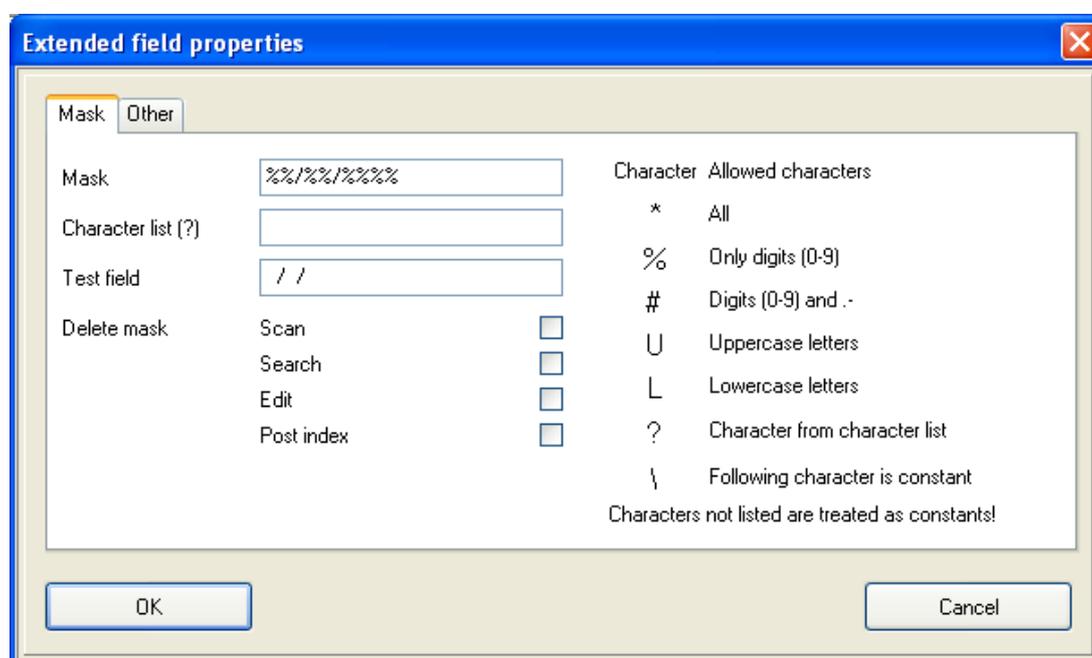
You can either select the new index with a double click on the list item or confirm the data in the index field with the return key. This will automatically

fill all connected folder index fields with index information from the index file. The list will disappear and the focus will be set on the next field.

*If one of the fields in the index file contains no value (""), existing index information in the connected index field will remain. If one of the fields in the index file contains a blank (" "), existing index information will be deleted.*

## Extended Field Properties

Extended properties can also be applied to each field, which can dictate what is allowed to be entered into a particular field. These properties are accessible by selecting the button **Ext.** on the extreme right of the field to which you wish to apply them.



### ***Input Mask***

To set an input mask, type in the type of character you wish to be typed in for each of the field character positions in the **Mask** box. The character types are listed. As can be seen in the example above, entering dashes and slashes within the mask will force those characters to be in the field. When typing into a field, the cursor will automatically jump over these characters. You can test the format of the input mask within the **Test field** box.

## Duplicate Index Action

The **Duplicate Index Action** list offers options that will determine what action should be taken if the same index information as an existing record is entered. The available options are:

| Action              | Description  |
|---------------------|--|
| None                | <b>Duplicate Index Action</b> is disabled  |
| Append              | The document/pages will be appended to the existing record   |
| Append with prompt  | The user will be prompted whether to append the document/pages to an existing record.  |
| Reject              | The index information will be rejected   |
| Prepend             | The document/pages will be inserted at the beginning of the existing record  |
| Prepend with prompt | The user will be prompted whether to insert the document/pages at the beginning of the existing record.  |
| Copy index          | This option is the same as the field property <b>Duplicate Index Action</b> . If you use the <b>Copy Index</b> property in the <i>Extended Field Properties</i> you are able to use another field property like Barcode for the index field. |

## Date Validation

Validation of a user entered date can be performed by selecting the **Check if Valid Date** option. This will ensure that incorrect dates are not accepted. In addition, you can set the format in which the date has to be entered by the user by selecting the **New Date Format** option, and entering the required format in the field provided. Some Examples:

| Date       | Format     |
|------------|------------|
| 23.06.03   | DD.MM.YY   |
| 2003-06-23 | YYYY-MM-DD |
| 06/23/2003 | MM/DD/YYYY |

## Mandatory Field

If this option is selected, an entry must be made into the field when indexing.

## ***Field Must be Full***

This option, when selected, will force the user to enter index information in the field, to the full length of the field. For example, if the field length is set to 10, then 10 characters must be entered by the user into the field.

## ***Right Align***

When entering numeric values, the contents of the field can be automatically right aligned with leading 0's or blanks by selecting the appropriate option.

# **Advanced Settings**

## ***Job Separation Sheet***

With the optional Forms Recognition enabled, ScanFile can use job separation sheets during batch scanning. This enables several files to be placed in the scanner feeder at the same time with the job separation sheets placed between them. The files will be automatically divided and records created in the ScanFile folder.

From the drop down ***Job Separation Sheet*** list, you can select which separation sheet is to be used when batch scanning documents within the Folder.

Please see the ***Job Separation Sheets*** chapter for a full description on configuring the separation sheets.

## ***Import Compression Format***

An optional feature of ScanFile is support for the LuraDocument compression format. This offers far greater levels of image compression without any significant loss of quality, allowing you to store many more documents per megabyte than standard compression formats.

Using this option in ***Setup Folders***, you can set the default image compression format to LuraDocument or to TIFF G4/JPEG format.

Please see the chapter on ***LuraDocument*** for more details.

## ***Duplicate Index Action***

This option ***Execute after Zone OCR reading*** allows you to assign whether the duplicate index action will be executed after a zone OCR.

## ***Index information***

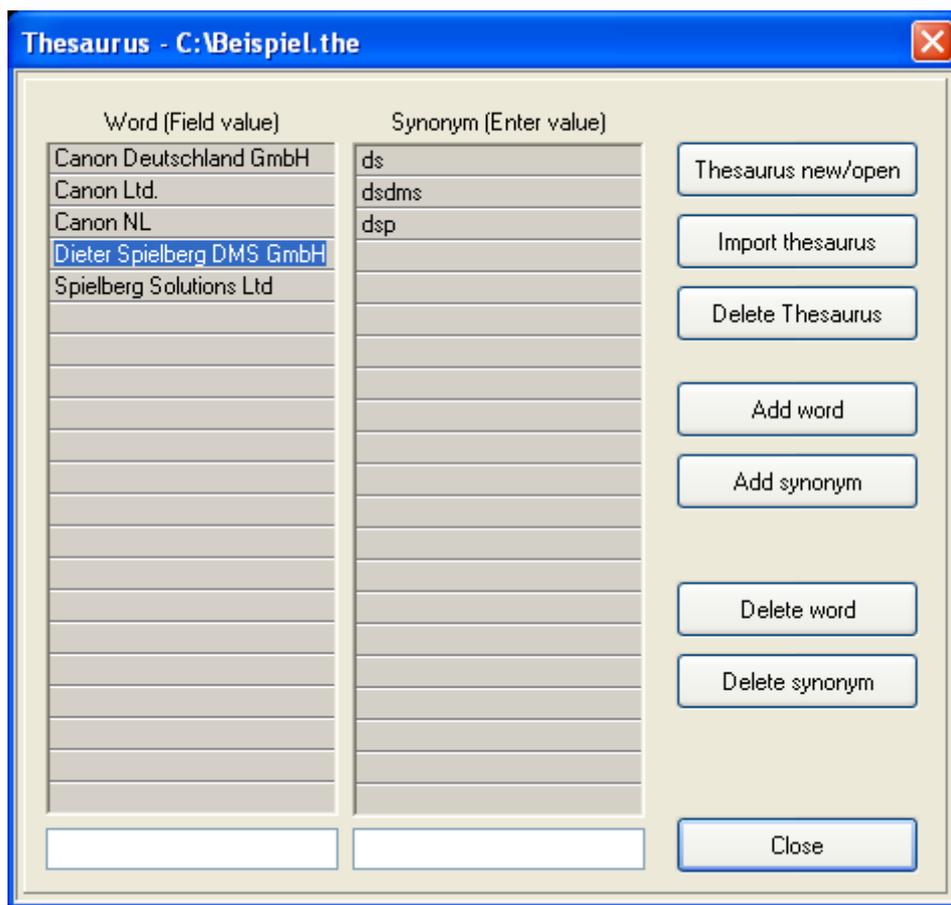
With the option ***Clear fields*** the contents in the index fields within the toolbox will be deleted by changing the category in the folders toolbox.

## ***Document Retention Recording***

Document Retention control is a setting that enables you to perform an action on the contents of a folder after an allocated amount of time. This is useful, for instance, if you want to clear a backlog of documents from a folder that are no longer needed, to save space.

# Thesaurus

The Thesaurus field property can be used to cut out repetitive indexing, and to ensure that index data such as names are typed correctly. A list of words can be defined, and multiple synonyms - or short codes - can be set for each word. For example the short code 'dsp' can be applied to 'Dieter Spielberg DMS GmbH', and when indexing, if 'dsp' is typed in, it will be replaced with 'Dieter Spielberg DMS GmbH '.



To create or edit a Thesaurus list, from the **Options** menu, choose **Edit Thesaurus**. On the displayed screen, choose **Thesaurus New/Open** to open an existing Thesaurus, or to create a new one. The Thesaurus files are given the extension '.THE', so are easily identifiable.

The words are displayed in the left column, with their associated synonyms in the right column. Only the synonyms for the selected word are displayed.

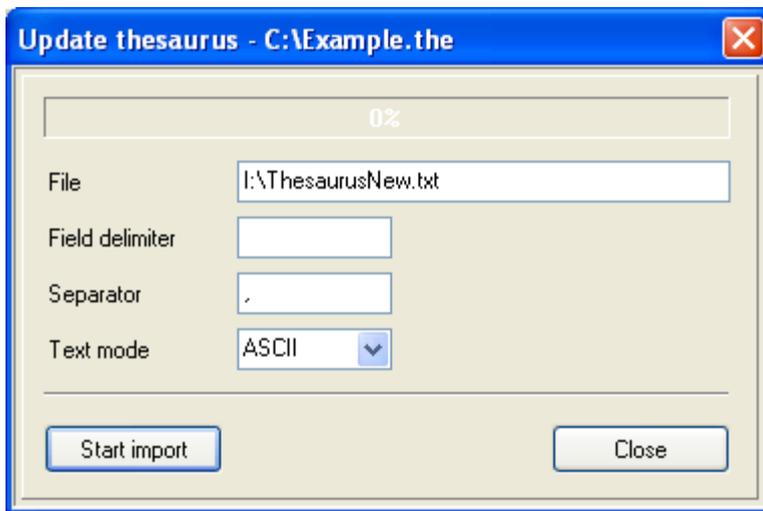
To add a word, choose **Add Word** and then type the word. To add a synonym for a word, select the word then choose **Add Synonym**, and then type the synonym. When finished, choose **Close** and the changes will be automatically saved.

*The same Thesaurus can be applied to as many folders as you wish. They are not specific to a folder.*

## Thesaurus Import

A new button was added to the Thesaurus window: **Import Thesaurus**. This function allows you to automatically fill or extend a Thesaurus file.

After clicking on **Import Thesaurus**, you are asked to select a file containing update information. Then following window is displayed:



Enter field separator, field delimiter and text mode and click on **Start Import**. The file will be imported. The first field of a line will be considered to be a word, all following fields will be interpreted as synonyms belonging to the word.

If a word is not found in a ScanFile Thesaurus, it will be created. All synonyms belonging to this word will be added, as long as they are not already in use. Synonyms have to be unique, so double entries are not allowed.

After a successful import you can return to the Thesaurus window by clicking on **Close**. If you opened the Thesaurus from an open folder, the new entries will be immediately at your disposal.

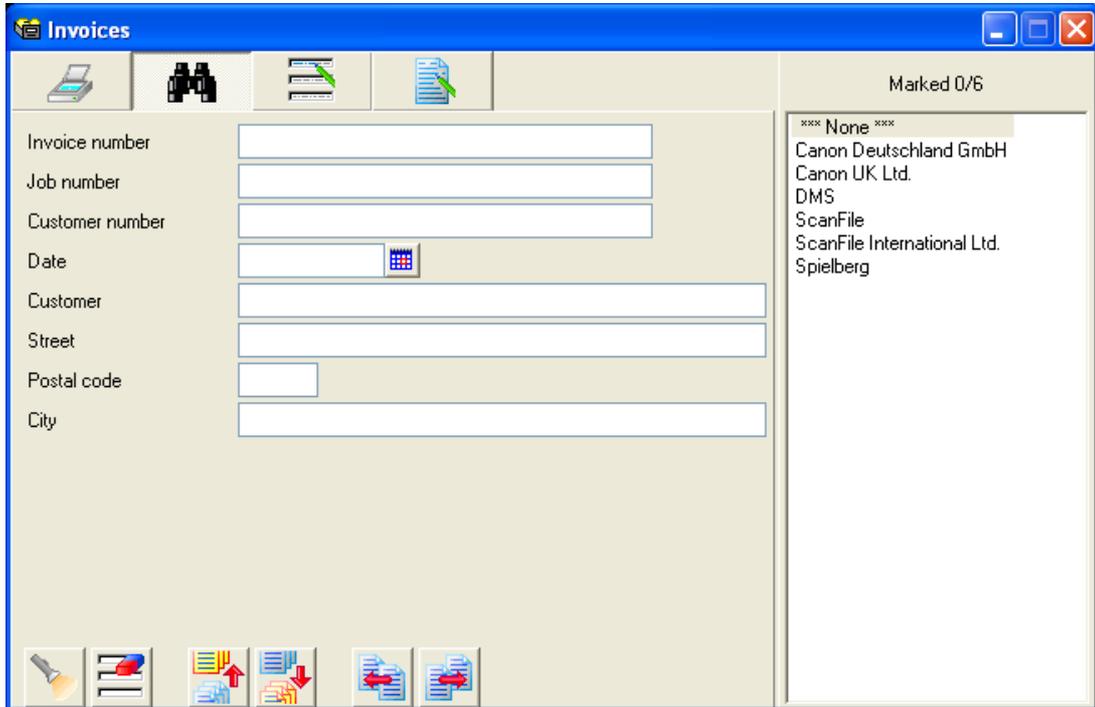
## Keywords

A predefined list of keywords can be created and assigned to a folder. This is an extra level of indexing, and allows multiple keywords to be attached to a particular document. To attach a keyword list to a folder, click on the **Keyword List** button in the **Setup Folders** dialogue, and then select the list you wish to apply. All keyword lists have the extension '.KEY'.

To create a keyword list, or to edit an existing one, choose **Edit keyword lists** from the **Options** menu.



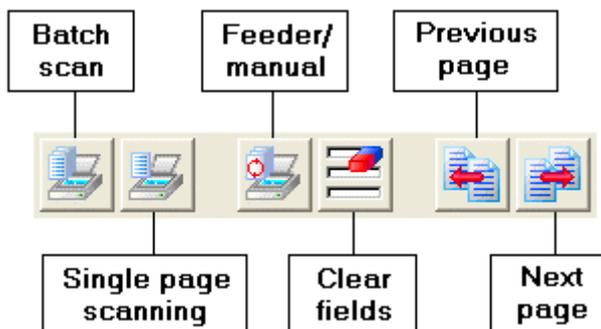
Whenever a folder is open the folder toolbox will be available, allowing you to access the majority of functions that need to be carried out within a folder such as scanning, indexing and editing and searching.



The structure of the folders toolbox depends on the folders setup and may vary from the picture above.

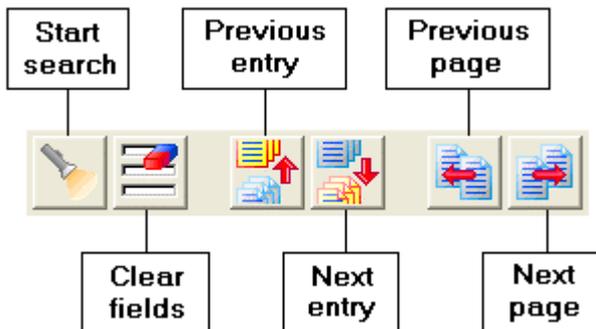
## ***Toolbox – Scan***

The following tools will be available if the **Scan** option is selected in the folder toolbox. These allow you to scan single or multi-page files, select manual or auto feed, and to browse through the current file.



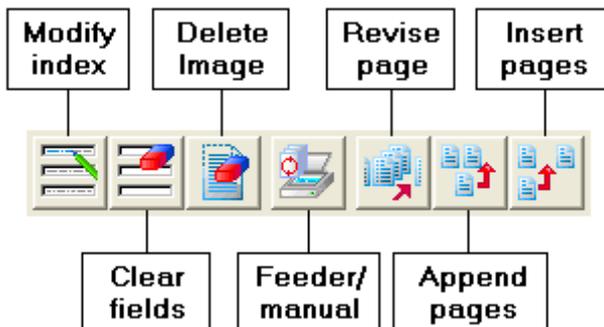
## ***Toolbox – Search***

This selection allows you to specify the required search criteria for documents, and perform a search. This will result in a list of the files found being displayed.



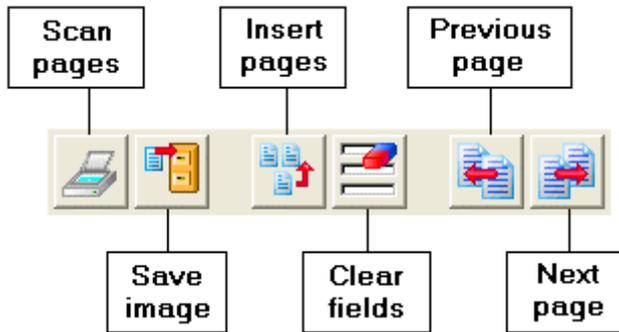
## ***Toolbox – Edit***

From this the indexing information for a document can be changed. You can also amend the document itself by inserting, appending, revising and deleting pages.



## ***Toolbox – Postindex***

Post-indexing allows you to scan documents that are to be indexed at a later date. The images scanned are stored in a separate area of the folder, and are not divided into files. When going through the post-index pool, the images can be separated into files by using the available tools. They can also be appended to existing files.



## Keyword Display

If a keyword list has been assigned to a folder various options as to how and whether the keywords are displayed are available.

In the **Keywords Search Mode** of the **General Settings** screen, the keyword list preferences can be set.

You can choose not to display the keyword list at all by selecting **Hide Keyword list**. The **Display keywords as Text** option will display the keywords in a column format, but if this is not selected, the keywords will be displayed in a cell format.

You can also choose whether, when doing a multiple keyword search, the records displayed will show records that have keyword 1 **AND** keyword 2, or that have keyword 1 **OR** keyword 2.

*To select multiple keywords when either indexing or searching, hold down the **CTRL** key when clicking on the words you wish to select.*

## Document Retention Recording

Document Retention control is a setting that enables you to perform an action on the contents of a folder after an allocated amount of time. This is useful, for instance, if you want to clear a backlog of documents from a folder that are no longer needed, to save space.

*This action can only be performed on folders created in version 6.0.0 or later of ScanFile.*

### Setup

Once a folder has been setup to activate the recording of the Document retention information you must select Document retention from the Options

menu and click on the **Activate** checkbox. You are then required to select a time you wish to start recording the retention information for that record, here you have four options:

| Setting             | Description   |
|---------------------|---|
| Document Open Date  | Set by the user                                     |
| Document Close Date | Set by the user                                     |
| Last Addition Date  | Set pages were last added to the Document.          |
| Last Retrieval Date | Recorded from when the Document was last retrieved. |

Once you have selected the time at which the Retention Recording will start you must select how long the data will be held for, this is done by monthly periods.

Finally you must select what action you wish to be performed once the Retention Time has expired, here you have a choice to export, destroy or move the documents.

# Folders Summary

Folders are the storage location for all documents held in a ScanFile system. Folder can also contain the index data associated with those documents.

## ***Folder Specification***

|              |                        |
|--------------|------------------------|
| Folder Name  | 32 Characters          |
| Fields       | 10 Maximum             |
| Field Name   | 32 Characters          |
| Field Length | 255 Characters Maximum |
| Keyword List | 1 per Folder           |
| Thesaurus    | 1 per Field            |

## ***Extended Settings***

|                             |   |
|-----------------------------|---|
| Compression Format          | TIFF/JPEG or LuraDocument   |
| Job Separation Sheet        | None/Job Separation Sheet/Named Sheet   |
| Duplicate Index Action      | Sets the action for duplicate index information                                       |
| Clear Fields                | Clears the index information within the folders<br>Toolbox when changing the category |
| Retention Control Scheduler | Adds a folder to the Document Retention Scheduler                                     |

## ***Field Properties***

|              |  |
|--------------|--|
| None         | No Property                                      |
| Duplicating  | Field retains previously entered value           |
| Counting " " | Puts leading blanks in front of numeric values   |
| Counting "0" | Puts leading 0's in front of numeric values      |
| Date         | Current Date                                     |
| Long Date    | Current date in format eg. '07 October 2003'     |
| Barcode      | Accept barcode value while scanning              |
| Thesaurus    | Assign Thesaurus to field                        |
| Copy Index   | Duplicates index information of existing records |
| Mod 2        | Customer checksum                                |
| Mod 10.1     | Customer checksum                                |
| Mod 11.1     | Customer checksum                                |
| Mod 11.2     | Customer checksum                                |
| Verify 11    | Customer checksum                                |
| ISBN         | Customer checksum                                |

External List Reads index information from an external file for fast indexing

### ***Extended Properties***

|                  |   |
|------------------|---|
| Mask             | Only accept input in pre-defined format         |
| Duplicate Index  | Allow/Not allow Duplicate index                 |
| Check Valid Date | Checks entry for valid date & specified format  |
| Mandatory Field  | Field must contain data                         |
| Must be Full     | Field must contain data to maximum field length |
| Right Align 0's  | Sets leading 0's in front of numeric values     |
| Right Align " "s | Sets leading blanks in front of numeric values  |



# ***Editing Documents***

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# Editing Documents

There are several options that allow you to change a document after it has been scanned. These are:

- Append Pages
- Insert Pages
- Delete Pages
- Revise Pages
- Split File
- Change the Page Order
- Save Rotation

The first four options are available in the Folder Toolbox from the **Edit** option.

## ***Append Pages***

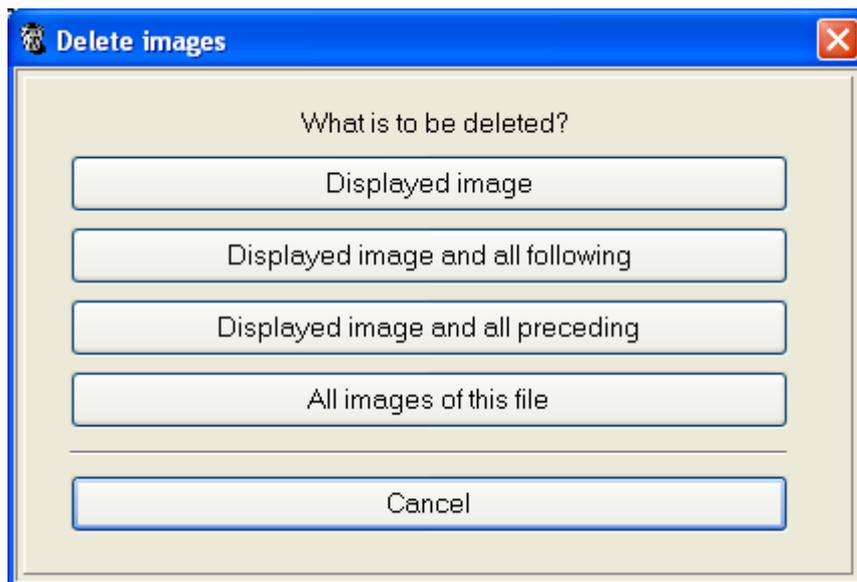
Once you have selected the file you want to append to on the Hitlist, choose the **Edit** option in the Folder Toolbox, and press the append icon. The pages to be appended will then be scanned. After all the pages have been scanned, you will be prompted to save the pages, continue scanning, or to abandon the append

## ***Inserting Pages***

To insert pages into an existing file, select the file on the Hitlist, then go to the page that you want to insert pages before. Click on the Insert pages icon in the **Edit** option of the Folder Toolbox. Once the feeder is empty, you will be prompted to save or discard the pages just scanned.

## ***Delete Pages***

There are several choices when deleting pages from a document. First of all, display the page at which you wish to start deleting, and then select the **Delete** icon from the Folders Toolbox. You will then be prompted on what you want to delete. Select the appropriate option and the file will be updated.



## ***Revise Pages***

An original document can be revised by clicking on the ***Revise Pages*** button in the Folder toolbox Edit menu. This will scan in an amended copy of the document and allow you to browse through the revised and original pages.

## ***Split File***

This option enables you to break apart a single file in to two files with identical index information. To do this, select the file you wish to break apart from the Hitlist, and then display the page of the file that you wish to become the first page of the second file. Select ***Split File*** from the ***Edit*** menu. After confirming that you wish to proceed, a second file will be created. If required, you can then edit the index information of the files to reflect the changes.

## ***Change Page Order***

Once a document has been scanned, you may find that you wish to change the position of a page within the file. This can be achieved in one of two ways.

### **Image Display Menu**

While displaying the page of the file that you wish to move, pressing the right mouse button in the image display window will show the right click menu.

By choosing ***Change Image Position*** you will then be prompted to enter the number of the page you wish to move the currently displayed page to.

## FastPics Drag & Drop

Within the FastPics window, by holding down the left mouse button on the page of the document you wish to move, and then dragging that page to the position within the file you wish to move the page to, the page will be moved and the file reordered.

## Save Rotation

The orientation that a scanned image will be displayed can be set and saved so that it will always be displayed in the chosen orientation.

To do this, set the currently displayed image to the rotation you wish to save and from the **View** menu, select **Save rotation** for. You can then choose to set the rotation for the displayed page, all pages of the record, or all selected records.

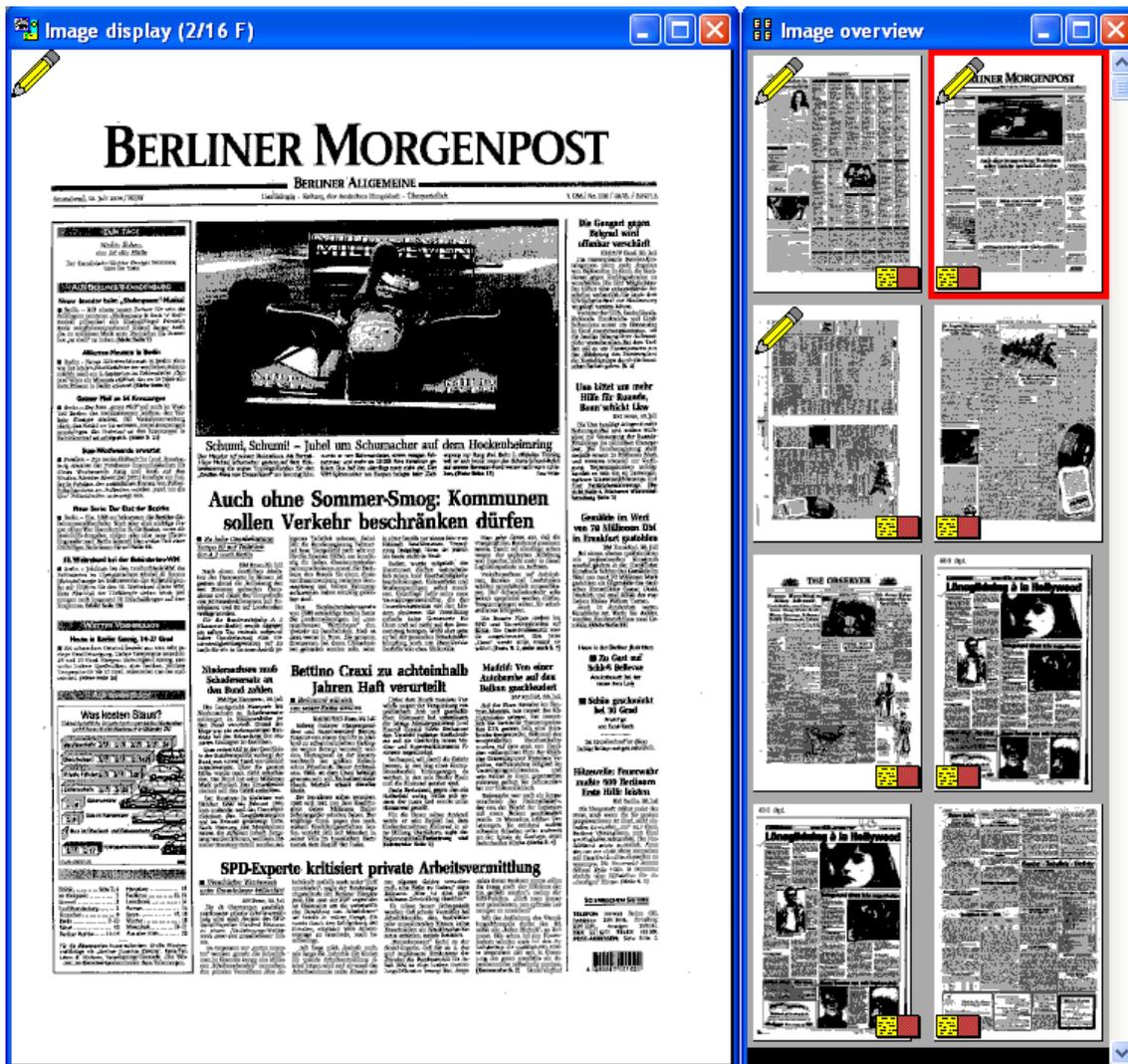
*The image rotation setting is saved in the Folder database, and does not affect the original scanned image.*

# Annotations

These can be used to mark or highlight part of a page that is of particular interest. The annotations are specific to the page on which they are created. Different annotations can be added to different pages within the same document. The annotation types are:

- Text annotation
- Line
- Highlight
- White-out Area
- Black-Out Area

If a file has annotations attached to pages, this will be signified by a pencil symbol in the top-left corner of the image display window. This will also be shown in the FastPics.



Please note: Annotations cannot be applied to native format documents.

## Hidden Records

A user within a default security level group of **Trustee** or above has the option of hiding records within a folder. Hidden records will not be shown on the Hitlist to users within the **View** security level group.

To hide a record, highlight the record you wish to hide on the Hitlist, and then press the **Hide Record** tool, or select **Hide Record** from the **Options** menu. If a record has been marked as hidden to View level user groups., an X will be shown in the Notes column of the Hitlist against the record. To unhide a record, select the record on the Hitlist, and select Hide Record.



# *Libraries*

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# Overview

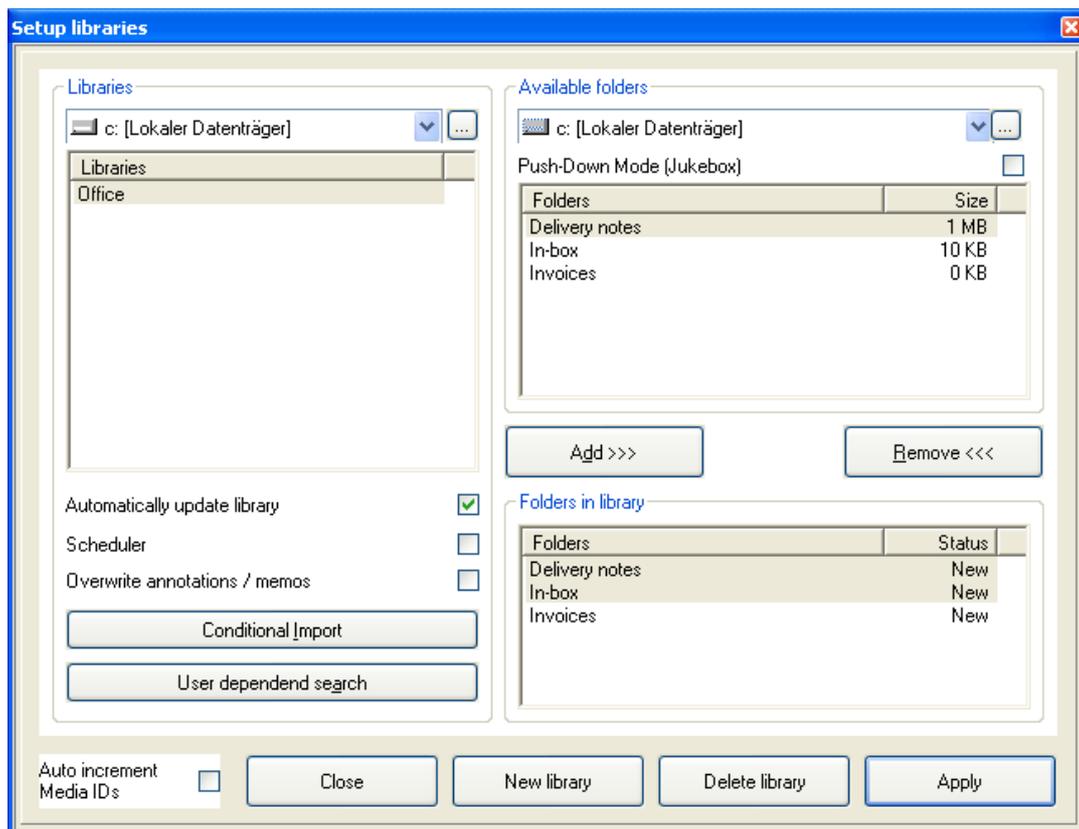
The Libraries feature is a purchasable option of ScanFile.

A library is a collection of the indexing information from ScanFile folders. Libraries allow you to search across all the folders that have been added to a library.

Due to the construction of a ScanFile library, it is possible to have folders with completely different field structures within the same library. However, to ensure that you find the documents you want, you would have to make sure that a name field, or customer number field, for example, is always in the same position within the folder, since the library search is based on index field positions rather than index field names.

## Create / Edit Libraries

Selecting the **Setup Libraries** option from the **Libraries** menu will display following screen:



A list of the libraries already created is shown on the left side of the dialogue. To create a new library, click on the **New Library** button, and then type in the

name you wish to give the library. You can then choose which folders you wish to add to the library.

First, select the drive reference the folder(s) is on, and then highlight the folder name in the top list. To add that folder to the library, click on the **Add** button.

Prior to pressing the **Apply** button to add the folders to the library, you can choose to select the **Automatically Update Library** option. With this option selected, every time a library is opened, the folders imported into the library will be checked for updates. If a folder has been updated, the changes will automatically be carried over to the library.

The **Scheduler** option is used with the ScanFile Remote Services, which is described in the chapter **Remote Services**.

Once you have added all the folders to the library, the library will be created by clicking on the **Apply** button, which will show a progress dialogue while importing the index information into the library.

Please note that each drive a folder resides on will be given a media ID, so that ScanFile can identify the correct drive for that folder. In the case of CDs, each disk will be given an ID. The media IDs can be set automatically, by selecting **Auto increment Media IDs** on the **Setup Libraries** dialogue, or can be entered manually. When entering the Media ID's manually, an alphanumeric reference can be given.

## **Conditional Import**

**Conditional Library Import** is a feature that allows you to limit and specify which documents from a folder you wish to import into a Library. This is useful especially if there is information in a folder that you do not want in a specific Library.

To setup a **Conditional Import**, click on the button of the same name on the **Library Setup** window and the **Conditional Import** window will be displayed. Here you have three options; **Field**, **Condition** and **Value**.

Under **Field** you must select which field is to be used as the conditional field from the fields available in any of the selected folders. Secondly you must select the **Condition** to be applied; here you are given a number of options:

| Option  | Description  |
|---------|--|
| Greater | This is used usually for numerical or date fields, should a number be entered and any numbers in that field be greater, the records will import. |

|                  |    |  |
|------------------|----|--|
| Smaller          |    | This is used usually for numerical or date fields, should a number be entered and any numbers in that field be smaller, the records will import.   |
| Equals           |    | This can be used for numeric or alphabetic text, should any record match exactly what is entered in the value box then it will be imported.  |
| Not Equal        |    | This can be used for numeric or alphabetic text, should any record not match exactly what is entered in the value box then it will be imported   |
| Greater<br>Equal | or | This will typically be used for numeric but can also be used for alphabetic text. Should any value entered be Greater than or Equal to the number entered then it will be imported.                            |
| Smaller<br>Equal | or | This will typically be used for numeric but can also be used for alphabetic text. Should any value entered be Smaller than or Equal to the number entered then it will be imported.                            |
| Like             |    | This option is used in conjunction with wildcards. If you type the value as part of a word but use a wildcard for the rest of it should import all matches E.g. Scan* will import Scan, Scanner, ScanFile etc. |

Finally you must enter the value that the condition must adhere to whether it be numeric or alphabetic text.

The **Conditional Import** can be setup to perform the checks for import on up to two fields at the same time. With the option **AND** or **OR** you can determine the records that are to be imported by the second field should you wish. **AND** selected both conditions have to be valid, **OR** connected only either one of the conditions have to be valid.

## ***User Dependent Search***

If you select the **Setup Libraries** option from the **Libraries** menu and click on the button **User depended search**, a window will be displayed, allowing you to select an index field that is used for access verification. This field has to contain the name of the user to connect the logged in user to the document when a search within the library is performed using WebServer.

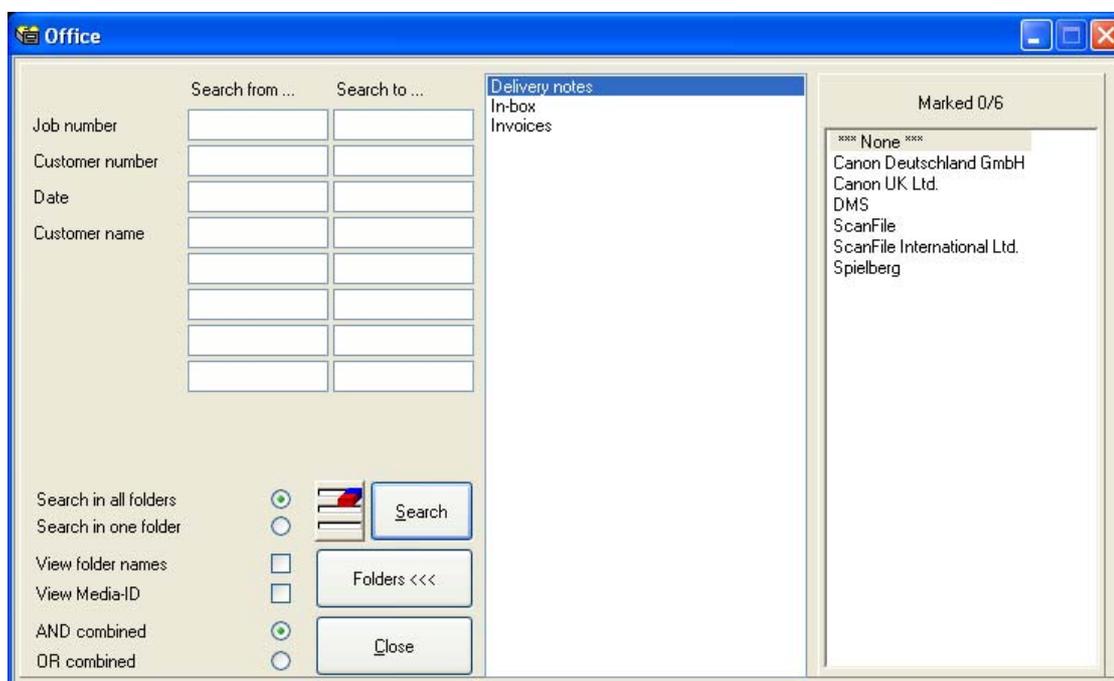
As an example, if you have a library that contains Customer Invoices, and you wish to make these available to your customers using WebServer, you can create a ScanFile user for each customer, with the user name being the Customer number. When creating the Invoices Library, you can then set the

library filter to the field number that corresponds to the Customer Number field. When a customer logs in to the WebServer system using his customer number, it is ensured that he can only access the invoices belonging to him.

*Please note that if a user is a member of the Admin user group, the filter will not apply, and that user will be able to view all records within the library.*

## Search in Libraries

Firstly, you must open a library you wish to search in. To do this, select **Open Library** from the **Libraries** menu, and then choose the library you wish to open on the selected search drive. The Library search screen will then be displayed:



The number of search fields depends on the field structure of the imported folders. The folder with the largest amount of index fields limits the amount of search fields.

Always the field names of the selected folder will be shown. If a selected folder has less index fields than others, the remaining search fields are unnamed. But named or not, any of the fields can be used for searching, irrespective of the number of fields a folder has, as other folders may have more fields.

The keyword list of a library is a summary of all imported folder keyword lists, and can be used to search for documents in the same way as for folders.

Selecting **Options -> General Settings -> Hide Keyword List** will turn off displaying of keywords.

By pressing the **Folders** button, you can display or hide the names of the folders in the library. You can also highlight a folder name, and choose to just search within that folder.

To search, specify the criteria and then press the **Search** button. A Hitlist will then be displayed showing the results of the search.

Unlike a folder, when the Hitlist is displayed and the Image Display window opened, the first page from the first file will not be shown, because the folder, in which this document is stored, may not be on-line. To show the contents of the document, you must double-click on the relevant document on the Hitlist.

*If the document cannot be accessed directly, ScanFile will prompt you to enter a medium with a specific **Media ID** the document is stored on. In this case the search drive has to be listed in the search drive list of ScanFile.*

The headings in the Hitlist show the field names of the selected archives. Since the possibility exists that folders with different fields are stored in the same library the headings of the columns changes, in order to indicate the selected document.

# *General Scanning*

---

## Overview

New documents can be scanned into ScanFile via either the **Scan** mode of the folder toolbox, or by the **Post-index** mode.

How the indexing information relating to the document will be entered is very much dependent upon the type of document being scanned, and how the folder was set up, and what properties have been set for the folder fields. The most basic method is to enter the indexing information into the fields in the folder toolbox, select the keywords required (if applicable) and then start scanning. If the documents have barcodes, if a field has been set for auto increment, or if the documents are to be OCR'd, the index information will be created automatically after the document has been scanned.

## Single & Batch Scan

To add documents to your folder by scanning, choose the **Scan** option from the folder toolbox, select either the **Batch Scan** or the **Single Page Scan** button to start scanning.

**Batch Scan** will create will create a multi-page document from the pages being fed through the scanner. Once the feeder is empty, you will be prompted to save the images or to continue scanning into the same file. **Single Page Scan** will create a new file for each page scanned.

In both modes the Canon DR-3020, DR-5020 and DR5080c can recognise and act upon control sheets, allowing you to change between single & double sided scanning, text & photo mode, and also for file separation whilst using batch scan. The Job Separation Sheets in ScanFile allow the automatic file separation independently from the scanner model. This option needs the license for Forms Recognition.

For scanners directly controlled from ScanFile, scanning can be stopped at any time by pressing the **STOP** button, which will appear in place of the Scan icons, while scanning is in progress.

If you wish to change any of the default parameters for the scanner prior to starting to scan, this must be done from the **Scanner Setup** screen.

## Postindex Pool

The Post-index facility lets you scan batches of documents very quickly, and then divide them into files and apply indexing information to them at a later date. Documents scanned to this 'Pool' are kept in a special work area until

they are indexed, whereupon they are added to the main index and file storage location within the folder.

To add documents to the Postindex pool, select **Post-index** from the **Folder Toolbox**, place pages into the scanner feeder, and then select the **Scan Pages** icon.

Once the documents are in the pool, they can be viewed by using the **Next page & Previous page** icons.

To create a new file, select the page that is the first page of the file, type in the indexing information for the file, and then click on the **Save Image** icon. Once you have pressed the **Save Image** icon, the next page in the Postindex pool will be displayed.

To keep adding pages to the new file, just keep on pressing the **Append page** icon for each page of the file that is displayed. When a new file needs to be created, just press the **Save Image** icon again.

The **Append page** feature of Postindex can also be used to append pages to existing files. Via the search option find the file you wish to append to, go to the Postindex pool, display the page you want to append, and then press the **Append page** icon.

*Instead of pressing the Append icon you can also press the **+** key on the keyboard to append pages. This will only work if the first field is in overwrite mode. Pressing the **-** key will bring the appended page back into the Postindex pool. Pressing **CTRL and +** will append all remaining images from the Post-Index pool. By pressing **ALT and +** all remaining pages will be imported into the folder as single page documents.*

## Function Sheets

The Canon DR-3020 and the Canon DR-5020/80c scanners support the use of two types of function control sheets. The control sheets can be used to change the paper size being scanned, as well as changing from single-sided to double-sided scanning.

Batch detection sheets are used to enable several files to be placed in the scanner feeder at the same time with the batch detection sheets placed between them. The files will be automatically divided and records created in the ScanFile folder. With each type of function sheet, you can elect to either keep or discard the function sheet (the sheet is not saved in ScanFile), and to either stop or continue scanning when the function sheet is detected.

The use of the function sheets is selected from the scanner setup.

## Job Separation Sheets

From ScanFile Release 7.3, the Forms Recognition option adds support for Job Separation Sheets while scanning, which enables several files to be placed in the scanner feeder at the same time with the job separation sheets placed between them. The files will be automatically divided into documents and stored in the ScanFile folder. Sheet templates can be assigned to a Folder within the Folder setup.

Job Separation Sheets can be assigned to a folder in the **Setup Folder** window and can be used with any scanner. Further information about working with Job Separation Sheets are given in the chapter **Job Separation Sheets**.

# *Indexing*

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## Overview

The correct indexing of documents is very important, as you have to rely on the index information to search and retrieve your documents later on. The more detailed your index information is, the better you will be able to narrow down your search results.

The following indexing options are available:

- Manual Indexing
- Automatic Indexing
- Import of index files
- OCR Indexing

The first three options are standard features that are described later on in this chapter. Please refer to the **Import** chapter to read more about the import of index information from an external file. To index documents with Zone OCR recognition, the ScanFile OCR option needs to be installed and licensed.

Several methods can be used at the same time, so that some index fields are filled manually as others are filled automatically by selected field properties or by a Zone OCR process.

## Manual Indexing

When indexing manually, the user has to type in the index information. This can be done before documents are scanned or saved to the folder from the Postindex pool. The index information of documents in the folder can be changed at any time. Enter the information into the text boxes and confirm with **Return**. ScanFile will automatically jump to the next index field and the user can continue with the index entry.

Options such as the Duplicating field property and applying a thesaurus to a field help to cut out repetitive indexing and to ensure that index data such as names are typed correctly. Please refer to chapter **Folders** to read more about these field properties.

### **Area Indexing**

With area indexing, for each field in the folder, ScanFile can zoom and display a specific portion of the image. This is particularly useful when indexing batches of similar documents that have the indexing information in the same position.

To do this, first you must ensure that the **Area/PostIndexing** feature is turned on within the **General Settings**. Then select the first document you want to index from the Hitlist, and choose the **Edit** option on the Folder toolbox.

Place the cursor in the first field, and then zoom and move the image within the image display window until the information relevant to the index field is being displayed. Type this information into the index field, and press Enter. The cursor will automatically move to the next field, and you can then zoom and move the image accordingly for the next field. Repeat this for all fields. When you press the **Enter** key in the last field, ScanFile will automatically move to the first field of the next record in the Hitlist, and display the area of the image relevant to that field.

## Automatic Indexing

ScanFile offers various functions to auto fill index fields, depending on the index field and folder settings. Which settings are available and what index contents they generate can be found in the **Folders** chapter.

## OCR Indexing

ScanFile's Zone recognition allows you to read area's of a document, and place the result of the OCR in to the folder fields. To use this function an installed and licensed ScanFile OCR feature is required. How to set up zones and/or forms is described in the **OCR & Form Recognition** chapter.

## Edit Index

To edit the index information of an existing document, select the document in question in the Hitlist and switch to the **Edit** mode in the Folder Toolbox. The index information of the selected document are displayed and can be changed. Save changes by clicking on the **Change Index** button. The index information is saved, the Hitlist is updated. Another option is using the **Return** key in the last index field to save index information. The index of the document is saved, the Hitlist will be updated, but then ScanFile will jump to the next document on the Hitlist and display first image and index information of the new document.



# *Searching and Viewing documents*

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## Overview

Searching for documents within ScanFile is a straightforward and easy task. The standard document search tools in ScanFile are comprehensive, allowing you to perform range searches with AND/OR properties on more information than just the user-defined index fields created within a folder.

## Search

The primary search screen is available from the Folder toolbox **Search** option, where the fields within the folder are presented, as well as the keywords if used. Just enter your search criteria, and pressing the **Search** button will produce a list of all the documents that matched the search criteria. At the same time, the first document in the matching list will be displayed.

| Wildcard | Description  |
|----------|--|
| *        | Denotes a string of any length (even 0)  |
| ?        | Denotes any single character   |
| [x,y,z]  | Denotes one character , x or y or z ( [list of characters] )                                 |
| [1-5]    | Denotes a single character of 1,2,3,4 or 5 (first character must be smaller than the second) |

*With wildcards, there is no distinction between uppercase and lowercase.*

### Examples:

| Wildcard | Description   |
|----------|---|
| *        | Puts all records into the Hitlist                                       |
| ?????    | Shows all records with 5 characters in the field selected               |
| 1*       | Shows all records beginning with 1, for example: 1, 11-19, 100-199 s.o. |
| M??le    | Shows records with Mable, Mowle etc                                     |

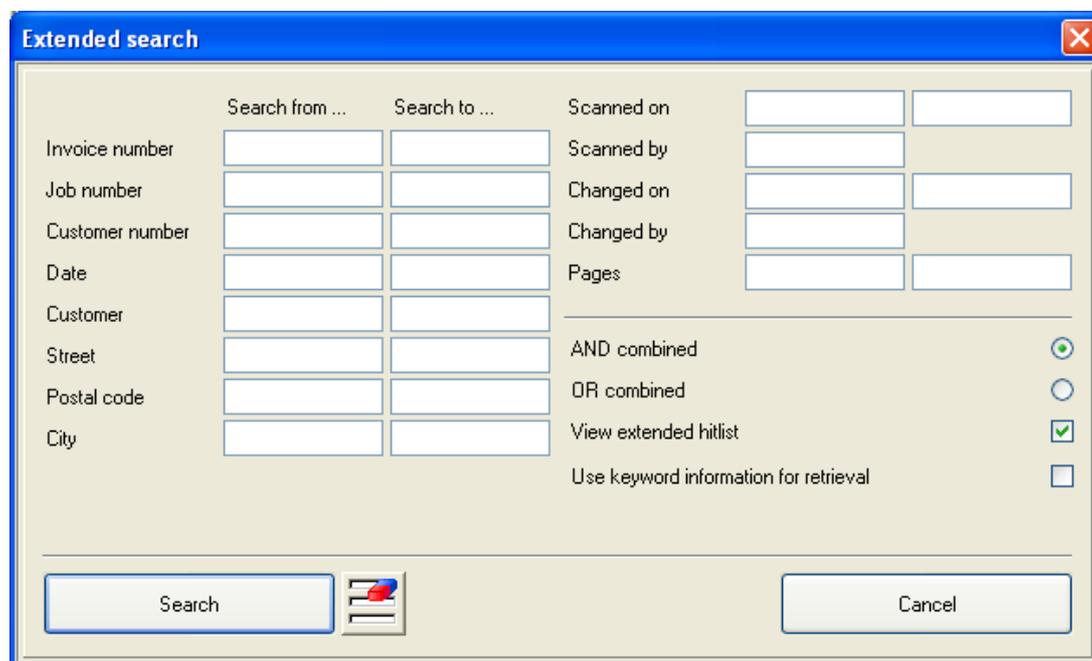
|      |  |
|------|--|
| M*le | Shows records with Mable , Mayle, Mole, Mowle, Mule, Module etc. |
|------|--|

Use of wildcards combined with other keyword fields reduces the Hitlist to a minimum and targets desired records as closely as possible. Several search criteria can be combined to narrow down the results. The search entries are logical **AND** combined, apart from keywords, which can be set to produce and **AND** or an **OR** search.

Once the search has been performed it will return a Hitlist of the results of your search. Both the Hitlist and the Image Display windows can be sized as required. The size of the display on the PC will obviously affect how these windows can be shown. The fields within the Folder Toolbox will display the indexing information and the assigned keywords for the selected record from the Hitlist. The information shown in the Folder Toolbox will change to reflect the record selected.

## Extended Search

The **Extended Search** option allows the user to find documents using the above information, as well as giving a more user-friendly display for range searches on any field in the folder.



All the user-defined folder fields can have a range search performed upon them, as well as the Scan date and Change date fields. When the search is performed, the resultant Hitlist can be displayed with or without the additional

fields, by selecting the **View extended Hitlist** option. The additions in the extended hitlist show who the document was scanned by, the date it was scanned on, the name of any user that may have changed that document and the date that it was changed on.

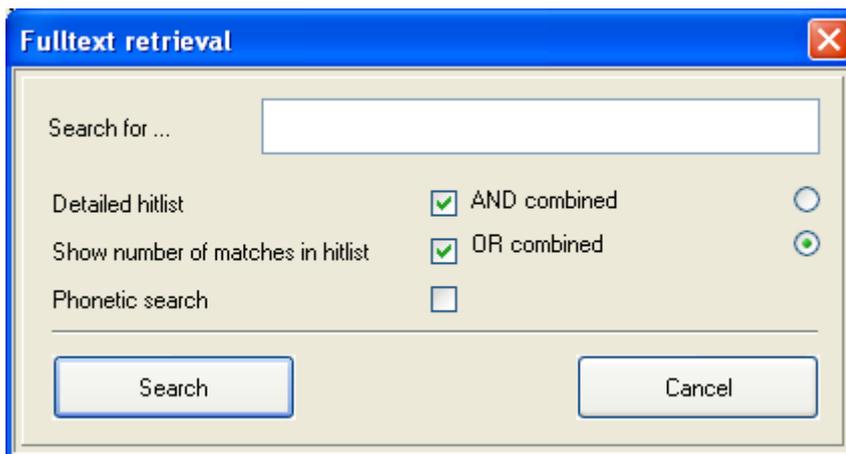
## Multiple Index Search

This feature allows you to search across selected index fields for the documents you require. To perform this type of search, select **Multiple index search** from the **Search** menu. You can then enter the search criteria and select the folder/library fields that you want to search across. Wildcard characters, such as '\*' and '?' can be used in the search criteria. Pressing the **Search** button will then display a Hitlist showing all the documents that matched the criteria used.

## Full Text Search

Selecting **Full text search** from the **Search** menu allows you to search the word list resulting from full text recognition. The search screen will appear allowing you to type in the word or words to search for. Searches can include multiple words, and can be set to an **AND** or an **OR** search on the words entered.

Selecting the page to view is exactly the same as previously, just highlight it in the Hitlist and the page will be displayed in the Image window.



| Option                 | Description  |
|------------------------|--|
| Detailed Hitlist       | This option, when selected, will show a Hitlist record for each page that contains the word or words searched for. When not selected, the Hitlist record will correspond to the file the words were found in.<br><br>Please note that a <b>Detailed Hitlist</b> can take a longer period of time to be generated due to each page having to be identified. |
| Show number of matches | With this selected, the number of times the word or words occur on the page or in the file will be displayed in the Hitlist.   |
| Phonetic Search        | With the <b>Phonetic Search</b> option words with a similar pronunciation to the searched word will be included in the search result.  |

When you select a record on the Hitlist, by single clicking on it with the mouse, the document being displayed will automatically change to show the selected file.

## Hitlist

The Hitlist, which shows the list of documents that matched the search criteria can be altered to show the information in a number of ways. The column width, and the order of the columns within the Hitlist can be amended.



| Row | Job number | Customer number | Date       | Customer name  | Pages | Note |
|-----|------------|-----------------|------------|----------------|-------|------|
| 1   | 00004229-8 |                 | 13.05.2004 | SchulzGmbH     | 1     |      |
| 2   | 00004229-8 |                 | 23.05.2004 | SchulzGmbH     | 1     |      |
| 3   | 00004229-8 |                 | 31.05.2004 | Schulz GmbH    | 1     |      |
| 4   | 00005197-2 |                 | 19.02.2004 | Holz wurm GmbH | 1     |      |
| 5   | 00005197-2 |                 | 29.02.2004 | Holz wurm GmbH | 1     |      |
| 6   | 00005197-2 |                 | 08.03.2004 | Holz wurm GmbH | 1     |      |
| 7   | 00007143-4 |                 | 15.03.2004 | Hammerhof KG   | 1     |      |
| 8   | 00007143-4 |                 | 25.03.2004 | Hammerhof KG   | 1     |      |
| 9   | 00007143-4 |                 | 02.04.2004 | Hammerhof KG   | 1     |      |
| 10  | 00008474-7 |                 | 13.01.2004 | Rübensaft KG   | 1     |      |
| 11  | 00008474-7 |                 | 23.01.2004 | Rübensaft KG   | 1     |      |

Record: 1 of 15 Selected: 0

To alter the column width, move the mouse pointer to the right edge of the column, within the column heading, and then hold the left mouse button down and drag the column edge to the required width.

To move a column, hold down the left mouse button anywhere within the column heading and then drag the column to the required position.

You can also select whether the Row Number and/or the Notes columns are displayed. This is done from the **General Settings** Options screen. If from this screen you select to save Column Settings, the changes you make will be saved, and each time you open a Hitlist, those settings will be used. They can be changed at any time, with the new settings then being saved. It is also possible to set **Alternating Row Colours** which will display the rows in alternate grey and blue lines instead of just grey.

## Hitlist menu

From the Hitlist menu, several options are available that allow you to alter the display of the Hitlist information, and to also print, export copy and send documents. The Hitlist menu is available by pressing the right mouse button anywhere within the Hitlist window. The available options are:

| Option                      | Description  |
|-----------------------------|--|
| Sort Ascending / Descending | Will sort the Hitlist by the data in the column over which the right mouse button was clicked. |
| Print Hitlist               | Prints the Hitlist record information to the default printer                                   |
| Export to file              | Exports the Hitlist record information to a named file   |
| Copy to Clipboard           | Copies the Hitlist record information to the Windows Clipboard                                 |
| Font                        | Select the font and font size the Hitlist will use.  |
| Move                        | Moves all pages from a record.   |
| Copy                        | Copies all pages from a record.  |
| Paste                       | Pastes previously copied or moved pages into the selected record.                              |
| Send to...                  | Send selected Hitlist documents to folders, users, e-mail, route, wallet and export. See below |

|                  |  |
|------------------|--|
| Move to...       | Moves the selected document into a chosen folder   |
| Summarise column | For Numeric Values: Calculates the total of the selected column  |
| Combine rows     | Either combines marked records or records with same index information. When marked the rows to be combined will adopt the index information in the row that was first selected by the mouse. |
| Delete           | Deletes selected records and documents   |
| Filter image(s)  | Filters selected records   |
| OCR              | Performs Full Text or Zone OCR on the selected records and also gives option to Copy OCR text to the clipboard.  |
| Select           | Tool to select documents   |
| Close            | Close the Hitlist menu   |

## ***Send to...***

The ***Send to*** option from the Hitlist menu allows you to send a document or selected documents to a variety of destinations, which are explained below.

| <b>Option</b>   | <b>Description</b>  |
|-----------------|---|
| ScanFile Folder | Sends selected document(s) to another ScanFile Folder.    |
| Choose Target   | Exports selected document(s) and index information.       |
| User            | Sends selected document(s) to a user's Personal Hitlist.  |
| Route           | Sends selected document(s) to a pre-defined Route.        |
| Export to file  | Exports selected document(s)                              |
| E-Mail          | Attaches selected document(s) to a new email message      |
| Wallet          | Creates a Wallet with the selected document(s).           |
| EMail Wallet    | Creates a new email and attaches the wallet to this email |

*When selecting the File or Email option, the images can be saved as PDF format documents. This is enabled within General Settings -> Send to email.*

## **Combine rows**

The **Combine Rows** option on the Hitlist menu either will combine selected records within the folder or records with the same index information. When marked the rows to be combined will adopt the index information in the row that was first selected.

*It is not possible to undo after performing this action. Please use this option with caution.*

## **OCR**

The **OCR** Option from the Hitlist menu allows you to either Full text OCR, or Zone OCR a single document, or selected documents. If you wish to perform batch OCR on all or new documents added to a folder, please use the options available from the main **OCR** menu.

| <b>Option</b>         | <b>Description</b>   |
|-----------------------|--|
| Full text recognition | Performs Full Text OCR on selected documents                                     |
| Zone recognition      | Performs Zone OCR on Page 1 of selected documents                                |
| Copy text             | Copies the OCR'd text from all pages of the document in to the Windows clipboard |

## **Select Option**

When you click on a record on the Hitlist, or use the arrow keys to scroll through the records, the current record will be shown with a dark grey background. If you wish to select multiple records, to perform a specific task, this can be done in a number of ways. The column at the extreme left of the Hitlist is used to select records.

To select a range of records, press the left mouse button in the left column of the Hitlist next to the first record to be selected, and then, while holding down the **Shift key**, click on the last record in the range. All records in the range will be highlighted in yellow.

To select specific records, while holding down the **CTRL key**, click in the left column next to each record you wish to select.

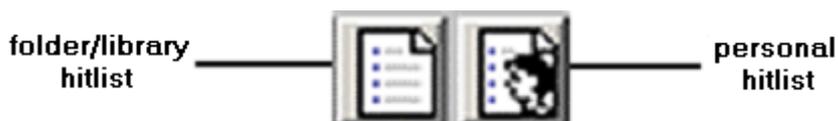
The Hitlist menu **Select** option can also be used for record selections.

| Option | Description                          |
|--------|--------------------------------------|
| All    | Selects all documents in the Hitlist |
| Toggle | Inverts selection                    |
| Remove | Deselects all documents              |

## Personal Hitlist

The Personal Hitlist allows a user to build a list of documents that they may wish to refer to on a frequent basis, without the need to keep on searching folder and/or libraries for them. The Personal Hitlist is totally independent of folders, and therefore any document from any folder may be placed in the Personal Hitlist

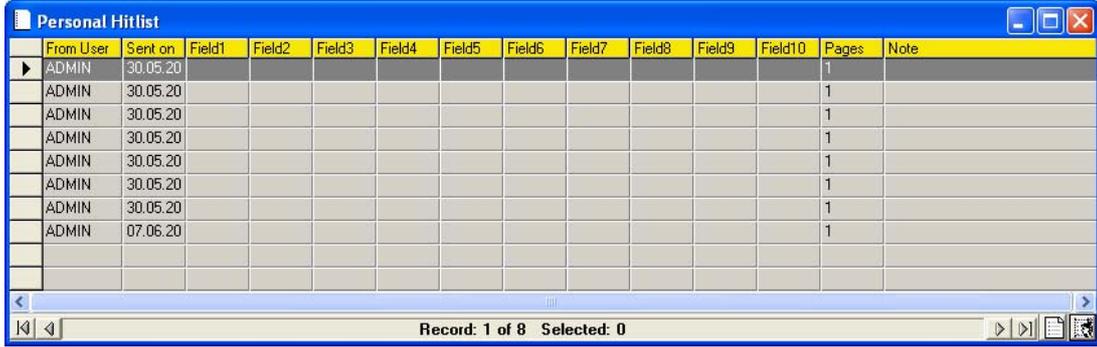
It is also possible for one user to send a document to another user's Personal Hitlist. The Personal Hitlist can be accessed in one of two ways, by the Personal Hitlist option on the **File** menu, or by clicking on the icon in the bottom right of the Hitlist, if you have a folder or library open. To revert to the folder/library Hitlist, click on the button next to the **Personal Hitlist** button in the bottom right of the Hitlist.



When you display the Personal Hitlist, the Folder toolbox will be shown, allowing you to perform searches within the Personal Hitlist.

To place a document in the Personal Hitlist, highlight the document in the standard Hitlist, hold down the left mouse button, and drag it to the **Personal Hitlist** icon. Another method is to right-click on the document and then choose **Send To User**. A list of all the users will be displayed; choose the name of the user, and then click **OK**.

From the **Send To User**, the document can be sent to another user, or to your own Personal Hitlist. When the Personal Hitlist is displayed, additional fields to the standard Hitlist are shown, which detail the name of the source folder, the name of the user who put the document into the Personal Hitlist, and the date the document was added.



|   | From User | Sent on  | Field1 | Field2 | Field3 | Field4 | Field5 | Field6 | Field7 | Field8 | Field9 | Field10 | Pages | Note |
|---|-----------|----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|-------|------|
| ▶ | ADMIN     | 30.05.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |
|   | ADMIN     | 30.05.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |
|   | ADMIN     | 30.05.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |
|   | ADMIN     | 30.05.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |
|   | ADMIN     | 30.05.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |
|   | ADMIN     | 30.05.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |
|   | ADMIN     | 30.05.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |
|   | ADMIN     | 07.06.20 |        |        |        |        |        |        |        |        |        |         | 1     |      |

Record: 1 of 8 Selected: 0

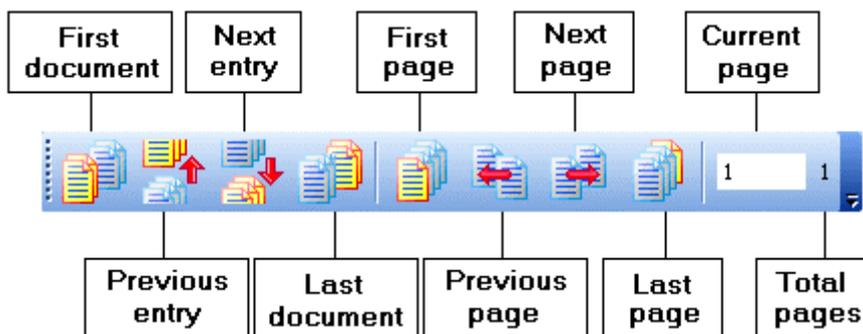
The additional fields shown on a personal Hitlist are **From Folder**, **From User** and **Sent On**. When the Personal Hitlist is displayed, the Field Name row is shown with a yellow background to distinguish it from the Standard Hitlist. The names of the folder fields are not shown, as documents may have come from different folders with different fields.

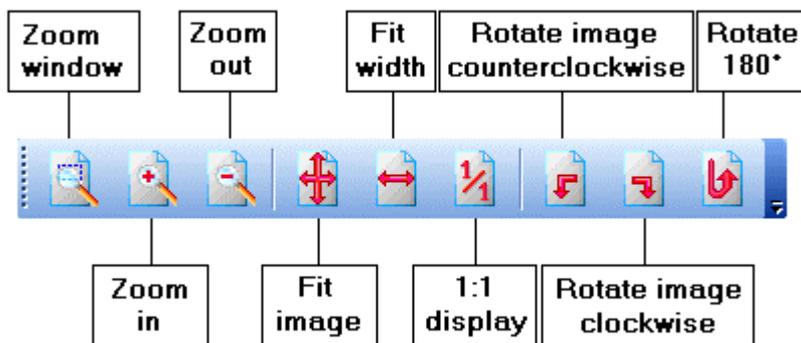
You can edit the documents within the Personal Hitlist. The changes do not have any effect to the original document in the folder. All changes are only saved in the Personal Hitlist.

Documents placed in a Personal Hitlist will remain until manually deleted, unless they are placed there by the Document Routing option, and the user selects not to keep a local copy.

## Image Display

All Documents are shown in the Image Display Window. ScanFile has a comprehensive set of tools available to change the way displayed images are shown. The images can be zoomed, rotated and also fit to the height or width of the image window. A file can be paged through by selecting the next/previous icons on the toolbar.





## Image Display Menu

Pressing the right mouse button while in the document display window will open the document display menu. This allows you to perform actions on the page currently displayed. Several options available are the same as offered on the Hitlist menu, but will only apply to the displayed page. Please note that these options only apply to scanned documents.

| Option                | Description  |
|-----------------------|--|
| Image information     | Show file information about displayed image.   |
| LuraDocument          | If the image is in Lura Document Format this will allow you to switch between the images layers. |
| Print/copy area       | Select an area on the page and print or copy to clipboard.                                       |
| Convert to...         | OCR's image and converts text to chosen file format.   |
| Create working copy   | Opens a secondary display window with the current page   |
| Fit image             | Sizes the page to fit within the display window  |
| Fit width             | Sizes the page to fit the width of the display window  |
| 1:1 display           | Maximum zoom level   |
| Change image position | Reorders the page within the document  |
| OCR                   | Perform full text or zone OCR on the page, or copy the page text to the clipboard                |

|            |   |
|------------|---|
| Move       | Moves the displayed image to the clipboard ready to paste to another record.  |
| Copy       | Copies the displayed image to the clipboard ready to paste to another record. |
| Send to... | Send page to another folder, user, export, email and wallet.                  |
| Move to... | Moves the selected document into a chosen folder                              |
| Close      | Closes the document display menu  |

## Electronic Documents

ScanFile supports the display of over 200 different electronic document file formats, such as Microsoft Office documents, Adobe PDF documents, HTML pages and graphic format files, such as AutoCAD and CorelDraw.

When viewing multi-page documents such as PDF files and PowerPoint presentations, the tools to move from page to page, or worksheet to worksheet will be displayed at the bottom of the viewing window. For documents such as Word files and text files, these can be scrolled through using the scroll bar on the right of the viewing window.

### ***Electronic Document Display Menu***

The options displayed when you right-click on an electronic document will be different to those available when viewing a black & white or colour image.

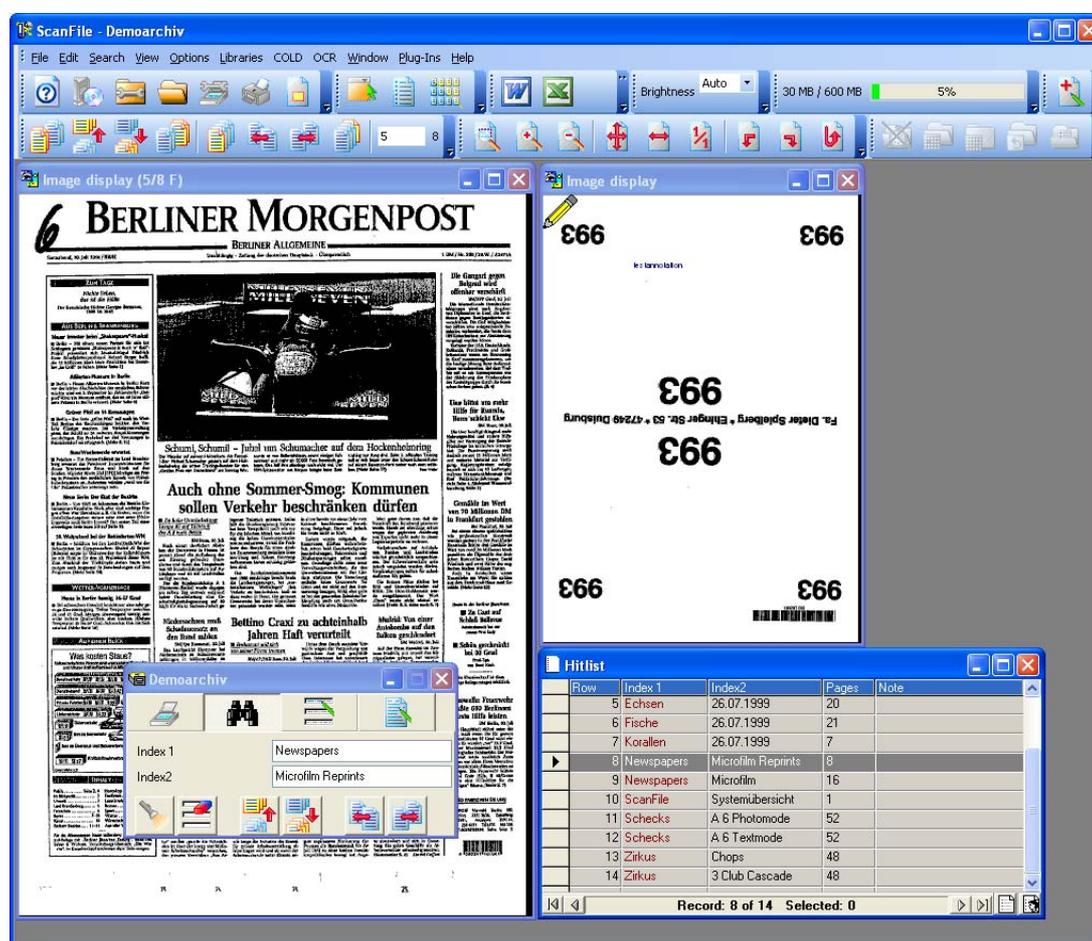
| Optionen           | Description   |
|--------------------|---|
| To the clipboard   | Copies the selection to the Windows clipboard                       |
| Print              | Prints the currently displayed document                             |
| Display            | Selects to display the document in Draft, Normal or Preview mode    |
| Options            | Settings that affect the copying, display and printing of documents |
| Launch application | Launches the documents associated application (if available)        |

# Viewing Multiple Documents

Up to three secondary image display windows can be opened in addition to the standard image display window. To open a secondary display window, right click on the image in the standard display window and choose **Create Working Copy**. This will open a secondary display window showing the image currently displayed in the standard display window.

The secondary display windows are totally independent of the standard display window, and of the folder, and do not relate to a particular file. It is not possible to page through a document from a secondary window.

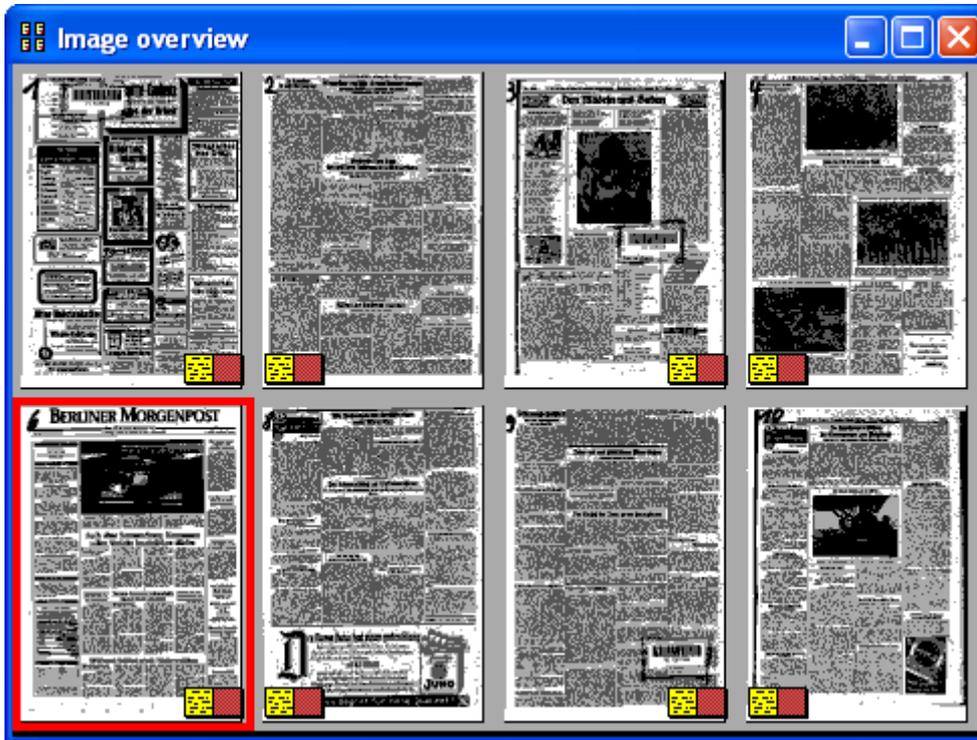
The secondary windows will remain open until they are manually closed, or ScanFile is closed.



## FastPics

FastPics are thumbnail representations of the pages within a file that can be displayed. The page you then want to view can be selected and shown in the

Image window. FastPics will also show whether a page was the front or back of a double sided document, and you can also tag pages for printing or exporting by clicking when the mouse pointer turns to a tick over the FastPic image of the page.



Electronic documents, such as word processing files, will show a page with the reference EDOC. COLD information pages will have the word COLD.

## ***FastPics Menu***

Pressing the right mouse button within the Thumbnail window will open the Thumbnail option menu, which allows you to perform actions on the selected pages within the document. The options available are the same as offered on the Hitlist menu, but will only apply to the pages within the document that have been selected.

| Option | Description  |
|--------|--|
| OCR    | Full text or zone recognition can be performed on the selected pages. The OCR'd text can also be copied to the clipboard |
| Move   | Mark the selected pages for moving to another record within the folder   |

|            |  |
|------------|--|
| Copy       | Copies the selected pages for pasting to another record within the folder  |
| Send to... | Selected pages can be sent to another folder, a user, exported, or emailed |
| Move to... | Moves the selected document into a chosen folder                           |
| Select     | Selects all or no pages, or inverts the current selection                  |
| Close      | Close the option menu  |



# *Electronic Document Import*

---

## Overview

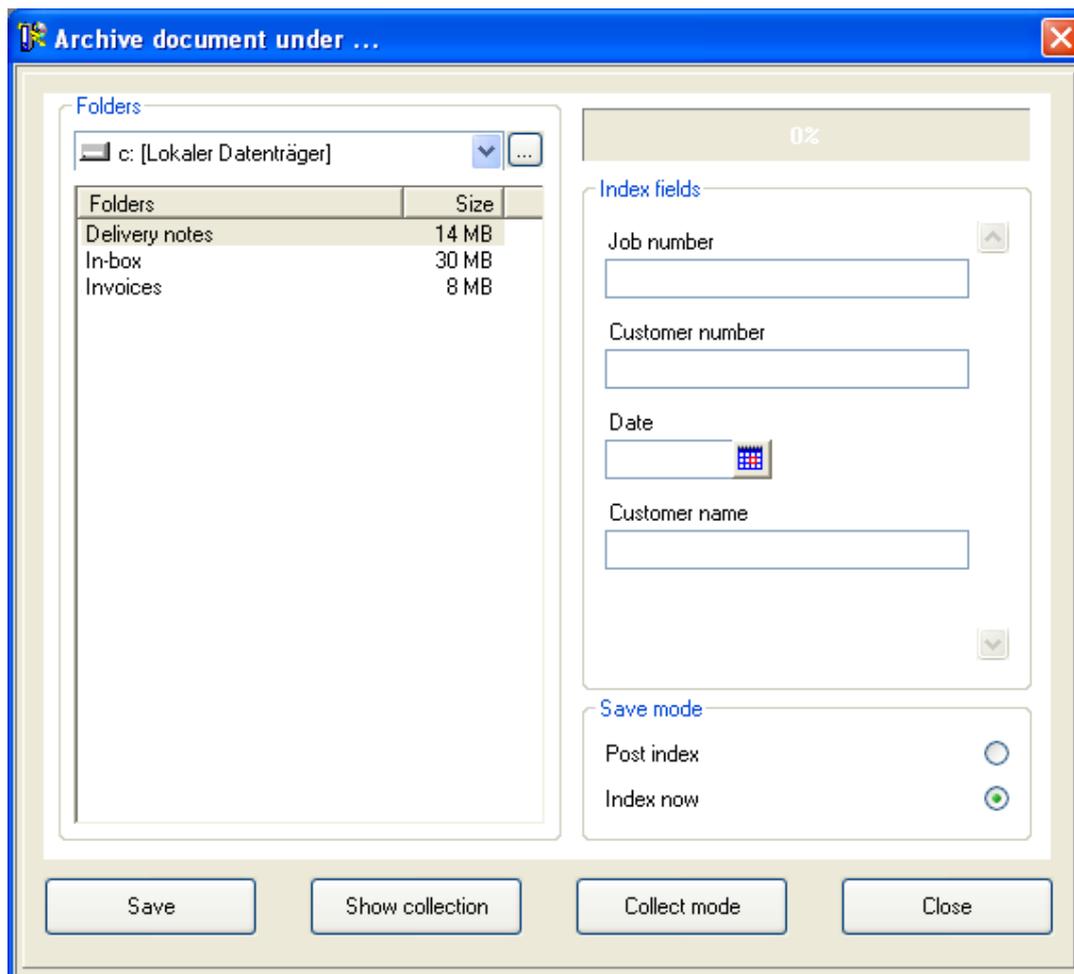
There are several methods for importing and sending documents to ScanFile folders. Documents can also be saved in their original format or alternatively converted to TIFF format. This chapter describes different methods of importing electronic documents into ScanFile folders.

## TIFFWriter

TIFFWriter is a Windows Printer driver that allows you to 'print' any document from any Windows application into a ScanFile folder. Each page will be analysed by TIFFWriter and will either be processed as a colour or black & white page. If a page has ANY colour content, it will be converted to JPEG format. Pages with black & white only content will be converted to compressed TIF format.

TIFFWriter is an option for ScanFile and can be selected for installation during the installation process of ScanFile. If the option has not been purchased, it will report that it is not licensed.

To 'print' a document into ScanFile using TIFFWriter, from a Windows application, choose the **Print** option and select the **ScanFile TIFFWriter** printer. From the printer **Properties** dialogue, the standard options such as paper size and orientation single or double sided and resolution can be set. Pressing the **OK** button of the **Print** dialogue will display the Index screen.



From this display, you can select which folder you want to put the document into. Once you have selected the folder, the folder fields (and keywords if assigned to the folder) will be displayed. You can then type index information relevant to the document, or you can choose to place the document into the Post Index pool.

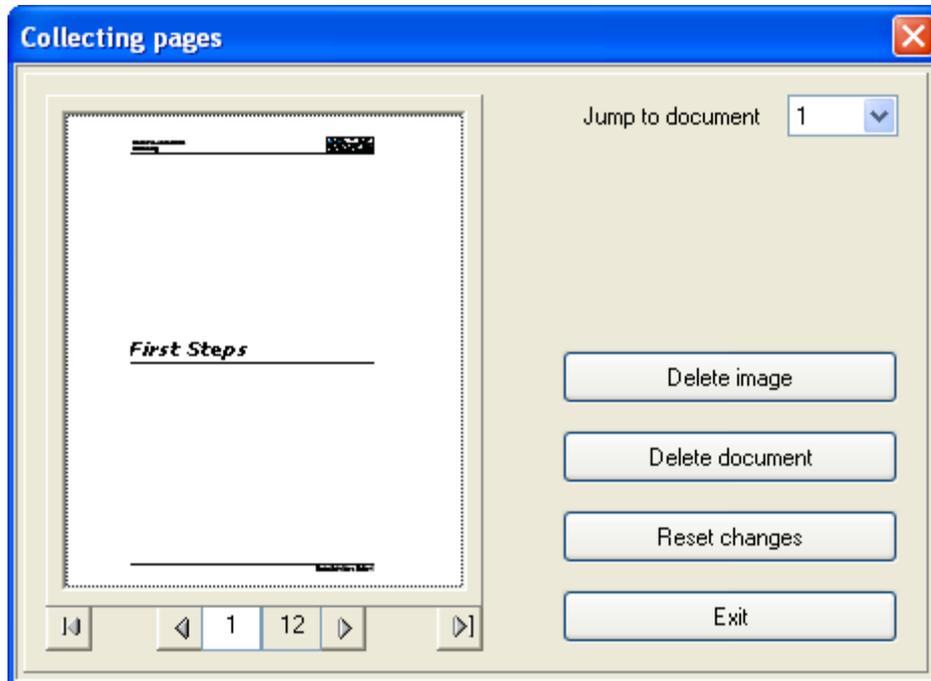
Once you have indexed the document, or selected to put the document into the Post Index Pool, pressing **Save** will put the document in the folder.

## **Collect Mode**

TIFFWriter also has a **Collect Mode**, which allows you to print multiple documents using TIFFWriter before saving them to ScanFile folders.

To activate this feature, once you have printed the first document and the Index screen has been displayed, press the **Collect Mode** button. The Index display will then change to just show an **End Collection** button. While this is displayed you can print using TIFFWriter from Windows applications without having to store each printout at once.

When you have finished printing your documents, press the **End Collection** button, and the screen will return to the standard Index display. You can review the documents held with the collection by pressing the **Show Collection** button, which will then open the **Collecting pages** screen.

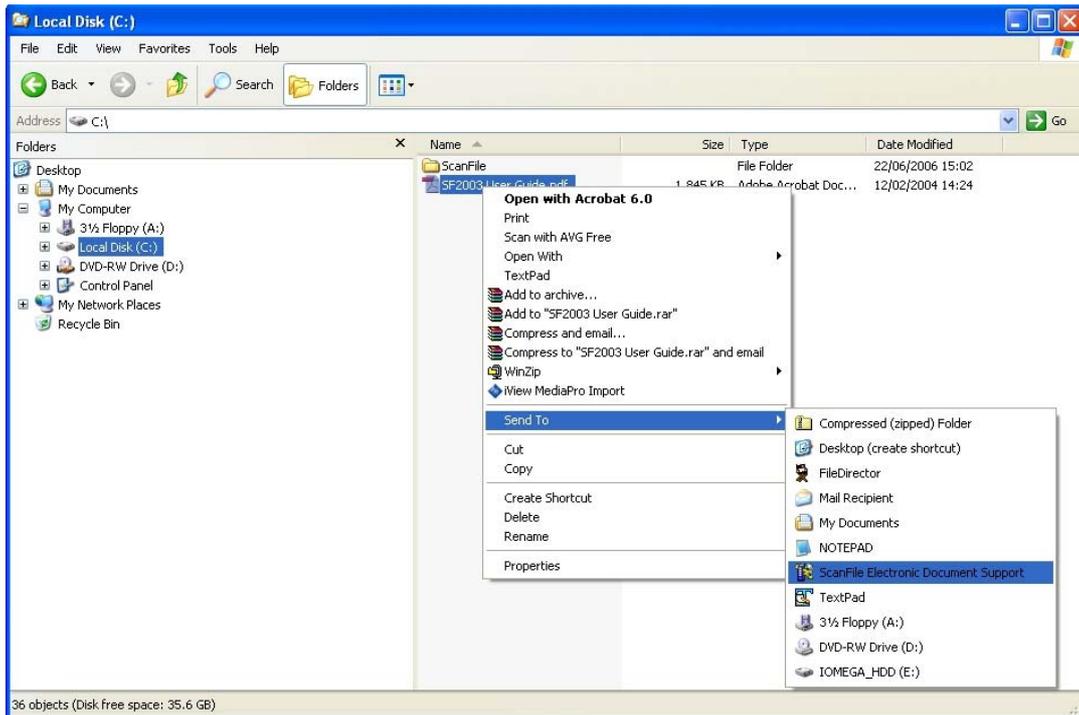


You can page through the collected documents using the navigation buttons at the bottom of the preview window, and select the document to view from the **Jump to document** drop down list.

You can also select to delete pages from a document by displaying the page and pressing the **Delete image** button, or you can delete a whole document using the **Delete document** button. All the documents in the collection will be saved to one ScanFile folder document, or they can be placed in the folder Postindex pool.

## Explorer Send To

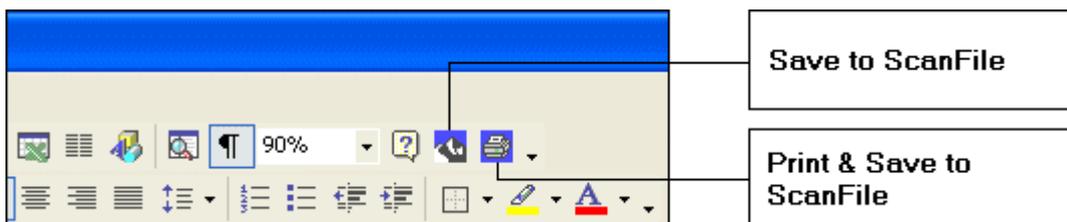
Within Microsoft Windows, a new option will have been added to the Windows Explorer pop-up menu: **Send To->Electronic Document Support** after the installation of ScanFile. This allows you to highlight files from within Explorer, and then choose the ScanFile folder you wish to put them into.



After highlighting the document(s) you wish to put into ScanFile, press the right mouse button and choose the **Send To** option. Choosing the **ScanFile Electronic Document Support** option will display the same dialogue as for TIFFWriter, but it handles the documents in a different way. The documents are not converted to TIFF or JPEG, but saved to a ScanFile folder in their original file format.

## MS Office Integration

The Office integration tools, which you can select during the installation of ScanFile, allow you to file documents to ScanFile folders from within Microsoft Office. The tools support Microsoft Word and Excel 97 and Microsoft Word, Excel, Access, PowerPoint and Outlook 2000, XP and 2003. The documents will be saved with ScanFile in their original format, unlike TIFFWriter which converts the documents to TIFF format. Two toolbar icons will be added to the programs, and these are shown below.



## ***Send To ScanFile***

The ***Save to ScanFile*** icon will open the Index screen as detailed in the ***TIFFWriter*** option and ***Explorer Send To*** option. The functionality of the Index window is the same as described in these chapters.

## ***Print and Save To ScanFile***

This option performs two functions: it will print the document to your selected printer and open the Index screen to allow you to save the document to ScanFile.

## **ScanFile VNP**

The optional ***ScanFile VNP*** server application allows you to create PCL5 compatible printers on servers and workstations, which will be directed to specific VNP ports, which then takes the printed output, converts it to Group4 TIF format and saves it to pre-defined locations.

These files can then be automatically imported into ScanFile using one of the Scheduler applications within Remote Services, such as the TIFF Spooler, which works in conjunction with the Forms Recognition.

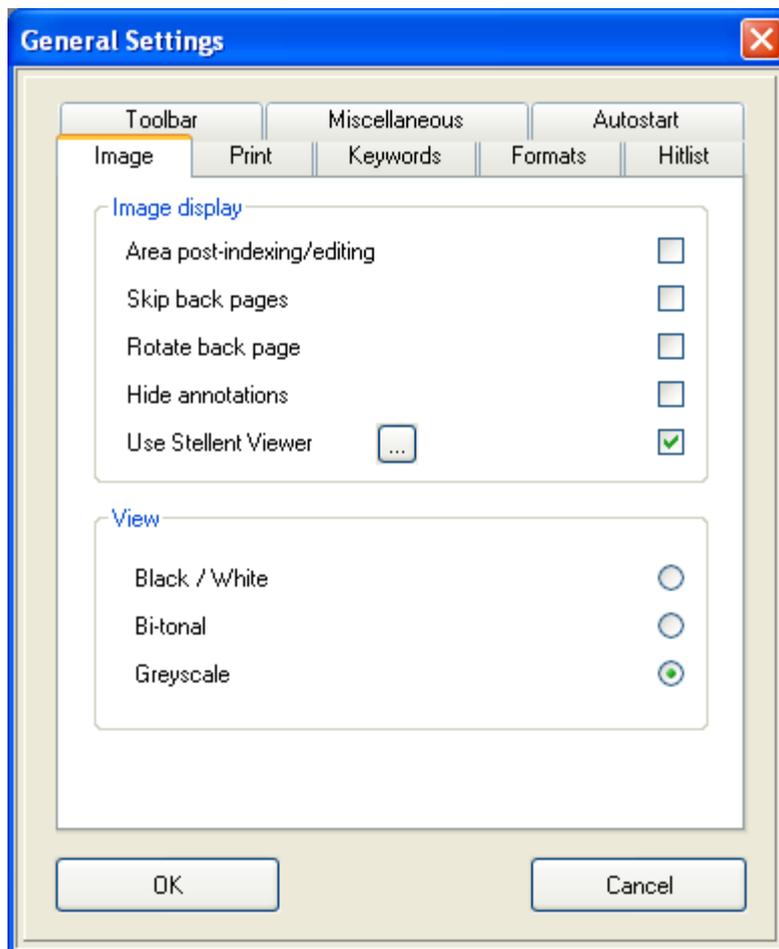
# *General Settings*

---

## Overview

The General Settings screen can be found under **Options -> General Settings**. This allows you to set various options that will affect the quality of the displayed image, change how the Hit List is displayed, the main window background, and other options that change the Keywords display and image print.

These can be changed at any time whilst using ScanFile, but some options such as **Show additional Toolbar** will only take effect when ScanFile is restarted.



## Display Mode

The vast majority of PC monitors are unable to display a document at its scanned resolution. As an example, an A4 page scanned at 200dpi results in an image 1664 pixels wide by 2532 pixels in length. This means that if the monitor resolution is lower than this, information from the image has to be 'removed' to be able to display it. This can then result in a loss of quality in

the displayed image. ScanFile has three image display modes which can be applied so that optimum display quality can be achieved:

| Option        | Description  |
|---------------|--|
| Greyscale     | Applies 4 levels of greyscale to enhance the displayed image |
| Bitonal       | Applies one level of grey to enhance the image               |
| Black / White | Displays the image with no enhancement                       |

*When the scanned image is displayed at 1:1 level (one screen pixel for each scanned pixel), the Greyscale and Bitonal enhancements are not applied.*

There are more settings to influence the image display in ScanFile. Following table lists the options and gives a brief description:

| Option              | Description  |
|---------------------|--|
| Skip back pages     | When enabled, it will stop the reverse side of a double-sided scanned document from being displayed when browsing through a file.  |
| Rotate Back Page    | If a double-sided page has been scanned, and the reverse side of the document is 'upside down' in relation to the front side, the option will display the reverse side of all files in the correct orientation.  |
| Hide Annotations    | Allows you to hide annotations added to a scanned page. A pencil symbol in the upper left corner will then indicate if there is a hidden annotation belonging to the image.  |
| Use Stellent Viewer | Allows you to switch off the display of electronic documents with the Stellent Viewer, which can take some time if the documents are large. If this viewer is not used, the electronic documents will appear as an iconic symbol on the image window. With a double click on the icon the documents can be displayed in their corresponding applications, as long as they are installed. |

## Hitlist

The Hitlist is used to display the results of a document search. Four options are available, to alter its appearance and functionality.

| Option                  | Description   |
|-------------------------|---|
| Display Hitlist Numbers | The records in the Hitlist will be numbered in ascending order. This will be in the first column of the Hitlist.  |
| Show Notes Column       | Adds a column to the end of the Hitlist. The Notes column will show whether records have memos applied to them, or that the records are hidden. Records with a memo attached will show a 'M' in the Notes column. Records hidden for users of the group <b>View</b> will have an 'X'. |
| Save Column settings    | If selected, it allows each user, for each folder they have access to, to customize how the Hitlist is displayed. The order of the columns in the Hitlist can be changed, as well as the column widths. These settings will be saved with the folder or library being accessed.       |
| Alternating Row Colours | The setting changes the view of the hitlist from plain grey lines to alternating blue and grey lines, this can help when viewing similar index information.   |

## Printing

Following settings change the print settings of ScanFile:

| Option            | Description   |
|-------------------|---|
| Exact Scale Print | When printing documents, pages will be printed at the exact scale at which they were scanned. This may mean that because a printer has a non-printable border, the page being printed will not fit onto one A4 page. When this option is not enabled, ScanFile will ensure that an A4 page will fit on a single printed page by slightly reducing the size. |

|                         |  |
|-------------------------|--|
| Automatic Orientation   | When enabled, ScanFile will test and select automatically which orientation will be best for the document to be printed in.  |
| Ignore Duplex mode      | When scanning double sided documents, ScanFile records whether a stored page was the front or back of a page. When printing these to a double-sided printer, if the <b>Ignore Duplex mode</b> is disabled, ScanFile will print each page as it was scanned - front pages will be printed on the front of a sheet, back pages will be printed on the back of a sheet. When this mode is enabled the pages will be printed in straight sequence. |
| User, Date and Time     | The option will print the name of the computer, the user, and the date & time the document was printed at the top of each sheet.   |
| Page numbering          | When activated, ScanFile prints the page number and the total number of pages at the top of each sheet.  |
| Text Annotations        | When enabled, text annotations can be printed on a separate sheet to the image when this option is selected.   |
| Print index information | When enabled, index information of a document will be printed at the top of each sheet.  |

## Keyword Search Mode

If a keyword list has been applied to a folder or library, you can choose how this is displayed, and how the keyword search will operate.

| Option                  | Description  |
|-------------------------|--|
| Clear Selected Keywords | If the option is enabled, when the Clear fields button is pressed in a folder or library, the currently highlighted keywords will be de-selected. If this option is disabled, the keywords will remain selected. |
| Hide Keyword List       | When a folder or library is open, this option, when selected, will not show the keyword list next to the folder or library fields.   |

|                          |  |
|--------------------------|--|
| Display Keywords as Text | Enabled, the keyword list will be shown in list format. Otherwise the text will be shown in the cell box. One of the features of the Canofile is index cells, which work in the same way as keywords. These cells can have graphic images scanned into them and can be displayed using cells.                |
| AND / OR                 | When using keywords to search for documents, multiple keywords can be selected. By choosing either the <b>AND</b> or the <b>OR</b> option, the search will find documents that have had ALL the selected keywords applied to them, or will find documents that have had ANY of the keywords applied to them. |

## Personal Hitlist

Every user in ScanFile owns a Personal Hitlist. This list is a way for each user to keep a list of documents together so that they do not need to search for them each time they wish to view them. Additionally, users can send documents to other users' Personal Hitlist. These options allow you to select whether users will be informed when another user sends a document to a user's list.

| Option        | Description  |
|---------------|--|
| No message    | If the option is selected, no action will be taken if a new document appears. A user will have to manually check for new documents in their personal hitlist |
| At Login      | Each time a user starts ScanFile, their Personal Hitlist will be checked for new messages if the <b>At login</b> option is selected.                         |
| Time Interval | A user's Hitlist can be checked at specific time intervals if the <b>Time interval</b> option is selected, and a time period entered.                        |

How a user is informed about new documents can be chosen as follows:

| Option | Description  |
|--------|--|
| Beep   | Will play a sound when a new document was found on the Personal Hitlist. |

|           |   |
|-----------|---|
| Message   | A message will be displayed.  |
| Auto open | With this option selected, the Personal Hitlist will automatically open whenever a new document is added to it. |

## Library Date Format

The format in which date fields are displayed in ScanFile Libraries can be set from this option. You can select the order in which the days, months and years are displayed as well as the separator to be used. The formats are:

- DD MM YY
- DD MM YYYY
- MM DD YY
- MM DD YYYY
- YY MM DD
- YYYY MM DD

Valid separators are '/', '-' and '!'.

## Postindex

This option sets the mode and storage location for the post index pool.

| Option          | Description  |
|-----------------|--|
| Normal Mode     | There is one post index pool for each ScanFile folder, which is physically stored in the subdirectory of each ScanFile folder.   |
| Customized Mode | There is one central post index pool for all ScanFile folders. The storage location of this central pool can be defined by clicking on the button.<br><br>Be aware, that in a network situation this can lead to problems, when several people are working simultaneously with a central pool. |

## Send to Email

This option allows you to select how images are sent to an e-mail message. If a document has multiple pages, the images can be put into the new message as either single page TIFF files, a multi-page TIFF file or as a PDF File. If a document is of mixed format – it also contains colour documents or Word/Excel files – these will be separate to the file(s). This setting also affects the **Save to File** option

| Option         | Description  |
|----------------|--|
| Normal Mode    | In this case all files that are sent and automatically appended to an Email, remain in there original format.  |
| Multipage TIFF | In this mode the system stores single TIFF files in a multipage TIFF files. In case a document contains only TIFF files, one multipage TIFF file is appended to the Email.<br><br>In case a document contains a mixture of file formats, it will still collect consecutive TIFF pages and COLD pages in one file, all other formats remain in their original format. |
| Group to PDF   | In this mode pages in TIFF, JPEG and COLD format will be converted into a PDF file containing these pages as graphics.<br><br>Electronic documents are appended in their original format.  |

## Other Settings

| Option                            | Beschreibung   |
|-----------------------------------|--|
| Memo note – view / hidden creator | Automatically enters a short entry into the memo of a document, noting who and when locked or unlocked the display of a document.          |
| Use Global Scanner Settings       | Activated, all user related scanner settings are ignored and the scanner settings of user ADMIN will be applied for every folder and user. |

|                                       |   |
|---------------------------------------|---|
| Display Inactive Buttons              | With this option, you can choose whether buttons on the toolbars are displayed or not, dependent on whether they are applicable to the function being carried out. If this option is not selected, toolbar buttons will be greyed out when not applicable.  |
| Display Additional Toolbar            | The toolbar along the top of the main ScanFile window will be shown when the option is selected.  |
| Hide Tooltips                         | Tool tips are short descriptions of the functions of the toolbar buttons. They will be displayed if the mouse cursor is left over a toolbar button for a moment. You can select whether these are displayed or not by enabling/disabling this option.   |
| Automatic Date in Memo field          | Enabled, this will add the date and time of a memo to a memo applied to a document.   |
| Automatically Clear Pooldrive         | The option is used by the <b>Prepare CD</b> function. When selected, the existing contents of the pool drive will be deleted prior to the new information being written to it.  |
| Area/Post-indexing function           | The <b>Area/Post-indexing function</b> , when selected, will allow you to set an area of the image to move and zoom to for each field in the folder. This is used during index editing, and when indexing documents from the Post-Index pool.   |
| Check Number of Barcodes              | When scanning bar-coded documents, the contents of the barcode can be read during scanning and inserted into fields in the folder. You can select whether ScanFile will check if the correct number of barcodes has been read from the document, in relation to the number of fields in the folder that have been set with the barcode property.  |
| Auto Index failed barcode read with X | When scanning single page bar-coded documents, if ScanFile fails to read a barcode from a page, an 'X' can be placed in the folder barcode field, to identify the document for later indexing. The <b>Auto Index failed barcode read with X</b> option selects this. If this option is not selected, and ScanFile was unable to read a barcode, scanning will pause and you will be prompted to type in the index information into the barcode field. |

## Choose Background

The default display for the main ScanFile window is a grey background. Each user can change this by selecting the **Choose Background** button in the **General Settings**. You can then select whether you wish to choose a colour for the background, or to apply an image to the main screen background.

### Colour

To choose a colour press the **Choose Colour** button, and the following dialogue will be displayed:



You can then choose the colour you wish, and press **OK**. You will then be returned to the **Choose background** screen shown on the previous page.

*The available colours will be dependent upon the settings of the display adaptor.*

### Image

Selecting the **Choose Image** option will allow you to apply a Bitmap (.BMP) file to be displayed in the main image window. The top left corner of the selected bitmap will be in the top left corner of the main ScanFile screen.

# *User Management*

---

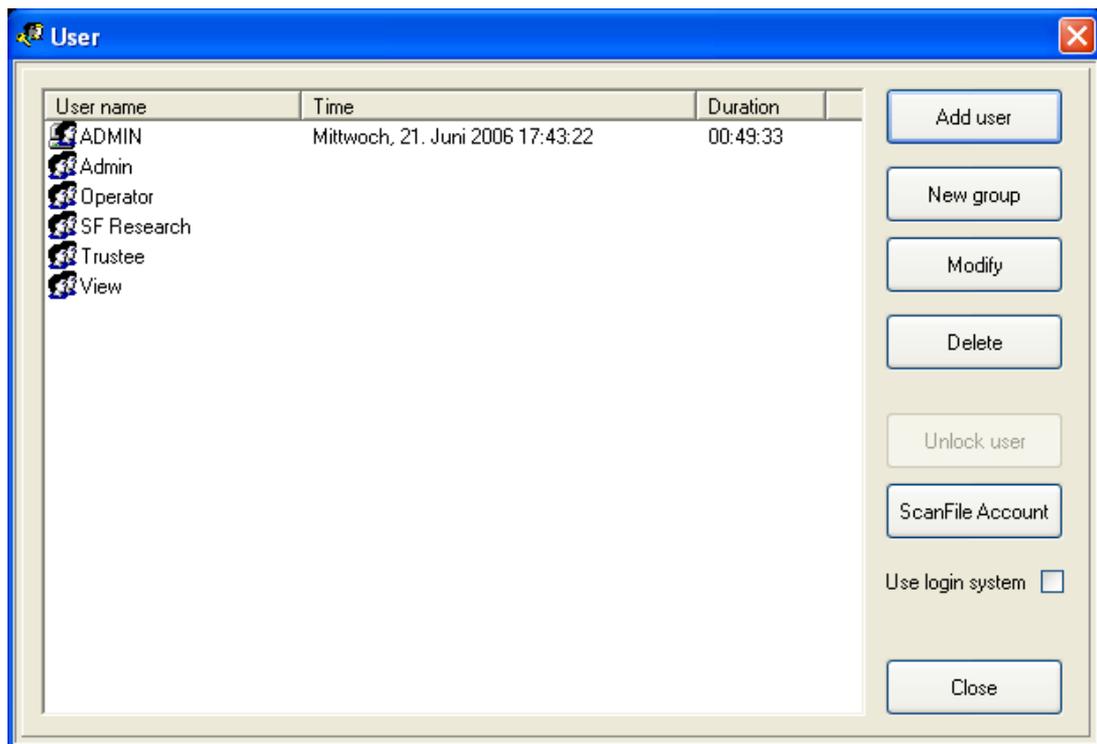
## Overview

By default, each user must log in to ScanFile with a unique user name and optional password. Each user created in ScanFile can also be granted or denied access to any area or option of ScanFile, ScanFile WebServer and ScanFile RemoteStation.

Groups can also be created to manage the access rights for one or more users, inheriting the group's rights. This is useful, if you have a number of users that you wish to assign same rights to. Two types of user groups are available for selection, Customised User Groups and Default User Groups, which are covered later in this chapter.

## Adding and Editing Users

To manage user access to ScanFile, select **Edit User** from the **Options** menu, and the screen below will be displayed



This window lists the currently defined users and groups, and gives information about the users that are logged in, what time they logged in and the duration they have been logged in the program.

After the installation you will find here the pre-defined user **ADMIN** and the user groups **Admin**, **Operator**, **Trustee** and **View**. Here you can select a user or group for editing or deletion, or you can add a new user or group.

Users/Groups can be deleted by selecting the list entry and clicking to button **Delete**.

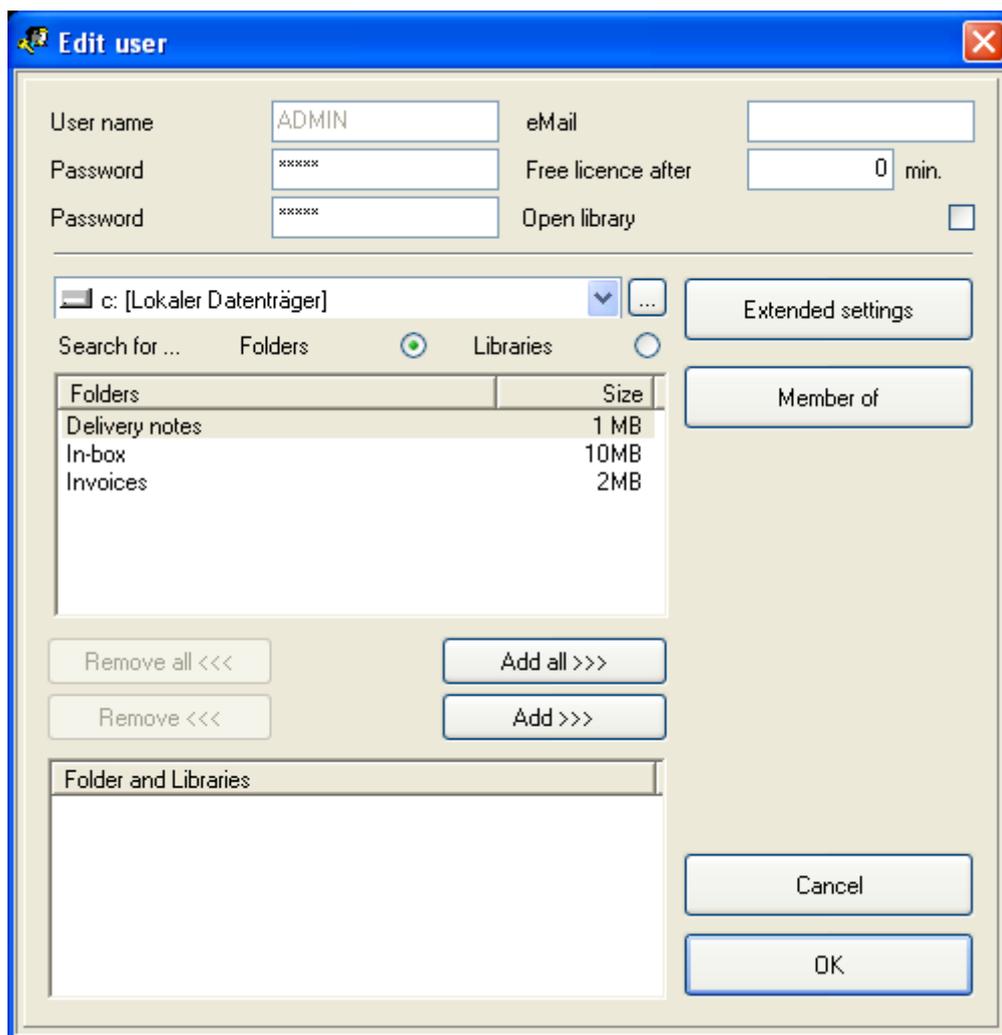
*The user **ADMIN** has administration rights. It is important to change the default password **ADMIN** once ScanFile has been set-up.*

The **Use login system** option allows you to disable the login requirement, so that when ScanFile is opened, you will not be asked for a user name and password, and will automatically be logged in as the Admin user.

*Only the user ADMIN or members of the group Administrator have the right to enabled/disable the **Use login system** option.*

## Adding a User

To add a new user, click on the **Add User** button in the main User Management window and the following screen is displayed.



| Folder and Libraries | Size |
|----------------------|------|
| Delivery notes       | 1 MB |
| In-box               | 10MB |
| Invoices             | 2MB  |

You must enter a user name, the password is optional but the use of one is recommended. It is also possible to add an e-mail address for the user which is used by the RemoteStation client, the use of which is explained later in this manual.

In ScanFile Version 8 a license time limit was added for every user. A user license can be freed after a certain amount of time. This prevents users not working with the program from blocking a user license as long as they are logged in. The default value is zero. The logged in user will only free his license by logging out. Every other value larger than zero indicates the time in minutes a user is blocking a license before others are able to obtain it.

You can then select which Folders and Libraries the user has access to. Firstly you need to select the location where the Folders or Libraries reside and they will then be listed in the top box. To give a user access to a folder or library, highlight it in the top list box, and then press the **Add** button. That folder or library will then be shown in the bottom list box. To give a user access to all the folders or libraries on the selected drive, click on the **Add All** button.

To remove folders or libraries from the access list, press the **Remove All** button, or select the folder or library, and then press **Remove**.

With the **Open library** option, you can select whether the **Open** tool on the left toolbar of the main ScanFile window will open folders or libraries. When not selected, the **Open Folder** list (default setting) will be displayed. When selected, the **Open library** list will be displayed.

Another option in the user setup is to add an individual user to a group of users. To do this click on the **Member of** button and a window will appear listing all available groups. To make the user you are editing a member of one of these groups, highlight the group and click on the **>>** button to add that user. Then click on **Ok** to save. ScanFile will return to the **Edit User** window.

Also from this window you can select **Extended Settings**, these are explained later in this chapter.

Once you have finished with all options, press the **OK** button, and the user configuration will be saved.

## **Modifying a User**

To edit an existing user's rights highlight the user on the main Users Window and select **Modify**. All options that are available when creating a new user will apply. Once you have finished this, press the **OK** button, and the user configuration will be saved with any changes made.

## ***User blocking***

If a user enters an invalid password three times in a row, the ScanFile User Management will block this user. The user is not able to log into any ScanFile program from that point on. Any user with administrator rights can unblock this user. Go to **Options-> User management** and select the blocked user. The button **Unblock** will be activated. A click on this button will unblock the user.

# **Adding and Editing Groups**

It is possible in ScanFile to define User groups and assign access rights to them. Groups are especially useful should you have a number of users that you wish to assign same rights to. The administration of access rights is easier and more efficient this way.

If a user is member of more than one group, the user inherits a conjunctive combination of all group rights.

## ***Default User Groups***

Four different levels of User Group have been included by default in ScanFile. These can be seen when entering the **Edit User** area of ScanFile from the **Options** menu. The groups that are created by default all have default security levels associated with them. The levels are:

**View:** Users added to this group are allowed to retrieve and view data records that are not hidden. The users may also view memos but not modify them.

**Trustee:** Trustees are allowed to edit memos and to hide and reveal index records.

**Operator:** Operators are allowed to scan, edit, and prepare for CD writing, rename and post-index. Operator level users cannot create, edit or delete folders.

**Admin:** Members of the Admin group have full access in the ScanFile system. They can create, edit and delete folders and switch off the login/password system.

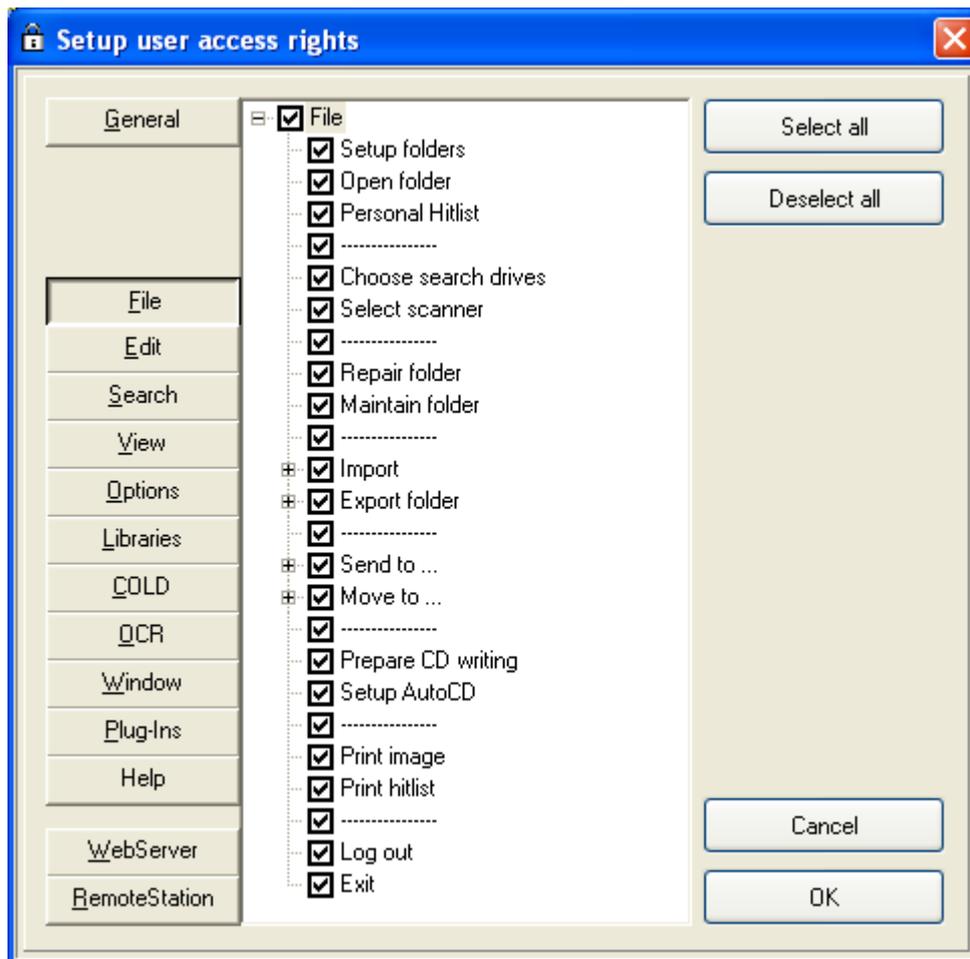
To setup a Default user group highlight the group required and click on **Modify**. A window will open, that you know from creating and editing users. You can modify the group settings the same way.

## User Defined Groups

Additionally to the pre-defined groups you can create new groups and assign folder, libraries and menu rights matching your requirements to them. Click on **New Group** and the **User Setup** window will be displayed. Creating a new group requires the same steps as creating a new user.

## Extended Settings

When creating or editing a user or group you need to assign the rights that user or group will have within ScanFile for the folders/libraries they have access to. The **Extended Settings** screen allows you to define exactly which functions, or groups of functions a user or group will have access to. The functions are displayed in groups which mirror the ScanFile menu options. Following window will be displayed after you clicked on the **Extended Settings** button:



To select which options you wish to allow or prohibit for the user or group, click on the corresponding tab on the left hand side of the window and then

select the options required. A Tick in the checkbox means that option is allowed; a blank checkbox will mean that option is prohibited. The selected options are then the only options viewable when that user or group member logs into ScanFile. Included are three options at the top right hand side of the window to allow you to select all or deselect all options listed against one tab and to select the default options available for the whole menu listings.

Use **Select All** or **Deselect All** to select/deselect every displayed menu option.

The **General** Tab at the top left hand side of the window will display the Administrator selection next to it. When ticked it will automatically give the currently selected user or group full administrator rights to the ScanFile program which will limit no options.

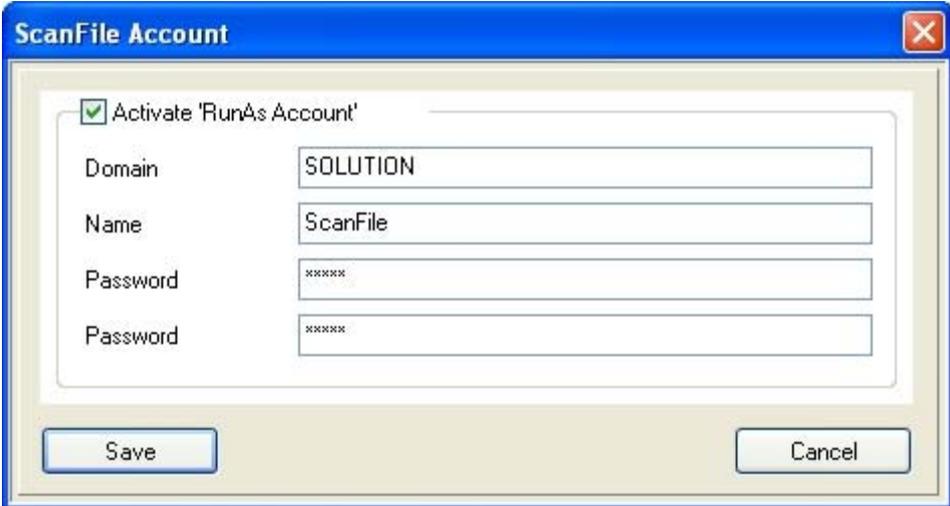
If a user is a member of more than one group, and different settings have been applied to these groups, the menu options available to a user will be inherited from the group the folder or library the user has open is a member of.

## ScanFile Account

The ScanFile Account allows you to run ScanFile with a windows user account. ScanFile folder and libraries, protected with this windows user account are protected from unauthorized access.

### ScanFile

To enter a windows user account, open **Options -> Edit User** and click und **ScanFile Account**. Following window is displayed:



The screenshot shows a dialog box titled "ScanFile Account" with a blue border and a close button in the top right corner. Inside the dialog, there is a checked checkbox labeled "Activate 'RunAs Account'". Below this, there are four input fields: "Domain" containing "SOLUTION", "Name" containing "ScanFile", and two "Password" fields, both containing "xxxxxx". At the bottom of the dialog, there are two buttons: "Save" on the left and "Cancel" on the right.

Select **Activate „RunAs Account“**. The fields will be enabled. Enter domain, user name and the password. Please enter the password a second time to verify your first entry and to avoid mistyping. Save the new settings, close all windows and restart ScanFile. After the restart, ScanFile will run under the entered windows user account.

## **Remote Service**

If you use the Remote Services, please note that the Windows service has to run under the same domain account as ScanFile.

Display **Start -> Settings -> Control Panel -> Administrative Tools -> Services**. Go to ScanFile Remote Service. If the service has already been started, please stop the service. With the right mouse button, select **Settings** to display the **ScanFile Remote Service Properties**. Select the tab **Log On** and change from Local System account to Log On As. Enter the same domain account as in ScanFile. Close the settings window and start the service.

*ScanFile Account doesn't work with Windows Workgroup accounts.*

*Please note that the domain account has to be at least entered as a Power user on the machine!*

# ***Additional Settings***

---

## Overview

Further settings are available within ScanFile that allow you to select the language ScanFile uses, which barcode to read, and other scanning related functions. These are described below.

## Choose language

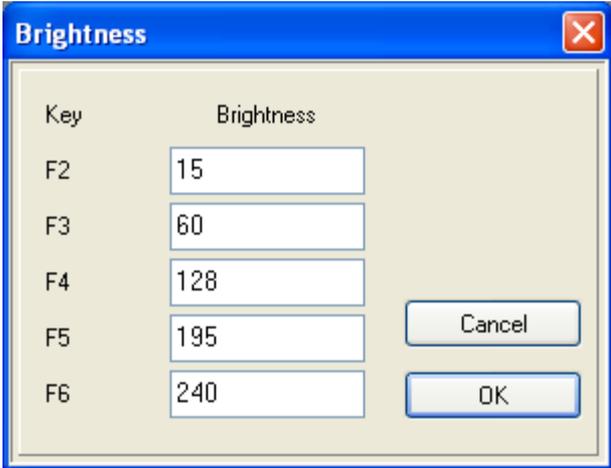
When installing ScanFile, you will be asked to select the language required, but this can be changed at any time by selecting **Choose Language** from the **Options** menu. Available languages are:

Before the new language will take effect, ScanFile must be closed down and restarted.

*The Far East languages Japanese, Korean and Chinese are available in special setups.*

## Choose brightness

Select **Choose brightness** from the **Options** menu to assign predefined brightness levels used during scanning to the function keys F2 – F6. Where, for example, documents have different background colours, and the scan quality using the automatic mode of the scanner is insufficient, manually set values can be applied. By pressing the appropriate function key, that brightness level will be used during scanning.



| Key | Brightness |
|-----|------------|
| F2  | 15         |
| F3  | 60         |
| F4  | 128        |
| F5  | 195        |
| F6  | 240        |

Obviously, the setting of these values is a matter of trial and error, but once the correct values are found, they need not be changed. This can be

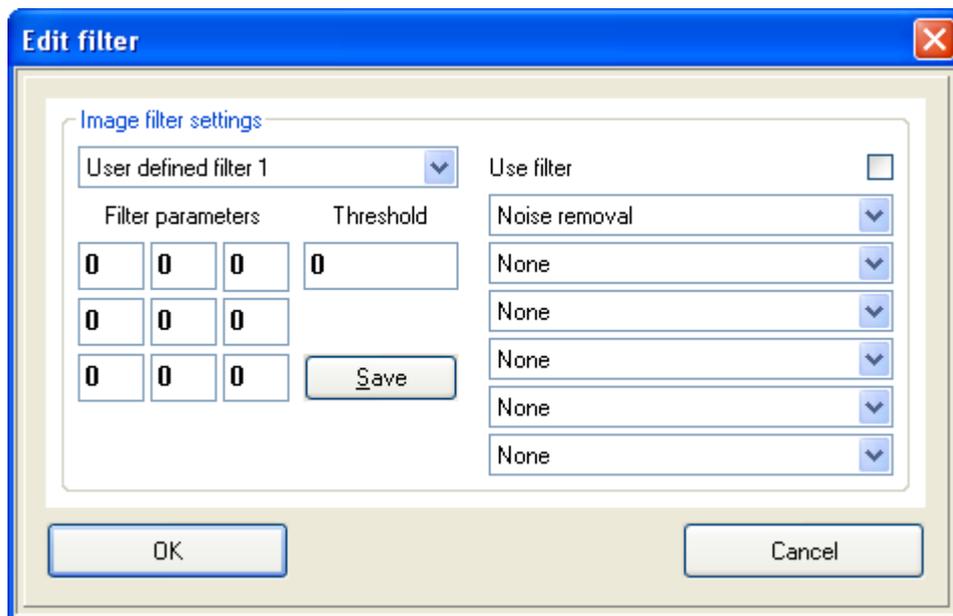
overridden by using either the automatic mode or by selecting the brightness level using the control on the toolbar.

*A function key value of zero will, when that key is pressed, reactivate the scanner's automatic brightness function.*

## Setup Filter

This option enables you to enhance the quality of a scanned page by applying predefined filter options, or by creating your own filter settings. These settings can be entered when selecting **Setup Filter** from the **Options** menu. The filter can be applied either after scanning by selecting **Edit -> Use Filter**, or during scanning if the **Use Filter** option is selected.

Up to three user defined filter settings can be created and saved. These can then be applied by selecting them from the drop down lists on the right side of the **Filter Settings** window. Up to six filters (standard or user defined) can be applied at any time, and they will be actioned in the order – from top to bottom – that they are selected in the drop down lists.



## Pre-defined Filters

There are six pre-defined filters that can be applied, and these are described below.

| Filter                  | Description  |
|-------------------------|--|
| Noise Removal           | This will remove single black & white pixels                                   |
| Horizontal line removal | This will remove horizontal lines  |
| Vertical Line removal   | This removes vertical lines  |
| Brighten page           | This will brighten the page  |
| Darken page             | This darkens the page  |
| Complete Lines          | Attempts to complete horizontal & vertical lines                               |
| Softer edge             | Will soften edges of words and graphics, blending them with their surroundings |
| Harder edge             | More clearly defines the edges of graphics, boxes and text.                    |

The following example shows the result of filtering using **Noise removal**. This filter favours white or black areas and removes isolated white and black pixels. As a result the contrast and readability is improved whereas the storage space is reduced.

|   |   |
|---|---|
| <p>Two other features enhance document management functions. Once a document is scanned, the software gives you the ability to amend the document.</p> <p>There are several options available for a scanned document after it has been scanned:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Insert Pages</li> <li><input type="checkbox"/> Append Pages</li> <li><input type="checkbox"/> Delete pages</li> </ul> | <p>Two other features enhance document management functions. Once a document is scanned, the software gives you the ability to amend the document.</p> <p>There are several options available for a scanned document after it has been scanned:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Insert Pages</li> <li><input type="checkbox"/> Append Pages</li> <li><input type="checkbox"/> Delete pages</li> </ul> |
|---|---|

## User Defined Filters

The filter algorithm calculates the brightness of each pixel of an image. With black and white images, the brightness value of each pixel is binary: the

value of a black pixel is 1 and of a white pixel 0. The brightness value to be allocated to a pixel is calculated by the weighted sum of the neighbouring pixels. These weighting factors give a 'coefficient' to a filter. Since the calculated brightness values have to be assigned either to black (1) or white (0) a threshold for the decision must be defined.

|   |   |   |
|---|---|---|
| 1 | 1 | 1 |
| 1 | 1 | 1 |
| 1 | 1 | 1 |

With his filter parameters and a threshold of e.g.3 an isolated white (black) pixel will be automatically converted to black (white).

|   |   |   |
|---|---|---|
| 1 | 2 | 1 |
| 2 | 2 | 2 |
| 1 | 2 | 1 |

With these parameters and a threshold of 4 thin interrupted horizontal and vertical lines will be closed.

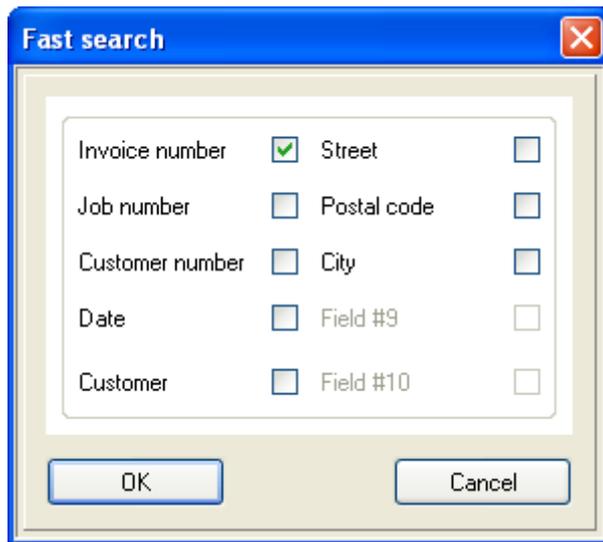
The setting of these parameters depends on the quality of scanned images, i.e. the image resolution, the zoom factor and the brightness of the image. Filtering generally enhances the screen display readability of low contrast microfilm images and reduces storage requirement dramatically.

Please note, it is possible, with the incorrect use of the filter to turn a scanned document completely black, or completely white. When working with filters, **NEVER** turn the **Use Filter** function on until you are sure that the filter settings are correct for the documents to be scanned. This can be done by scanning an example, amending the filter settings, and then selecting **Filter Image** from the **Edit** menu This option will ask for confirmation before saving the filtered image.

## Fast Search

With the option **Fast Search** you can set what are called Binary Indexes against specific fields within a folder or library. A binary index can substantially reduce search times on folders and libraries with large numbers of index records, when the search is performed on the field set for binary indexing.

To set a binary index for a field within a folder or library, first of all make sure that the folder or library is open. Then select **Fast Search** from the **Edit** menu, and the following screen will be displayed.



Select the field to set a binary index on, and then press **OK**. A binary index will then be created for that field.

*A field set with a binary index can adversely affect the import of new records. This is especially so when importing folders into libraries. It is therefore wise to switch the binary index OFF before importing folders into libraries, and then to switch the binary index back on.*

# *Barcodes*

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## Overview

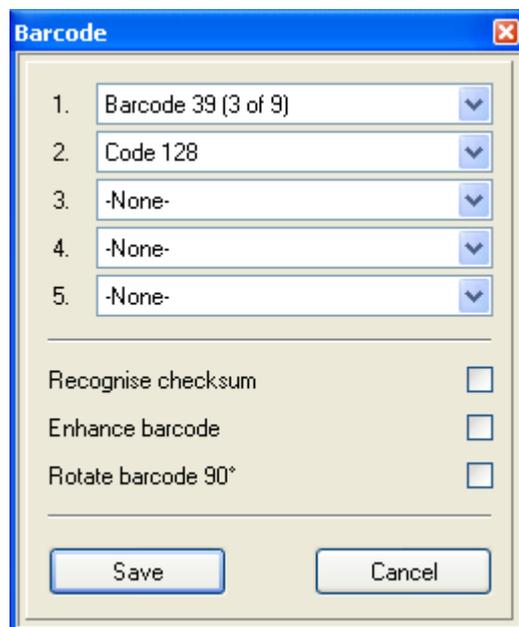
Documents containing barcodes can have the value of the barcodes inserted into index fields in the folder either during scanning or by performing zoned barcode reading as a batch process after scanning. The barcode function is an option of ScanFile, and must be purchased to enable it. ScanFile can read up to 10 barcodes at a time in either reading mode.

## Barcode Formats

Five barcode formats are supported by ScanFile. The supported formats are:

- Code 39
- Extended 3 of 9
- 2 of 5 interleaved
- Codabar
- Code 128

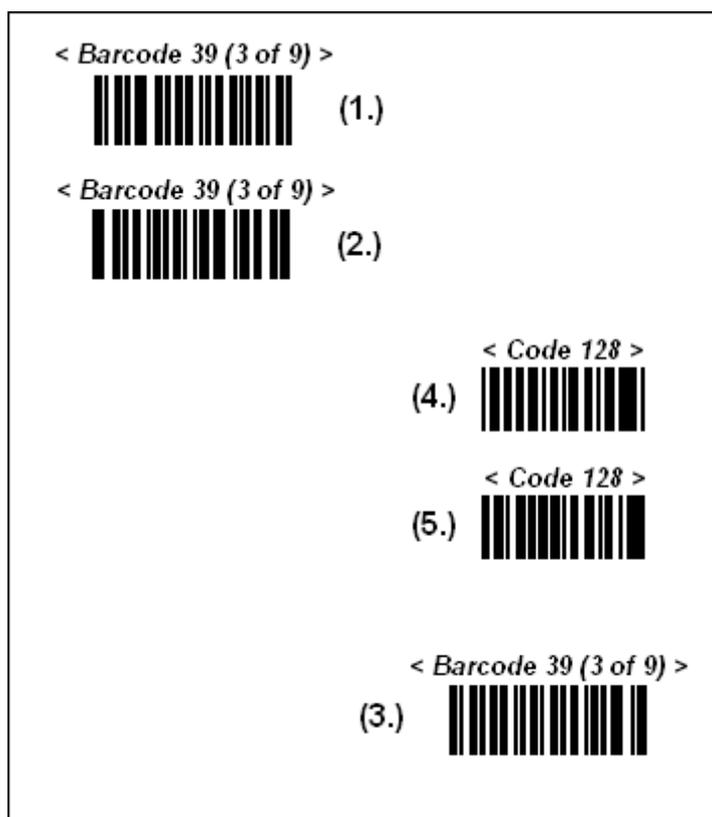
The barcode type can be selected from **Choose Barcode** from the **Options** menu. Additionally you can select settings to influence the way ScanFile reads barcodes.



With the Fields 1 to 5 up to 5 barcode types can be set to be read sequentially. This assigns the priority to the chosen barcode types. Referring to the settings in the screenshot above the whole page would be scanned for possible barcodes. After this every barcode found in the page is proofed for his validity as **Barcode 39 (3 of 9)**. If the barcode is a valid the value is read

and saved. After proofing all barcodes for their validity as a **Barcode 39 (3 of 9)** the barcodes found in the page will be proofed for their validity with the next barcode type. With the given settings this would be the **Code 128** barcode type. If a barcode is a valid **Code 128** barcode the value is read and saved to the corresponding field. This sequence is repeated until all selected barcode types were read.

The priority of the barcodes also sets the order in which the read values are pasted into the index fields. The following example shows the order to insert the index values referring to the configuration above.



*When using more than one barcode type on the same page there are some consideration that need to be taken into account.*

*When using **Barcode 3 of 9** and **Extended 3 of 9** these barcodes have the same symbologies and can lead to barcodes being recognized twice when both uses on the same page.*

**Barcode 2 of 5 interleaved** by design is a simplistic barcode, which can result in other barcode results that are not 2 of 5 interleaved being read. To remedy this then the hierarchy of the barcodes used needs to be considered and if 2 of 5 interleaved is to be used then this barcode should be the last barcode on the document.

The barcode reading module can also recognize a **barcode checksum**, which checks for the validity of the barcode. The checksum number is not added to the index field.

The **Enhance barcode** option can improve the reliability of reading barcodes from poorly printed documents, such as those produced by dot-matrix printers.

The **Rotate Barcode 90 °** will read barcodes that are printed down a page, rather than across.

## Reading while Scanning

There are two ways for reading bar-coded documents while scanning, as follows:

**Single page Scanning** will create a new index record for each page scanned. The contents of the barcode on each page will be inserted into the barcode fields applied to the folder.

With **Batch Scan**, the barcodes can be used as file separators. If a barcode is found on a page being scanned, a new index record is created. If there are no barcodes on the next page being scanned, this page will be appended to the previously created file. The next page to be scanned that contains barcodes will create a new index record.

### **Folder Configuration**

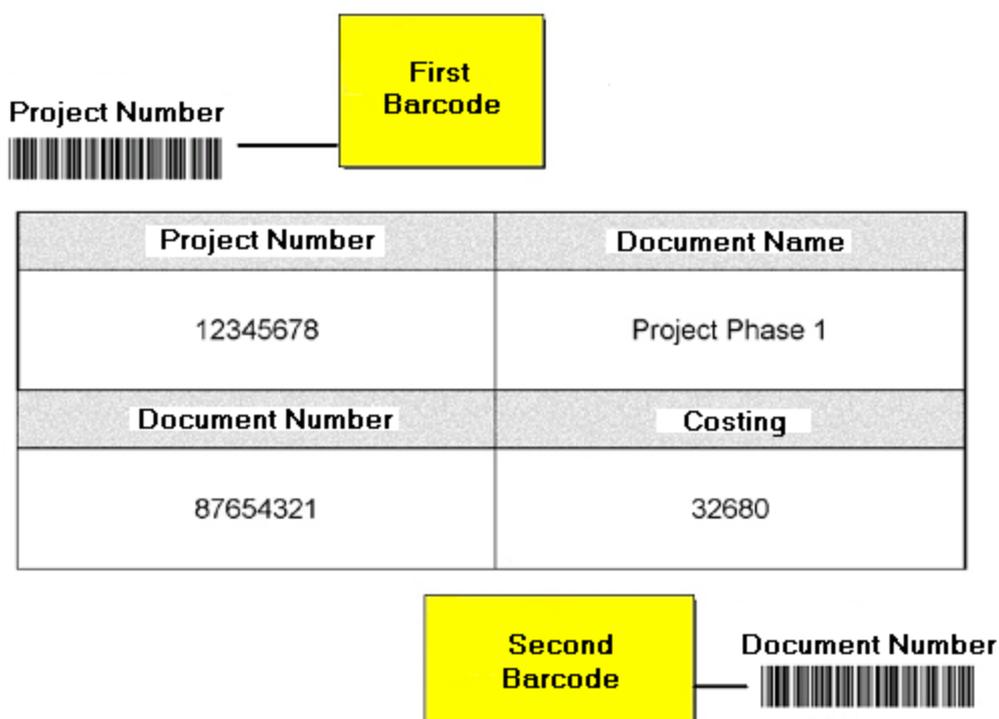
ScanFile can read up to ten barcodes at one time, and place the results in to the folder fields. When setting up folders, a property of **Barcode** can be set for each field. In the example below, the fields *Serial No and Pick-Up Code* have the **Barcode** property applied to them. When documents are scanned in to the folder, ScanFile will attempt to read barcodes from the scanned pages, and insert the result into these fields

| Name            | Length | Properties | Ext. |
|-----------------|--------|------------|------|
| Invoice number  | 30     | Barcode    | ...  |
| Job number      | 30     | Barcode    | ...  |
| Customer number | 30     | Barcode    | ...  |
| Date            | 10     | Date       | ...  |
| Customer        | 75     | None       | ...  |
| Street          | 75     | None       | ...  |
| Postal code     | 10     | None       | ...  |
| City            | 75     | None       | ...  |

## Reading Barcodes

The location of barcodes on a form does not have to be specified for this mode of reading. If there is more than one barcode on a page, the data held in the first barcode found on the page will be placed in the first field in the folder with a barcode property. The data held in the second barcode found will be placed in the second barcode field, and so on.

In the example shown below, the data held in the first barcode, Project Number, will be placed in the Project No field in the folder, which is the first field with a barcode property.



In **General Settings**, the following options can be set:

You can select whether ScanFile will check if the correct number of barcodes has been read from the document, in relation to the number of fields in the folder that have been set with the barcode property. The **Check Number of Barcodes** option controls this.

When scanning single page bar-coded documents, if ScanFile fails to read a barcode from a page, an 'X' can be placed in the folder barcode field to identify the document for later indexing. The **Auto Index failed barcode read with X** option selects this. If this option is not selected, and ScanFile was unable to read a barcode, scanning will pause and you will be prompted to type in the index information into the barcode field.

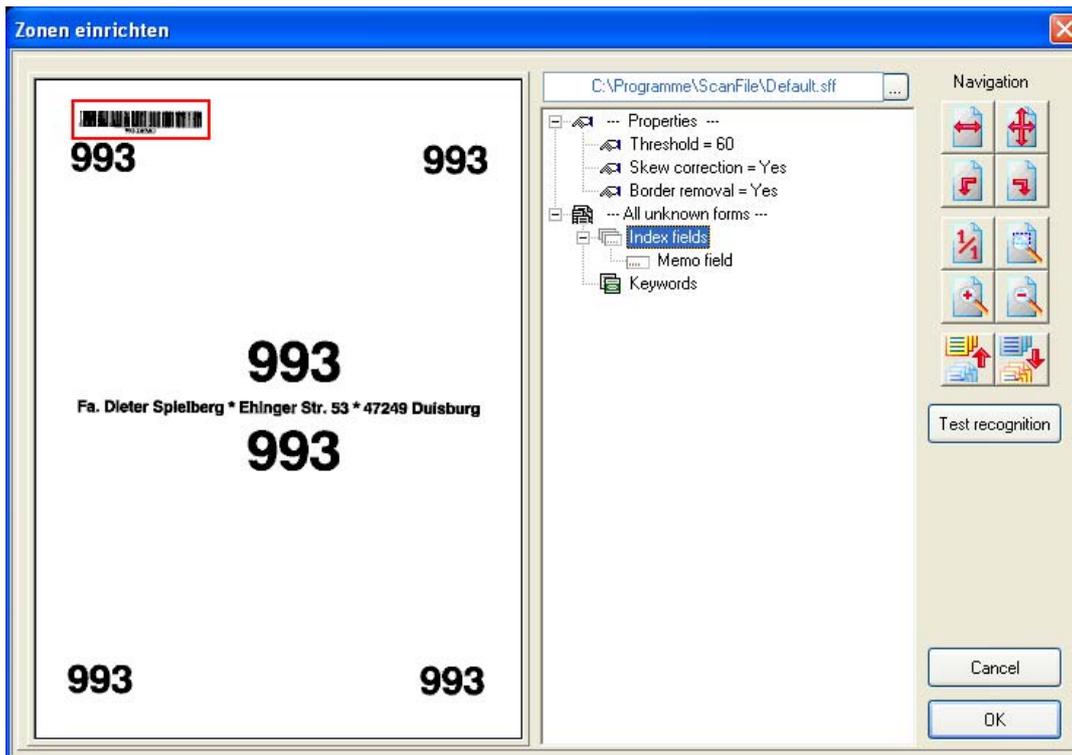
*You can also read a documents barcodes after it has been scanned by displaying the page, and then pressing the F12 function key or selecting **Edit -> Recognise barcodes**.*

## Zone Barcode Reading

This method of reading barcodes allows you to specify the field to which the barcode value will be placed. Up to ten zones can be defined and linked to fields in the folder. Zone barcode reading can also be combined with zone OCR reading, allowing you to read barcodes and text from scanned pages at the same time. Please note the ScanFile OCR option is required for this feature

### **Defining Zones**

To define the zones, from the **OCR** menu select **Setup zones** and the OCR image window will be displayed, which will show the first page of the first file in the folder, or the currently displayed page from the folder.

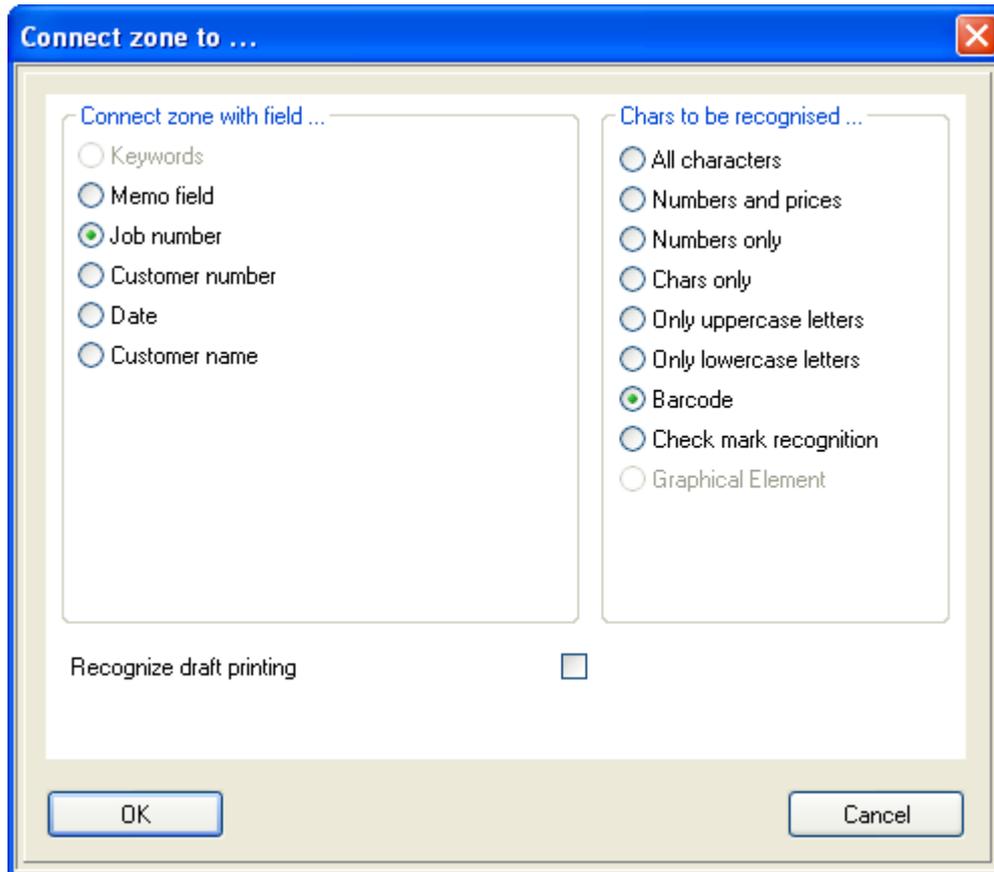


You can navigate through the files in the folder by using the available tools until the page you wish to define zones is displayed.

*Please note that the zone recognition will always be carried out on the first page of a file!*

To ensure that when drawing the zone the correct part of the page is within the zone, you can zoom and rotate the image within the display window. Once you have displayed the area of the page you wish to create a zone for, right-click on the **Indexfields** option under **All unknown forms**, and choose **Add Field**.

A crosshair cursor will then be displayed in the image window, and by moving the cursor to where you want the zone to start, and then holding down the left mouse button and moving the mouse, you can define the zone. Releasing the left mouse button will then fix the zone, and the **Connect zone to** screen will be displayed.



On this screen, you can select which field within the folder you wish to associate the zone with, and you can also specify the content type of the zone. In this example the zone is associated with the field 'Project No.' with a content type of **Barcode.**

The **Recognize draft printing** option will assist in reading faded or dot matrix printed documents.

Press **OK** to return to the **Setup Zones** window.

Once you defined a zone, it can be changed at any time. Right-click on the field name under Index fields you have two choices:

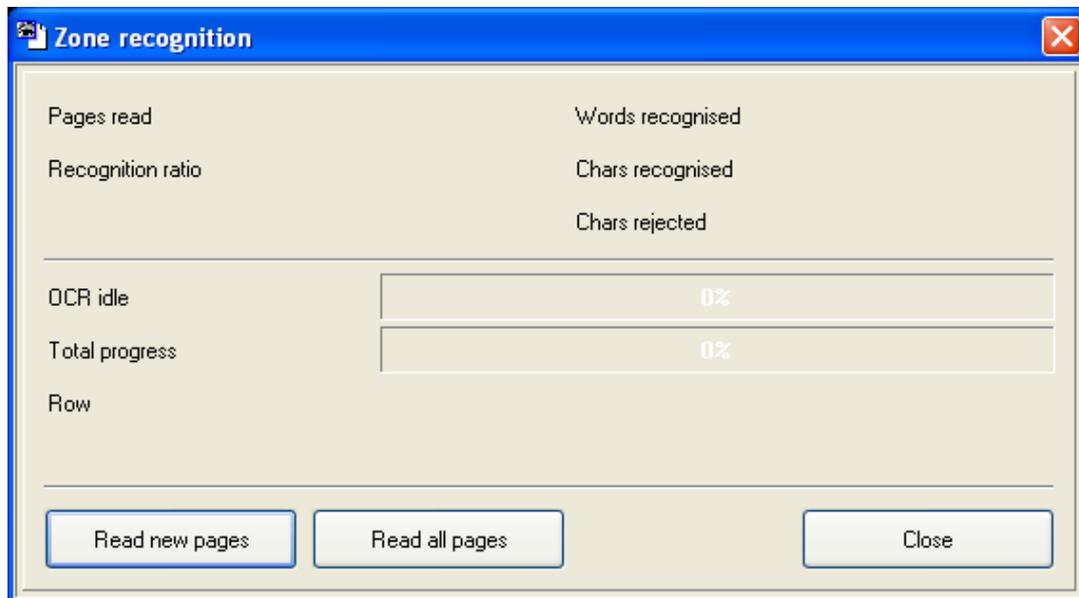
The **Edit** option allows you to resize a zone and also to change the field association and the content type setting. Zones can be deleted by selecting the **Delete** option

*Ensure that the zones are a little bigger than necessary, to compensate small differences between scanned pages.*

After all the zones have been created, press **OK** to close the **Setup zones** window.

## Reading Barcodes

To perform the zone recognition, select **OCR -> Zone recognition** and the **Zone Recognition** screen will be displayed:



Selecting the **Read all pages** option will perform the recognition on all the files in the folder. The **Read new pages** option will perform the recognition on the files that have been added since the last recognition was performed.

*The folder you wish to perform the recognition on must be open.*

### **Reading Selected Documents and Pages**

The process described above will read all the records within a folder, or the records added to the folder since zone recognition was last run. Alternatively, you can read single or selected records within a folder. In order to do this, use the **OCR** menu option, which is shown when right-clicking in the Hitlist or Image Display window.



# ***OCR & Forms Recognition***

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## Overview

This is an option for ScanFile, and has two methods of OCR. Full Text OCR and Zone Recognition.

Full text recognition creates a searchable database, allowing to find pages of documents that specific words appear on. Electronic documents containing text and COLD documents can be read as well. Since COLD data are already text based, the fulltext reading is very fast and reliable.

Zone recognition allows you to read area's of a document, and place the result of the OCR in to the folder fields.

The Forms Recognition option works in conjunction with the OCR zone option of ScanFile. Its purpose is to recognise a form by means of defined identifiers and then index records with data read from the contents of zones that have been created for each form.

From ScanFile Release 7.3, the Forms Recognition option includes support for Job Separation Sheets. Please see the according chapter for information on how to configure and use these.

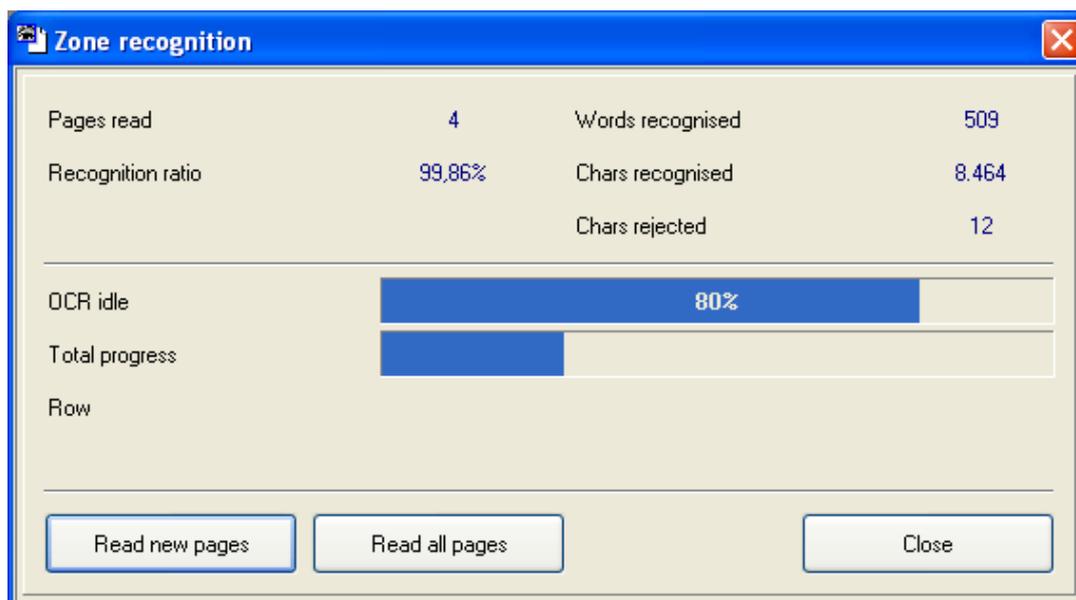
## Full Text Recognition

Using this option every scanned page of a ScanFile folder is read, and recognised words will be saved in a database. This database is attached to the folder, and can be searched by anyone who has ScanFile.

*You do NOT need the OCR module to do a **Full Text Search**; you only need the OCR module to perform the recognition in the first place.*

o do a fulltext recognition, open the relevant folder and click to menu **OCR -> Full text recognition**.

You can select whether you wish to OCR all pages in the folder or just the new pages – the pages added since the OCR was last run.



Once the recognition starts, the progress can be monitored. The information displayed includes a recognition ratio, showing the perceived reliability of the process. Obviously, the OCR recognition will have problems with bad quality documents, so always ensure that the documents to be OCR'd are of decent quality. It is also wise to have scanned them at a minimum of 300x300dpi for best results.

## ***Read Selected Documents or Pages***

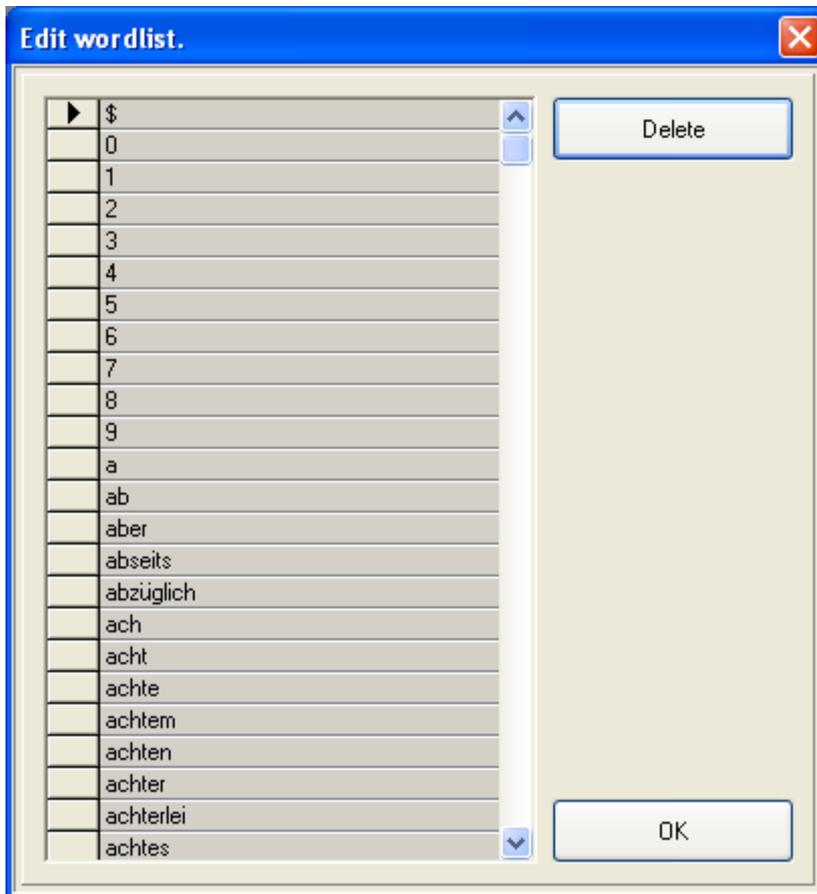
The process described above will OCR all the pages within a folder, or the pages added to the folder since **Full Text OCR** was last run. Alternatively, you can OCR individual or selected pages of a record, or single or selected records within a folder. To OCR records or pages, use the **OCR** menu option, which is shown when right-clicking in the relevant window.

| Window          | Description                |
|-----------------|----------------------------|
| Hitlist Window  | Selected record or records |
| Image Window    | Displayed page             |
| FastPics Window | Selected page or pages     |

## ***Edit Wordlist***

When performing a full text OCR, there will be some words that you would not wish to search on, and that just take up space within the OCR database. These are generally words such as 'that', 'the', 'and' etc. These can be set to

be ignored by adding them to the OCR wordlist, which you can open by selecting the **Edit wordlist** option on the **OCR** menu. Per default this wordlist is empty and no words are filtered from the text read.



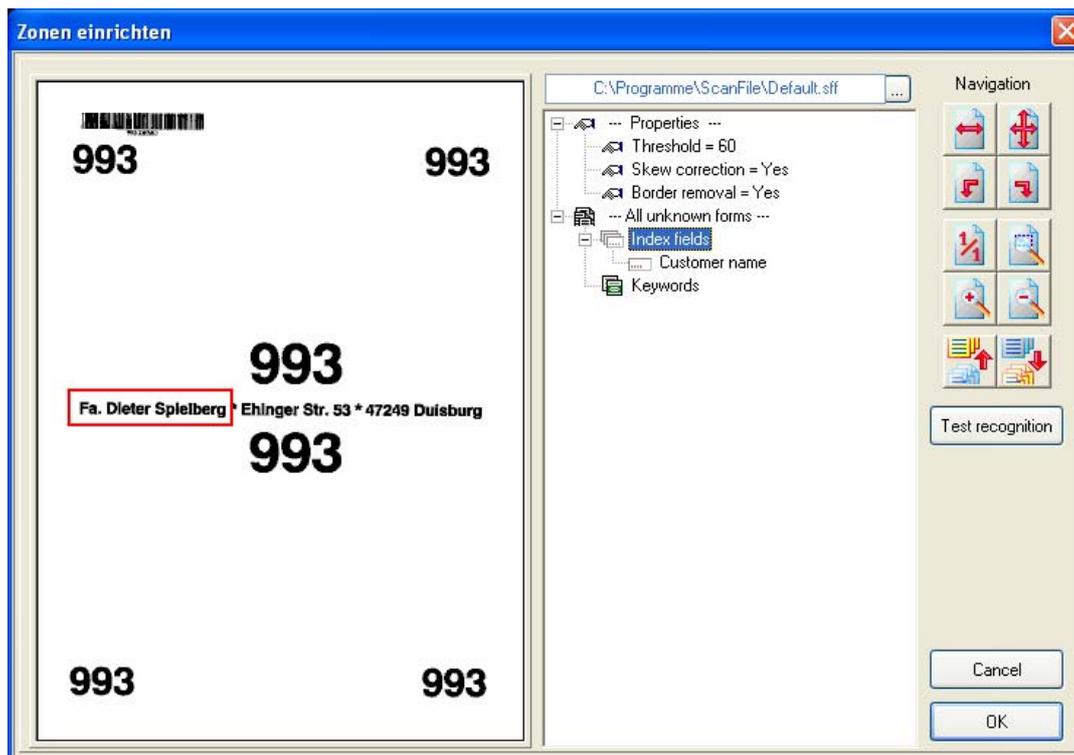
*How to perform a full text search is described in chapter **Searching and Viewing Documents**.*

## Zone Recognition

This method allows you to specify parts of a document to be OCR'd and the results put into specific fields within the folder. Up to ten zones can be defined and linked to fields in the database.

### **Setting up Zones**

To define the zones select **Setup Zones** from the **OCR** menu and the zone configuration screen will be displayed, showing the first page of the currently selected Hitlist.



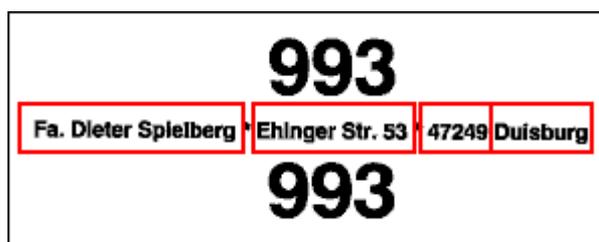
You can navigate through the files in the folder by using the available tools, until the page you wish to define zones for is displayed. Then you define the zones and link them to the index fields of the folder.

*Please note that the zone recognition will always be carried out on the **FIRST** page of a file.*

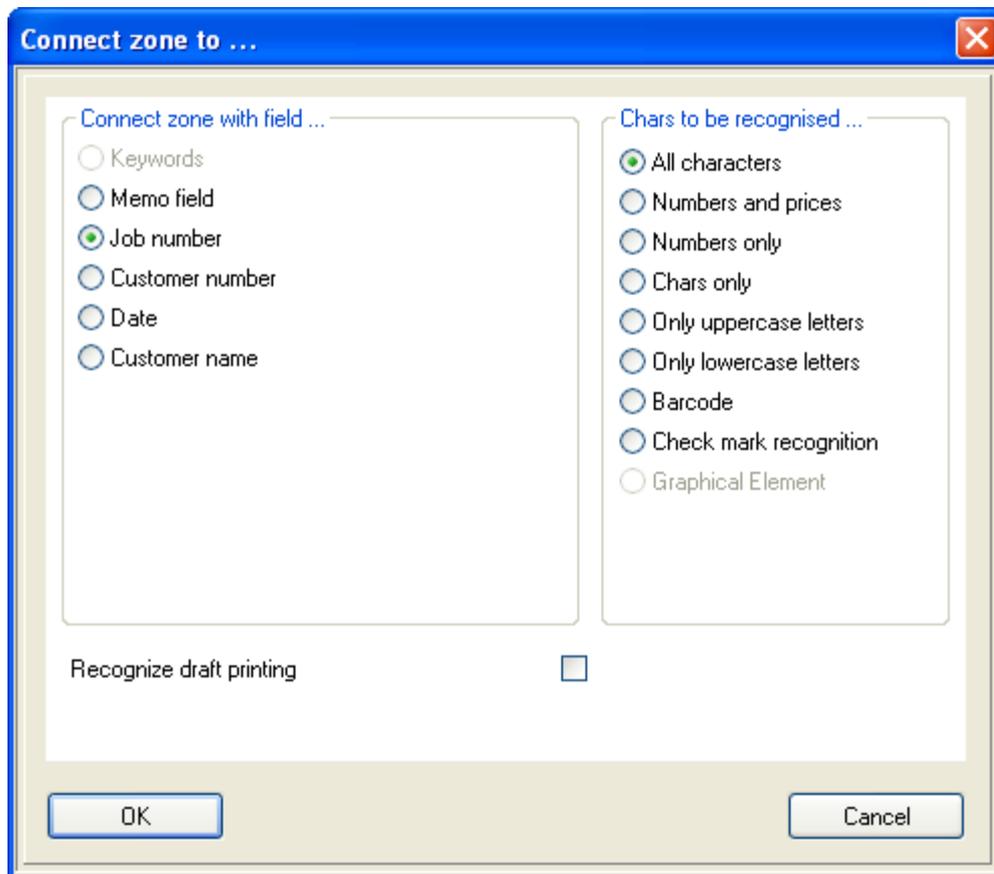
To ensure that when drawing the zone, the correct part of the page is in the zone, you can zoom and rotate the image within the display window. Once you have displayed the area of the page you wish to create a zone for, right click on **Index fields** on the OCR tree under the **All Unknown Forms** branch and select **Add Field**.

This will then display a crosshair cursor in the image display window, and by moving the cursor to the beginning of the zone, and then holding down the mouse button, you can define the zone.

The example below shows several zones already created. Always ensure that there is sufficient space around the zone for slight differences and skewing during the scanning process.



The zone has been defined once you released the mouse button. Then you can relate the zone to a particular field within the folder.



In addition to the Folder fields, a zone can be associated to the Memo for each record. From here, you can also specify the characters allowable for that field:

| Option           | Description  |
|------------------|--|
| All characters   | This is to be used if the characters are a combination of any keyboard character, including punctuation marks etc. |
| Numbers & Prices | This is to be used if the characters are a combination of numbers and currency symbols such as £ or \$.            |
| Numbers Only     | This is to be used if the characters are numerical characters only.  |
| Characters Only  | This is to be used if the characters are alphabetical characters only.   |

|                        |  |
|------------------------|--|
| Only Uppercase Letters | This is to be used if the characters are Uppercase alphabetical characters only.   |
| Only Lowercase Letters | This is to be used if the characters are Lowercase alphabetical characters only.   |
| Barcode                | This is to be used if the characters are Barcodes. Please note: the barcode format must be selected beforehand in the <b>Options -&gt; Choose Barcode</b> menu from the main ScanFile Desktop.<br><br>For more information see chapter <b>Barcodes</b> |
| Check Mark             | This is used to determine a number of values on forms with check boxes such as survey forms. Further information later in this chapter.  |
| Graphical Element      | (Identifier Only) This is to be used if the identifier is a graphic or picture on a form. This could be used if the identifier is a company logo for example.  |

The selection of the characters allowed for a zone increases the reliability of the results of the OCR reading. If you assign **Numbers only** to a field, the amount of possible characters is significantly reduced and a zero will not be mistaken as an O.

The options **Barcode**, **Check Mark** and **Graphical** Element are extended functions. They are needed for reading barcodes and forms recognition. How to configure and perform Barcode recognition is described in the chapter **Barcodes**. **Forms recognition** will be described later on in this chapter.

The **Recognize draft printing** option will assist in reading faded or dot matrix printed documents.

After a zone is defined, it can be edited any time by right-clicking on the corresponding index field and selecting **Edit**. This allows you to resize a zone and also to change the field association and the content type setting.

Zones can be deleted by right-clicking on the field name under Index fields and selecting the **Delete** option

*Ensure that the zone is large enough to compensate size differences of scanned pages.*

When all required zones have been setup, the Zone OCR reading can be started. Just like fulltext OCR reading you can select between **Reading All** and **Reading New** pages.

## **All & New Pages**

To perform zone recognition, open a folder and then from the OCR menu, select **Zone recognition**.

Selecting the **Read all pages** option will perform the recognition on all the files in the folder. The **Read new** pages option will perform the recognition on the files have been added since the last recognition was performed.

## **Read Selected Documents or Pages**

You can OCR individual or selected pages of a record, or single or selected records within a folder. To OCR records or pages, use the **OCR** menu option, which is shown when right-clicking in the relevant window.

*Please note that the zone recognition will always be carried out on the **FIRST** page of a file.*

# Forms Recognition

This option works in conjunction with the OCR zone option of ScanFile. Its purpose is to recognise a form by means of defined identifiers and then index records with data read from the contents of zones that have been created for each form.

The normal Zone OCR will apply the defined zone from **All Unknown Forms** on each page. This is not a problem if you only have one type of document per folder. But if you save different types of documents, you need a different set of zones per document. This can be achieved by using the ScanFile option Forms Recognition.

The Forms Recognition allows you to specify identifiers for a document, giving ScanFile the opportunity to identify a document and apply the zones belonging to a certain document type. Identifiers can be a graphic or picture on a form, this could be used if the identifier is a company logo for example, or a unique identifier text.

## **Setup Form**

The first part of the forms recognition process is to setup zones on the different forms that are to be identified and indexed. To do this you must first scan in some good examples of the forms to a ScanFile folder. Then to begin the zone setup select **Setup Zones** from the **OCR** menu on the main ScanFile Desktop and the Forms configuration screen will be displayed that you already know from setting up OCR zones.

To create a form you must first click with the right hand mouse button on **All unknown Forms** and select **Add Form**. You will be asked to give the new form a name. Once you have named the form it will appear in the OCR tree on the right hand side of the setup zones window. Also in this tree, under the form name, there will appear three additional options explained below.

## **Index Fields**

After creating a new form, the zones for the index fields can be setup. The zones are setup the same way as in the Zone Setup window. For more information see **Setup Zones** in this chapter.

## **Identifier**

An Identifier is a part of a form that distinguishes it from other forms, so that the Forms Recognition can tell the difference between two or more types of form that may be scanned in one folder.

To create an identifier, right mouse click on **Identifiers** and select **Add Identifier**. Similarly to the zone setup, a crosshair will appear over the image display, use this crosshair to draw a box around the identifier you wish to use. Once you release the mouse button a window will appear asking you which identifier you wish to use, the selection you make here depends on the type of identifier you have selected to use for that form.

Should you select any of these options, with the exceptions of Barcode, Check Mark and Graphical Element, you must type in the Identifier Text box at the bottom of the Set ID-Field Properties window the text, (in which format you selected) that should be used as the Identifier. For example if the identifier is form number 12345 you select **Numbers Only** and then type in 12345 in the identifier text box.

Once the identifiers have been setup it is now possible to test the reliability of the Forms Recognition by clicking on the **Test Recognition** button from the **Setup Zones** window. This will give a percentage of recognition next to the name of the form in the OCR tree. The recognition rate will be 100% for the form you used to setup the identifiers. The recognition rate of other scanned pages of the same form may vary.

## Keywords

To speed up retrieval once a form has been recognised and indexed it is possible to add Keywords to a form. In order to do this, right mouse click on Keywords and select **Add Keyword**. A keyword list will then appear. Select the keyword you wish to add from the list and then click on **OK**. Repeat this for every keyword you wish to add.

*A keyword list must be added to the folder you are working in before you attempt to add keywords to a form setup.*

## Check Marks (OMR)

Another option of the Forms Recognition is Check Mark Recognition. This is used to determine a number of values on forms with check boxes such as survey forms. These values can then be entered, once the Forms Recognition has been performed, as index information.

To set up Check Mark Recognition you must first scan in a form that has checkboxes on it to prepare the checkbox zones for recognition. Once you have scanned the page, select **OCR -> Setup Zones**. From the OCR tree in the **Setup zones** window, right click on index field and select **Add Zone**. Draw a box using the crosshair around each checkbox on the form that you wish to be recognised. When you release the mouse button you will be prompted which field you wish to attribute that zones information to, select the zone you wish and then select **Check Mark Recognition**. To adjust the settings for the way the index information is entered click on the '...' box. Here you will be given a number of default choices for indexing:

| Option       | Description  |
|--------------|--|
| Mark Set     | This setting determines the index information that is entered if a checkbox is marked.     |
| Mark Not Set | This setting determines the index information that is entered if a checkbox is not marked. |
| Separator    | This setting determines the separator that is entered between index values on the hitlist. |

The Mark Set and Mark Not Set settings have a number of default entries that can be entered as index information: Yes & No, True & False, On & Off and Keywords assigned to the folder. However it is possible for you to enter your own information to be applied as index data.

With selecting a **Separator**, you specify the character that will separate multiple index entries in one index field. You can choose from predefined characters, but you also have the possibility to enter your own separator.

Once this is all set up, perform a zone recognition from the OCR menu and the index fields will be filled.

## Properties

At the very top of the OCR tree in the **Setup Zones** window you will find three options:

| Option          | Description   |
|-----------------|---|
| Threshold       | The threshold is the setting that determines whether a forms data will be recognised by the reliability of that form.<br><br><b>Example:</b><br><br>If the threshold is set to 60 then any forms which have matching identifiers will return higher than 60 and be recognised, any forms that don't have matching identifiers will score below 60 and be rejected as that form. |
| Skew Correction | This setting will straighten or un-straighten any images that have been scanned to assist with a more successful OCR.   |
| Border Removal  | This setting will remove or add the borders that may appear on a document once it has been scanned.   |

## Forms Database

The forms with the relevant index field setup and the identifiers are stored in a forms database. The default forms database is stored in the ScanFile application path as file **default.sff**. The file is displayed above the OCR tree in the window **Setup Zones**. All changes to the forms database will be saved when clicking on **OK**.



# ***Job Separation Sheets***

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## Overview

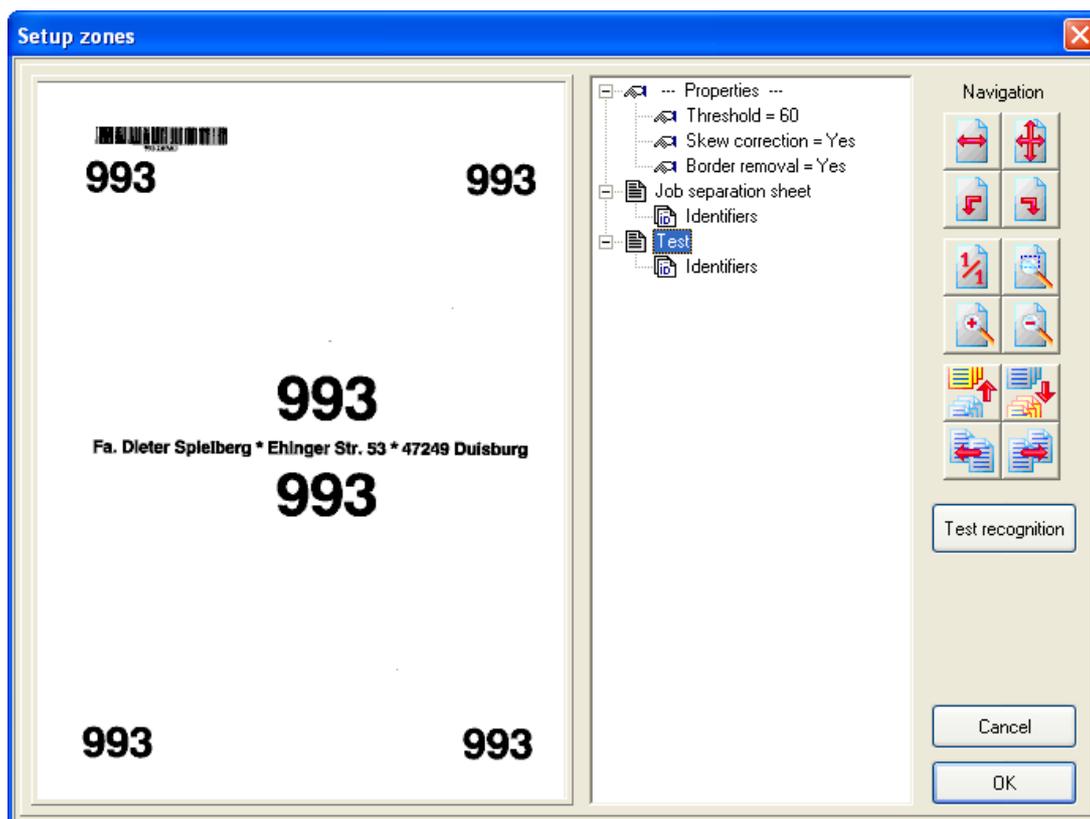
ScanFile can use job separation sheets during batch scanning, which enables several files to be placed in the scanner feeder at the same time with the job separation sheets placed between them. The files will be automatically divided into documents stored in the ScanFile folder. The job separation sheets are user defined.

Only users with Administrator or Operator status are given permission to configure Job Separation Sheets by default. This applies to new installations. For upgraded installations, Operators will have to be assigned permission manually. Please see the **Security** chapter.

## Setting Up Job Separation Sheets

To create a separation sheet template, you must first scan a sample of the sheet to a ScanFile Folder. It is good practise to create a Folder to hold all the different separations sheets that you wish to use, and from this you can create the templates. The templates you create can be applied to any ScanFile Folder.

With the Folder that has the sample separation sheet open select **Setup job separation sheets** from the **Options** menu. This will open the separation sheet setup screen. You can then select the separation sheet image that you want to create the template for.



To create a sheet you must first click with the right hand mouse button on **Job separation sheet** and select **Add Form**. You will be asked to give the new form a name. Once you have named the form it will appear in the Sheet tree on the right hand side of the setup window. Also in this tree, under the sheet name, there will be a sub node called Identifier. This node contains all identifiers that are used later on to identify the separation sheet.

*If you do not intend to use more than one job separation sheet, you do not need to create a new sheet as described above. You can create the Identifier within the default **Job separation sheet**.*

## Identifiers

An Identifier is used to distinguish the separation sheet from all the other documents being scanned. To create an identifier, right-click on **Identifiers** and select **Add Identifier**. A crosshair will appear over the image display, use this crosshair to draw a box around the identifier you wish to use.

You can create multiple Identifiers by repeating the process described above.

Once the identifiers have been setup it is now possible to test the reliability of the sheet recognition by clicking on the **Test Recognition** button from the Setup window. This will give a percentage of recognition next to the name of the form in the tree.

During a scan process all scanned images are compared with the saved job separation sheets. If the threshold is reached, an image is considered to be a job separation sheet and therefore isn't saved. At the same time the current document is closed and a new document is created. Further scanned images are saved into the new document.

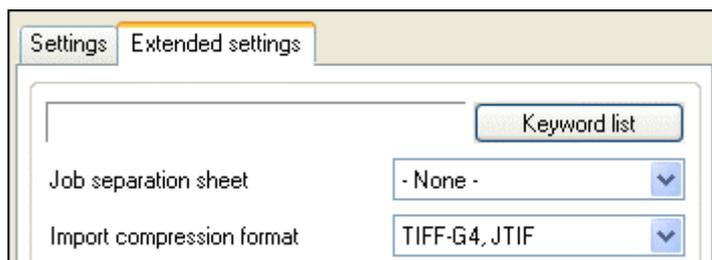
## Properties

Additional settings can be applied to influence the recognition. These properties are also used in the Zone OCR setup. The following table gives a short overview:

| Option          | Description  |
|-----------------|--|
| Threshold       | The threshold is the setting that determines whether a sheet will be recognised by the reliability of that sheet. When you run the Test Recognition a percentage will be marked against the sheet. Example: If the threshold is set to 60 then any sheets which have matching identifiers will return higher than 60 and be recognised, any sheets that don't have matching identifiers will score below 60 and be rejected as that sheet. |
| Skew Correction | The setting will straighten or unstraighten any images that have been scanned to assist with a more successful recognition.  |
| Border Removal  | This setting will remove or add the borders that may appear on a document once it has been scanned.  |

## Using Separation Sheets

Each ScanFile Folder can have a Job Separation Sheet template associated with it. This is configured in the **Setup Folder** window by selecting the folder you wish to configure, go to **Extended Settings** and select the template to use within the **Job separation sheet** drop-down list.



# ***Microfilm Scanning***

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## Overview

The Canon microfilm scanners can be equipped either with a fiche carrier or a roll film retrieval FS Controller III. to allow batch scanning of the documents held on the film or fiche.

## Fiche Carrier

After the user has entered the index information and positioned the fiche carrier to the relevant frame on the fiche, the scanning process is started by clicking on either **Batch scan** or **Single page scanning**. Using a fiche carrier, the **Feeder/manual** button is ignored.

When a scan is finished (the scanned pages and the relevant data record have not yet been saved), the user must decide on the step required next.

## FS Controller III

The FS Controller II is an automatic roll film carrier that can be directly controlled from ScanFile.

## Single Page Scanning – Microfilm

Single Page scanning will create one record for each page scanned. You can switch between manual or automatic mode, dependent on the carrier.

### ***Fiche Carrier***

Using the fiche carrier, you need to go to the page to scan manually.

- Insert fiche to be scanned
- Position to the relevant fiche frame
- Set zoom and focus properly
- Key in index for the frame to be scanned (if not created automatically by barcode, counting or duplicating index fields)
- Start scanning process by clicking on the **Single page scanning** button

## FS Controller III

The FS Controller III can scan in a given number of frames automatically. It can be switched between automatic and manual feed.

### Manual Mode

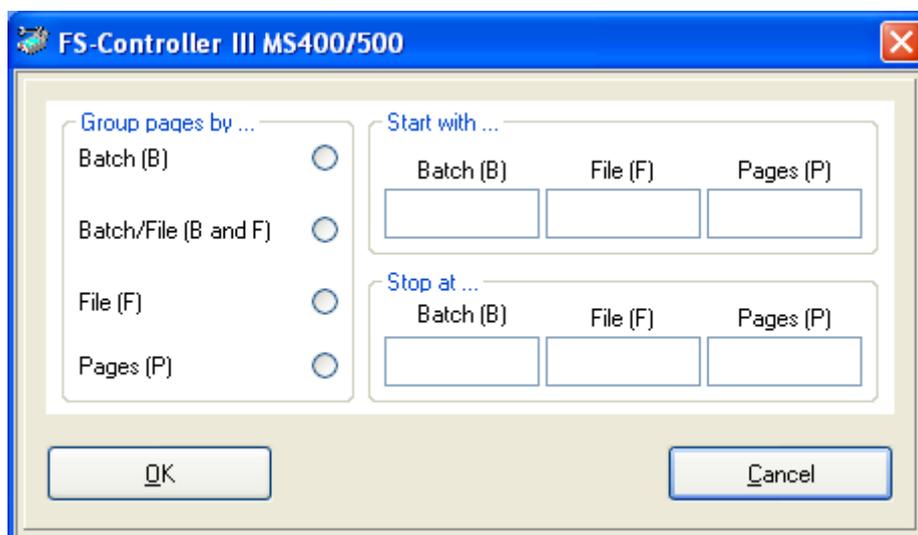
In this mode the pages are manually selected via the keyboard or knob of the FS III and scanned as single page records.

- Insert the film to be scanned
- Position the FS III to the frame to be scanned (with keyboard or turning knob of FS III)
- Set zoom and focus properly
- Key in index for the frame to be scanned (if not created automatically by barcode, counting or duplicating index fields).
- Start scan by clicking on the **Single page scanning button**

### Feeder Mode

In this mode a user-definable number of frames is scanned automatically and saved as separate records.

With this option automatic indexing (barcode, counting or duplicating fields) should be set, as it is not possible to key in index information during the scanning process. The index can also be keyed in or edited later.



- Group pages by pages (**P**)  
(scans and stores images as single page records between Page blip numbers entered)
- Group pages by File (F)  
(scans and stores images as single page records between File blip numbers entered)
- Group pages by File (**F und B**)  
(scans and stores images as single page records between File-and batch blip numbers entered)
- Group pages by Batch (**B**)  
(scans and stores images as single page records between Batch blip numbers entered)

*Be sure that the mode of the FS Controller III for blip reading is set properly. For more information on the FS Controller III, see the MS300 / MS350 / MS400 / MS500 / MS800 Scanner Configuration manual, or the FS Carrier III manual.*

## Batch Scanning - Microfilm

Batch scanning will create a document containing multiple scanned pages.

### **Manual Mode**

Using manual mode, the user can scan several images into a batch record from roll film. ScanFile will combine these single images to one document.

- Insert the film to be scanned into the FS Controller III
- Set roll film retrieval to the first image (by the keyboard or knob of the FS III)
- Set Zoom and focus
- Key in the index information (if not created automatically by barcode or by duplicating or counting fields).
- Start scanning by clicking on the **Batch Scan** button.
- Select next frame if necessary and click on **Continue scanning**. Repeat this step until end of batch
- To end batch click on **Save scanned** pages

### **Feeder Mode**

In this mode a user-definable number of images is scanned sequentially and stored as one batch (document).

The index is either entered manually or created automatically using barcode, counting or duplicating fields. The index can also be keyed in or edited later.

The images to be scanned can be selected according to the blips (**B,F,P**) on film:

- Group pages by pages (**P**)  
(scans and stores images into one batch between Page blip numbers entered)
- Group pages by File (**F**)  
(scans and stores images between File blip numbers entered into batches)
- Group pages by File (**F und B**)  
(scans and stores images between File blip and batch blip numbers entered into batches)
- Group pages by Batch (**B**)  
(scans and stores images between Batch blip numbers entered into batches)

*Be sure that the mode for blip recognition on the FS Controller III is set properly. For more information on the FS Controller III, see the MS300 / MS350 / MS400 / MS500 / MS800 Scanner Configuration manual, or the FS Carrier III manual*



# ***Document Routing***

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## Overview

The ScanFile module **Document Routing** allows you to assign documents to pre-defined routes that will direct the documents to users and/or archives in an order that has been defined within the route.

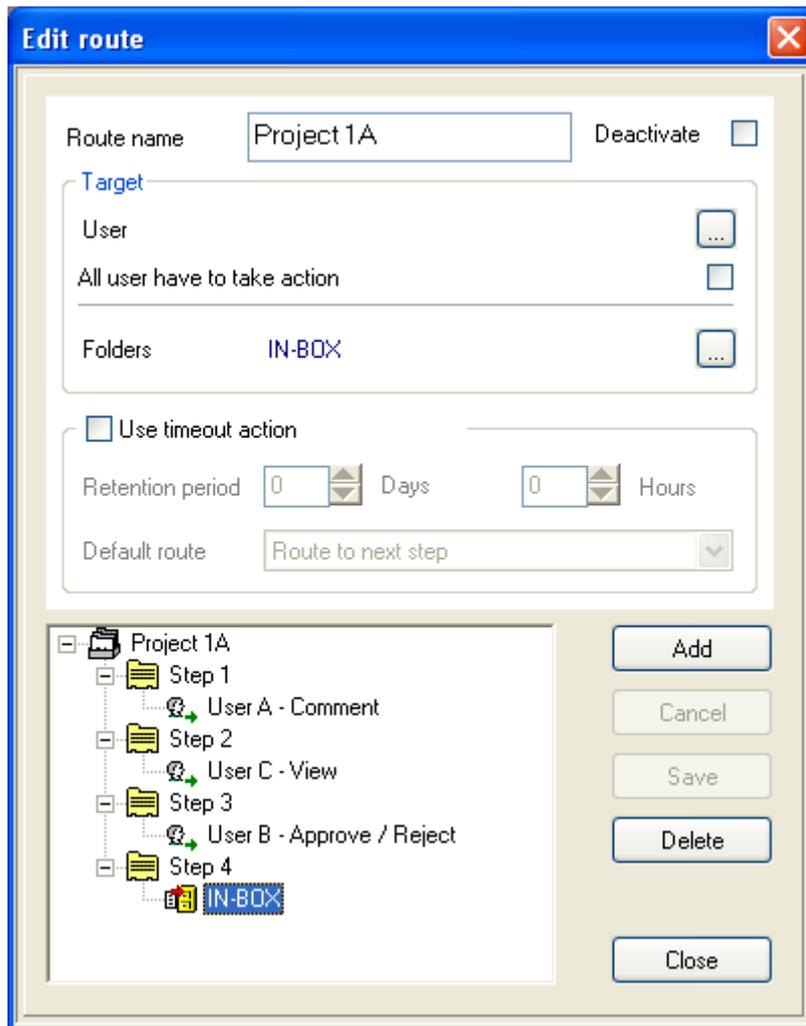
The Document routes consist of separate steps, which can vary depending on selected options. At each step the document can be assigned to a specific folder and/or users. Until each user at each step within a route has performed the required action, such as viewing or approving, the document will not move onto the next step in the route.

If a document routed to a user, it will appear in the user's personal hitlist.

## Configuring Routes

Setup can only proceed if the user wishing to setup a Document Route has Administration rights to ScanFile. To define a route along which to send documents, firstly click on **Options** and select **Document Routing** from the menu, this will return an **Edit Process** window. Here you will find a number of options including a list of any routes that have been defined previously. From here select **New** and you will be presented with the **Create Route** window.

In the **Create Route** window there are a number of options that need to be defined to create a working Document Route. Firstly you will need to give the route a name and then you can continue onto the next stage.

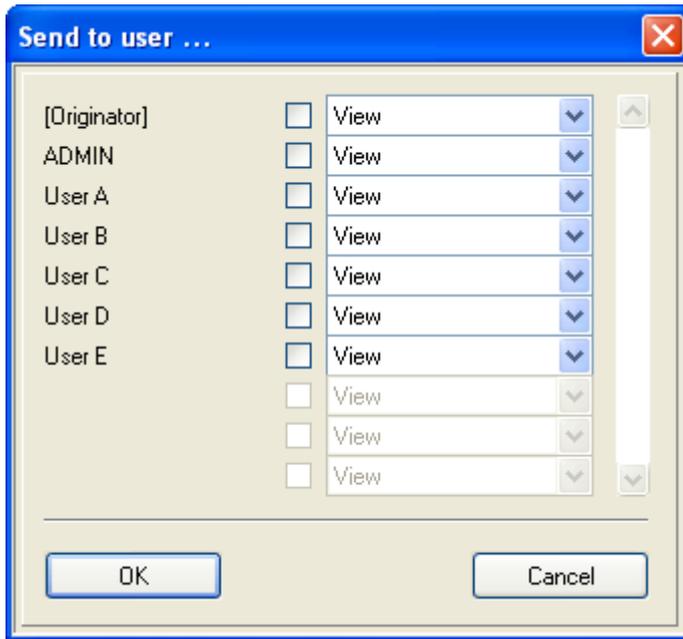


## Steps

**Steps** are different stages that can be setup within a route. At each of these stages you can define a number of users and/or folders that you wish the sent document to go to. When sending to users you can also decide what those users do with the document after they view it.

To create a step, click on the **Add** button on the right side of the tree view. Select a target for the documents. This can be a user or users of the ScanFile system and/or ScanFile Folders.

If you want to select ScanFile users as step target, click on “...” in the user section of the target frame. A window **Send to user** opens.



All available ScanFile users are listed here.

In version 8 a new user has been added to the user selection of the route: **[Originator]**. This user is a placeholder for the creator of a route in the running program. This way you can integrate the creator of a route into your route setup without knowing the user.

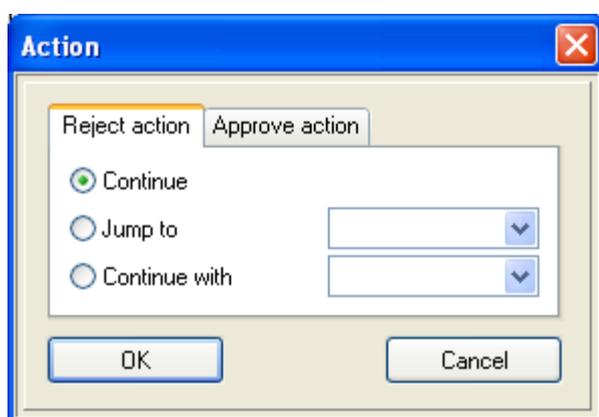
*If you display a route later on in the Remote Service Configuration Tool, you will never see the placeholder **[Originator]** As soon as the creator of a route is known to Document Routing, the process will work with the real user name.*

Choose the target user or users for the current step. Additionally assign user actions that the users have to perform, once a routed document arrived on their personal hitlist. Following user actions are available:

| Option | Description  |
|--------|--|
| View   | The <b>View</b> option the user that receives that document will only need to view it and confirm the image display before it continues on to the next step in the Route (Steps are explained above). This is confirmed by clicking on the eye symbol on the document. |

|                           |  |
|---------------------------|--|
| Comment                   | This option then the user that receives that document will be prompted to comment on it by means of a clipboard button that appears on the document when it is viewed. To comment on the document the user must click on this button and a text box will appear that should be filled out. Any comments they make are attached to that document and will continue onto the next step in the route. The following users on that Route can then view these comments. |
| Approve/ Reject           | The Approve/Reject option allows the user two possibilities. He can approve or reject the document by clicking on the <b>Approve</b> or <b>Reject</b> button displayed in the image window. Where the document is sent to, depending on the choice, will be selected when setting up a Route.  |
| View (Password)           | This option is identical to the action <b>View</b> , but this will force the user to enter their ScanFile password to signify that the step has been completed.  |
| Comment (Password)        | This option is identical to the option <b>Comment</b> , but this will force the user to enter their ScanFile password to signify that the step has been completed.   |
| Approve/Reject (Password) | This option is identical to the <b>Approve/Reject (password)</b> option, but this will force the user to enter their ScanFile password to signify that the step has been completed.  |

If you select the **Approve/Reject** or **Approve/Reject (Password)** option, there are three actions that can be set to take place when the user either accepts or rejects the document. You can apply the action in the window **Action**, opening directly after you chose **Approve/Reject**.



Following options are selectable to define the action when the user approves or rejects a document:

| Option        | Description   |
|---------------|---|
| Continue      | This option will mean that the document will continue to the next step of the defined route.  |
| Jump to       | The document will jump to the specified step, bypassing steps if required. The step you wish the document to jump to must be selected here. |
| Continue with | The document will continue on a different predefined Route from the beginning. This route must also be selected here.                       |

Confirm your selected action by clicking on **OK** and ScanFile returns to the **Send to user** window. Repeat this for every user in one step, whose action is different than **View**. Return to the window **Create Route** by clicking on **OK**.

Before a document can proceed to the next step, the user or users assigned to a step must perform the action assigned to them. If you have assigned more than one user to a step on the route, you can select that the document can proceed to the next step if one of the users has performed the action assigned to them. This can be done by ensuring the **All users must perform action** option is not selected. If this option is selected, all users assigned to a step must perform their action before the document can progress.

#### Send To Folders

If you want to select ScanFile Folders as step target, click on “...” in the Folder section of the target frame. A window **Available Folders** opens. In here are folders that have been previously set up on the system. Select the target folder or folders for the current step. Once you have selected one or more folders from the list click on **OK** and they will be entered as part of a step on the route in the window **Create Route**.

#### Timeout Action

Another option of Document Routing is the **Timeout Action**; this option determines the length of time a Document is retained within a single step of a Route. This can be extremely useful, for example:

A route has been setup with one user on step one and another user on step two. A document is sent to that route by a third party user however, User One is not available to view the document. This would mean that User Two does not get to view that document until it has eventually been viewed by User One.

To avoid this happening you need to define a time limit that a document can reside in one step of the Route. By selecting the **Use Timeout Action** it is possible to define a **Retention Time Limit**, this can be done in units of Days and Hours in the boxes on the **Create Route** window. There are 3 directions available, per step that a document could take should the retention time have elapsed:

| Option                 | Description   |
|------------------------|---|
| Route to Next Step     | Once the defined <b>Retention Time</b> has elapsed it will move the Document onto the next step of the Route. If there is no next step defined then the document will remain at that step until it is viewed. |
| Route to Previous Step | Once the defined <b>Retention Time</b> has elapsed it will move the Document back to the step before it. If there is no previous step defined then the document will remain at that step until it is viewed.  |
| Route To Sender        | Once the defined <b>Retention Time</b> has elapsed the document will be moved into the personal hitlist of the user who originally sent that document to the Route.   |

*The **Timeout Action** is only valid if that particular step of the Route includes a user. **Timeout Actions** do not have any bearing on Folders as targets.*

After creation of one step, click on the **Save** button. The step will appear as a tree node in the tree view of the **Create Route** window. In this tree view you can see all steps and their assigned targets and user actions. If you wish to edit a step, select the node and edit its settings. You can discard your changes by clicking on **Cancel**. If you click on **Save**, your changes will be saved and the tree view is updated. If you wish to remove any of the steps defined, highlight the required step and click on the **Delete** button.

## Other Routing Options

Selecting **Options -> Document Routing** opens the **Edit process** window. Apart from setting up Routes there are two settings for the general Routing process.

## Save Job Reports

Details of the actions performed by the Document routing can be saved to a text file. This will record information on all the steps for each defined route. You can specify the name and location for this log file in the **Save job reports in** field.

## Clear Completed Jobs

In addition to the **Timeout Action** there is another time related option. Database, Image and instruction information is kept within ScanFile when a document is sent to a Route, even when the Route has been completed and the document has reached its final destination. **Clear Completed Jobs** will clear all of this information from within ScanFile after a specified time limit entered in the box on the main Document Routing window. If this information is not cleared additional hard drive space can be taken up by this, usually unwanted, information.

Setting the **Clear Completed Jobs** time to zero will retain that information until a higher value is entered.

## Active Route Log

The **Active Route Log** is a report of all Document Route actions that are currently in progress, listed in here you will find useful information regarding the current stages of a document that has been sent to a Route:

Route Name, the name of the user who sent the document to the Route, the Status of the document, the active user or user who currently needs to action that document, the time it was sent to that Route, and the time remaining before the next step of that route times out.

To view any of the Route information in more detail, highlight the required Route and click on **View**. This will give a more in depth history of actions that have been progressed for each document, and will also show the document index details and any comments that were made on the document.

## Sending to a Route

Assigning a document to a route is done by clicking with the right mouse button on the document(s) you wish to send in the Hitlist and select **Send To Route**. This will display a window listing all Routes that have previously been setup. Select the Route you wish to send the documents on and confirm your selection by clicking on **OK**.

Also on this window is an option called **Split Records**, this is used if multiple documents are being sent to the Route. If selected, each document will be treated separately on the route. All required user actions along the route will be requested independently from each document.

If **Split Records** is not selected then multiple documents that are being sent will be batched together, and treated as one route task. All required user actions along the route will only take effect, when all documents have been processed.

## Viewing Routed Documents

Any documents sent to a route will appear in users Personal Hitlist. They can be identified by the name of the sender being **SFROUTE'**.

### **Local Copy**

By default, once the action has been performed and the document progresses to the next step of the route, it will be deleted from the Personal Hitlist. You can however choose to keep a copy of the document by clicking on the **Keep local copy** checkbox before performing the action. This copy will not be updated with the changes done to the document while it is sent along the route.

### **Actions**

When the document is displayed, action icons will appear corresponding to the actions assigned for that step of the route. The three actions are **View**, **Comment** and **Approve/Reject**.

For **Comment** and **Approve/Reject** actions, a window will pop up to allow you to add comments concerning the document. The comments associated with a document can be view by pressing the **Route** icon, which is displayed in the top right corner of the document display window.

Before the document can progress to the next step of the route, the action assigned to the user must be performed. To do this, click on the action icon.

## Routing Service

The Document Routing Service is part of the ScanFile Remote Services. Its main task is to monitor the current routes and to send on documents, depending on the settings of these routes.

*The Document Routing Service in ScanFile Remote Services **must** be running to allow the Documents to move from step to step within a Route. This is described in the Remote Services chapter.*

For more information, please refer to the corresponding chapter in this guide.

# ***Printing, Email and Export***

# Overview

ScanFile has comprehensive facilities for the printing of scanned documents as well as for exporting both indexes and documents for use outside of ScanFile.

## Printing

With ScanFile, you can choose from several options for printing:

- Currently displayed page of a document
- All pages in the selected document
- Range of pages from the selected document
- Selected pages from the selected document
- Selected documents
- Hitlist
- Audit Trail Events

Selecting the **Print Image** option from the **File** menu allows you to print the currently selected file, or a range of pages from the currently selected file. It also gives you the opportunity to choose the printer you wish to print to.

The **Print** button in the toolbar has different functions depending on which window is active at the time it is pressed.

| Window         | Action  |
|----------------|---|
| Image Window   | Displayed image is printed                                |
| Hitlist Window | The selected hitlist documents are printed                |
| Fastpic Window | The selected images from the current document are printed |

*Selecting **Print Hitlist** from the **File** menu will print the Hitlist.*

*When printing scanned images, various options are available. These can be selected from the General Settings dialogue. The options and their explanations are listed in the chapter **General Settings**.*

## Email

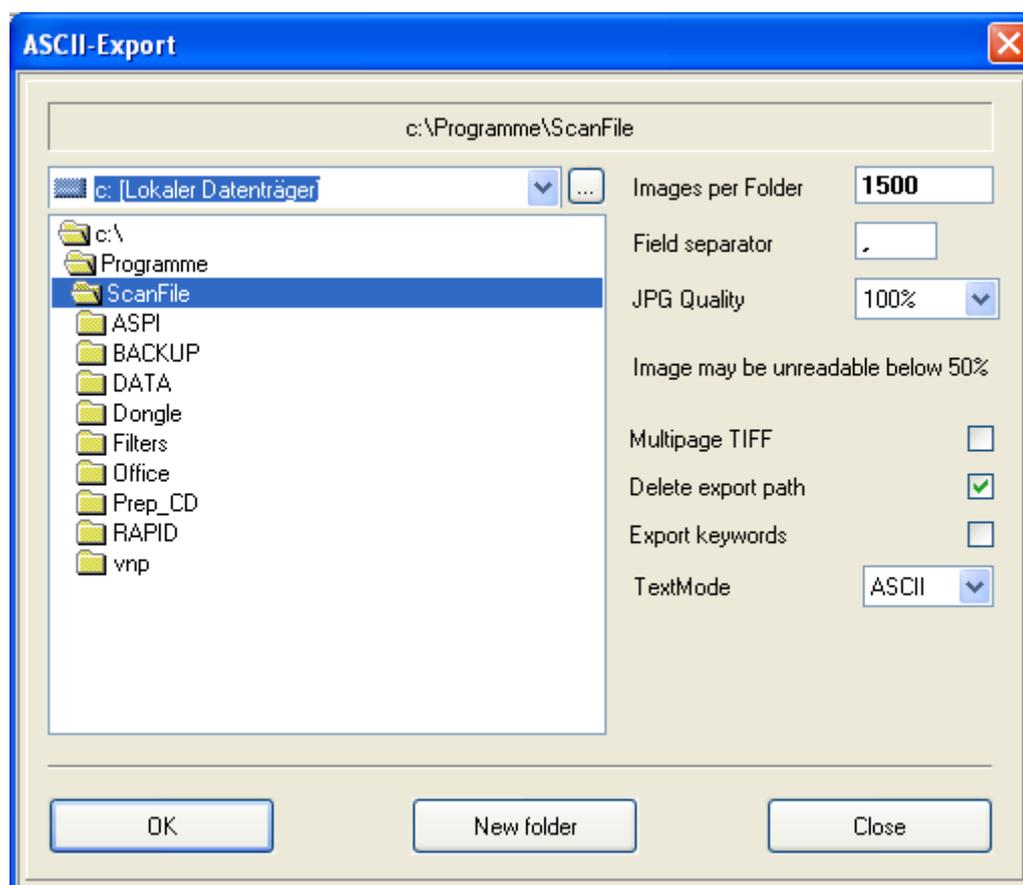
Use the pop-up menu of the hitlist to create an email with the selected document attached. Therefore right-click on a document in ScanFile, choose **Send To -> E-mail** option and ScanFile opens a new message window in the PC's default e-mail software, and attaches the selected document(s).

Scanned, multi-page documents can be converted to single page Tiff, multi-page Tiff's or PDF file, depending upon the option selected in **General Settings**. Electronic documents will be copied in their native format.

## Export

It is possible to export the contents of a folder for use with other systems. An ASCII file will be created with the index information and references to the exported image files.

Selecting **Export Folder** from the **File** menu will display the following dialogue:

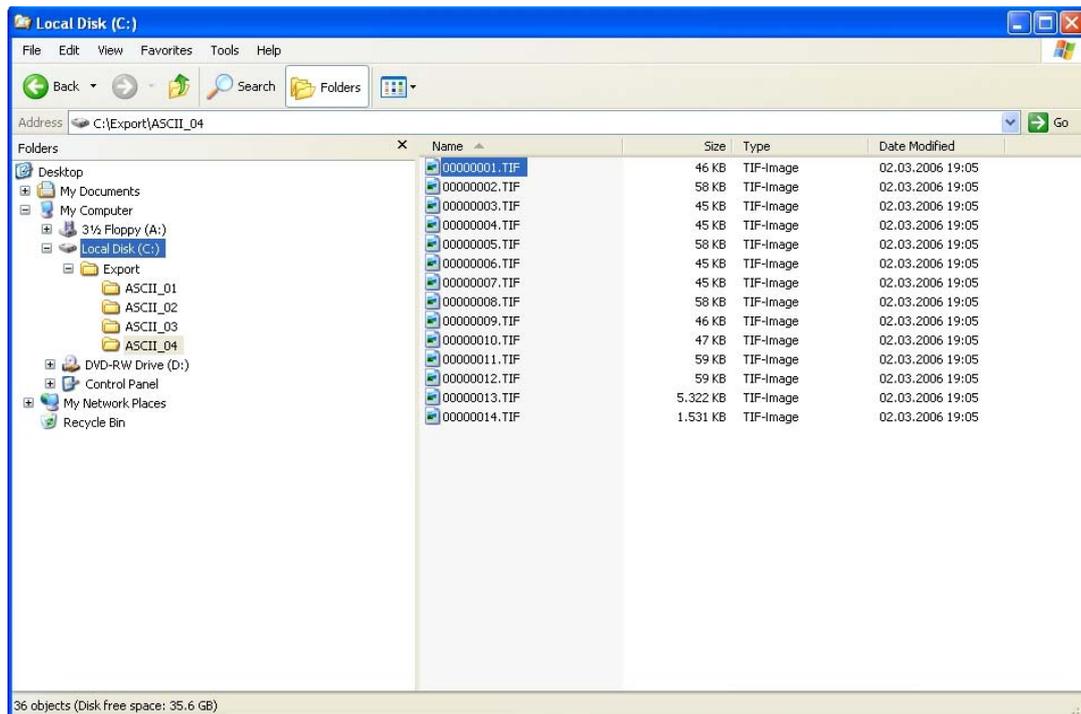


Before starting the export, the directory the information will be exported to must be selected. The number of TIFF images to be written to each directory can also be set, as well as the field delimiter for the data file. The delimiter is the character within a record line used to separate the index records. A comma is normally used for this purpose. Multi-page documents can be exported as either a multi-page TIFF file, or separate TIFF files for each page of a document.

If **Export keywords** is selected, ScanFile will export keywords as additional document index. If a document is not connected to a keyword, the index will be left empty ("""). If more than one keyword is assigned to a document, the document will be exported as many times as it has keywords assigned to, every time with a different one as additional index.

Pressing the **OK** button starts the Export. Subdirectories called **ASCII\_xx** will be created off the selected export directory, and these will contain the TIFF images. The number of TIFF images in each directory is dictated by the **Images per Folder** parameter. Each subdirectory created will also have an INDEX.DAT file, which holds the index information related to the images.

The result is shown in the example below.



# *Import*

---

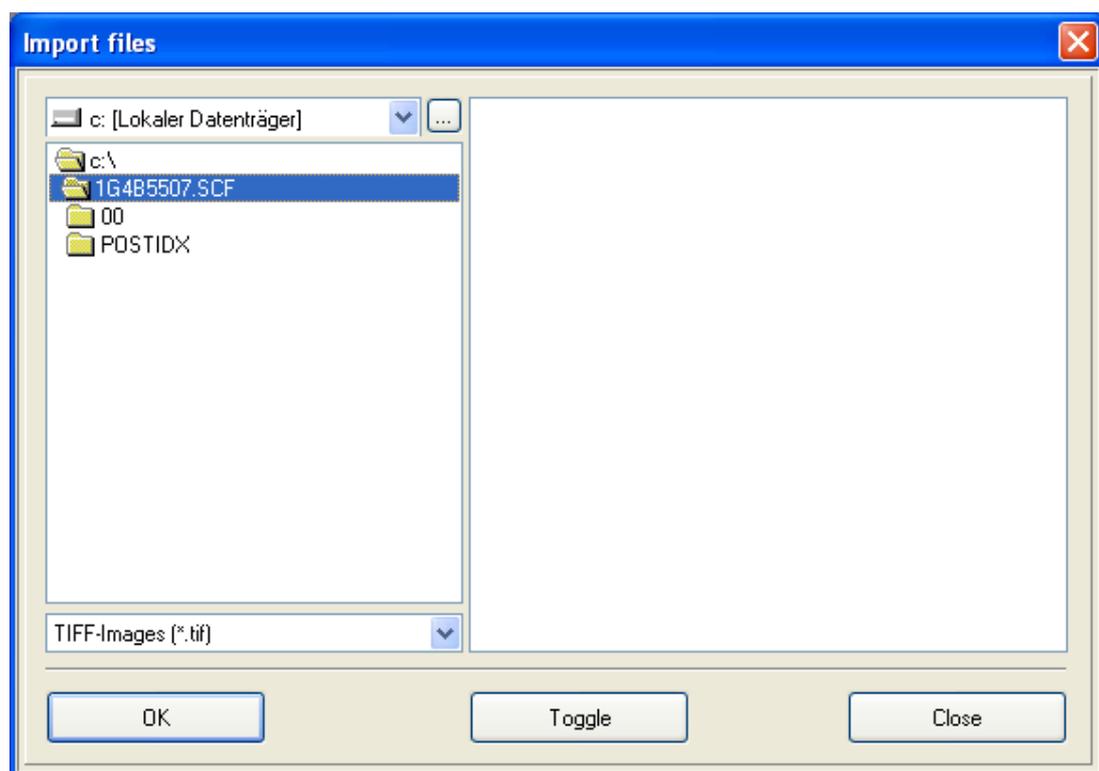
## Overview

Documents and index information can be imported or sent to a ScanFile folder in a number of ways and formats. Any format of document can be held in a ScanFile folder and viewed from either the folder or a library. Explained earlier in this Guide were TIFFWriter and the Send to ScanFile options. This chapter describes the import features available. There are three choices for importing:

- Files only
- Files and Index information
- Index information only

## Import Files

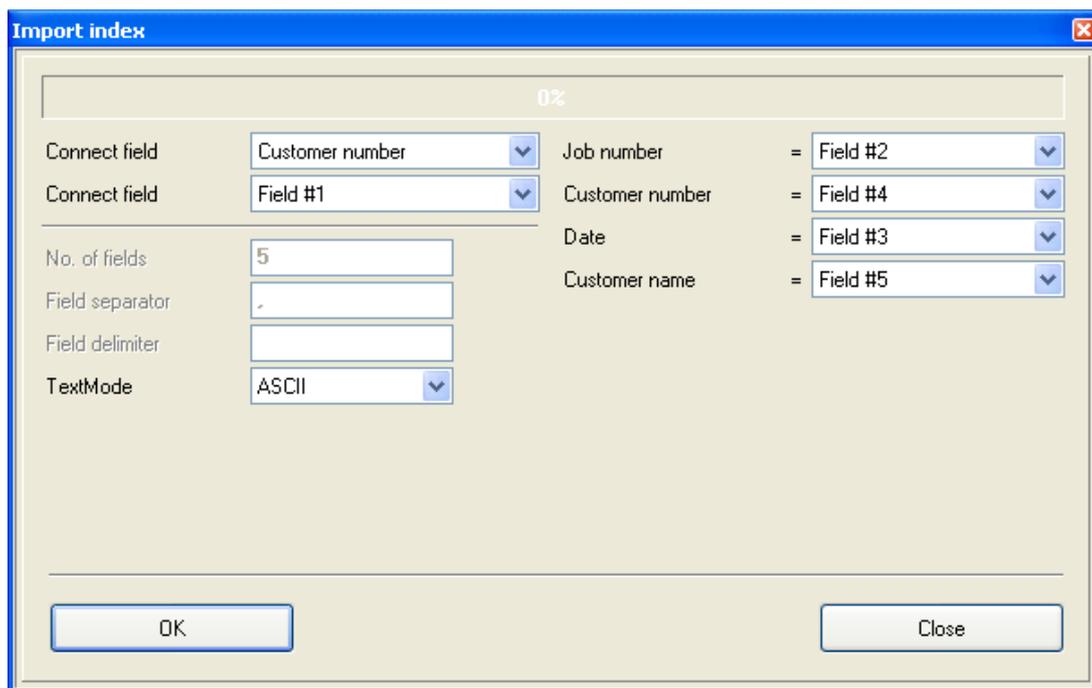
Select **Import -> Files** from the **File** menu, and the import screen will be shown.



Any format file can be selected for import,.Select the drive and directory where the files to be imported are, highlight the file or files to be imported, and then click on **OK**. The files will then be placed in the Postindex pool.

## Index Information

The Import index function is used to fill index records in existing folder documents with additional information. As an example, bar-coded documents may have been scanned, with the barcode representing a Project Number. An external can have that number in it plus the Document Name, Document No etc. The Project Number can be set to be the Connect field, and the additional index information will then be imported to the appropriate records. To open the Import select the **File -> Import -> Index** menu.

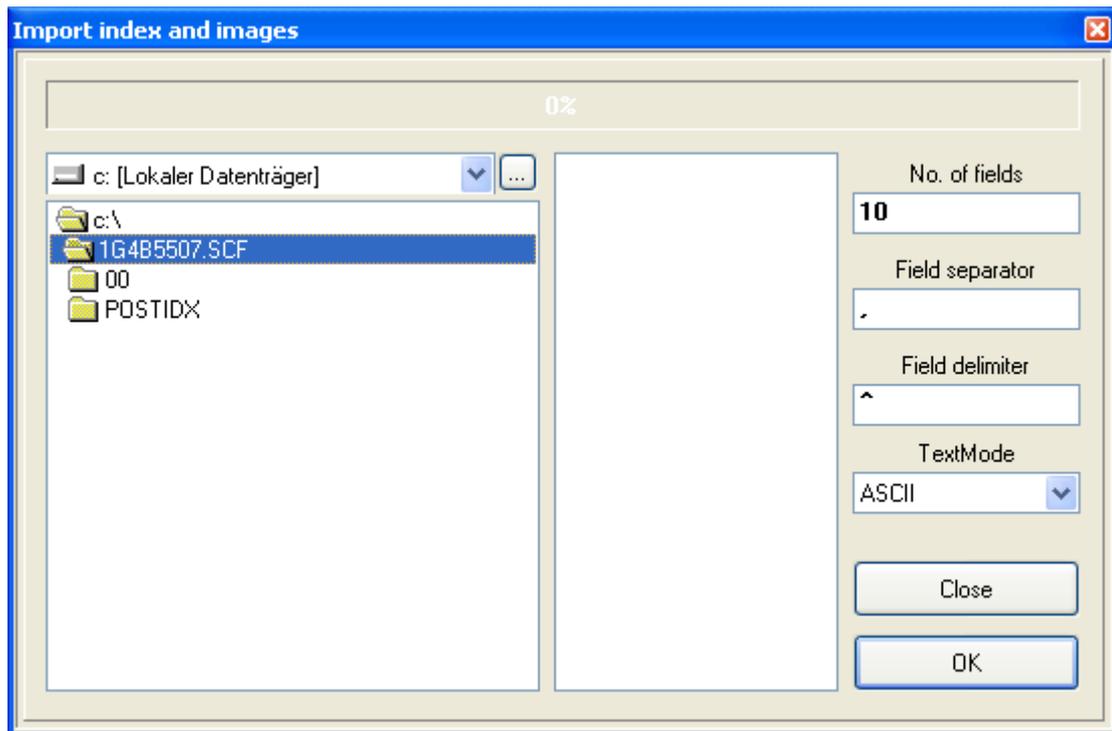


The example text file shows 10 records, with the index information within the records being delimited by commas. The first field is the Project Number – the Connect field – which already exists in the folder. The Import will use this to search for matching records, and then fill the other folder fields with the additional information.

From the **File** menu, select **Import Index**, and then select the data file that holds the index information, the screen above will be shown. The Folder fields will be displayed on the left, and the fields from the import file can be matched to these. It is very important that the No. of fields, parameter is correctly set, as well as any field separators and delimiters. Once the import has been set up, the import can be started by pressing the **OK** button.

## Files & Index Information

Files and their associated index information can be directly imported into a ScanFile folder. An ASCII file may hold the index details for project information, and will also hold references as to which TIFF files belong to a particular record. This can be read into ScanFile, the index records created automatically, and the images imported and associated with the correct index record.



*This option is also used to import index information with no associated files. This allows you to create 0 page records in a folder to add documents to at a later date.*

## File Format

It is very important when importing index information from a text file that the index records are formatted correctly within that file.

Firstly, each record must start on a new line within the text file. This can be easily verified by opening the file in a text viewer such as Notepad. When exporting data from other applications, most of the applications will automatically start a new record on a new line. They do this by adding the CR (Carriage Return) and LF (Line Feed) ASCII characters to the end of each record.

The format of each record within the import file is also very important. When importing multiple index fields into each record, ScanFile expects each field's index information to be separated by a character. The most common character used for this is a comma (,). See the following example:

12345,Project XY,Phase X,Customer Y

The comma (,) separates the four fields:

- Field #1: 12345
- Field #2: Project XY
- Field #3: Phase X
- Field #4: Customer Y

These four fields can be assigned to the index fields in the import folder. The options **No. of fields** and **Field separator** must be filled with a 4 and a comma (,) so that ScanFile is able to import the index information correctly. As a **Field separator** every character that is not part of the index information itself can be used. If the **Field separator** occurs in the index information a **Field delimiter** can must be added to separate the fields. The **Field delimiter** must be the first and the last character in each field. If so all characters between the field delimiter characters, even a character that is used as **Field separator**, will be used as index information.

"12345 ","Project XY","Phase X,Y","Customer Y "

The comma (,) separates the four fields:

- Field #1: 12345
- Field #2: Project XY
- Field #3: Phase X,Y
- Field #4: *Customer Y*

The example uses a quote sign (") as **Field delimiter**. Without the **Field delimiter** the comma (,) in field #3 would also be interpreted as **Field separator** and the field content would be divided into two different fields.

In addition to the import of index information ScanFile is also able to import index information and related files from. In this case the index file must contain the index information and the document filenames. All files must be located in the same path as the index file itself, or have the path to the file location as part of the filename. The following example shows a line of an import file to import index information and their related files.

"12345 ","Project XY","Phase X,Y","Customer Y","01.tif","02.xls"

ScanFile would find the following information:

- Field #1: 12345
- Field #2: Project XY
- Field #3: Phase X,Y
- Field #4: *Customer Y*
- 
- File #1: 01.tif
- File #2: 02.xls

The example shows the index information and two related files. The file named 01.tif is a TIFF file that is directly imported to the chosen folder. When importing TIFF files, these can be either single or multi-page Group 4 TIFF files. The second file named 02.xls is an Excel file that will be appended to the document after the last page of the TIFF file.

***COLD***

---

## Overview

The optional ScanFile COLD (**C**omputer **O**utput to **L**aser-**D**isc) module allows the import of computer generated spool data into ScanFile folders. This data can be combined with scanned or other imported documentation to give a complete, comprehensive document storage system.

The COLD module will take the spool data, such as mainframe-generated invoices, and automatically create index records to the appropriate pages.

This manual explains the setup and import procedures required by the COLD module, and details the supported import spool data formats.

## Supported File Formats

A spool file can contain many thousands of pages of data, which must be divided into pages and have index data associated with those pages.

Generally, spool data can be divided into the following formats, although other formats are in use:

- Spool Files
- COM 1 Files
- COM 2 Files
- Text Files

Spool files will have the 'FF' character (Hex 0C) to signify page breaks within the file.

COM 1 files use the first column of the file (the first character in each line) to specify page breaks and other formatting.

COM 2 files use the first 4 columns to control page breaks.

Text files generally should have a fixed number of lines allocated for each page.

The ScanFile COLD module supports the above formats, although other format files can be imported by specifying other data within the file to act as page break characters.

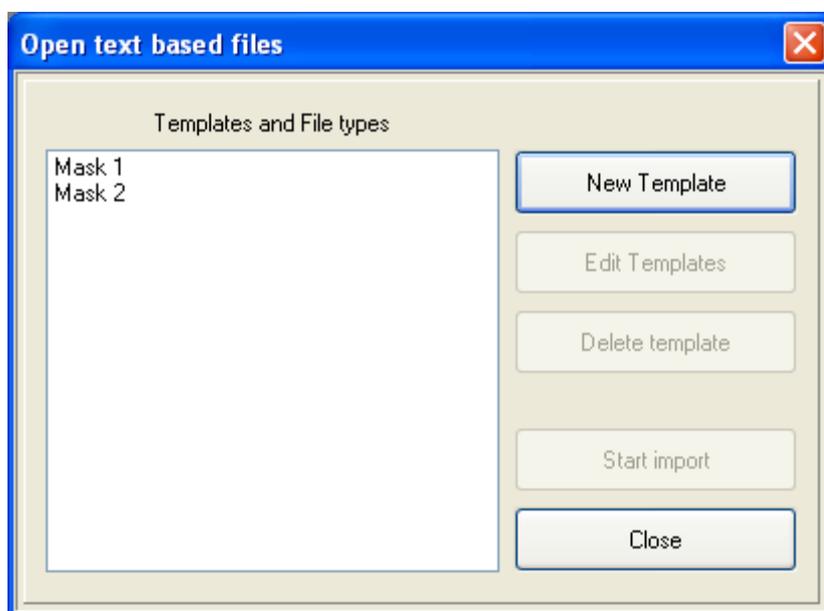
## The Import Template

For each spool data format, an import template must be created. The template specifies the import file type, the indexing information location and the display formatting such as overlays and font, font size and line and character spacing.

Once a template has been created, it can be used to import spool data from any file that has the same format as the file the template was created from.

### *Creating a Template*

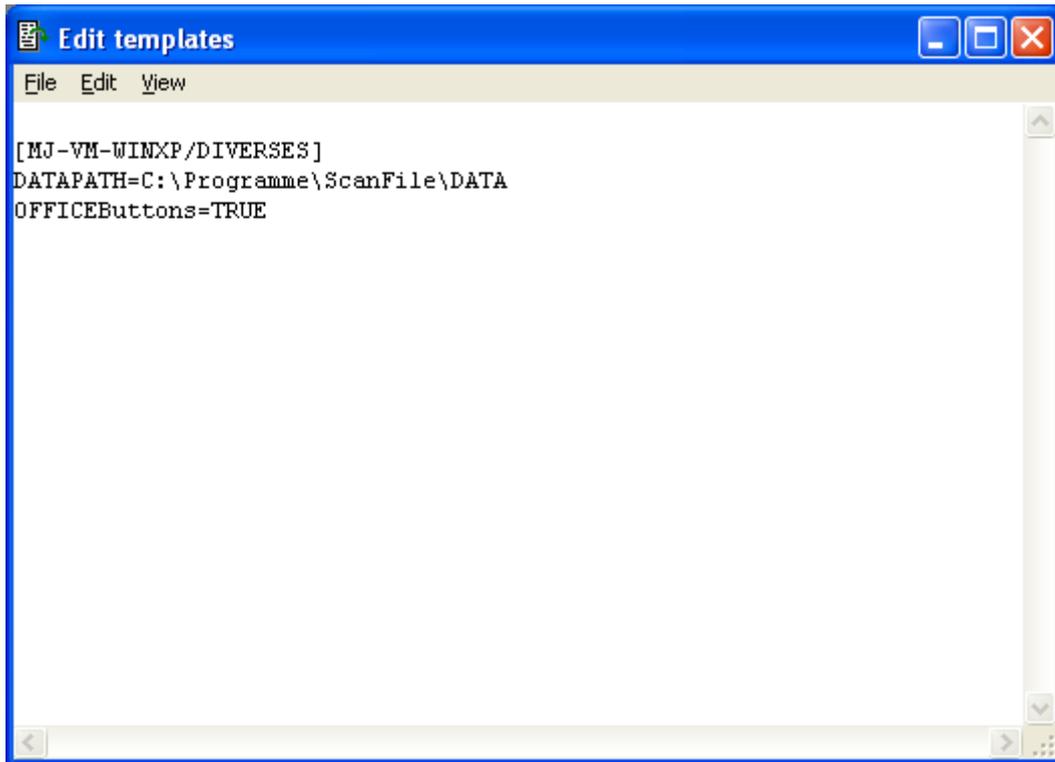
To create an Import template, choose the **COLD -> Open/Import** and the Template list will be displayed.



From this screen, select **New Template**, and you will then be asked to give a name to the template. This name should be associated with the data format being imported. Type in the name you wish to give to the template, press the **OK** button, and you will then be asked to choose the spool file to be used to design the template.

By default any file with the extensions \*.TXT, \*.DAT and \*.ASC will be listed, although if the file has a different extension, choose the **ALL Files** option from the List of File Types drop-down list. Select the spool file you wish to use from the list and then click on the **OK** button.

Once the spool file has been chosen, the data will be displayed within an **Edit Template** window within ScanFile. This window is where all the parameters associated with the template can be set.

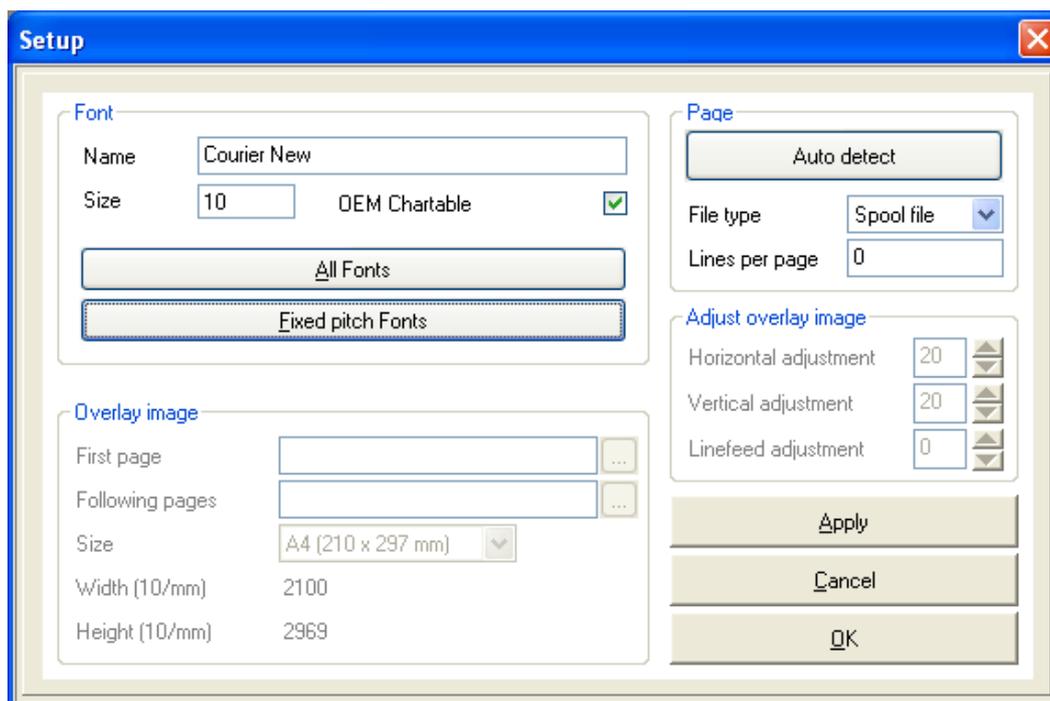


If the spool file has no page break character (Hex 0c) within it, a message stating this will be displayed. If this is the case, the file must contain a fixed number of lines per page, or must have a unique value within it other than Hex 0c that can be used to signify a page break.

Also, the Hex 0c filters must be removed. See the section on **Filters** for information on this.

## ***Spool File Type***

To ensure that the COLD module pages the file correctly, choose **Edit** -> **Page Settings** within the **Edit templates** window, and the **Setup** screen will be displayed.



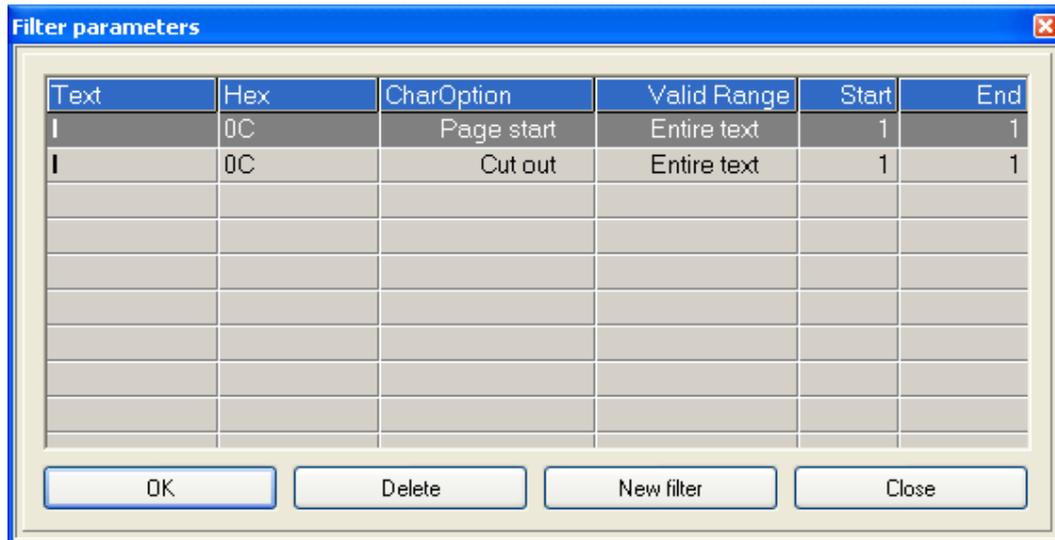
From this screen you can attempt to automatically detect the file type by pressing the **Auto Detect** button. This option will detect whether the file is a COM1 or COM2 format, and show the file type accordingly. If it is not one of those, the **Auto Detect** will attempt to find a non-standard page break within the file. If it cannot do this, the parameters must be set manually. In the **Lines per page** field, specify the number of fixed lines allocated to each page within the spool file.

To set the options chosen, either manually or by the Auto Detect function, click the **Apply** button, and then choose **OK**. You will then return to the **Edit template** window.

## Filters

Filters are used to specify the actions to be carried out, when a certain character or sequence of characters within the spool file is encountered. By default, a page break filter is created for each new template. For spool files with no page break characters, these must be removed. To do this, choose **Edit -> Edit Filter** within the **Edit templates** window.

The **Filter parameters** screen will be displayed, showing the pre defined page break filters.



Highlighting a filter and pressing the **Delete** button will remove it.

The options that can be performed against a sequence of characters are shown below, and can be accessed by clicking in the **CharOption** column in the row of the sequence you wish to set an option for. A drop down list will become available, allowing you to select the required option.

| Option           | Description   |
|------------------|---|
| Cut Out          | This option will remove the selected sequence, and move any text to the right of the sequence, to the left  |
| Blank Out        | This will replace the selected sequence with spaces   |
| Page Start       | This action can be set to identify the selected sequence of characters as the start of a new page. This is useful if the import file has no identifiable page break character, and does not have a fixed number of lines per page |
| 0 line feeds     | This option is normally used with COM1 and COM2 format files. The sequence selected will not evoke any line feed.   |
| One line feed    | The sequence selected will be replaced by one line feed   |
| Two line feeds   | The sequence selected will be replaced by two line feeds  |
| Three line feeds | The sequence selected will be replaced by three line feeds  |

Additionally to the **CharOption** the **Valid Range** drop down list is used to identify the area of the import file that the filter should look and act upon the selected sequence. The options available are described below.

| Option        | Description  |
|---------------|--|
| This Position | Will only perform the action upon the sequence at the position in the import file where the text was highlighted |
| Start to Here | Will perform the Action from the start of the import file, to the selected sequences position in the file        |
| Here to End   | Will perform the action from the location of the selected sequence to the end of the file                        |
| Entire Text   | Will perform the action upon the entire file   |

Once the Filter Parameters have been set, the spool data should be displayed, and you should be able to page through the file correctly.

Some spool files may contain other information such as printer control codes that are used to specify whether text should be in bold or underlined. These codes will be shown in different ways in the spool file, but they should not be shown when the file is imported into ScanFile.

As an example, the code '#BLD' is shown in the spool file at the start and end of a piece of text. This signifies that when printed, that text should be printed in Bold. This code needs to be hidden or removed when the file is imported, and the filter can be used for this purpose.

This can be done by highlighting the code in the **Edit template** window, and then choosing **New Filter** from the displayed menu. From the **CharOption** column within the **Filter Parameters** window, the **Cut out** option can be chosen. Select **Entire Text** from the **Valid Range** drop down list to filter the code from the text.

Repeat this for every control code.

## **Index Fields**

The COLD module, when importing the spool data into a ScanFile folder will not only import the page information, but will also create the index records associated with the pages. To do this, the location of the index information on the spool data page must be specified.

To add an index field record, highlight the text to be used for indexing in the **Edit Template** window, and a pop-up menu will be displayed. Choosing the

**New Index Field** option then allows you to enter the index field name. This can be repeated for each index field you wish to create.

*A very important point is that the location of the index data **MUST** be consistent across each page of the spool data file, the location of the index data cannot be varied from page to page.*

*The index fields **MUST** be created in the same order as the fields within the folder the data is to be imported to.*

To view the fields created, choose the **Edit -> Edit Field** option from the menu. From this screen, you can see exactly what has been specified for each index field, and this information can be edited. For example, you may not have highlighted sufficient characters for a name field, and that can be adjusted from this window.

Some spool data files may contain multi-page records, such as an invoice being continued over several pages. These pages can be grouped into one index record in the ScanFile folder, by setting the **Group Pages if** option. This will be displayed if the page grouping data in the **Edit Template** window is highlighted, and the **Connect pages** option is selected from the pop-up menu.

Any relevant data can be used to group pages together, such as an increasing page number, or the same data on following pages as on the first page. The required option can be selected by choosing from the drop down list, and the available options are:

- No grouping
- Increasing Number
- Empty on next page
- Not empty on next page
- As preceding page

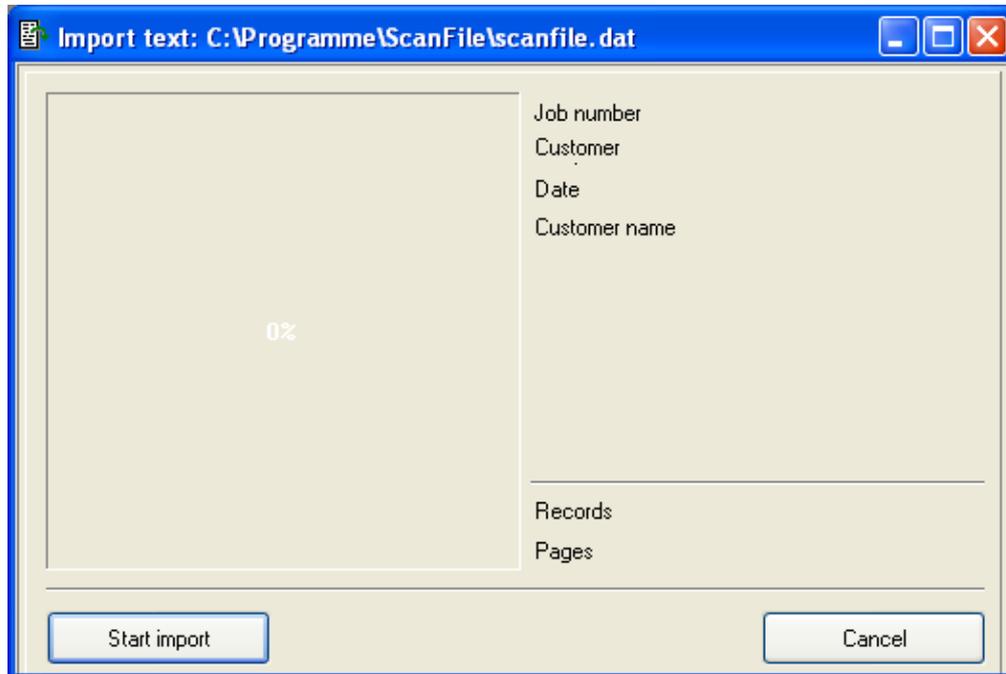
Once these options have been set, the raw data is ready to be imported into ScanFile.

## Importing Spool Data

Before you can import spool file data into ScanFile, the folder the data is to be imported into must be open. It is also important that the fields specified in the import template are the same as in the folder, and in the same order. If this is the case, choose **COLD -> Open/Import**, and the **Open Template** dialogue will be displayed. Select the template to be used for the import,

ensuring that it is the correct template for the open folder, and then press the **Start Import** button. You will then be asked to select the spool data file to be imported into the folder.

Select the correct spool file for the template and the import screen will appear.



During the import the screen displays all index fields defined for the current template and their processed contents, the amount of imported records and the total amount of imported pages. Pressing the **Start Import** button will start the import.

## Viewing COLD Data

Searching for and viewing COLD data is achieved in the same way as for any other document stored in a ScanFile folder. A folder may be opened, the search criteria entered, the **Search** button pressed. A Hitlist will then be displayed, and the first document shown in the image window.

All the standard image rotate and zoom controls will function with COLD data.

## Page Settings

It may be that the default paper size, font and font size and line and character spacing are incorrect for the spool data being imported. These can be amended in one of two locations.

After the spool data has been imported, choosing **General Settings** from the **COLD** menu will display the **Settings** dialogue.

When creating or editing a template, choosing the **Graphic** option from the **View** menu will display the spool data in graphic format. This will then allow you to edit the page settings for the spool data.

In the Edit Template window, select **Page Settings** from the **Edit** menu, and the Settings screen will be displayed

If the **Graphic** option is not selected, all options apart from the file type selection options will be greyed out. Whilst the **Graphic** option is selected, the correct paper size can be set, as well as the font and font size to be used for displaying the data.

Please note that although any font can be selected, even TrueType fonts, most spool data is printed in a fixed width font.

Also in the pages settings dialogue you will find a checkbox option called **OEM Chartable**, this, when checked, ignores generally foreign characters from a COLD template, E.g. ã,é,ì,ö,û. If you wish these characters to be recognized then uncheck this option.

## Overlays

When spool data - such as invoices - are printed, they are usually printed onto prepared forms with named columns and data headings. Without these forms, the data can be quite hard to read, and can easily mislead. For this type of spool data, the ScanFile COLD module allows a scanned image of the form to be specified for a template, and when the imported data is displayed, it will be overlaid on the image of the form. Two separate overlays can be specified, for the first page of a record, and for any subsequent pages of a record. If it is the same form for every page the **Following pages** field can be left blank.

When using overlays, it is critical that the text will line up in the correct position relative to the overlay form. It is therefore important that an original form is scanned to be used for the overlay, and that this is not scaled in any way. The form can be scanned using ScanFile or any other program. The image file of the scanned page can be used in ScanFile as an overlay.

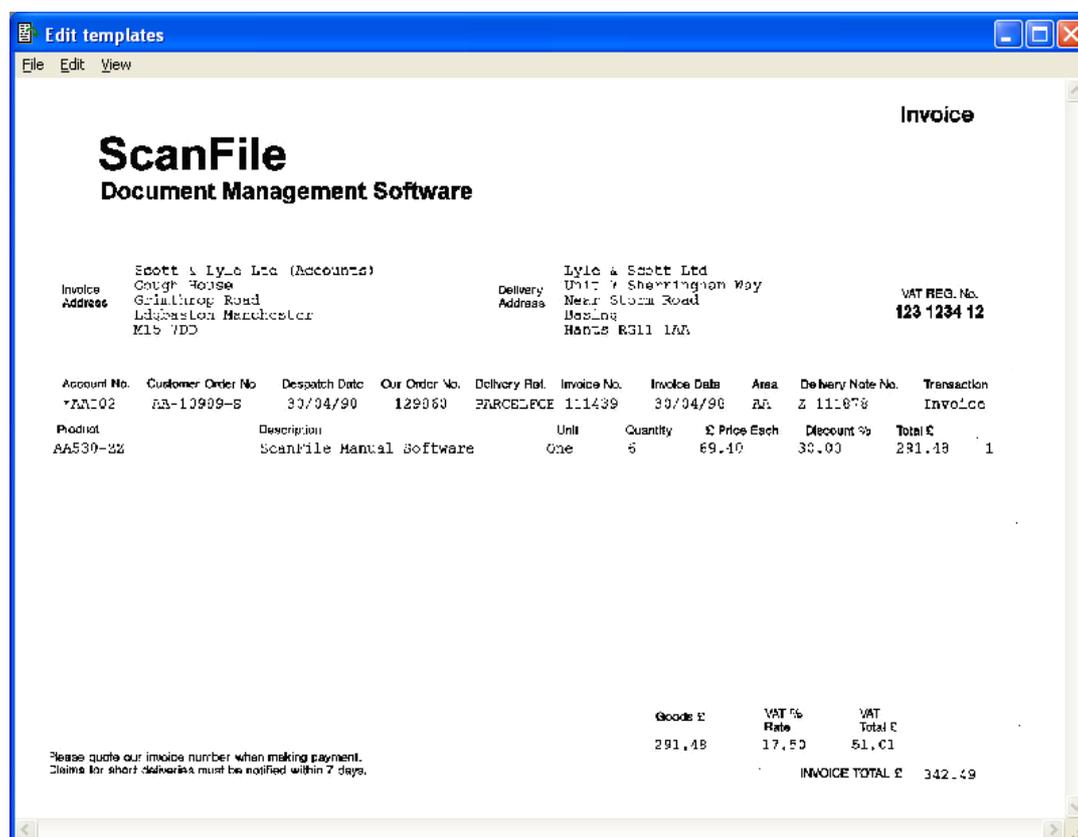
The other options that can affect the alignment are the Overlay Settings. Firstly, adjust the **linefeed** setting, and this will normally ensure that – if the correct font and font size have been selected - the data will fit the overlay. If any other adjustments need to be done, the **horizontal** and **vertical** adjustment options can be used for minute changes to the character positions.

The **Linefeed** setting adjusts the number of pixels between each line of text.

The **Horizontal** and **Vertical** settings move the page of text x number of pixels left, right, up or down.

After changing any of these settings, by pressing the **Apply** button, you should immediately see the effect the settings have had.

An example of COLD information overlaid on a scanned image is shown below.



## Imported Files

For each folder, a list of the files imported into that folder, and the name of the template used to import the data can be displayed by choosing the **List Imported files** from the **COLD** menu while the folder is open.



# *LuraDocument*

---

## Overview

LuraDocument®, an option of ScanFile, is a document compression procedure which preserves text legibility together with high visual and colour quality. The basis of the LuraDocument procedure is the analysis and segmentation of documents.

Mixed documents are segmented to generate the following three images:

- a binary image containing text
- a foreground image preserving the text colour
- a background image with the text removed

The three images are then individually compressed using the most appropriate efficient techniques.

LuraDocument is particularly suited to documents scanned at a resolution of 300 dpi or higher, containing large image regions together with text.

The separation stage uses the segmentation to separate the document into three images of different resolutions:

The text is removed from the original document to generate a colour or greyscale image containing the image regions and text background. This image is compressed using a specially adapted version of the "LuraWave" wavelet based image coder. The removal of text regions - extremely difficult structures for image coders to compress - enables a significantly higher compression performance to be achieved.

The removal of image regions from the Bitonal text image makes high compression rates possible. The Bitonal text image is compressed with a LuraTech developed context-based coder, generating compressed data 10%-40% smaller than that achieved by CCITT Fax Group 4.

A third image, containing colour for text regions, is generated and compressed using the "LuraWave" wavelet coder. The Bitonal text image is compressed with the original document resolution while the background and text colour images are coded with a reduced resolution.

## Selecting LuraDocument

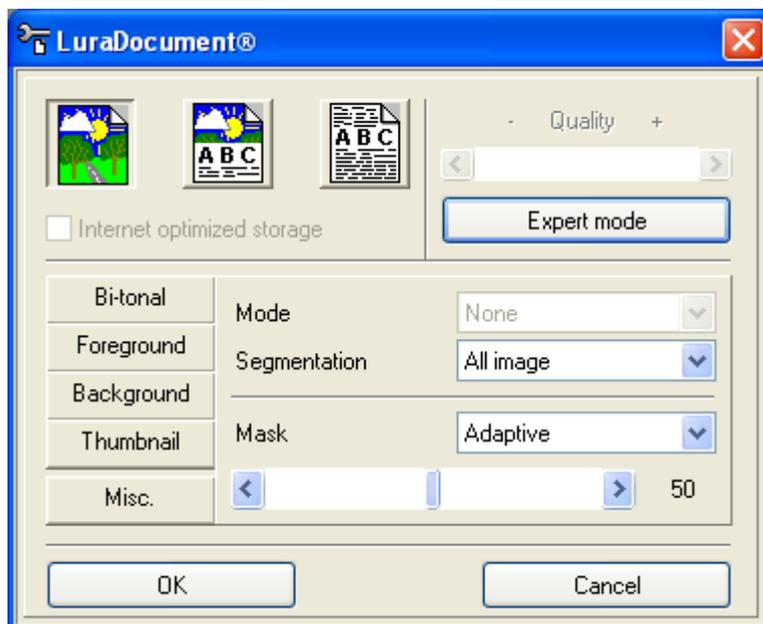
LuraDocument can be made the default image compression format for a folder when creating or editing a folder. Select **File -> Setup Folders** and go to the **Extended settings** tab. On the tab you find the **Import compression format** field, which represents the default image compression format of the

folder. You can choose between **LuraDocument** or **TIFF G4/JTIF** format. This can be changed any time.

Additionally you can use the LuraDocument compression within the scanner setup for the DR-5020/5080c, DR-3060/3080c, DR-5060F and MS-800.

## LuraDocument Settings

The settings can be viewed and amended from two places in ScanFile. In Scanner Setup for the Canon DR-5020/5080c, DR-3060/3080c, DR-5060F and MS-800 when you select LuraDocument as the compression format, a tool icon will be displayed. Clicking on that will display the settings screen. In addition, you can select it from the **Options -> Compression** menu. With either option, the configuration screen will be displayed.



### Predefined Settings

There are three pre-defined settings that can be used that for differing types of documents to be scanned. Additionally, these formats can be optimised for Internet retrieval using ScanFile WebServer.

| Option  | Description   |
|---|---|
|  | This will set the compression to the optimum settings for graphic only images |

|   |  |
|---|--|
|  | <p>The compression will be optimised for images that are mixed text and graphics</p> |
|  | <p>The compression will be set for text only images</p>                              |

There are also 5 quality levels that will affect the compression levels of the foreground and background images, but will not affect the text compression.

The **Internet optimised storage** will change the storage mode to **Embedded**. The image can then be displayed progressively. The quality becomes continuously better during loading over telephone lines. An interrupt of the transmission results in a smoothed but full-size image

## Expert Settings

The Expert mode allows you to alter the compression and quality levels of the image segments. These are divided into:

- Bi-tonal
- Foreground
- Background
- Thumbnail
- Miscellaneous

### Bi-tonal

The Bi-tonal settings are for the text part of the image and can determine how the text is segmented and stored, and the compression level. Following options are available:

| Option       | Description   |
|--------------|---|
| Mode         | This sets the compression format in which the text is saved. This can be (LuraDocument) LDF, TIFF G4 or no compression  |
| Segmentation | This defines whether the image is all text, a mix of text and graphics, or all graphics. An auto mode is also available |

|         |  |
|---------|--|
| Mask    | The mask sets how LuraDocument processes the image text. It can adapt it's processes dependant upon specific parts of the image, or process the whole image using the Constant setting |
| Quality | The quality can be set from 1 to 100   |

## Foreground

The foreground image saves the text colour information, and can be set for differing levels of compression and quality thresholds.

| Option       | Description   |
|--------------|---|
| Mode         | This sets the foreground image to Baseline or Embedded. You can also select no (None) settings.                   |
| Sample       | The value is the down-sample rate. The higher the value, the higher the compression and lower the image quality   |
| Min. Quality | This sets the threshold for the minimum image quality, which if not achieved , can override the compression level |

## Baseline

This mode does not consume as much working memory as the **embedded** mode. It is the only available mode if you compress very large images. The resulting image is partly embedded. The compression is a little bit faster than in **embedded** mode. If you display a **baseline** compressed image in your homepage and you have a bad transmission capacity the image will be displayed in top-down mode.

## Embedded

This allows the image to be displayed progressively, and is optimised for internet delivery. The quality becomes continuously better during loading over telephone lines. An interrupt of the transmission results in a smoothed but full-size image.

## Thumbnail

These settings affect how the thumbnail is generated and stored.

| Option       | Description   |
|--------------|---|
| Mode         | This sets the thumbnail image to <b>Baseline</b> or <b>Embedded</b>   |
| Min. Quality | This sets the threshold for the minimum image quality, which if not achieved, will affect the thumbnail generation. |

## Miscellaneous

You can set a compression factor that LuraDocument will attempt to achieve. The factor can be set from 1 to 100.

The compression that can be achieved using LuraDocument depends on many factors. In general are documents with higher resolutions (high dpi number) easier to compress. The complexity of the document has a major influence. If the amount of text is very high compression is very difficult as the text layer is always compressed lossless. For the background image and the text colour image the quality or compression ratio can be chosen.

So the total compression ratio can be controlled via the size of the text layer (dependent on the settings of quantization and segmentation) and the quality of the fore- and background images.

If a compression factor set during compression, the system will try to achieve this compression exactly. However it is possible that the text layer is too huge or that in order to guarantee the minimal requested image quality the actual rate may be higher.

To reach maximum compression two things should be observed:

- As the text layer is compressed lossless, the text layer has to be kept as small as possible:
- Automatic text detection will always result in smaller text sizes than the setting "everything is text". However if the text sensitivity levels is too low some letters may not be detected.

High compression ratios may also be obtained by lowering the minimum image qualities. Another way to increase compression is to lower the resolutions for text colour image and the background image. This can be done if the document has a simple structure.

# ***Auditing***

---

## Overview

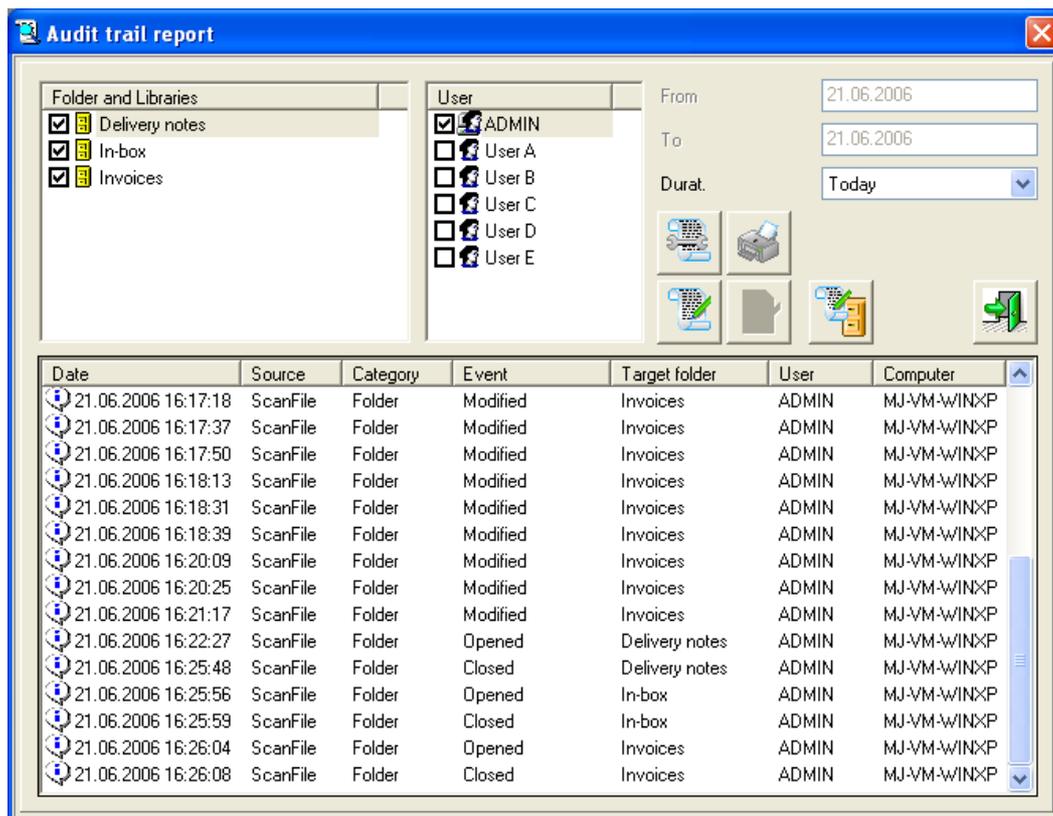
The Audit Trail option in ScanFile tracks and records any event performed in the application. This is used primarily by system administrators and can be customised to track a number of different events.

The Audit Trail option will display the recorded event information in an event viewer format, which can also be printed.

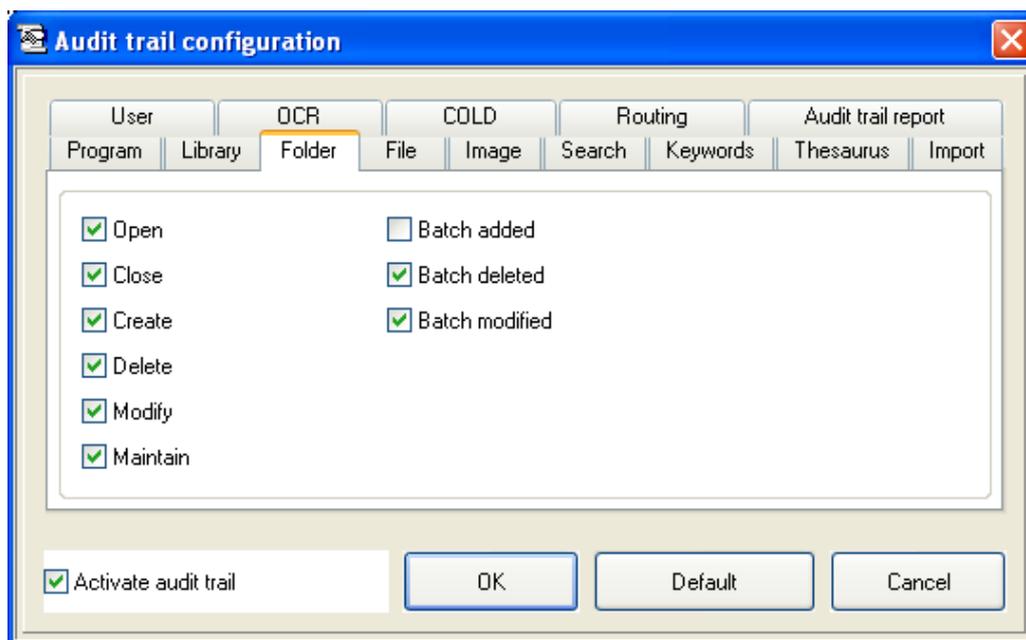
In addition to recording ScanFile events, WebServer events are also recorded within the Audit system.

## Audit Configuration

To create the required report, options have to be selected to determine which events are to be recorded. Select **Audit Trail Report** from the **Options** menu to open the following window:



Click on the button **Audit Trail Configuration**  from the main **Audit Trail Report** window and this will display the configuration window.



The option **Activate audit trail** allows you to switch the auditing of events on or off. If the option is checked, the events selected are recorded.

In the configuration window there are a number of tabs, each headed for various areas of ScanFile where events can be recorded. An example of this is the **Folder** tab, where it is possible to select from a number of events that can be recorded when working with Folders. If you wish to record the event that a folder is opened, closed, modified or deleted and so on then these options must be selected by means of the checkboxes.

Once the required event settings have been defined click on **OK** to save the settings and you will be returned to the main Audit Trail configuration window.

## Displaying events

Once any of the events selected have been activated or modified in the main ScanFile program, a list of up to 100 events can now be displayed. To do this click on the **Filter List** button. If the event list that is returned is not specific enough there are three ways to narrow down the results so that only the events that are currently required are displayed.

The first option is to select which folders and libraries you wish to display events from; these are selected by means of checkboxes on the main **Audit Trail Report** window. Click again on **Filter List**. The new list contains event actions recorded from all users that are related to the selected folders and libraries.

The second option to select is the user/s whose event actions are to be displayed; this is also done by means of checkboxes in the main **Audit Trail Report** window.

Thirdly, should you require events to be displayed for a certain date or time period this period should be defined by selecting **Customized** in the **Duration** list and by amending the date boxes labelled **From** and **To** in the main **Audit Trail Report** window. Another option here is the ability to define pre-determined periods by weeks and months; these are also listed in the **Duration** list. After selecting a time period, click again on **Filter List**. The new list contains event actions recorded in the given period.

To view an event in more detail double click on it and an **Audit Trail Details** window will be displayed.

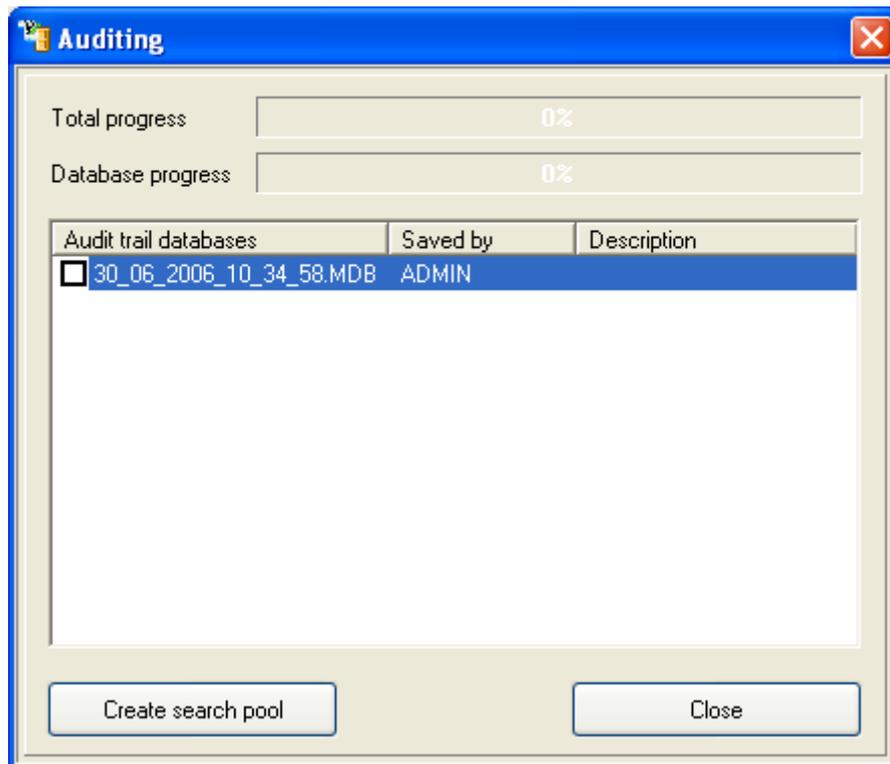
## Printing Events Lists

Once a satisfactory event list has been returned it is possible to print the list by clicking on the **Print** button from the main **Audit Trail Report** window. At this point you will be prompted if you wish to continue and selecting **Yes** will print the report directly to the default printer installed on your system.

## Searching in archived Audit Trail data



Click on **Create Search Pool** and the window below will open. It displays all databases that have been previously exported to **ScanFile Path\Saveaudit**. Select the exported Audit Trail data required for your research and click on **Create Search Pool**. The program will merge all selected databases to one temporary database. Return to the Audit Trail window by clicking on **Close**. All Audit Trail functions will now work on the temporary database. You can research as usual.



If you wish to end your research, click on . The temporarily created database will be deleted. The data you are working on afterwards is the current Audit Trail database.

*If you close the Audit Trail window, the temporary Audit Trail database is also deleted. If you reopen the Audit Trail window again, the current Audit Trail data will be displayed.*



# *Codeless Connector*

---

## What is Codeless Connector?

With Codeless Connector a link can be created between ScanFile and fields (for data entry/display) in any other windows application. The great benefit of a Codeless Connector is to take over data from another application for indexing or searching with a simple keyboard combination without big programming expenses and effort.

*The principle of Codeless Connector is based on the module name and the ID of the control used. Controls are objects like buttons, menus or fields to be filled out. The contents of the controls (fields) are read and passed on to ScanFile. In this way the retrieving of information is independent of the application used.*

### Requirements

A license has to be provided for each user, who wants to use the Codeless Connector. The configuration is done via menu **Options -> Codeless Connector**. The windows application you want to transfer information from has to be installed on the same machine where you setup the application links.

## Configure Codeless Connector

The following steps must be carried out for configuration:

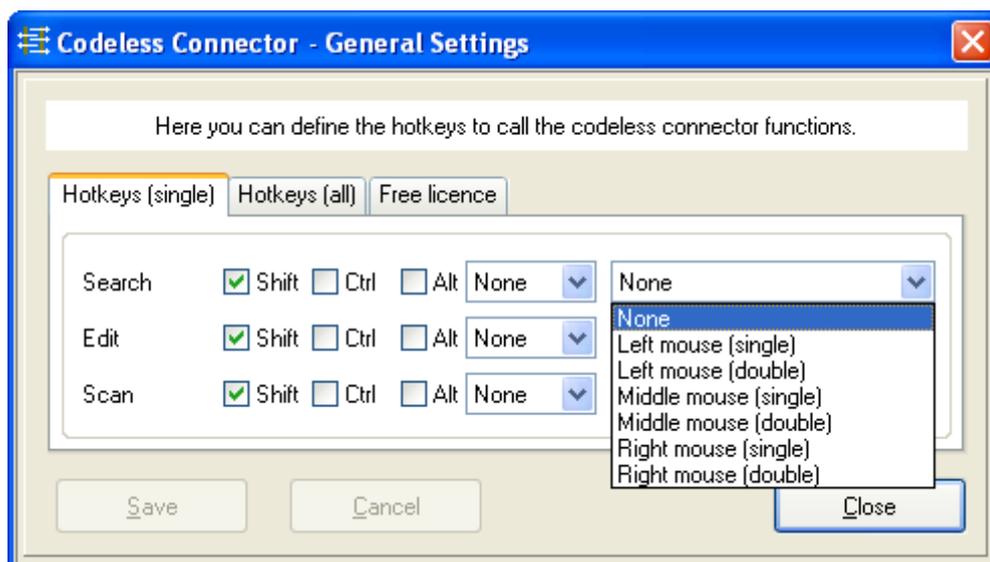
- Configuration of keyboard shortcuts for transfer of field contents.
- Creation of one or more Codeless Connector connections to different applications

### Configuration of Keyboard shortcuts

With selecting **Options -> Codeless Connector -> General Settings** the keyboard shortcuts can be configured. For each function (Search, Edit, Scan) the keys **Ctrl**, **Alt** or **Shift** and a character can be selected. Mouse clicks can also be used as shortcuts.

*Please note, that the combinations configured must be unique for each function and must not interfere with other shortcuts (also from other applications).*

The following image shows the window to set up the keyboard shortcuts:



Via the tabs **Hotkeys (single)** or **Hotkeys (all)** the keyboard shortcuts are setup. The first will trigger the actions only for the active field, the latter will trigger the actions for all defined fields of the third party application.

## Configuration of a Codeless Connector link

Select **Options -> Codeless Connector -> Create Link** in order to create a new connection to a field. A dialogue window is displayed, where actions can be taken. Select a target folder or library and a target index field, into which the content of the field from the source application should be imported.

*Folders and/or libraries and index fields have to be created beforehand to be selectable here.*

### Clear fields

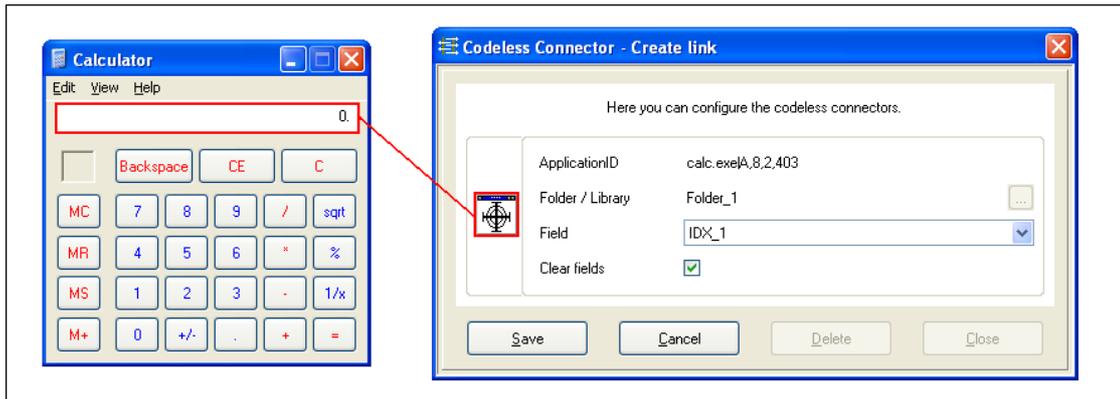
If this option is set, all index fields in ScanFile are cleared before the new index information is retrieved and filled in by a shortcut. If this option is not set, the new information is overwriting the existing index information in ScanFile.

### ApplicationID

The little crosshair icon on the left is used to link the fields.

Open a windows application from which a field entry should be retrieved. Click on the crosshair in Codeless Connector, keep the mouse button pressed and drag the crosshair to the relevant field in the windows application. Release the mouse button, when you have selected the field you wish to link. Next to the ApplicationID appears a unique application/field identifier.

Example with Windows calculator:



*Connections with fields are possible with any windows application using controls. Fields from JAVA applications cannot be linked because the controls cannot be read separately.*

## Use Codeless Connector

In order to retrieve field entries and trigger an action in ScanFile, start the relevant application and ScanFile. Display the linked fields in the windows application and apply the configured shortcut to retrieve the field contents. The content of the field(s) are now passed on to the linked fields in ScanFile and the predefined action (Search, Edit, Scan) is performed.

# ***CD Preparation***

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## Overview

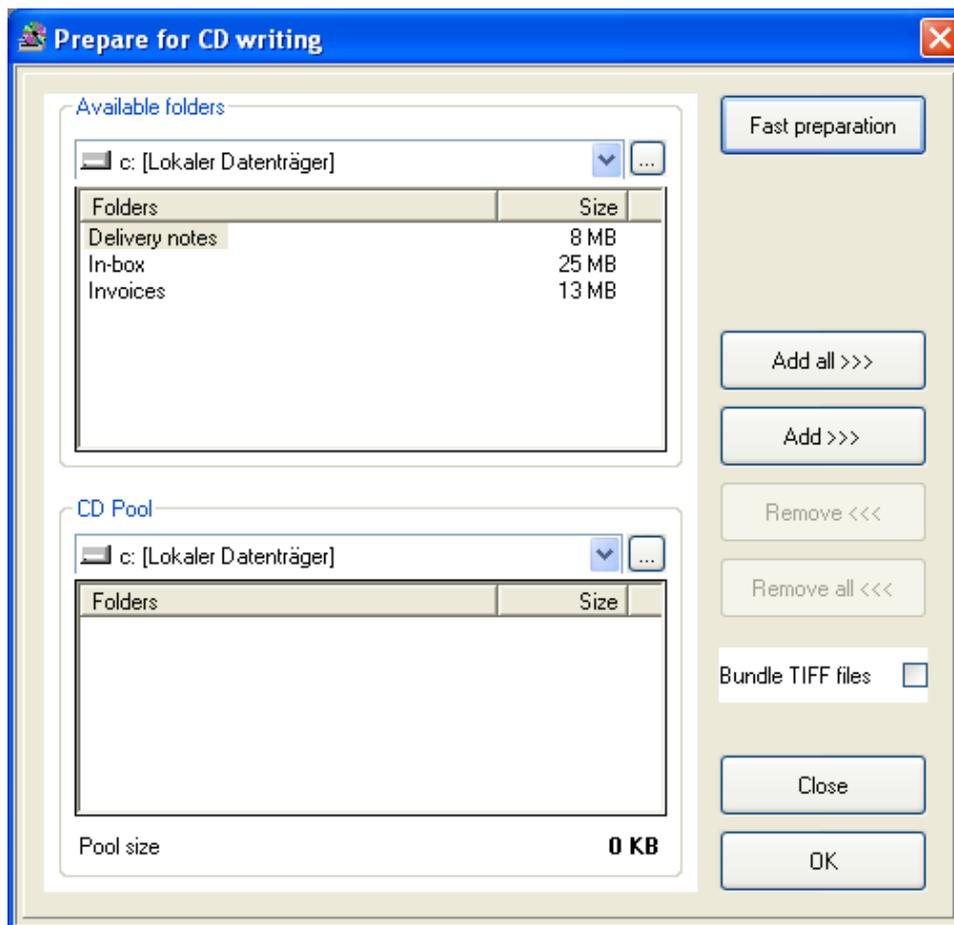
Once a folder has been completed, and is no longer required to be updated, it can be archived to other media such as CD. There is also an option to put a retrieval only version of ScanFile on to a CD with the folder or folders so that the information can be retrieved on any PC running MS Windows, even if that PC does not have ScanFile installed on it. A CD Ticker is required for preparing such an executable. Ticker will be described later on in this chapter.

ScanFile does not itself have built-in CD Writing software, and therefore a third party application is required. Normally, this will be supplied with the CD writer. The normal method of CD writing is to specify within the CD writing application the information to be written to CD and then choose the write to CD option within the application.

*From Windows XP on it is possible to burn data on a CD without third party software. For more information refer to your Windows Help.*

## CD Preparation

To select **CD Preparation**, choose that option from the **File** menu, or click on the toolbar button and the CD Preparation screen will be displayed.



There are two ways to prepare ScanFile Folders for archiving. Either you choose **Standard Preparation** or **Fast Preparation**.

## **Standard Preparation**

By dropping down the **CD Pool Drive** option in the **CD Preparation** window, the drive to which the folders will be copied can be selected. Next, select the drive(s) containing the folders to be copied. Select the folders you wish to add to the CD Pool individually, by highlighting the folder name and then clicking **Add**, or by clicking **Add All**, which will add all the folders from that drive to the CD Pool.

Ensure that the maximum capacity of the CD pool doesn't exceed the capacity of your storage media. When writing to CDs, it is advisable to reserve 5% of the disk space for the CD writing program for creating and closing the writing session.

The only other option to select at this stage is the **Bundle TIFF Files** option. If this is selected, all the separate TIFF files within a folder will be combined into one large 'Container' file, which has advantages when it is intended to

place the CDs into a jukebox. If this is not selected, the TIFF files will be copied individually.

After the folders and options have been selected, click the **OK** button to start the process. A prompt will then appear asking whether a copy of the retrieval software is to be copied. If **Yes** is selected, the application will be copied to the CD\_TRANS.CD directory. Such a CD can be used in any PC for retrieval. The amount of the CD Tickers stored in the hardware dongle will be decreased by one. Select **No** to create a CD without retrieval program. In this case the amount of CD Ticker isn't reduced.

If **Yes** was selected, the folders can be secured with a password to stop unauthorised access. A prompt will be displayed asking whether a password should be applied. To avoid mistyping, the password has to be entered twice.

When **Ok** is pressed, the CD\_TRANS.CD will be created on the Pool Drive, the folders will be copied, and, if selected, the retrieval version of ScanFile will also be copied.

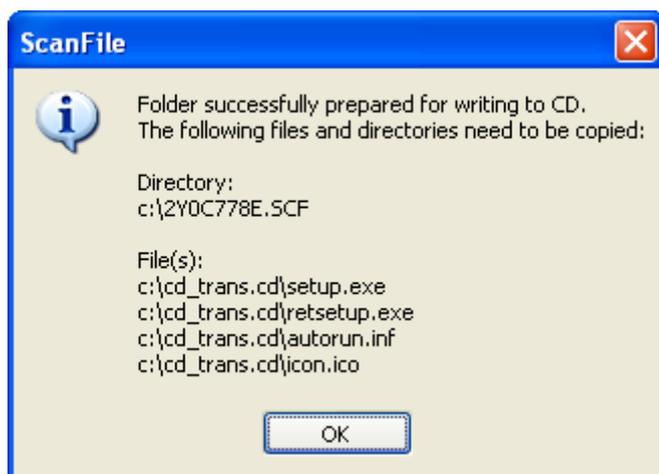
The preparation starts. If missing, the folder CD\_TRANS.CD on the CD Pool Drive is created, and the selected folders and retrieval software will be copied. Each folder receives an additional file, validating the folder for the use with the Retrieval Software.

After the CD preparation finished, the contents of the CD\_TRANS.CD directory can be copied to CD.

## ***Fast Preparation***

With ***Fast Preparation***, the folder is not copied into a CD\_TRANS.CD directory, but is left in its original location. The folder will have a special archive file added to it to enable it to be used with the retrieval version of ScanFile. Also, the retrieval software will be copied to the CD\_TRANS.CD directory of the pool drive.

The process for selecting the folder is the same as described above, but to start the ***Fast Preparation***, click on the ***Fast Preparation*** button in the CD Preparation dialogue. The folder will be checked, the archive drive will be added, and the retrieval software copied to the CD\_TRANS.CD directory of the pool drive. A window pops up giving you the location of the selected folders and retrieval software.



## CD Tickers

If you wish to create a ScanFile Executable CD with a retrieval only version of ScanFile, this will require a CD Ticker. These can be purchased in groups from your supplier. Each executable CD preparation will use one CD ticker. These are licences allowing you to put the retrieval only version of ScanFile on a CD. You can create as many copies of that CD as you wish.

Each time you purchase a group of tickers, you must give your dongle serial number to your supplier, who will then send you a PickUp Code. This PickUp code has to be entered clicking **Internet licence** or be loaded via file transfer as described in chapter **Licensing**. The number of Tickers can be displayed by clicking **Options - Display ticker status**.

## Writing to CD

How this is achieved, and what facilities are available will be dependent upon the software being used to write the data to a recordable CD.

If you have chosen the **standard preparation**, the retrieval software and all selected folders were copied to CD\_TRANS.CD directory. The contents of the CD\_TRANS.CD directory can be written to CD.

With **Fast Preparation**, the folders are left in their original location and the software will be copied to CD\_TRANS.CD directory, and they can therefore be selected and copied directly.

Please refer to the manual supplied with the CD writing application for exact instructions on using the application.



# *Scanner Setup*

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## Overview

ScanFile has built-in support for the following Canon scanning devices:

- DR-3020
- DR-3060
- DR-3080C
- DR-3080CII
- DR-5020
- DR-5060F
- DR-5080C
- DR-2050C
- DR-2080C
- DR-2580C
- DR-5010C
- DR-6080
- DR-7580
- DR-9080C
- DR-7080C
- MS300
- MS350
- MS400
- MS800
- CR-180
- CF510

Additionally, ScanFile supports the Panasonic KV-S2026C directly, and also supports any TWAIN and Kofax device.

## SCSI Connected Scanners

With some of the built-in drivers, if the scanner is using a SCSI connection, the SCSI adaptor the scanner is attached to must be specified. This can be done by selecting from the top drop-down list in **Select Scanner SCSI ID**. If there is only one SCSI adaptor card installed in the PC, this will be selected by default.

The scanner itself then has to be selected. A SCSI Adaptor can have up to 7 SCSI devices attached to it. They are each identified by a SCSI ID in the range 0-7. Normally, the SCSI adaptor itself will be set to SCSI ID 7. This leaves 0-6 for other devices.

The correct SCSI ID for the scanner can be selected by using the second drop-down list in **Select Scanner SCSI ID**. For any SCSI device attached to the selected adaptor card, a description of what the device is will be displayed next to the SCSI ID

## Scanning Resolution

Any scanning device has the ability to scan documents at different resolutions. These are measured in Dots per Inch (Dpi). In the majority of scanners, vertical and horizontal resolutions will be the same, although certain Canon DR scanners can scan at split resolutions.

The resolution that a document is scanned at will have two effects. The higher the scan resolution, the better the quality of the image that will be

produced. Higher scan resolutions will produce larger file sizes for a scanned image. With file compression which ScanFile utilises, the file size can be reduced.

The resolution chosen to scan particular documents will very much depend upon the type of document being scanned, its quality, whether it is to be 'live' or 'archive' filing, and user preference.

## Test Scan

The Test scan function is available within the inbuilt Canon scanner drivers, and allows you to scan a document with your selected settings, to see whether these settings are correct.

Place a document in the scanner feeder and then press the **Test Scan** button. The document will then be displayed in the Test Scan Display window.

The image quality can be checked from this window. The Plus (+) and Minus (-) signs in the bottom left and right of the Test scan window allow you to enlarge and reduce the size of the image. Pressing the **O** allows a box zoom - draw a box around the area you wish to enlarge. The **#** will display the complete image in the Test scan window. The image can be moved around within the window by pressing and holding the right mouse button, while the cursor is over the Test Scan window, then dragging the mouse around the window.

## Scanner Control Sheets

The Canon DR-3020, DR5020 and DR05080c are delivered with two types of control sheets. The first type can change the scanner settings, whilst the second will affect how the documents are stored. The Control sheets can be inserted between pages/files and, during scanning, will affect either how the documents are scanned or how they are filed.

For each type of control sheet, four options are available

- • Detect & Scan, Continue Scanning
- • Detect & Skip, Continue Scanning
- • Detect & Scan, Stop Scanning
- • Detect & Skip, Stop Scanning

If the **Detect & Scan** option is chosen, the control sheet is stored in the ScanFile folder. If the **Detect & Skip** option is selected, the control sheet is not stored in the ScanFile folder.

Job Separation control sheets are used to divide documents placed in the scanner feeder into separate files when scanned. Place a Job Separation sheet between each file, choose the required **Batch Detection** mode, and then scan the documents.

When a control sheet has been detected, scanning can either continue or stop. You may wish to stop scanning so as to enter additional indexing information. Alternatively, you may wish to scan everything and then index it. In this case, choose the **Continue Scanning** option.

The Function Control sheets affect the operation of the scanner. With these sheets, during scanning, the scanning mode can be changed from Text Mode to Photo Mode, or vice versa, by the use of the appropriate control sheet. Using The Simplex and Duplex control sheets changes the scanning mode to either single or double-sided scanning.

## Scanner Configuration

There are many options that can be selected for the scanners, and these are split over several screens which are selected from **Scanner Setup**. The most used options are collected together on the first screen displayed when **Scanner Setup** is selected. The options of the different scanners are detailed below.

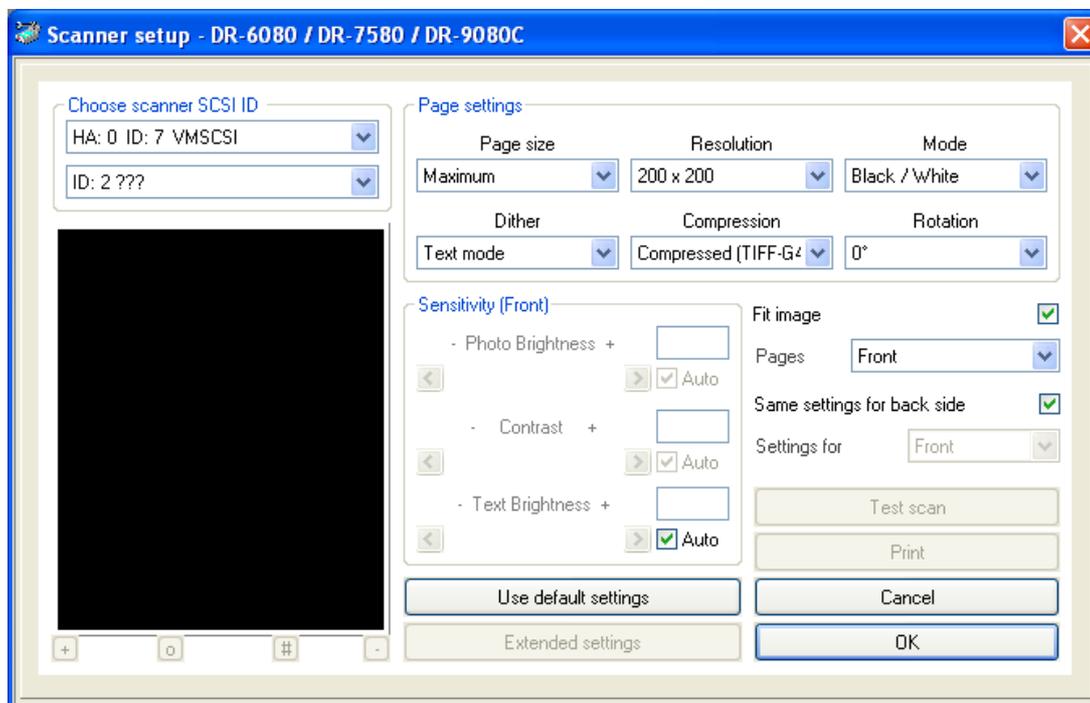
### Canon DR-6080, 7580 & 9080c

The DR-6080, DR-7580 and DR-9080c are high performance A3 scanners with a maximum scanning throughput of up to 180 images per minute. They are double-sided scanners with automatic paper size and thickness detection. Additionally, document skew is automatically corrected during the document feed.

The DR-6080 and DR-7580 support black & white and greyscale scanning whilst the DR-9080c supports several modes up to a maximum 24 bit colour. The maximum scanning resolution is for all scanners 600 dpi.

## Scanner Configuration

The following screen shows the first screen displayed when choosing **Scanner Setup** for the Canon DR-6080, DR-7580 or DR-9080C.



## Page Settings

All three scanners are capable of scanning single or double sided documents, and different settings can be applied for each side of a double sided document. The first option to select is whether to scan single or double sided. Selecting **Front**, **Back**, or **Front/back** scanning from the option on the screen above can do this.

The **Fit Image** option sets the scanner to automatically detect the size of each page scanned, and will adjust the page size to the actual size of the document. When this is set, the **Page Size** option is disabled

If scanning double-sided documents, different settings can be applied for each side of the documents. To use the same settings for both sides of the documents, click on the **Same settings for back side** option. To use different settings for each side, uncheck the **Same settings for back side** option, and then choose from the drop down list which side you wish to choose to set the scanning preferences.

For each side, or both sides of a document, the following options can be set.

| Setting    | Description  |
|------------|--|
| Page Size  | <p>Select one of the following document sizes:</p> <ul style="list-style-type: none"> <li>• Letter - 8.5 x 11 Inch</li> <li>• Legal - 8.5 x 14 Inch</li> <li>• A3 - 297 x 420 mm</li> <li>• A4 - 210 x 297 mm</li> <li>• A5 - 148 x 210 mm</li> <li>• A6 - 105 x 148 mm</li> <li>• B4 - 250 x 353 mm</li> <li>• B5 - 176 x 250 mm</li> <li>• B6 - 125 x 176 mm</li> </ul> <p>If <b>Fit Image</b> is enabled, this setting is disabled</p> <p><b>Window Page Size Setting:</b></p> <p>If you select the <b>Window</b> page size option, you can specify an area of the document to be saved. To do this, select Window as the page size, then perform a Test Scan on a sample document. A sizeable box will be overlaid on the image in the Test Scan window. Size the box over the area of the sample document, and the box size and location will then be saved.</p> <p>Please note that when this option is used, only the area of the document inside the box will be saved. All other parts of the scanned document will be discarded.</p> |
| Resolution | You can select one of the following: 100, 150, 200, 240, 300, 400 & 600dpi   |
| Dither     | Use this setting when scanning in black and white mode. This applies error diffusion to simulate greys and half-tones on the scanned document. This is useful when scanning photos.  |
| Mode       | This option is used to set the number of colours to be scanned. Please note that DR-6080 and DR-7580 support black & White and greyscale mode scanning. All other settings are applicable to the DR-9080c. The DR-9080c supports 24 bit colour scanning. The larger the bit value selected, the more colour shades will be scanned. Please be aware that greyscale and colour scanning, especially at high resolutions, can result in extremely large file sizes.  |

|             |   |
|-------------|---|
| Rotation    | A document can be scanned and then rotated and saved. The available rotation options are 0°, 90°, 180° or 270°.   |
| Compression | <p>ScanFile will store images in one of four ways:</p> <ul style="list-style-type: none"><li>• Uncompressed TIFF</li><li>• Group 4 Compressed TIFF</li><li>• Jpeg</li><li>• Lura Document</li></ul> <p>The type of compression and file format you select is dependent upon several factors including the type of document to be scanned, and the type of output required of that document once stored.</p> <p><b>Uncompressed TIFF:</b> This format will perform no compression on the image data produced from the scanned document, and will result in large file sizes.</p> <p><b>Group 4 Compressed TIFF:</b> This format will compress the scanned image data, normally by a factor of 10 to 15. This is only used for black &amp; white scanned images. This is a 'lossless' compression format which means that none of the original scanned information is discarded.</p> <p><b>JPEG (JTIFF):</b> JPEG is a standardised image compression mechanism, which is designed for compressing either full-colour or grey-scale images of natural, real-world scenes. Jpeg is a 'lossy' compression format, which means that data is discarded from the original scanned image data to achieve the levels of compression possible. It is possible to vary the amount of data to be discarded, and therefore the quality of the remaining image. ScanFile has various quality levels for Jpeg images which will determine how much data is 'dropped' from the original scanned image, and will radically affect the size of the file produced.</p> <p><b>Lura Document:</b> Lura Document is a standardised image compression ratio which is designed essentially for compressing either full colour or greyscale images to dramatically smaller files sizes. Lura document is also a 'lossy' compression format, however, ScanFile includes extensive options for determining levels of quality for Lura Document scanned images.</p> |

## ***Sensitivity***

These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

### ***Text Mode***

In this mode, only the Text Brightness setting can be adjusted. All three scanners have an automatic brightness function built-in, but this can be overridden and manually set if necessary.

When the **Auto** is selected, the scanner will automatically sense the brightness setting required for each page as it is scanned.

The Brightness setting can be any value between 1 and 255, with 1 being the darkest setting, 255 being the brightest. A value of 0 will select Auto brightness. To manually set a brightness value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

### ***Photo Mode***

In this mode, the Photo Brightness and Contrast settings can be adjusted. All three scanners have automatic brightness and contrast functions built-in, but these can be overridden and manually set if necessary.

When the **Auto** setting is selected, the scanner will automatically sense the brightness and/or the contrast setting required for each page as it is scanned.

The brightness and contrast settings can be any value between 1 and 255, with 1 being the darkest setting, 255 being the lightest. A value of 0 will select auto brightness or contrast. To manually set a brightness or contrast value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## ***Extended Settings***

The **Extended Settings** option allows you access to the advanced functions of the scanners. Many settings are available from this option, and these are explained on the following pages.

*Several of these settings can affect the quality of the scanned image and they should therefore be used with caution!*

## Double Feed Detection

There are two methods to set the scanner to detect the simultaneous feeding of two or more sheets of paper. The scanner can be calibrated for paper thickness and/or length. To set **Double Feed Detection** tick either the **Detect by ultrasonic** or **Detect by Length** checkbox or both. When you next scan a batch of documents, the first page fed through the scanner will have its thickness and/or length measured and the measurement then stored. Subsequent documents' measurements will be compared against the stored value and if the scanned document is thicker or longer than the stored value, an error will be displayed.

## Filter Settings

The Filter settings can be used to improve the quality of the scanned image, and to set colour dropout areas where the document will not be scanned.

| Option             | Description  |
|--------------------|--|
| Dropout Colour     | This function is only available with the DR-9080. It is available separately for the front and back page. It will disable the scanning of areas of the document of a particular colour. The settings are: <ul style="list-style-type: none"><li>• None: Disables Colour dropout</li><li>• Red: Will not scan red parts of the document</li><li>• Green: Will not scan green parts of the document</li><li>• Blue: Will not scan blue parts of the document</li></ul> |
| Automatic Exposure | This sets the Automatic Exposure level and affects the brightness and contrast settings for the image. This has a valid range of 1 to 9 and can be set by moving the slider bar, or using the arrow keys to increase or decrease the value.  |
| Edge Emphasis      | This can be used to emphasis contour lettering, as well as softening scanned images such as photos. This has a valid range of 1 to 5 and can be adjusted by moving the slider bar, or using the arrow keys to increase or decrease the value.  |

## Other Options

Other settings are available and these are detailed below:

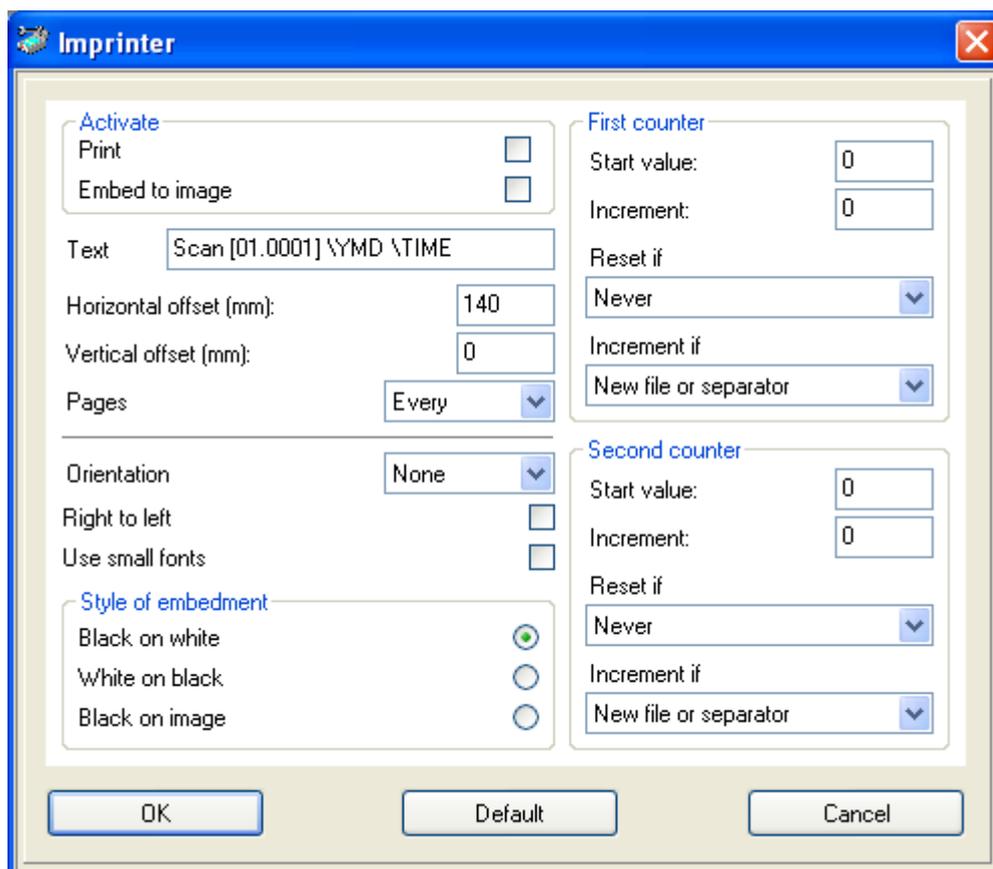
| Option                  | Description   |
|-------------------------|---|
| Verify Count            | This can be used to ensure that a known number of pages are being fed correctly through the scanner. Before scanning, the number of pages to be scanned can be set, and if that number of pages is not fed through the scanner, an error will be displayed. |
| Simple Staple Detection | The scanner has a simple staple detection for document feeding. When the sensor detects a staple in either upper corner, the scanning process is automatically stopped.   |
| Deskew by roll          | This function activates a hardware based deskew of sheets to ensure the correct feeding of pages.   |

### Imprinter Option

If the **Imprinter** option has been installed in the scanner, this can be configured by selecting the **Imprinter** option from the **Extended Settings** screen.

The Imprinter option allows you to print specified alphanumeric and symbol characters at any position on a back page as it is being scanned. You can also embed the characters to be printed in the scanned image.

To set the Imprinter to print text on a page as it is being scanned, tick the **Print** checkbox. To embed the text as part of a scanned image, tick the **Embed to image** checkbox.



The text to be printed can be specified in the **Text** field. If the counters are to be used, these must be specified within square brackets. If both counters are used, the values must be separated by a decimal point (full stop).

The **Horizontal offset** only applies if the text is to be embedded in the scanned image. You can specify the offset in millimetres from the left edge of the page. When printing text, the horizontal offset is applied manually, please refer to the scanner manual for instructions on how this is done.

The **Vertical offset** specifies the distance in millimetres from the top edge of the paper to start printing the text.

You can select to print the text on every page, on the first page of a new file as indicated by the New file key, by setting the **Pages** drop down list to **Every** or **Next** page.

You can set the direction in which the text will print from the **Orientation** drop down list. The available values are None, 90, 180 and 270 degrees.

The **Right to left** option will set the Imprinter to add characters from right to left.

The default font size the Imprinter uses is 12x12 dots. You can select to use a smaller 8x7 font size by ticking the **Use small fonts** checkbox.

The **Style of Embedment** can be set from one of three options:

- **Black on White** will print black text on to a white background.
- **White on Black** will print white text on a black background.
- **Black on image** will print black text on to the image.

There are two counters that can be configured, and these options apply to both. The Start value of the counter can be set as well as the value to increment the value for each page.

The following values can be set for the **Reset if** and **Increment if** options. **Reset If** will reset the counter to its start value. **Increment If** will add the specified increment value to the counter.

- Never
- Separator
- New File or Separator
- New File
- Each Document

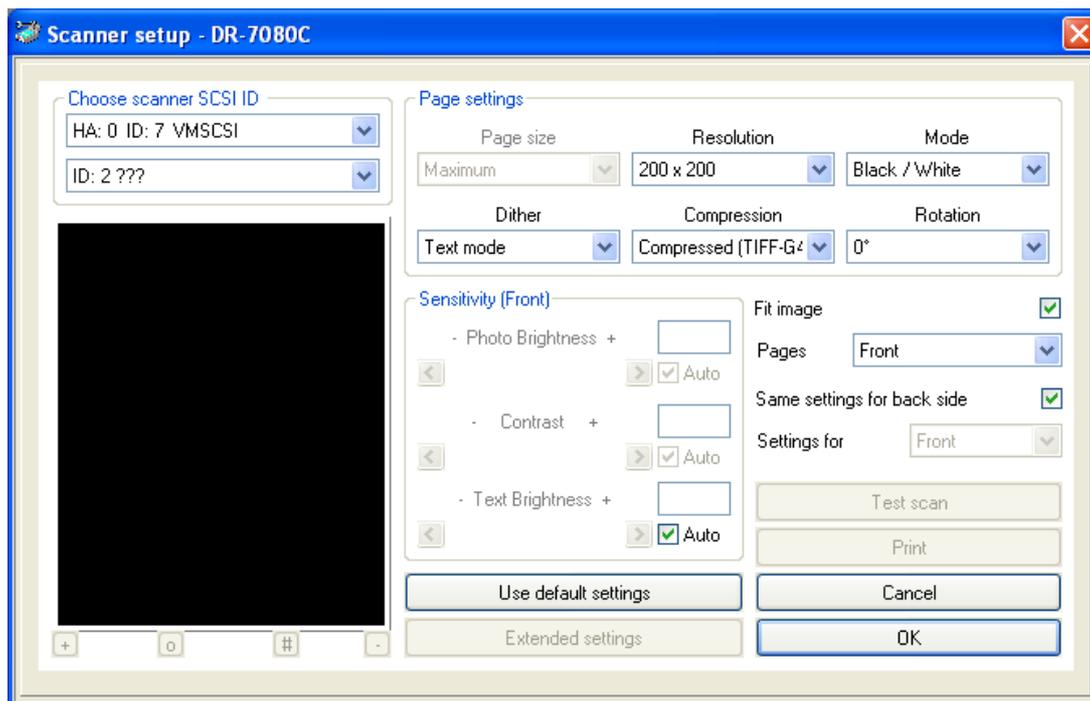
## Canon DR-7080C

The Canon DR-7080C can be used with a document feeder and a flatbed with documents up to A3. Therefore it is suitable to scan pages automatically from the document feeder and to scan single pages for example from books. In feeder mode the scanner can scan black and white, greyscale and full colour up to A3 size. The maximum resolution is 600 dpi.

### **Scanner Configuration**

There are many options that can be selected for the scanners, and these are split over several option screens which are selected from **Scanner Setup**.

The following screen is displayed when choosing **Scanner Setup** for the Canon DR-7080C.



## Page Settings

The scanner is able to scan single or double sided documents, and different settings can be applied for each side of a double sided document. The first option to select is whether to scan single or double sided or to scan from flatbed without feeder. Selecting **Front**, **Flatbed** or **Front/back** scanning from the option on the screen above can do this.

The **Fit Image** option sets the scanner to automatically detect the size of each page scanned, and will adjust the page size to the actual size of the document. When this is set, the **Page Size** option is disabled if scanning double-sided documents, different settings can be applied for each side of the documents. To use the same settings for both sides of the documents, click on the **Same settings for back side** option. To use different settings for each side, uncheck the **Same settings for back side** option, and then choose from the drop down list which side you wish to choose to set the scanning preferences.

For each side, or both sides of a document, the following options can be set:

| Setting    | Description  |
|------------|--|
| Page Size  | <p>Select one of the following document sizes:</p> <ul style="list-style-type: none"> <li>• Letter - 8.5 x 11 In</li> <li>• Ledger-R - 17 x 11 In</li> <li>• Letter-R - 11 x 8,5 In</li> <li>• Legal-R – 14 x 8.5 In</li> <li>• A3-R - 420 x 297 mm</li> <li>• A4 - 210 x 297 mm</li> <li>• A4-R - 297 x 210 mm</li> <li>• A5 - 148 x 210 mm</li> <li>• A5-R - 210 x 148 mm</li> <li>• B4-R – 353 x 250 mm</li> <li>• B5 - 176 x 250 mm</li> <li>• B5-R - 250 x 176 mm</li> </ul> <p>If <b>Fit Image</b> is enabled, this setting is disabled</p> <p><b>Window Page Size Setting:</b></p> <p>If you select the <b>Window</b> page size option, you can specify an area of the document to be saved. To do this, select Window as the page size, then perform a Test Scan on a sample document. A sizeable box will be overlaid on the image in the Test Scan window. Size the box over the area of the sample document, and the box size and location will then be saved.</p> <p>Please note that when this option is used, only the area of the document inside the box will be saved. All other parts of the scanned document will be discarded.</p> |
| Resolution | <p>You can select one of the following: 100, 150, 200, 240, 300, 400 &amp; 600dpi</p>  |
| Dither     | <p>Use this setting when scanning in black and white mode. This applies error diffusion to simulate greys and half-tones on the scanned document. This is useful when scanning photos.</p>   |
| Mode       | <p>This option is used to set the number of colours to be scanned.</p> <p><b>Black &amp; White:</b> The black &amp; white mode scans only in black &amp; white.</p>  |

|                    |  |
|--------------------|--|
|                    | <p><b>Greyscale:</b> Greyscale mode creates images with 256 greyscale levels.</p> <p><b>Colour:</b> The DR-7080C supports 24 bit colour scanning. The larger the bit value selected, the more colour shades will be scanned.</p> <p>Please be aware that greyscale and colour scanning, especially at high resolutions, can result in extremely large file sizes.</p>  |
| <p>Rotation</p>    | <p>A document can be scanned and then rotated and saved. The available rotation options are 0°, 90°, 180° or 270°.</p>   |
| <p>Compression</p> | <p>ScanFile will store images in one of four ways:</p> <ul style="list-style-type: none"> <li>• Uncompressed TIFF</li> <li>• Group 4 Compressed TIFF</li> <li>• Jpeg</li> <li>• Lura Document</li> </ul> <p>The type of compression and file format you select is dependent upon several factors including the type of document to be scanned, and the type of output required of that document once stored.</p> <p><b>Uncompressed TIFF:</b> This format will perform no compression on the image data produced from the scanned document, and will result in large file sizes.</p> <p><b>Group 4 Compressed TIFF:</b> This format will compress the scanned image data, normally by a factor of 10 to 15. This is only used for black &amp; white scanned images. This is a 'lossless' compression format which means that none of the original scanned information is discarded.</p> <p><b>JPEG (JTIFF):</b> JPEG is a standardised image compression mechanism, which is designed for compressing either full-colour or grey-scale images of natural, real-world scenes. Jpeg is a 'lossy' compression format, which means that data is discarded from the original scanned image data to achieve the levels of compression possible. It is possible to vary the amount of data to be discarded, and therefore the quality of the remaining image. ScanFile has various quality levels for Jpeg images which will determine how much data is 'dropped' from the original scanned image, and will radically affect the size of the file produced.</p> |

|  |   |
|--|---|
|  | <b>Lura Document:</b> Lura Document is a standardised image compression ratio which is designed essentially for compressing either full colour or greyscale images to dramatically smaller file sizes. Lura document is also a 'lossy' compression format, however, ScanFile includes extensive options for determining levels of quality for Lura Document scanned images. |
|--|---|

## ***Sensitivity***

These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

### ***Text Mode***

In this mode, only the Text Brightness setting can be adjusted. The DR-7080c has an automatic brightness function built-in, but this can be overridden and manually set if necessary.

When the **Auto** is selected, the scanner will automatically sense the brightness setting required for each page as it is scanned.

The Brightness setting can be any value between 1 and 255, with 1 being the darkest setting, 255 being the brightest. A value of 0 will select Auto brightness. To manually set a brightness value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

### ***Photo Mode***

In this mode, the Photo Brightness and Contrast settings can be adjusted. The DR-7080c has automatic brightness and contrast functions built-in, but these can be overridden and manually set if necessary.

When the **Auto** setting is selected, the scanner will automatically sense the brightness and/or the contrast setting required for each page as it is scanned.

The brightness and contrast settings can be any value between 1 and 255, with 1 being the darkest setting, 255 being the lightest. A value of 0 will select auto brightness or contrast. To manually set a brightness or contrast value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## Extended Settings

The **Extended Settings** option allows you access to the advanced functions of the scanners. Many settings are available from this option, and these are explained on the following pages.

*Several of these settings can affect the quality of the scanned image and they should therefore be used with caution!*

### Filter Settings

The Filter settings can be used to improve the quality of the scanned image, and to set colour dropout areas where the document will not be scanned.

| Option             | Description   |
|--------------------|---|
| Dropout Colour     | This function is available separately for the front and back page. It will disable the scanning of areas of the document of a particular colour. The settings are: <ul style="list-style-type: none"><li>• None: Disables Colour dropout</li><li>• Red: Will not scan red parts of the document</li><li>• Green: Will not scan green parts of the document</li><li>• Blue: Will not scan blue parts of the document</li></ul> |
| Automatic Exposure | This sets the Automatic Exposure level and affects the brightness and contrast settings for the image. This has a valid range of 1 to 9 and can be set by moving the slider bar, or using the arrow keys to increase or decrease the value.   |
| Edge Emphasis      | This can be used to emphasis contour lettering, as well as softening scanned images such as photos. This has a valid range of 1 to 5 and can be adjusted by moving the slider bar, or using the arrow keys to increase or decrease the value.   |

## Canon DR-5020, 5080C & 5060F

The DR-5020, 5080c and 5060F are high performance A3 scanners with a maximum scanning throughput of 80 A4 pages per minute. They are all double-sided scanners with automatic paper size and thickness detection.

Additionally, document skew is automatically corrected during the document feed process from the 500 sheet paper feed tray.

The DR-5060F incorporates an inbuilt microfilm camera.

The DR-5020 supports black & white scanning whilst the DR-5080c supports several modes up to a maximum 24 bit colour. The maximum scanning resolution for both of these scanners is 400dpi. The DR-5060F supports black & white scanning only with a maximum scanning resolution of 300dpi.

Pre and post document endorers are options which can be added to the scanners. A Barcode decoder can also be included as an option.

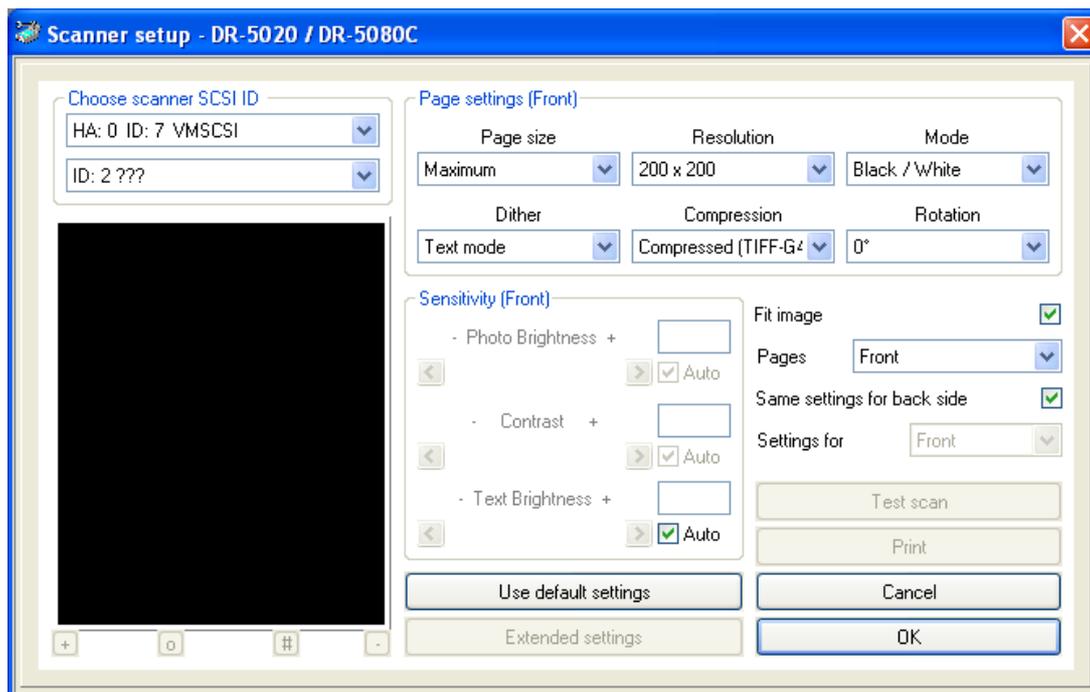
Document specifications are:

- Width 55mm to 297mm
- Length 70mm to 432mm
- Thickness 0.06mm to 0.15mm (0.05 to 0.2mm Manual Feed)

## ***Scanner Configuration***

There are many options that can be selected for the scanners, and these are split over several option screens which are selected from ***Scanner Setup***. The most used options are collected together on the first screen displayed when ***Scanner Setup*** is selected.

The following screen shows the first screen displayed when choosing ***Scanner Setup*** for the Canon DR-5060F. This has an additional option to the setup screen for the DR5020/80c, allowing the film position to be saved to a folder field, but apart from that the screen has the same options.



## Page Settings

All three scanners are capable of scanning single or double sided documents, and different settings can be applied for each side of a double sided document. The first option to select is whether to scan single or double sided. Selecting **Front**, **Back**, or **Front/back** scanning from the option on the screen above can do this.

The **Fit Image** option sets the scanner to automatically detect the size of each page scanned, and will adjust the page size to the actual size of the document. When this is set, the **Page Size** option is disabled if scanning double-sided documents, different settings can be applied for each side of the documents.

To use the same settings for both sides of the documents, click on the **Same settings for back side** option. To use different settings for each side, uncheck the **Same settings for back side** option, and then choose from the drop down list which side you wish to choose to set the scanning preferences.

For each side, or both sides of a document, the following options can be set:

| Setting    | Description   |
|------------|---|
| Page Size  | <p>Select one of the following document sizes:</p> <ul style="list-style-type: none"> <li>• Letter - 8.5 x 11 Inch</li> <li>• Legal - 8.5 x 14 Inch</li> <li>• A3 - 297 x 420 mm</li> <li>• A4 - 210 x 297 mm</li> <li>• A5 - 148 x 210 mm</li> <li>• A6 - 105 x 148 mm</li> <li>• B4 - 250 x 353 mm (ISO)</li> <li>• B4 – 257 x 364 mm (JIS)</li> <li>• B5 - 176 x 250 mm (ISO)</li> <li>• B5 - 182 x 257 mm (JIS)</li> </ul> <p>If <b>Fit Image</b> is enabled, this setting is disabled</p> <p><b>Window Page Size Setting:</b></p> <p>If you select the <b>Window</b> page size option, you can specify an area of the document to be saved. To do this, select Window as the page size, then perform a Test Scan on a sample document. A sizeable box will be overlaid on the image in the Test Scan window. Size the box over the area of the sample document, and the box size and location will then be saved.</p> <p>Please note that when this option is used, only the area of the document inside the box will be saved. All other parts of the scanned document will be discarded.</p> |
| Resolution | <p>You can select up to one of the following resolutions : 200, 210, 220, 230, 240, 250, 260, 270, 280, 290, 300 and 400 dpi (Dots per Inch)</p> <p>With the above settings the horizontal scan resolution is the same as the vertical resolution. There are also 2 high speed scanning settings, which have split resolutions. The first figure is the horizontal setting, the second refers to the vertical setting. These are marked in the Resolution list with asterisks (*): 200 x100 and 300x150 dpi.</p>  |
| Dither     | <p>Use this setting when scanning in black and white mode. This applies error diffusion to simulate greys and half-tones on the scanned document. This is useful when scanning photos.</p>  |

|             |  |
|-------------|--|
| Modus       | <p>This option is used to set the number of colours to be scanned.</p> <p>Please note that the DR-5020 and DR-5060F only support Black &amp; White mode scanning. All other settings are applicable to the DR-5080c.</p> <p><b>Black &amp; White</b></p> <p>The black &amp; white mode scans only in black &amp; white.</p> <p><b>Greyscale</b></p> <p>The DR-5080c supports 4, 16 &amp; 256 levels of Greyscale</p> <p><b>Colour</b></p> <p>The DR-5080c supports 3, 6, 12 and 24 bit colour scanning. The larger the bit value selected, the more colour shades will be scanned.</p> <p>Please be aware that greyscale and colour scanning, especially at high resolutions, can result in extremely large file sizes.</p>  |
| Rotation    | <p>A document can be scanned and then rotated and saved. The available rotation options are 0°, 90°, 180° or 270°.</p>   |
| Compression | <p>ScanFile will store images in one of four ways:</p> <ul style="list-style-type: none"><li>• Uncompressed TIFF</li><li>• Group 4 Compressed TIFF</li><li>• Jpeg</li><li>• Lura Document</li></ul> <p>The type of compression and file format you select is dependent upon several factors including the type of document to be scanned, and the type of output required of that document once stored.</p> <p><b>Uncompressed TIFF:</b> This format will perform no compression on the image data produced from the scanned document, and will result in large file sizes.</p> <p><b>Group 4 Compressed TIFF:</b> This format will compress the scanned image data, normally by a factor of 10 to 15. This is only used for black &amp; white scanned images. This is a 'lossless' compression format which means that none of the original scanned information is discarded.</p> |

|  |  |
|--|--|
|  | <p><b>JPEG (JTIFF):</b> JPEG is a standardised image compression mechanism, which is designed for compressing either full-colour or grey-scale images of natural, real-world scenes. Jpeg is a 'lossy' compression format, which means that data is discarded from the original scanned image data to achieve the levels of compression possible. It is possible to vary the amount of data to be discarded, and therefore the quality of the remaining image. ScanFile has various quality levels for Jpeg images which will determine how much data is 'dropped' from the original scanned image, and will radically affect the size of the file produced.</p> <p><b>Lura Document:</b> Lura Document is a standardised image compression ratio which is designed essentially for compressing either full colour or greyscale images to dramatically smaller files sizes. Lura document is also a 'lossy' compression format, however, ScanFile includes extensive options for determining levels of quality for Lura Document scanned images.</p> |
|--|--|

## ***Sensitivity***

These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

## ***Text Mode***

In this mode, only the Text Brightness setting can be adjusted. All three scanners have an automatic brightness function built-in, but this can be overridden and manually set if necessary.

When the **Auto** is selected, the scanner will automatically sense the brightness setting required for each page as it is scanned.

The Brightness setting can be any value between 1 and 255, with 1 being the darkest setting, 255 being the brightest. A value of 0 will select Auto brightness. To manually set a brightness value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## **Photo Mode**

In this mode, the Photo Brightness and Contrast settings can be adjusted. All three scanners have automatic brightness and contrast functions built-in, but these can be overridden and manually set if necessary.

When the **Auto** setting is selected, the scanner will automatically sense the brightness and/or the contrast setting required for each page as it is scanned.

The brightness and contrast settings can be any value between 1 and 255, with 1 being the darkest setting, 255 being the lightest. A value of 0 will select auto brightness or contrast. To manually set a brightness or contrast value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## **Extended Settings**

The **Extended Settings** option allows you access to the advanced functions of the scanners. Many settings are available from this option, and these are explained on the following pages.

*Several of these settings can affect the quality of the scanned image and they should therefore be used with caution!*

### **Double Feed Detection**

There are two methods to set the scanner to detect the simultaneous feeding of two or more sheets of paper. The scanner can be calibrated for paper thickness and/or length. To set **Double Feed Detection**, tick either the **Thickness** or **Length** checkboxes, or both. When you next scan a batch of documents, the first page fed through the scanner will have its thickness and/or length measured and the measurement then stored. Subsequent documents' measurements will be compared against the stored value and if the scanned document is thicker or longer than the stored value, an error will be displayed.

### **Manual Thickness Adjust**

The thickness setting can be manually adjusted when the automatic thickness detection is not used or when there are frequent double feeds of paper.

The setting ranges from 1 to 13, with 1 being the thinnest, and 13 the thickest setting. To adjust this setting, tick the **Activate** checkbox, and then use the arrow keys at either end of the slider bar to increase or decrease the value.

## Border Removal

You can set a margin around the scanning area. The value ranged from – 10mm to +10mm.

To use this function, tick the **Activate** checkbox. To adjust the values, use the arrow keys or the slider bar to increase or decrease the value. To enlarge the scanning area, to ensure the document edges are not clipped, set a plus value. To reduce the scanning area, so that the image is not framed by a black border, set a minus value.

## Filter Settings

The Filter settings can be used to improve the quality of the scanned image, and to set colour dropout areas where the document will not be scanned.

| Option              | Description   |
|---------------------|---|
| Erase Black Dots    | This will automatically erase isolated black dots on a white background from the scanned image.   |
| Erase White Dots    | This will automatically erase isolated white dots on a black background from the scanned image.   |
| Erase Notch         | This will automatically remove areas that are caused by contours  |
| Complete Thin Lines | This will automatically fill in broken or thin faint lines.   |
| Drop Out Colour     | <p>This function is only available for the DR-5080c and will disable the scanning of areas of the document of a particular colour. The settings are:</p> <ul style="list-style-type: none"> <li>• None: Disables Colour dropout</li> <li>• Red: Will not scan red parts of the document</li> <li>• Green: Will not scan green parts of the document</li> <li>• Blue: Will not scan blue parts of the document</li> </ul> <p>Colour Dropout can be disabled for a part of the document by setting values in the Disable Dropout option. This is measured in millimetres, and is applied x mm from the top edge of the scanned image to x mm from the top edge of the image, where x is the value required.</p> |

|                    |   |
|--------------------|---|
| Automatic Exposure | This sets the Automatic Exposure level and affects the brightness and contrast settings for the image. This has a valid range of 1 to 13 and can be set by moving the slider bar, or using the arrow keys to increase or decrease the value.  |
| Edge Emphasis      | This can be used to emphasis contour lettering, as well as softening scanned images such as photos. This has a valid range of 1 to 5 and can be adjusted by moving the slider bar, or using the arrow keys to increase or decrease the value. |

### Other Options

Several other settings options are available and these are detailed below:

| Option          | Description   |
|-----------------|---|
| Verify Count    | This can be used to ensure that a known number of pages are being fed correctly through the scanner. Before scanning, the number of pages to be scanned can be set, and if that number of pages is not fed through the scanner, an error will be displayed. |
| Auto New File   | This setting can be used when batch scanning to automatically create a new file when the feeder empties. An option to continue scanning will be displayed and when this is pressed, a new file will be created.   |
| Use Front Panel | When this is enabled, the front panel of the scanner can be used to override certain settings set in the scanner driver. In the case of the DR- 5060F the front panel enables the user to also control the microfilm scanning functions.                    |

### DR-5060F Additions

An additional feature of the Canon DR-5060F is the *Save Film Position To* option on the driver screen. This calculates the position of the film from the 'blips' recorded on the microfilm by the built in camera unit on the scanner. When the position of the film has been calculated it can populate an index field in folders that have this option set.

## Function Keys

This settings screen can be used to set the functions available on the four keys on the front panel of the DR-5020, DR-5060F and DR-5080c. The available functions are:

- Manual Thickness Adjustment
- Scanner Calibration
- Auto Thickness Detection On/Off
- Auto Double Feed Detection On/Off
- Imprinter On/Off
- Save Settings

## Gamma

This option is used to download to the scanner Gamma data settings used to express colours and tones. These can be set for each of the colours shown.

To select a file, choose the colour from the dropdown list and then press **Open File**. This will allow you to select the Gamma settings file to associate with that colour.

## Barcode Decoder

If the Barcode decoder option has been installed in the DR-5020, DR-5080c or DR-5060F, the **Barcode Setup** option will be available from the **Extended Settings** screen. From this screen you can set which barcode types are to be searched for, and you can also specify an area of the document to search for barcodes, which can be on the front or back of a scanned page.

The scanners will recognise the following barcode types:

- EAN
- Code 39
- Codabar
- Code 25
- UPC
- UPC-A
- UPC-E
- Code 128

Up to four barcodes of differing types can be searched for and read from a document. The number to read can be set in the **Barcodes per page** option. To select the side of the page that the barcodes are on, choose the appropriate option from the **Side** drop down list.

To activate the barcode recognition, tick the **Use barcode recognition** checkbox. The **Activate buzzer** option will set the scanner to buzz each time a barcode is found and read.

Additionally you can set a specific an area on a page to search for barcodes. To select this option tick the **Activate** checkbox under **Search Area**.

The area to be read must be specified in millimetres, and the top left of the search area is set by putting the appropriate values in the Horizontal and Vertical offset value fields. You can then specify the width and height of the search area in the Width and Height value fields.

To set the scanner to read a particular barcode format or formats, tick the **Activate** checkbox in each of the barcode formats.

| Barcode | Option  |
|---------|---|
| EAN     | To read the Extended EAN format, tick the <b>Extended</b> checkbox.   |
| Code 39 | If the barcode has a checksum, this can be recognised by ticking the <b>Recognise checksum</b> checkbox. If this is selected, the checksum value can be returned by selecting the <b>Return checksum</b> option. You can also select to include the start and stop characters in the barcode read by ticking the <b>Return start/stop</b> checkbox.   |
| Codabar | If the barcode has a checksum, this can be recognised by ticking the <b>Recognise checksum</b> checkbox. If this is selected, the checksum value can be returned by selecting the <b>Return checksum</b> option. There are two checksum options for Codabar, <b>Mod 16</b> and <b>DR7</b> , which can be selected from the drop down list. You can also select to include the start and stop characters in the barcode read by ticking the <b>Return start/stop</b> checkbox. |
| Code 25 | <p>If the barcode has a checksum, this can be recognised by ticking the <b>Recognise checksum</b> checkbox. If this is selected, the checksum value can be returned by selecting the <b>Return checksum</b> option.</p> <p>By selecting <b>UPC</b>, you can then also select <b>UPC-A</b> and/or <b>UPC-E</b>.</p>  |

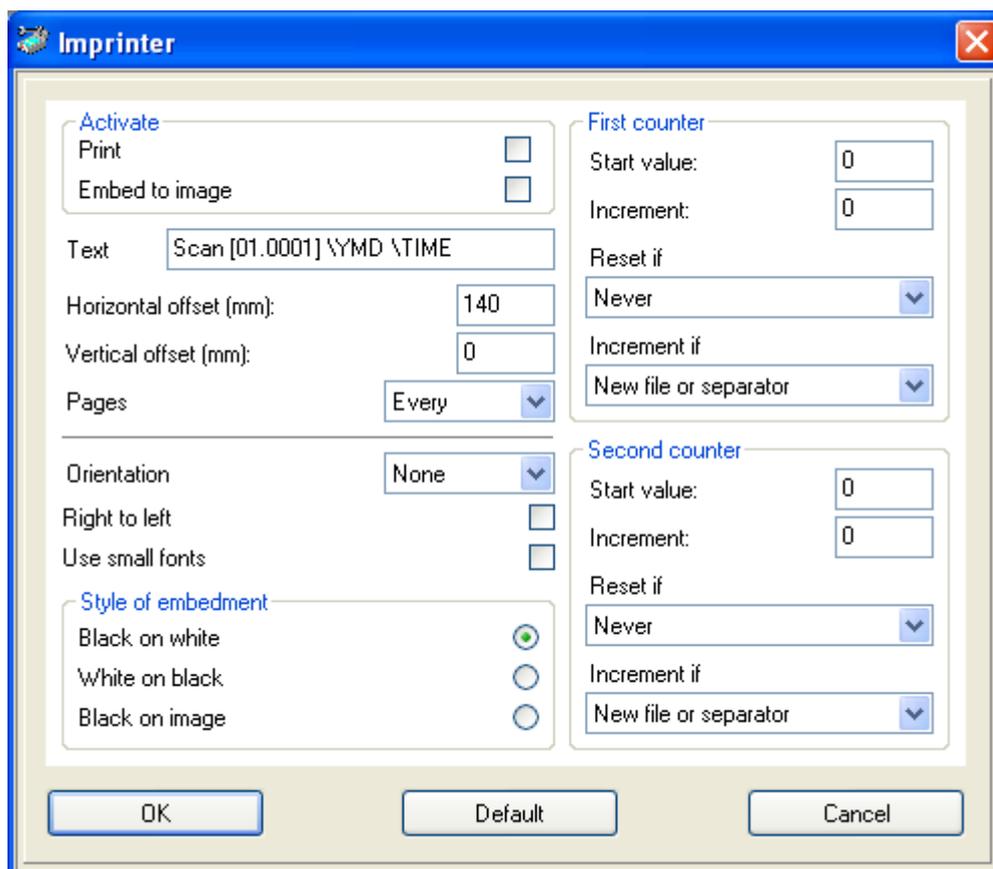
|          |  |
|----------|--|
| UPC-A    | <p>Extended UPC-A can be read by ticking the <b>Extended</b> checkbox.</p> <p>If the barcode has a checksum, this can be recognised by ticking the <b>Recognise checksum</b> checkbox. The header can also be returned by selecting the <b>Return Header</b> checkbox.</p> |
| UPC-E    | <p>If the barcode has a checksum, this can be recognised by ticking the <b>Recognise checksum</b> checkbox. The header can also be returned by selecting the <b>Return Header</b> checkbox.</p>  |
| Code 128 | <p><b>Code 128</b> has no options.</p>   |

### Imprinter Option

If the *Imprinter* option has been installed in the DR-5020, DR-5080c or DR-5060F, this can be configured by selecting the *Imprinter* option from the *Extended Settings* screen.

The Imprinter option allows you to print specified alphanumeric and symbol characters at any position on a page as it is being scanned. You can also embed the characters to be printed in the scanned image.

To set the Imprinter to print text on a page as it is being scanned, tick the *Print* checkbox. To embed the text as part of a scanned image, tick the *Embed to image* checkbox.



The text to be printed can be specified in the **Text** field. If the counters are to be used, these must be specified within square brackets. If both counters are used, the values must be separated by a decimal point (full stop).

The **Horizontal offset** only applies if the text is to be embedded in the scanned image. You can specify the offset in millimetres from the left edge of the page. When printing text, the horizontal offset is applied manually, please refer to the scanner manual for instructions on how this is done.

The **Vertical offset** specifies the distance in millimetres from the top edge of the paper to start printing the text.

You can select to print the text on every page, on the first page of a new file as indicated by the New file key, by setting the **Pages** drop down list to **Every** or **Next** page.

You can set the direction in which the text will print from the **Orientation** drop down list. The available values are None, 90, 180 and 270 degrees.

The **Right to left** option will set the Imprinter to add characters from right to left.

The default font size the Imprinter uses is 12x12 dots. You can select to use a smaller 8x7 font size by ticking the **Use small fonts** checkbox.

The **Style of Embedment** can be set from one of three options:

- **Black on White** will print black text on to a white background.
- **White on Black** will print white text on a black background.
- **Black on image** will print black text on to the image.

There are two counters that can be configured, and these options apply to both. The Start value of the counter can be set as well as the value to increment the value for each page.

The following values can be set for the **Reset if** and **Increment if** options. **Reset If** will reset the counter to its start value. **Increment If** will add the specified increment value to the counter.

- Never
- Separator
- New File or Separator
- New File
- Each Document

## Options Screen

The *Options* screen is for information and will show the attached scanner's installed or available options.

The Barcode, Imprinter and Endorser checkboxes will be ticked if the options are installed.

| Option             | Description   |
|--------------------|---|
| CC                 | CC is a special filter option                                   |
| YG-LED             | Will be ticked if the attached scanner is a DR-5020 or DR-5060F |
| Red/Green/Blue-LED | Will be ticked if the DR-5080c is attached                      |

The View options are values returned by the scanner. The DR-5080c will tick all three checkboxes. The DR-5020 and DR-5060F will return only Black & White and Bi-tonal.

## Canon DR-3060, 3080C & 3080CII

The DR-3060, DR-3080c and DR-3080cII are high performance A4 scanners with a maximum scanning throughput of 40 pages per minute. They are all double-sided scanners with automatic paper size and thickness detection. Both scanners incorporate a 100 sheet paper tray.

The DR-3060 supports black & white and 256 level greyscale scanning whilst the DR-3080c supports several modes up to a maximum 24 bit colour. The maximum scanning resolution for both scanners is 300dpi.

Post document endorsers are options which can be added to the scanners.

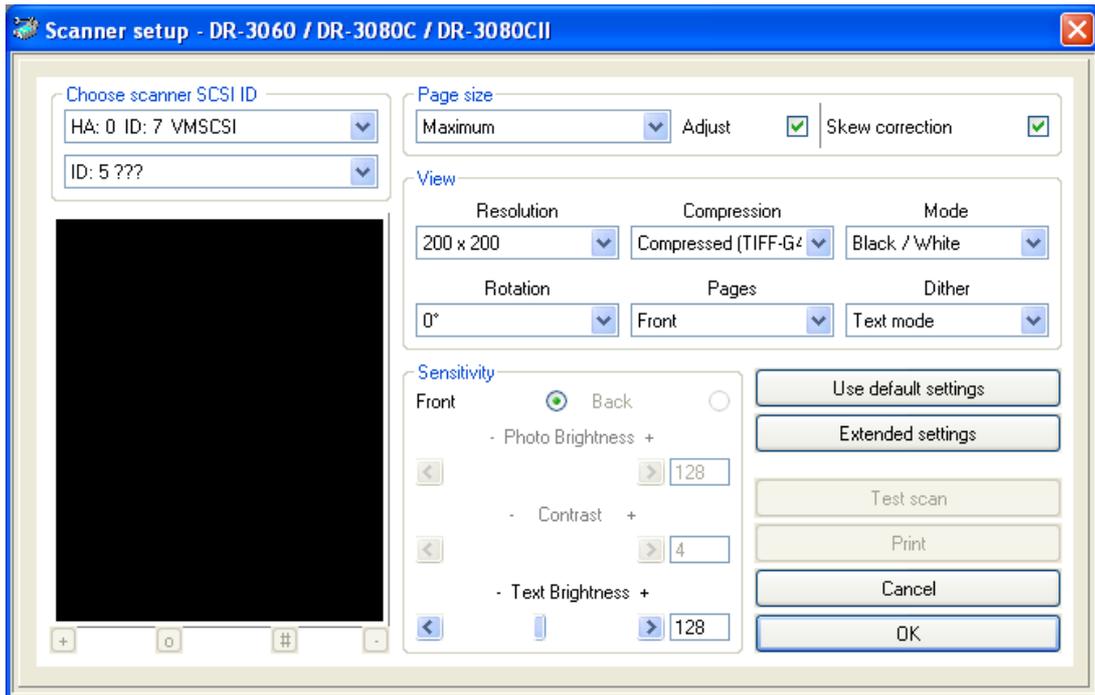
Document specifications are:

- Width 55mm to 257mm
- Length 70mm to 364mm
- Thickness 0.06mm to 0.15mm (0.05 to 0.2mm Manual Feed)

### ***Scanner Configuration***

There are many options that can be selected for the scanners, and these are split over different option screens which are selected from ***Scanner Setup***. The most used options are collected together on the first screen displayed when Scanner Setup is selected.

The following screen shows the first screen displayed when choosing ***Scanner Setup*** for the Canon DR-3060, DR-3080C or DR-3080CII.



## Page Settings

All three scanners are capable of scanning single or double sided documents, and different settings can be applied for each side of a double sided document. The first option to select is whether to scan single or double sided. Selecting **Front**, **Back**, or **Front/back** scanning from the option on the screen above can do this.

Please note that greyscale and colour scanning is only available for single sided, front page scanning on DR-3060 and DR-3080C.

The **Adjust** option sets the scanner to automatically detect the size of each page scanned, and will adjust the page size to the actual size of the document.

For each side, or both sides of a document, the following options can be set:

| Option     | Description   |
|------------|---|
| Page Size  | <p>Select one of the following document sizes:</p> <ul style="list-style-type: none"> <li>• Letter - 8.5 x 11 Inch</li> <li>• Legal - 8.5 x 14 Inch</li> <li>• A4 - 210 x 297 mm</li> <li>• A5 - 148 x 210 mm</li> <li>• A6 - 105 x 148 mm</li> <li>• B4 - 250 x 353 mm (ISO)</li> <li>• B5 - 176 x 250 mm (ISO)</li> </ul> <p>If Fit Image is enabled, this setting is disabled</p> <p><b>Window Page Size Setting:</b></p> <p>If you select the <b>Window</b> page size option, you can specify an area of the document to be saved. To do this, select Window as the page size, then perform a Test Scan on a sample document. A sizeable box will be overlaid on the image in the Test Scan window. Size the box over the area of the sample document, and the box size and location will then be saved.</p> <p>Please note that when this option is used, only the area of the document inside the box will be saved. All other parts of the scanned document will be discarded.</p> |
| Resolution | <p>You can select up to one of the following resolutions</p> <ul style="list-style-type: none"> <li>• 200 dpi</li> <li>• 240 dpi</li> <li>• 300 dpi (Dots per Inch)</li> </ul> <p>With the above settings the horizontal scan resolution is the same as the vertical resolution.</p> <p>There is also a high speed scanning setting, which has a split resolution. The first figure is the horizontal setting, the second refers to the vertical setting: 300x150</p>   |
| Dither     | <p>Use this setting when scanning in black and white mode. This applies error diffusion to simulate greys and half-tones on the scanned document. This is useful when scanning photos.</p>  |

|                    |  |
|--------------------|--|
| <p>Modus</p>       | <p>This option is used to set the number of colours to be scanned.</p> <p><b>Black &amp; White</b></p> <p>The black &amp; white mode scans only in black &amp; white.</p> <p><b>Greyscale</b></p> <p>The DR-3060 and DR-3080c support 256 levels of Greyscale</p> <p><b>Colour</b></p> <p>Only the DR-3080c supports 3, 6, 12 and 24 bit colour scanning. The larger the bit value selected, the more colour shades will be scanned.</p> <p>Please be aware that greyscale and colour scanning, especially at high resolutions, can result in large file sizes.</p>  |
| <p>Rotation</p>    | <p>A document can be scanned and then rotated and saved. The available rotation options are 0°, 90°, 180° or 270°.</p>   |
| <p>Compression</p> | <p>ScanFile will store images in one of four ways:</p> <ul style="list-style-type: none"> <li>• Uncompressed TIFF</li> <li>• Group 4 Compressed TIFF</li> <li>• Jpeg</li> <li>• Lura Document</li> </ul> <p>The type of compression and file format you select is dependent upon several factors including the type of document to be scanned, and the type of output required of that document once stored.</p> <p><b>Uncompressed TIFF:</b> This format will perform no compression on the image data produced from the scanned document, and will result in large file sizes.</p> <p><b>Group 4 Compressed TIFF:</b> This format will compress the scanned image data, normally by a factor of 10 to 15. This is only used for black &amp; white scanned images. This is a 'lossless' compression format which means that none of the original scanned information is discarded.</p> <p><b>JPEG (JTIFF):</b> JPEG is a standardised image compression mechanism, which is designed for compressing either full-colour or grey-scale images of natural, real-world scenes. Jpeg is a 'lossy' compression</p> |

|  |   |
|--|---|
|  | <p>format, which means that data is discarded from the original scanned image data to achieve the levels of compression possible. It is possible to vary the amount of data to be discarded, and therefore the quality of the remaining image. ScanFile has various quality levels for Jpeg images which will determine how much data is 'dropped' from the original scanned image, and will radically affect the size of the file produced.</p> <p><b>Lura Document:</b> Lura Document is a standardised image compression ratio which is designed essentially for compressing either full colour or greyscale images to dramatically smaller file sizes. Lura document is also a 'lossy' compression format, however, ScanFile includes extensive options for determining levels of quality for Lura Document scanned images.</p> |
|--|---|

## ***Skew Correction***

This function is a software driver based skew correction facility that can be selected by a checkbox on the main **Scanner Setup** window. Should pages be scanned at an angle through the scanner, and not appear straight when viewing, this option will straighten the page and justify it which will help when performing other actions such as OCR.

## ***Sensitivity***

These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

## ***Text Mode***

In this mode, only the Text Brightness setting can be adjusted. All three scanners have an automatic brightness function built-in, but this can be overridden and manually set if necessary.

When the **Auto** is selected, the scanner will automatically sense the brightness setting required for each page as it is scanned.

The Brightness setting can be any value between 1 and 255, with 1 being the darkest setting, 255 being the brightest. A value of 0 will select Auto brightness. To manually set a brightness value, untick the **Auto** checkbox

and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## Photo Mode

In this mode, the Photo Brightness and Contrast settings can be adjusted. All three scanners have automatic brightness and contrast functions built-in, but these can be overridden and manually set if necessary.

When the **Auto** setting is selected, the scanner will automatically sense the brightness and/or the contrast setting required for each page as it is scanned.

The brightness and contrast settings can be any value between 1 and 255, with 1 being the darkest setting, 255 being the lightest. A value of 0 will select auto brightness or contrast. To manually set a brightness or contrast value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## Extended Settings

The **Extended Settings** option allows you access to the advanced functions of the scanners. Many settings are available from this option, and these are explained on the following pages.

*Several of these settings can affect the quality of the scanned image and they should therefore be used with caution!*

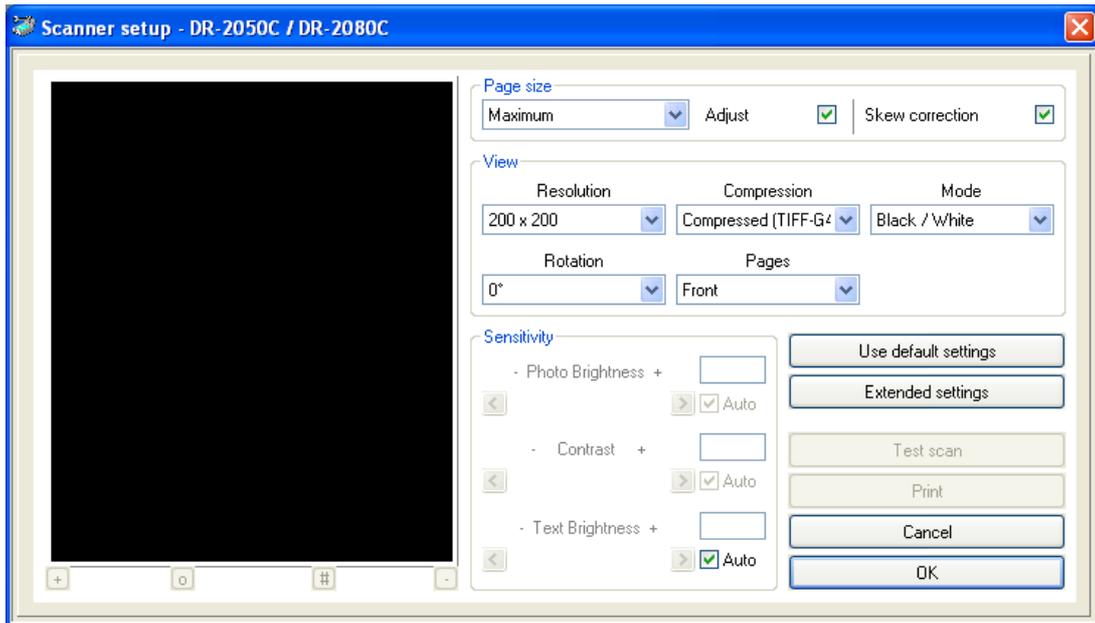
| Option                     | Description  |
|----------------------------|--|
| Automatic Page Suppression | This function allows both scanners to ignore unwanted blank pages being scanned. This can be performed for the front and back of a scanned page. To switch this option on click on the relevant activate checkboxes. The levels at which a blank page can be identified can be adjusted by the blackness threshold slide bar, this will help to identify pages with little surface coverage on the page and depending on the levels set will ignore those pages. |

|                 |  |
|-----------------|--|
| Drop Out Colour | <p>This function is only available for the DR-3080c and will disable the scanning of areas of the document of a particular colour. The settings are:</p> <ul style="list-style-type: none"><li>• None: Disables Colour dropout</li><li>• Red: Will not scan red parts of the document</li><li>• Green: Will not scan green parts of the document</li><li>• Blue: Will not scan blue parts of the document</li></ul> <p>Colour Dropout can be disabled for a part of the document by setting values in the Disable Dropout option. This is measured in millimetres, and is applied x mm from the top edge of the scanned image to x mm from the top edge of the image, where x is the value required.</p> |
| Edge Emphasis   | <p>This can be used to emphasise contour lettering, as well as softening scanned images such as photos. This has a valid range of 1 to 5 and can be adjusted by moving the slider bar, or using the arrow keys to increase or decrease the value.</p>  |

## Canon DR-2050C & DR-2080C

The DR-2050C and the DR-2080C are compact A4 workgroup scanner with a maximum scanning throughput of 20 pages per minute, or 39 images per minute when scanning double sided documents. They support black & white and 256 level greyscale scanning, and 24 bit colour. The maximum scanning resolution is 600dpi.

The following picture shows the DR-2050C and DR-2080C Scanner setup screen.



| Setting    | Description   |
|------------|---|
| Page Size  | The ScanFile driver will automatically detect the size of the page being scanned if the <b>Adjust</b> option is selected. If it is not selected, the maximum scan size will be used, and the image may have a black border.   |
| Resolution | <p>The DR-2080C supports resolutions from 100dpi to 600dpi. The resolutions available will be dependent upon the scanning mode selected.</p> <ul style="list-style-type: none"> <li>• Black &amp; White/Greyscale 200-600dpi</li> <li>• 24bit Colour 100-400dpi single/double sided</li> <li>• 600dpi single sided</li> </ul> |

|                    |  |
|--------------------|--|
| <p>Compression</p> | <p>ScanFile will store images in one of four ways:</p> <ul style="list-style-type: none"> <li>• Uncompressed TIFF</li> <li>• Group 4 Compressed TIFF</li> <li>• Jpeg</li> <li>• Lura Document</li> </ul> <p>The type of compression and file format you select is dependent upon several factors including the type of document to be scanned, and the type of output required of that document once stored.</p> <p><b>Uncompressed TIFF:</b> This format will perform no compression on the image data produced from the scanned document, and will result in large file sizes.</p> <p><b>Group 4 Compressed TIFF:</b> This format will compress the scanned image data, normally by a factor of 10 to 15. This is only used for black &amp; white scanned images. This is a 'lossless' compression format which means that none of the original scanned information is discarded.</p> <p><b>JPEG (JTIFF):</b> JPEG is a standardised image compression mechanism, which is designed for compressing either full-colour or grey-scale images of natural, real-world scenes. Jpeg is a 'lossy' compression format, which means that data is discarded from the original scanned image data to achieve the levels of compression possible. It is possible to vary the amount of data to be discarded, and therefore the quality of the remaining image. ScanFile has various quality levels for Jpeg images which will determine how much data is 'dropped' from the original scanned image, and will radically affect the size of the file produced.</p> <p><b>Lura Document:</b> Lura Document is a standardised image compression ratio which is designed essentially for compressing either full colour or greyscale images to dramatically smaller files sizes. Lura document is also a 'lossy' compression format, however, ScanFile includes extensive options for determining levels of quality for Lura Document scanned images.</p> |
| <p>Rotation</p>    | <p>A document can be scanned and then rotated and saved. The available rotation options are 0°, 90°, 180° or 270°.</p>   |

|              |  |
|--------------|--|
| <p>Mode</p>  | <p>This option is used to set the number of colours to be scanned.</p> <p><b>Black &amp; White</b></p> <p>The black &amp; white mode scans only in black &amp; white.</p> <p><b>Greyscale</b></p> <p>Both scanners support 256 levels of Greyscale</p> <p><b>Colour</b></p> <p>Both scanner support 24 bit colour scanning. The larger the bit value selected, the more colour shades will be scanned.</p> <p>Please be aware that greyscale and colour scanning, especially at high resolutions, can result in very large file sizes.</p> |
| <p>Pages</p> | <p>You can select whether to scan single or double sided documents.</p>  |

## ***Sensitivity***

These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

## ***Text Mode***

In this mode, only the Text Brightness setting can be adjusted. Both scanners have an automatic brightness function built-in, but this can be overridden and manually set if necessary.

When the **Auto** is selected, the scanner will automatically sense the brightness setting required for each page as it is scanned.

The Brightness setting can be any value between 1 and 255, with 1 being the darkest setting, 255 being the brightest. A value of 0 will select Auto brightness. To manually set a brightness value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## ***Photo Mode***

In this mode, the Photo Brightness and Contrast settings can be adjusted. Both scanners have automatic brightness and contrast functions built-in, but these can be overridden and manually set if necessary.

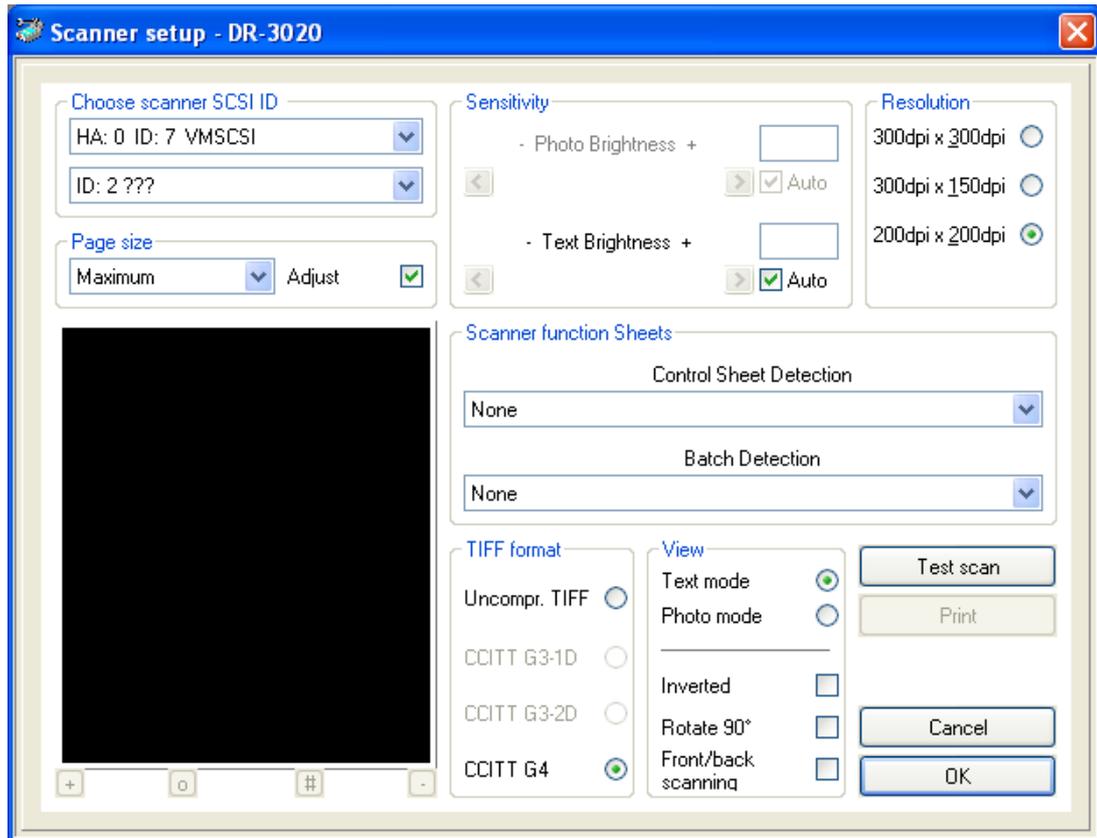
When the **Auto** setting is selected, the scanner will automatically sense the brightness and/or the contrast setting required for each page as it is scanned.

The brightness and contrast settings can be any value between 1 and 255, with 1 being the darkest setting, 255 being the lightest. A value of 0 will select auto brightness or contrast. To manually set a brightness or contrast value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## **Canon DR-3020**

The Canon DR-3020 is a 40 page per minute black & white scanner with automatic paper thickness and size detection, with a maximum paper size of B4. Its automatic document feeder can take up to 100 sheets at a time, and these can be either single or double-sided documents. It has an industry standard SCSI-2 interface. The DR-3020 has a maximum resolution of 300dpi.

To configure the DR-3020 scanning options, ensure that the DR-3020 is set as the default scanner and then click on the **Scanner Setup** button. The following window will then be displayed



## Scan Resolution

The Canon DR-3020 has three scan resolutions

- 200x200dpi
- 300x300dpi
- 300x150dpi

The selected scan resolution will affect the quality of the image, and also the scan speed. At a resolution of 300 x 150dpi, scanning single sided documents, the DR-3020 will scan at 40 pages per minute. At 300 x300dpi, scanning double-sided documents will slow the scanner to 11 sheets per minute.

## Page Size

The DR-3020 can scan up to A4 size pages. The paper size can be selected from the drop down list. By selecting **Maximum**, and clicking on the **Adjust** option, the DR-3020 will auto detect the paper size.

## ***View Options***

These options will affect how the images are stored and displayed. Standard documents will normally be scanned using the **Text Mode**. **Photo Mode** scanning will enhance the document during scanning, and result in better quality scans of pictures. Please note that the Photo mode option will result in larger scanned file sizes.

Documents, by default, are displayed using black text on a white background. The **Inverted** option allows this to be reversed, so that the document is displayed with white text on a black background.

The DR-3020 scans documents in 'portrait' format. For landscape documents, select the **Rotate 90°** option so that they will be displayed in the correct orientation.

When selected, the **Front/Back** scanning option will scan and store both sides of the scanned document. When not selected, only the front side of the document is scanned.

## ***Brightness Controls***

The Canon DR-3020 has an automatic brightness function, which should work with most documents. Unticking the **Auto** option, and then selecting the required brightness setting by using the slider bar, or by typing in the brightness value, between 1-255, can override this.

# **Check Scanner**

ScanFile support several check scanners, which can read MICR Coded checks. The following check scanners are supported:

- • TellerScan TS200
- • TellerScan TS300/350
- • TellerScan TS400ES
- • BUIC 1500

Some of the described settings may only apply to certain scanner models.

## ***Resolution***

The resolution can be 200x100 dpi or 200x200 dpi. Using 200x100 dpi scanning speed is bigger, but quality is less. The minor quality image is

interpolated to a 200x200 dpi image. Select the resolution which serves your application best.

## **MICR**

The MICR code can be read and stored to index fields of ScanFile folders. Select the relevant MICR type between **CMC7** and **E13B**.

In order to store the MICR information to ScanFile index fields you have to perform a test scan first. Afterwards the check will be displayed in the test scan display window and the adjoining MICR information will be displayed in the text fields below. For each of the different MICR information parts, you can select a ScanFile index field from a drop down list. When scanning checks, the relevant information will then be stored automatically in these fields.

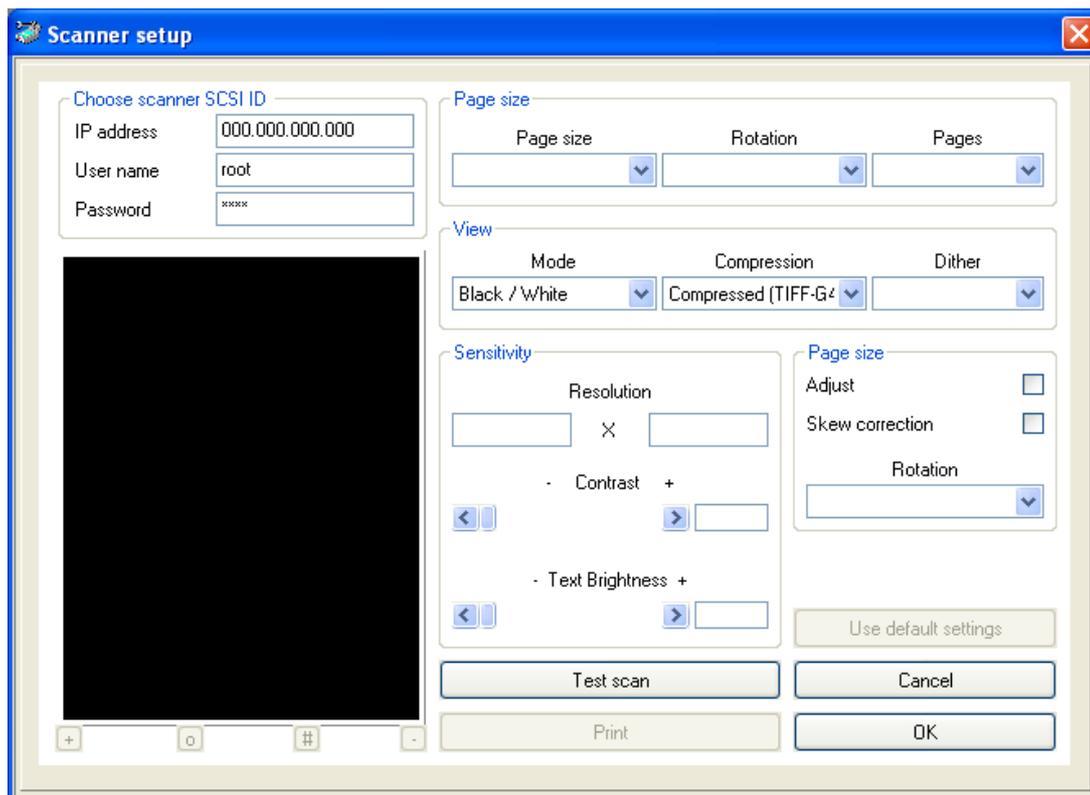
## **Axis 7000**

The **Axis 7000** is a network scan server box that will allow across network scanning with any scanner that is attached and supported by it.

### **Scanner Configuration**

There are many options that can be selected for any scanners attached to the Axis 7000, and these are defined in the **Scanner Setup**. The most used options are collected together on the first screen displayed when **Scanner Setup** is selected.

The following screen dialogue shows the first screen displayed when choosing **Scanner Setup** for the Axis 7000.



Please note that any settings that are defined for the Axis 7000 are dependant on the scanner that is attached to it. It is not possible to define which scanner is attached to it so the Axis 7000 must only be setup with the settings that are specific to that scanner.

## **Scanner SCSI ID**

To be able to recognise the Axis 7000 Scan Server you must enter its IP Address and the User Name and Password that have previously been configured on the Axis 7000. The correct configuration of the Axis 7000 can be verified using your web browser, please refer to the Axis user manual for details on how to do this.

## **Page Settings**

Any scanners attached that are capable of scanning single or double sided documents can have different settings applied for each side of a double sided document. The first option to select is whether to scan single or double sided, by selecting **Front** or **Front/back** scanning from the **Pages** drop down.

The **Adjust** option sets the scanner to automatically detect the size of each page scanned, and will adjust the page size to the actual size of the document.

For each side, or both sides of a document, the following options can be set:

| Setting    | Description  |
|------------|--|
| Page Size  | You can select any Page Size that is supported by the scanner attached, please check the relevant sections of this manual to verify which Page Sizes are available for each scanner.   |
| Resolution | You can select any Resolution that is supported by the scanner attached, please check the relevant sections of this manual to verify which resolutions are available for each scanner.   |
| Dither     | <p>Use this setting when scanning in black and white mode. This applies error diffusion to simulate greys and halftones on the scanned document. This is useful when scanning photos.</p> <p>The Inverted option allows you to change from black on a white background, to white on a black background.</p>  |
| Mode       | <p>This option is used to set the number of colours to be scanned. You can select any colour mode that is supported by the scanner attached, please check the relevant sections of this manual to verify which colour modes are available for each scanner.</p> <p>Please be aware that greyscale and colour scanning, especially at high resolutions, can result in large file sizes.</p> |
| Rotation   | A document can be scanned and then rotated and saved. The available rotation options are Portrait and Landscape  |

|             |   |
|-------------|---|
| Compression | <p>ScanFile will store images in one of four ways:</p> <ul style="list-style-type: none"><li>• Uncompressed TIFF</li><li>• Group 4 Compressed TIFF</li><li>• Jpeg</li><li>• Lura Document</li></ul> <p>The type of compression and file format you select is dependent upon several factors including the type of document to be scanned, and the type of output required of that document once stored.</p> <p><b>Uncompressed TIFF:</b> This format will perform no compression on the image data produced from the scanned document, and will result in large file sizes.</p> <p><b>Group 4 Compressed TIFF:</b> This format will compress the scanned image data, normally by a factor of 10 to 15. This is only used for black &amp; white scanned images. This is a 'lossless' compression format which means that none of the original scanned information is discarded.</p> <p><b>JPEG (JTIFF):</b> JPEG is a standardised image compression mechanism, which is designed for compressing either full-colour or grey-scale images of natural, real-world scenes. Jpeg is a 'lossy' compression format, which means that data is discarded from the original scanned image data to achieve the levels of compression possible. It is possible to vary the amount of data to be discarded, and therefore the quality of the remaining image. ScanFile has various quality levels for Jpeg images which will determine how much data is 'dropped' from the original scanned image, and will radically affect the size of the file produced.</p> <p><b>Lura Document:</b> Lura Document is a standardised image compression ratio which is designed essentially for compressing either full colour or greyscale images to dramatically smaller files sizes. Lura document is also a 'lossy' compression format, however, ScanFile includes extensive options for determining levels of quality for Lura Document scanned images.</p> |
|-------------|---|

## ***Skew Correction***

This function is a software driver based skew correction facility that can be selected by a checkbox on the main scanner setup window. Should pages be

scanned at an angle through the scanner, and not appear straight when viewing, this option will straighten the page and justify it which will help when performing other actions such as OCR.

## Sensitivity

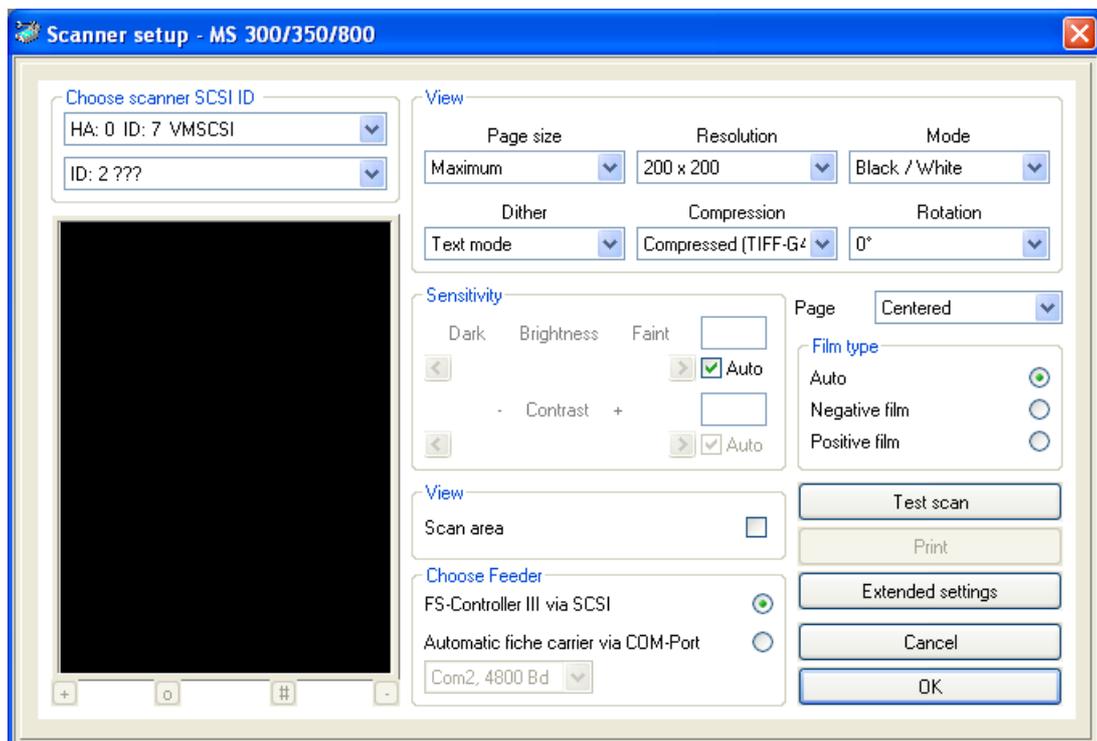
These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

## Canon MS-300, 350 & 800

The Canon MS300, 350 and 800 microfilm scanners offers high speed and high resolution scanning and provide easy conversion and integration into existing digital environments. Full automatic search and retrieval/scanning functions are available via the optional FS Controller III, where the scanner supports it.

## Scanner Configuration

The following screen shows the main settings screen displayed when choosing **Scanner Setup** for the MS-300, MS-350 or MS-800:



## Page Settings

A number of options can be set which will affect the size, quality and orientation of the documents being scanned. These are in the **View** section on the **Scanner Setup** screen.

The tables below and on the following pages show the available settings.

| Setting    | Description  |
|------------|--|
| Page Size  | <p>Select one of the following document sizes:</p> <ul style="list-style-type: none"> <li>• Letter - 8.5 x 11 Inch</li> <li>• Legal - 8.5 x 14 Inch</li> <li>• A3 - 297 x 420 mm</li> <li>• A4 - 210 x 297 mm</li> <li>• A5 - 148 x 210 mm</li> <li>• A6 - 105 x 148 mm</li> <li>• B4 - 250 x 353 mm (ISO)</li> <li>• B4 - 257 x 364 mm (JIS)</li> <li>• B5 - 176 x 250 mm (ISO)</li> <li>• B5 - 182 x 257 mm (JIS)</li> </ul> <p>If <b>Fit Image</b> is enabled, this setting is disabled</p> <p><b>Window Page Size Setting:</b></p> <p>If you select the <b>Window</b> page size option, you can specify an area of the document to be saved. To do this, select <b>Window</b> as the page size, then perform a Test Scan on a sample document. A sizeable box will be overlaid on the image in the Test Scan window. Size the box over the area of the sample document, and the box size and location will then be saved.</p> <p>Please note that when this option is used, only the area of the document inside the box will be saved. All other parts of the scanned document will be discarded.</p> |
| Resolution | <p>You can select one of the following resolutions 200, 300, 400 and 600 dpi (Dots per Inch)</p> <p>With the above settings the horizontal scan resolution is the same as the vertical resolution.</p>   |

|          |   |
|----------|---|
| Mode     | <p>The scanners support black &amp; white and greyscale scanning</p> <p><b>Black &amp; White</b></p> <p>The black &amp; white mode scans only in black &amp; white.</p> <p><b>Greyscale</b></p> <p>The scanners support 4, 16 &amp; 256 levels of</p> <p><b>Greyscale</b></p> <p>Please be aware that greyscale scanning, especially at high resolutions, can result in extremely large file sizes.</p> |
| Dither   | <p>Use this setting when scanning in black and white mode. This applies error diffusion to simulate greys and half-tones on the scanned document. This is useful when scanning photos.</p>  |
| Rotation | <p>A document can be scanned and then rotated and saved. The available rotation options are 0°, 90°, 180° or 270°.</p>  |

|             |   |
|-------------|---|
| Compression | <p>ScanFile will store images in one of four ways:</p> <ul style="list-style-type: none"><li>• Uncompressed TIFF</li><li>• Group 4 Compressed TIFF</li><li>• Jpeg</li><li>• Lura Document</li></ul> <p>The type of compression and file format you select is dependent upon several factors including the type of document to be scanned, and the type of output required of that document once stored.</p> <p><b>Uncompressed TIFF:</b> This format will perform no compression on the image data produced from the scanned document, and will result in large file sizes.</p> <p><b>Group 4 Compressed TIFF:</b> This format will compress the scanned image data, normally by a factor of 10 to 15. This is only used for black &amp; white scanned images. This is a 'lossless' compression format which means that none of the original scanned information is discarded.</p> <p><b>JPEG (JTIFF):</b> JPEG is a standardised image compression mechanism, which is designed for compressing either full-colour or grey-scale images of natural, real-world scenes. Jpeg is a 'lossy' compression format, which means that data is discarded from the original scanned image data to achieve the levels of compression possible. It is possible to vary the amount of data to be discarded, and therefore the quality of the remaining image. ScanFile has various quality levels for Jpeg images which will determine how much data is 'dropped' from the original scanned image, and will radically affect the size of the file produced.</p> <p><b>Lura Document:</b> Lura Document is a standardised image compression ratio which is designed essentially for compressing either full colour or greyscale images to dramatically smaller files sizes. Lura document is also a 'lossy' compression format, however, ScanFile includes extensive options for determining levels of quality for Lura Document scanned images.</p> |
|-------------|---|

## ***Sensitivity***

These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply

dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

## ***Text Mode***

In this mode, only the Text Brightness setting can be adjusted. All three scanners have an automatic brightness function built-in, but this can be overridden and manually set if necessary.

When the **Auto** is selected, the scanner will automatically sense the brightness setting required for each page as it is scanned.

The Brightness setting can be any value between 1 and 255, with 1 being the darkest setting, 255 being the brightest. A value of 0 will select Auto brightness. To manually set a brightness value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## ***Photo Mode***

In this mode, the Photo Brightness and Contrast settings can be adjusted. All three scanners have automatic brightness and contrast functions built-in, but these can be overridden and manually set if necessary.

When the **Auto** setting is selected, the scanner will automatically sense the brightness and/or the contrast setting required for each page as it is scanned.

The brightness and contrast settings can be any value between 1 and 255, with 1 being the darkest setting, 255 being the lightest. A value of 0 will select auto brightness or contrast. To manually set a brightness or contrast value, untick the **Auto** checkbox and select any other value as **Auto** by using the slide bar or typing in a value between 1 and 255.

## ***Feeder Selection***

The microfilm scanners MS300/350/800 can use the Canon FS Controller III for automatic film advancement while scanning. Additionally, an automatic fiche carrier is available in some countries.

## ***Scan Area Setting***

The MS300 and 350 have an A4 Portrait screen and the MS800 an A3 Landscape screen. On the MS800, the screen can also be separated into two A4 portrait zones or a centred A4 portrait zone. This setting will affect how

the documents being displayed are scanned. There are four settings as follows:

| Setting   | Description   |
|-----------|---|
| Left      | This will scan the left A4 portrait zone  |
| Centred   | Scans the Centred A4 zone   |
| Separated | Scans the left and right A4 portrait zones, and stores the two pages separately.  |
| Overlaid  | This mode can scan two A4 portrait halves and combines them in to one A4 portrait. Each half on the A4 Portrait is centred within the left and right A4 portrait zones. The scan from the right zone will be the top half of the page and the bottom half will be from the left zone. |

### ***Extended Settings***

This option can be used to set whether to use the front panel of the scanner to control scanning, rather than ScanFile itself. E.g. if you selected the option, you have to start the scan process by pressing the green button on the front panel of the MS-800.

### ***FS Controller III***

This section describes the setup and initialisation of the scanner with the FS Carrier III. A full description of this will be available in the FS Carrier III manual.

| Blip Level | Description            |
|------------|------------------------|
| 1          | Pageblip               |
| 2          | File – Pageblip        |
| 3          | Batch - File- Pageblip |

|                   | 1 Blip | 2 Blip | 3 Blip |        |
|-------------------|--------|--------|--------|--------|
| Shift + F + Store |        |        |        | Return |

|               |     |     |     |        |
|---------------|-----|-----|-----|--------|
| Password      | 149 | 149 | 149 | Return |
| 1 Search Mode |     |     |     | Return |
| Mode #        | 5   | 2   | 3   | Return |
| Canon Meth    | No  | No  | No  | Return |
| Ser Progr.    | 8   | 13  | 13  | Return |
| Std Blip      | Yes | Yes | Yes | Return |
| Neg. Blip     | Yes | Yes | Yes | Return |
| N/P Key on    | No  | No  | No  | Return |
| Stand Slice   | Yes | Yes | Yes | Return |
| Count Splice  | No  | No  | No  | Return |
| (Set)=#1 DOC  | Yes | Yes | Yes | Return |
| Enable (Auto) | No  | No  | No  | Return |
| Indexing      | --- | No  | No  | Return |
| Send Address  | No  | No  | No  | Return |
| Input OK      | Yes | Yes | Yes | Return |
| 8 X Plus Key  |     |     |     |        |
| Exit          |     |     |     | Return |

| Mode                   | Setting                  |        |
|------------------------|--------------------------|--------|
| Film adjust vertical   | SHIFT + ↓ or ↑           | Return |
| Film adjust horizontal | SHIFT + 4 then Yes or No | Return |

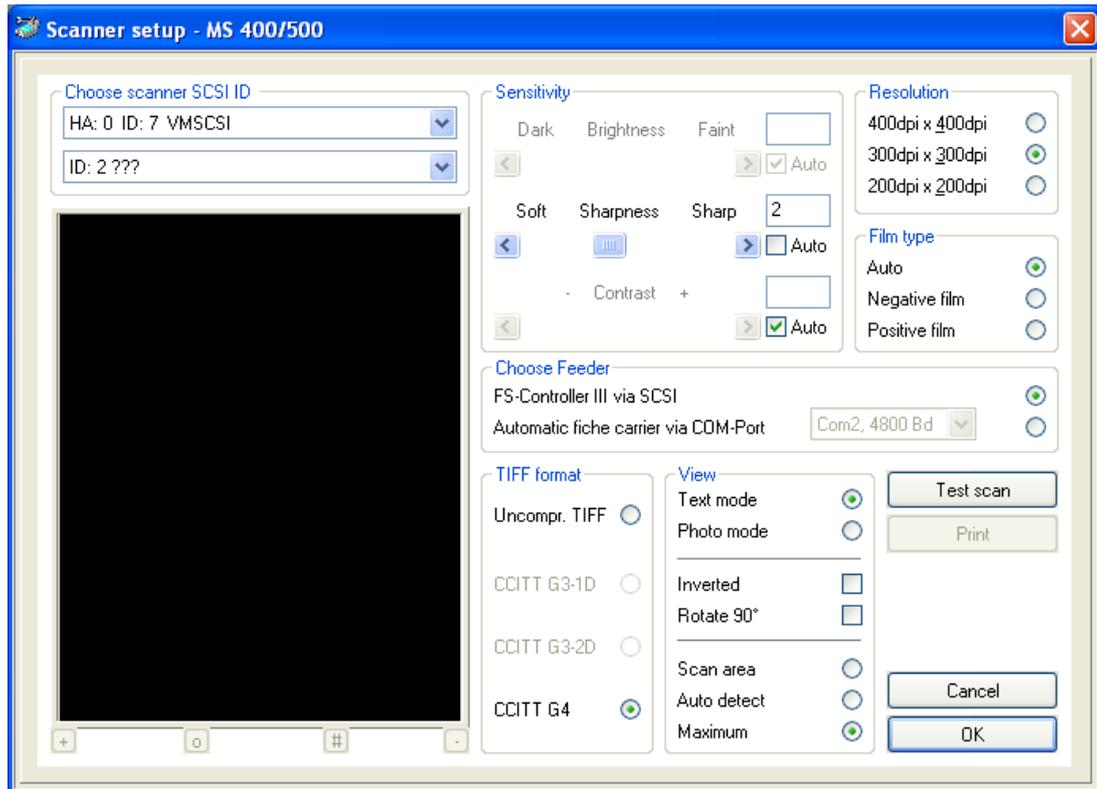
## ***FS Controller III – Scanning with Batch- + File***

|                   |     |                          |          |
|-------------------|-----|--------------------------|----------|
| Shift + F + Store |     |                          | Return   |
| Password          | 149 |                          | Return   |
| 1 Search Mode     |     |                          | Plus Key |
| 2 Machine setup   |     |                          | Return   |
| Trailer stop      | No  |                          | Return   |
| Mod F&C nstd      | No  |                          | Return   |
| E/M detect        | Yes |                          | Return   |
| Key buffer        | No  |                          | Return   |
| Face U/D set      | No  |                          | Return   |
| Face down         | Yes | Scan in ascending order  | Return   |
| Face down         | No  | Scan in descending order | Return   |
| Adrs prt set      | No  |                          | Return   |
| Address prt       | No  |                          | Return   |
| Japanese MSG      | No  |                          | Return   |
| Input OK          | Yes |                          | Return   |
| 7 X Plus Key      |     |                          |          |
| Exit              |     |                          | Return   |

## **Canon MS400 & 500**

Canon's digital microfilm reader printers have an optional SCSI kit to enable them to be used as PC scanning devices. Two modes are supported – manual or automatic feed scanning. With automatic feed scanning, an FS Carrier III will be required, as well as blipped films.

The maximum resolution of the MS scanners is 400dpi.



## Scan Resolution

The MS400 & 500 have three scan resolutions

- 200x200dpi
- 300x300dpi
- 400x400dpi

## View Options

These options will affect how the images are stored and displayed. Standard documents will normally be scanned using the **Text Mode**. **Photo Mode** scanning will enhance the document during scanning, and result in better quality scans of pictures. Please note that the **Photo Mode** option will result in larger scanned file sizes.

Documents, by default, are displayed using black text on a white background. The **Inverted** option allows this to be reversed, so that the document is displayed with white text on a black background.

The scanned documents can be rotated 90 degrees clockwise by selecting the **Rotate 90°** option so that they will be displayed in their correct orientation.

## ***Film Type***

Use this option to set the type of film loaded into the microfilm scanner. The **Auto** option will automatically detect the type of film loaded.

## ***Feeder***

This option allows you to set the type of feeder used on the microfilm scanner. It can be set for the Canon FS Carrier III, or Auto Fiche Carrier. For the Auto Fiche Carrier, the Communication port and baud rate being used must also be set.

Please note that these feeder options may not be available in all countries. Please check with the supplier of the microfilm scanner for availability.

## ***Sensitivity***

These settings allow you to adjust the brightness and contrast settings for each side of a document to be scanned. Different settings will apply dependent upon whether the document is to be scanned in Text mode or Photo Mode. Photo mode applies error diffusion to simulate rescaling.

## ***FS Controller III***

This section describes the setup and initialisation of the MS400/500 with the FS Carrier III. A full description of this will be available in the FS Carrier III manual.

| <b>Mode</b> | <b>Description</b>  |
|-------------|---------------------|
| I           | Page                |
| II          | File - Page         |
| III         | Batch – File - Page |
| VII         | File – Page         |

|                   | <b>Mode I</b> | <b>Mode II</b> | <b>Mode III</b> | <b>Mode VII</b> |        |
|-------------------|---------------|----------------|-----------------|-----------------|--------|
| Shift + F + Store |               |                |                 |                 | Return |
| Password          | 149           | 149            | 149             | 149             | Return |

|               |     |     |     |     |        |
|---------------|-----|-----|-----|-----|--------|
| 1 Search Mode |     |     |     |     | Return |
| Mode #        | 1   | 2   | 3   | 7   | Return |
| Canon Meth    | Yes | No  | No  | No  | Return |
| Serge Progr.  | 31  | 13  | 13  | 10  | Return |
| Ser. Level    | 1   | --- | --- | --- | Return |
| Std Blip      | Yes | Yes | Yes | Yes | Return |
| Neg. Blip     | Yes | Yes | Yes | Yes | Return |
| N/P Key on    | No  | No  | No  | No  | Return |
| Stand Slice   | Yes | Yes | Yes | Yes | Return |
| Count Splice  | No  | No  | No  | No  | Return |
| (Set)=#1 DOC  | Yes | Yes | Yes | Yes | Return |
| Enable (Auto) | Yes | No  | No  | No  | Return |
| Indexing      | --- | No  | No  | No  | Return |
| Send Address  | No  | No  | No  | No  | Return |
| Input OK      | Yes | Yes | Yes | Yes | Return |
| 8 X Plus Key  |     |     |     |     |        |
| Exit          |     |     |     |     | Return |

| SW103 – with FS Controller III |   |   |   |   |   |   |   |     |
|--------------------------------|---|---|---|---|---|---|---|-----|
| 1                              | 2 | 3 | 4 | 5 | 6 | 7 | 8 |     |
| x                              | x | x | • | x | x | x | x | On  |
| •                              | • | • | x | • | • | • | • | Off |

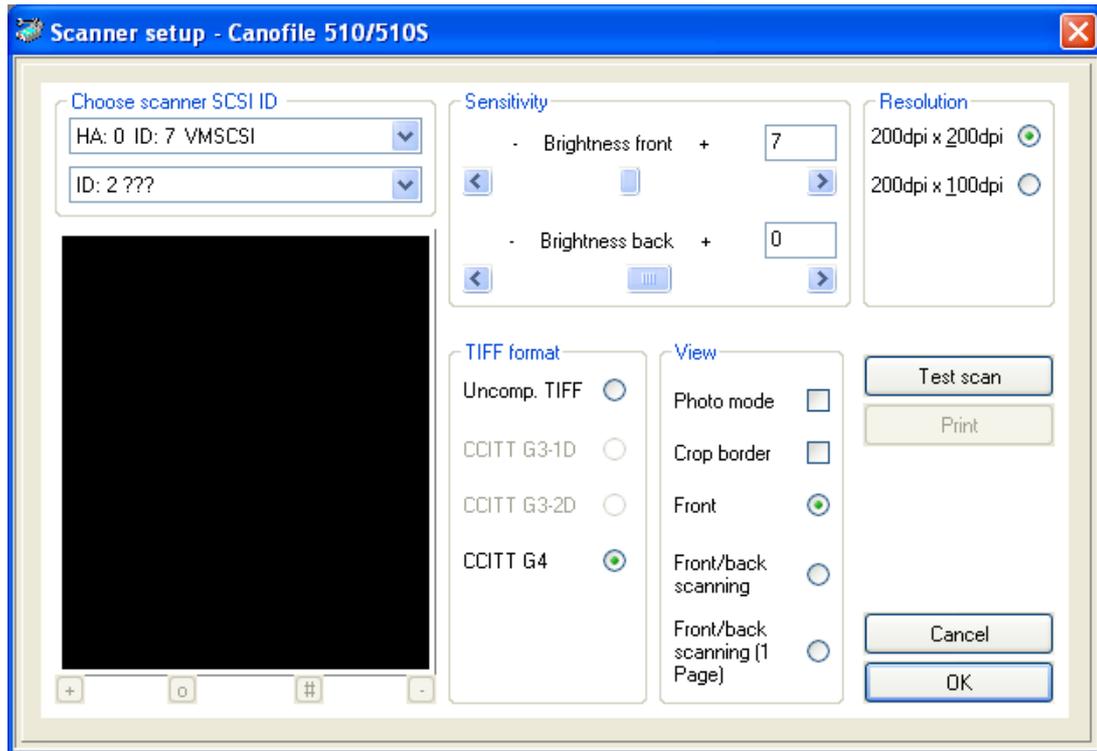
| SW103 – Without FilePrint 300 |   |   |   |   |   |   |   |     |
|-------------------------------|---|---|---|---|---|---|---|-----|
| 1                             | 2 | 3 | 4 | 5 | 6 | 7 | 8 |     |
| •                             | x | x | x | x | x | x | x | On  |
| x                             | • | • | • | • | • | • | • | Off |

| Mode                   | Description                          |
|------------------------|--------------------------------------|
| Film adjust vertical   | SHIFT + ↓ or ↑ then + or -           |
| Film adjust horizontal | SHIFT + 4 then Yes or No then Return |

## Canon Canofile 510/510S

The Canofile 510 is a standalone electronic filing system with a built-in 50 page per minute double-sided scanner. This has been discontinued by Canon. However, the CF510 has a SCSI connection which enables it to be attached to a PC and used as a scanner. Only certain CF510s can be used as scanners, so please check with Canon to ensure compatibility.

The screen below shows the scanner setup for the Canofile CF510 and Canofile CF510S.



## Scan Resolution

The CF510 has two scan resolutions

- 200 x 100 dpi
- 200 x 200 dpi

## View Options

These options will affect how the images are stored and displayed. Standard documents will normally be scanned using the **Standard Mode**. **Photo mode** scanning will enhance the document during scanning, and result in better quality scans of pictures. Please note that the **Photo Mode** option will result in larger scanned file sizes.

Each document scanned by the CF510 will have a Black border up to the maximum paper size of the CF510 scanner. Choosing the **Crop Border** option removes this border.

The CF510 has a double-sided scanner, this can be set to scan the front of a document only or both sides of a document. For double-sided scanning there are two options. **Front/Back** scanning will place each side of the document into a separate page. Choosing **Front/Back One Page** will result in both sides of the document being stored as one image.

## **Brightness Controls**

The scan brightness settings can be adjusted manually to suit the documents being scanned. Alternatively, the **Auto** option can be used to allow the scanner itself to determine the optimum setting.

## **TWAIN**

ScanFile has support for TWAIN compliant devices. TWAIN is an open standard device driver for scanners, and any scanner supplied with a TWAIN device driver should work with software applications supporting the TWAIN standard.

The scanner settings for TWAIN devices are set directly within the TWAIN device driver itself. The TWAIN interface will be displayed when scanning is started from ScanFile, whereupon the scanner settings can be applied.

When selecting **Scanner Setup** from the **Options** menu, the TWAIN setup screen will be displayed. From this screen you can select whether the TWAIN device driver interface will be displayed, and therefore whether you can change the current settings. If you choose not to display the screen the scanner will immediately start scanning.

If the scanner is a double-sided device, choosing the **Use duplex** mode will set the scanner to double sided scanning.

Some TWAIN scanners have built-in image compression capabilities to reduce the amount of information sent between the scanner and the PC. If the scanner has this capability, it can be selected by choosing the **Use Compressed Transmission** option.

## **Kofax**

Kofax manufacture specialist image processing boards for PCs to allow them to support high-speed scanners from companies such as Bell & Howell and Kodak. A TWAIN driver is available for the KOFAX scanner.



# *Maintenance*

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## Overview

Built in to ScanFile are utilities that will assist you if you experience problems with any of your folders or libraries. For this case ScanFile offers following functions to maintain and repair folder and libraries.

*The functions **do not replace** a regular backup. You should always take regular backups of all your ScanFile folders and libraries to prevent loss of data.*

## Maintain Folder

This utility is available from **File -> Maintain Folder**. ScanFile will check a folder for any errors within the database and for missing or corrupt document files. If any incorrect index records or records pointing to missing document files are found, a record of these will be written to the file **Error.log**, which is created in the PC's TEMP directory.

Problems such as these can occur if the PC was switched off during scanning or deleting, if the hard disk became full or corrupt, or if document files have been deleted from the ScanFile folder from outside of ScanFile.

Unfortunately, there is not a way to automatically correct such problems, and therefore the concerned index records will have to be deleted, and the documents rescanned.

*The Maintain folder utility may take some time to run but it is strongly recommended before writing a folder to archive write-once devices.*

## Repair Folder

If you experience a problem when trying to open a folder, you will be prompted to run the **Repair folder** utility. You can select this option from the **File -> Repair Folder** menu. This will attempt to repair and compact the folder database. Over time, the database may become fragmented on the hard disk, which will affect its performance. Compacting the database will rewrite it to a single area of the hard disk, and will also free any unused space in the database caused by deleted records. In most cases, running this utility should resolve problems with the folder.

## Repair Library

Just like ScanFile folders, it may happen that you experience a problem when you are trying to open a library. You will be prompted to run the **Repair library** utility. This option can be selected from the **Libraries -> Repair library** menu. This will attempt to repair and compact the library. The database will be rewritten to a single area of the hard disk, and will also free any unused space in the database caused by deleted records. In most cases, running this utility should resolve problems with the library.



# *Remote Services*

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## Overview

Included in the ScanFile setup is a server-based application called Remote Services. In version 7 this application was a configuration tool and executing program in one. In Version 8 the Remote Services is in two parts: the Remote Service and the Remote Service Configuration Tool, which is used to configure the service. Once the Remote service has been configured the Configuration Tool doesn't need to be running for the Remote Service to be active.

*If you wish to use the **Remote Services** a client installation has to be performed on the server to install the necessary components.*

The modules available, subject to the options that have been purchased, are:

|   |                                |
|---|--------------------------------|
|    | Import of Electronic Documents |
|    | Import of Files & Index        |
|   | Import of Indexes Only         |
|  | Library Update *               |
|  | Import of COLD data *          |
|  | Document Routing *             |
|  | Audit Trail *                  |
|  | TIFF Spooler **                |
|  | Fulltext OCR reading *         |
|  | Zone OCR reading *             |
|  | Retention Control              |

\* Features marked with an asterisk are additional purchases to the ScanFile core application

\*\* depending on the tasks you want to carry out, you may need an OCR and Forms Recognition licence

## Remote Services (Windows Service)

The Remote Service carries out the scheduled tasks. This application has been specifically designed to be run on Microsoft Windows NT4 and 2000 Servers or NT4, 2000 and XP workstations that may act as a workgroup server. The Remote Services application will be installed and automatically started during the installation of ScanFile.

When the Remote Services are installed, the Remote Service will be added to the list of server services. By default, this will be configured to use the local system account for its permissions. The Remote Service will require full access to the ScanFile program directory and to the ScanFile folders

If stopped, the Remote Services application will not perform its purpose, as the system process must continue to run for the duration of the required times and dates scheduled. For this reason it is intended to be run only on servers, or workstations acting as a server.

In addition to the services mentioned above, if the optional ScanFile VNP has been installed, the configuration and monitoring application for this can be started and stopped from within Remote Services Configuration Tool, from the ScanFile VNP menu option. ScanFile VNP is described later in this Guide.

### **Configuration**

The Remote Service is per default installed with the start type "Manually". Therefore it is inactive after installation and is not automatically started after a reboot. If you want to use the functionalities of the Remote Service, go to **Start -> Settings -> Control Panel -> Administrative Tools -> Services**. Select ScanFile Remote Service. With the right mouse button, select **Settings** to display the **ScanFile Remote Service Properties**. The tab **General** contains the start type. Change it from 'manually' to 'automatically'. This way the service will be started right after a reboot. Close the Service Control Panel. With **right Mouse -> Start** you can now start the service.

### **User Account**

The Remote Service utilises the local system account to access its resources. The access rights of the local system account are limited. You should assign a user account that provides the necessary access rights.

We recommend to create a new user account for the Remote Service. If the Remote Service has to access network resources, this should be a domain account.

*In case you are working with the ScanFile Account, please ensure that ScanFile and the Remote Service work with the same user account.*

## Permissions

The user you create must have Logon Locally rights and have permissions to change data on the following locations:

- ScanFile program directory
- ScanFile folders drive(s)/directories
- ScanFile library drive(s)/Directories

# Remote Services Configuration Tool

The Remote Services Configuration Tool is used to setup and schedule the modules to run at set times and dates for their individual purpose. The program runs as a separate application to the main body of ScanFile but still requires information from folders and libraries created and maintained by ScanFile to be able to operate correctly.

## Electronic Document Service

The Electronic Document Scheduler gives you the facility to automatically save documents to specific ScanFile folders. Any document saved or copied to a named directory will be archived into that directory's designated ScanFile folder. In contrary to version 7, the amount of monitored directories is not limited.

### ***Update Schedule***

The days, time period and frequency of the Scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the directories will be searched for new documents to be added to the specified folders.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day for which the update will be performed by entering the start time and end time in the ***From*** and ***To*** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the **Update every...** field.

## **Folder**

To select a ScanFile Folder to import documents from the Search directory, click on the **Add** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list. To specify the search and backup drive and the indexing options, the folder must be selected in the folder list, by clicking on the folder name. The name will then be highlighted.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the **Delete** button below the folder list.

## **Search Drive**

The **Search Drive** should point to the location where documents are going to be saved or copied to. This can be a directory on a drive or a UNC path. After selecting the Folder you can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

## **Backup Drive**

When the scheduler imports the files from the Search location to the specified ScanFile folder, the file(s) will be deleted from the Search location. To enable you to keep a copy of the file(s) outside of ScanFile, you can select a location to make a copy of the file(s) to.

You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

## **Indexing Options**

Documents can be imported into a ScanFile Folder in one of two ways, and the file name can be used for automatic indexing of the documents.

### **1) Postindex**

When the **Postindex** option is selected, all documents found to be archived will be placed in the selected ScanFile Folder's Postindex pool for later filing.

## 2) Using the File Name

The **Direct Index** option together with the **Use filename as default index** will save the documents directly to the folder, creating index records for each document saved, and placing the name of the file into the FIRST folder field.

### Separator

If you also select a **Separator**, the name of the file can be delimited so that it can be placed into separate consecutive Folder fields. Valid separators are:

, comma                   ; semi-colon                   . full stop  
- dash                   \_ underscore                   ‘ quote

*Example: - using a semi-colon as the separator*

D Smith Ltd;Quotation;01/06/2000.doc

Field 1 = D Smith Ltd

Field 2 = Quotation

Field 3 = 01/06/2003

### Selective Indexing & Keywords

When **Direct Indexing** is selected and **Use filename as default** index is not selected, the document's file name can be used to fill selected index fields and to assign keywords. This is achieved by prefixing the index data in the file name with **&/** and the Folder field Number.

*Example:*

**&i1**D Smith Ltd**&i2**Quotation**&i4**01/06/2000.doc

*Note that there is no entry for Field 3*

Keywords can be assigned to the documents by prefixing each keyword with **&K**

*Example:*

**&i1D Smith Ltd&i201/06/2003&kQuotation&ksoftware.doc**

Field 1 = D Smith Ltd

Field 2 = 01/06/2003

Keyword = Quotation, Software

*Separators and Prefixes are replaced by an underscore in the filename during the import.*

## ***Update Now***

This functionality gives you the opportunity to import documents from the search drives fast and out of schedule. Pressing the ***Update Now*** button will cause the Remote Services to perform an update with the next update loop.

# **COLD Import Service**

This scheduler only works, if the option is licensed. The COLD Import Scheduler gives the facility to automatically save COLD data information to specific ScanFile folders using a pre-defined indexing template. Any COLD data saved or copied to a named location will be archived into the ScanFile folder that the location is associated with. An unlimited amount of ScanFile Folders can be specified, with each Folder pointing to a different location, and using a different COLD template.

## ***Update Schedule***

The days, time period and frequency of the document scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the directories will be searched for new COLD files to be added to the specified folders.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the **From** and **To** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the **Update every...** field.

## **Folder**

To select a ScanFile Folder to import the COLD data to, click on the **Add** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list. To specify the search and backup drive and the import template, the folder must be selected in the folder list, by clicking on the folder name. The name will then be highlighted.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the **Delete** button below the folder list.

## **Search Drive**

The **Search Drive** should point to the location where the COLD files to be imported are saved or copied to. This can be a location on a drive or a UNC path. You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

## **Backup Drive**

When the scheduler imports the files from the Search location to the specified ScanFile folder, the file(s) will be deleted from the Search location. To enable you to keep a copy of the file(s) outside of ScanFile, you can select a location to make a copy of the file(s) to.

You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

## **Import Template**

You must specify the pre-defined COLD import template to be used with the ScanFile Folder. The template will have been created in ScanFile previously.

You can specify the import template by clicking on the three dots immediately after the field, which will then display a template list. Once you have selected the template, click on the **OK** button, and the name of the template will be shown in the field.

## ***Update Now***

This functionality gives you the opportunity to import COLD files from the search drives fast and out of schedule. Pressing the **Update Now** button will cause the Remote Services to perform an update with the next update loop.

# **Files and Index Import Service**

The Files and Index Scheduler gives the facility to automatically save files and ASCII or ANSI data files to specific ScanFile Folders. Any files and indexes saved together, and copied to a named directory, will be archived into that directory's designated ScanFile folder, providing the information is in the correct format. In contrary to version 7, the amount of monitored directories is not limited.

## ***Update Schedule***

The days, time period and frequency of the document scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the directories will be searched for new documents to be added to the specified folders.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the **From** and **To** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the **Update every...** field.

## ***Folder***

To select a ScanFile Folder to import documents from the search directory, click on the **Add** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list. To specify the search and backup drive and the

field, the folder must be selected in the folder list, by clicking on the folder name. The name will then be highlighted.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the **Delete** button below the folder list.

## ***Search Drive***

The **Search Drive** should point to the location where data to be imported is saved or copied to. This can be a location on a drive or a UNC path. You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

## ***Backup Drive***

When the scheduler imports the files from the Search location to the specified ScanFile folder, the file(s) will be deleted from the Search location. To enable you to keep a copy of the file(s) outside of ScanFile, you can select a location to make a copy of the file(s) to.

You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

## ***Fields***

Enter the number of fields the index information contains along with the field separator and delimiter. Then select whether the index information is contained in an ASCII or ANSI format.

## ***Update Now***

This functionality gives you the opportunity to import files and index information from the search drives fast and out of schedule. Pressing the **Update Now** button will cause the Remote Services to perform an update with the next update loop.

# Index Import Service

The Index Scheduler gives the facility to automatically save ASCII or ANSI data files to specific ScanFile Folders as index information. Any indexes saved and copied to a named directory, will be archived into that directory's designated ScanFile Folder, providing the information is in the correct format. In contrary to version 7, the amount of monitored directories is not limited.

With the index only scheduler the folder that the index is being imported to must already have the correct information saved in one of the ten connect fields, this allows the information in the data file to be imported into the correct fields. You must select which format the data is in ASCII or ANSI and the number of fields, field separator and field delimiter.

## ***Update Schedule***

The days, time period and frequency of the document scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the directories will be searched for new documents to be added to the specified folders.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the ***From*** and ***To*** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the ***Update every...*** field.

## ***Folder***

To select a ScanFile Folder to import index information into, click on the ***Add*** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list. To specify the search drive, the connected field and the linked index fields, the folder must be selected in the folder list, by clicking on the folder name. The name will then be highlighted.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the ***Delete*** button below the folder list.

## Search Drive

The **Search Drive** should point to the location where the index data file is located. This can be a location on a drive or a UNC path. You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location and data file name, click on the **OK** button, and the name of the location will be shown in the field.

## Fields

The Import Index function is used to fill index records in existing folder documents with additional information. As an example, bar-coded documents may have been scanned, with the barcode representing a Project Number. An external file – MS Access or ASCII format – can have that number in it plus the Document Name, Document No etc. The Project Number can be set to be the Connect field, and the additional index information will then be imported to the appropriate records.

```
12345678,Projekt Phase 1,87654321,32680
12345679,Teil 1 - Phase 2,97654321,12045
12345680,Machbarkeit,08654321,3000
12345681,Planung,18654321,6000
12345682,Prüfung,28654321,2500
12345683,Kapital,38654321,55678
12345684,Infrastruktur,48654321,17222
12345685,Beschaffung,58654321,96376
12345686,Installation,68654321,8787
12345687,Abnahme,78654321,4521
```

The example text file shows 10 records, with the index information within the records being delimited by commas. The first field is the Project Number – the Connect field – which will already exist in the folder. The Import will use this to search for matching records, and then fill the other folder fields with the additional information.

The Folder fields will be displayed on the left, and the fields from the import file can be matched to these. It is very important that the No. of fields, parameter is correctly set, as well as any field separators and delimiters

## Update Now

This functionality gives you the opportunity to import index information from the search drives fast and out of schedule. Pressing the **Update Now** button will cause the Remote Services to perform an index update with the next update loop.

# Library Update Service

This scheduler only works, if the option is licensed. On the contrary to version 7, an unlimited amount of locations can be selected to check for libraries that are set to scheduled update.

## ***Setup Libraries***

The Scheduler will update only libraries that have been set for scheduled updating. To do this, open **Setup library** in ScanFile, select the library from the list on the left of the screen, and then ensure that the **Scheduler** checkbox is ticked. Once this is done, press the **Apply** button.

## ***Update Schedule***

The days, time period and frequency of the library update scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the directories will be searched for libraries to be updated.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the **From** and **To** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the **Update every...** field.

## ***Library Directories***

To select a directory or path where libraries can be found on, click on the **Add** button below the folder list. You can then select the directory from the available storage locations. Once you have selected the directory, it will be shown in the library directory list.

The scheduler will update any library with the **Scheduler** setting in the selected drives/paths. The system will check, if any of the imported folders has been updated since being imported into the library. In this case the data in the library is updated according to the folder data.

Repeat this step for every directory or path you want to automatically update libraries on.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the **Delete** button below the folder list.

## ***Folder Directories***

To select a directory or path where folders that were added to libraries can be found on, click on the **Add** button below the folder directory list. You can then select the directory from the available storage locations. Once you have selected the directory, it will be shown in the folder directory list.

Repeat this step for every directory or path folders needed for the automatic update are located on.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the **Delete** button below the folder list.

## ***Update Now***

This functionality gives you the opportunity to update libraries located in the search drives fast and out of schedule. Pressing the **Update Now** button will cause the Remote Services to perform a library update with the next update loop.

# Document Routing

This scheduler only works, if the option is licensed. The Document Routing Scheduler progresses documents through each step of a documents specific route. Every 5 minutes the service will check all routed documents, and if all the actions within a routing step have taken place for a particular document, the document will be progressed to the next step within the route. Therefore the scheduler timer settings are disabled.

## ***In Progress Documents***

Documents that are currently **In Progress** within a route will be listed in the service window and by double-clicking on one of the documents, further information about the document will be displayed, such as the index information, and it's routing history to date. This will include the date and time of a routing action, the type of action and the name of the user.

## ***Update Now***

This functionality gives you the opportunity to route fast and out of schedule. Pressing the ***Update Now*** button will cause the Remote Services to perform an update with the next update loop.

## **Audit Trail**

This scheduler only works, if the option is licensed. The Audit Trail service allows authorised users to maintain the audit database. Dependent upon what events you have decided to audit, and the level of activity within ScanFile, the audit database can become extremely large, and you may therefore decide that certain events can be deleted after a time period. The standard schedule, which is once every 24 hours from the time the service was started. Therefore the scheduler timer settings are disabled.

*If you do not wish to delete any audit events, do not run the Audit Trail service.*

## ***Never Delete Automatically***

You can select which types of events will not be deleted automatically when the service is operating. When the event types are ticked, they will NOT be deleted.

## ***Deletion Period***

The number of days, after which events can be deleted, is in the range of 1 to 999.

## ***Export Audit Trail Data***

### **Audit Trail Exportpath**

The **Audit Trail Exportpath** should point to the location where the export database should be saved to. This can be a location on a drive or a UNC path. You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

### **Export audit trail data**

If you wish to export data, click on **Export audit trail data**. You will be given the opportunity to add a description to your export. Then the program automatically exports all records to a newly created database in the **Audit Trail Export Path**, named with the current date and time.

In the ScanFile **Audit Trail Report** window you can then select from the exported databases and create a temporary Audit trail database to search in.

## ***Compact Database***

It is a good idea to periodically run the **Compact database** option, as this will check the database for any errors and compact it, removing deleted records.

## ***Update Now***

This functionality gives you the opportunity to delete events from SFAudit.mdb fast and out of schedule. Pressing the **Update Now** button will cause the Remote Services to perform an update with the next update loop.

# **TIFF Spooler Service**

This service allows the automatic import and recognition of forms, and works in conjunction with the form templates created and configured within ScanFile. The forms to be imported must be Group 4 compressed TIFF format files or JPEG files.

## ***Update Schedule***

The days, time period and frequency of the document scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the directories will be searched for new documents to be added to the specified folders.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the **From** and **To** fields.

Specify how often, in minutes, that the service will check the image storage path for new documents, by putting a value in minutes in the **Update every...** field. The valid range is 1-9999 minutes.

## ***Folder***

To select a ScanFile Folder the forms will be imported and indexed to, click on the **Add** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list. To specify the image storage path, backup directory and the form database, the folder must be selected in the folder list, by clicking on the folder name. The name will then be highlighted.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the **Delete** button below the folder list.

## ***Image Storage Path***

Select the location that the service will check for documents to import from. The service will check only this location for forms to import. Documents, which should be automatically imported and indexed must be placed here.

## ***Backup drive***

When the scheduler imports the files from the Image Storage path to the specified ScanFile folder, the file(s) will be deleted from the storage location. To enable you to keep a copy of the file(s) outside of ScanFile, you can select a location to make a copy of the file(s) to.

You can specify the location by clicking on the three dots immediately after the field, which will then display a directory find screen. Once you have selected the location, click on the **OK** button, and the name of the location will be shown in the field.

## ***Form Database***

Select the database that contains the form templates. The default forms database is **default.sff**, which is in the ScanFile program directory, although this can be changed.

## ***Create batch***

This setting is for documents created by ScanFile VNP archive printing. In this case documents with more than one page are stored as one document.

## ***Update Now***

This functionality gives you the opportunity to import forms from the search drives fast and out of schedule. Pressing the ***Update Now*** button will cause the Remote Services to perform an import with the next update loop.

# Fulltext OCR Scheduler

## ***Overview***

This scheduler only works, if option OCR is installed and licensed. This service will automatically perform full text recognition on selected folders. Any pages that have not been OCR'd in the folders will be processed on the selected days and time.

## ***Folder***

To select a ScanFile Folder to have the full text OCR performed upon, click on the ***Add*** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the ***Delete*** button below the folder list.

## ***Update Schedule***

The days, time period and frequency of the fulltext OCR scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the folders will be searched for new documents to be OCR'd.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the ***From*** and ***To*** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the ***Update every...*** field.

## ***Update Now***

This functionality gives you the opportunity to perform a fulltext OCR fast and out of schedule. Pressing the ***Update Now*** button will cause the Remote Services to perform an OCR reading with the next update loop.

# **Zone OCR Scheduler**

## ***Overview***

This scheduler only works, if option OCR is installed and licensed. This service will automatically perform zone recognition on selected folders. Any documents that have not been zone OCR'd in the folders will be processed on the selected days and time.

## ***Folder***

To select a ScanFile Folder to have the zone OCR performed upon, click on the ***Add*** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the ***Delete*** button below the folder list.

## ***Update Schedule***

The days, time period and frequency of the zone OCR scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the folders will be searched for new documents to be zone OCR'd.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the ***From*** and ***To*** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the ***Update every...*** field.

## ***Update Now***

This functionality gives you the opportunity to perform a zone OCR fast and out of schedule. Pressing the ***Update Now*** button will cause the Remote Services to perform an OCR reading with the next update loop.

# Retention Control

## ***Overview***

A retention period can be set for each document. This is specified in months and will apply either from original creation or from the date of last updating. At the expiry of the forward period each document may be selectively moved, exported “off-line” or destroyed.

## ***Add a Folder to the Retention -Control***

The retention control will only monitor folders that are set for it. To add a folder to the retention control, select ***File – Setup folder*** in ScanFile. Select the folder in the folder list and switch to the tab ***Extended Settings***. Select ***Retention control scheduler - Add Folder*** checkbox.

## ***Folder***

To select a ScanFile Folder to be monitored for retention action, click on the ***Add*** button below the folder list. You can then select the folder from the available storage locations. Once you have selected the folder, it will be shown in the folder list.

To remove a ScanFile Folder from the list, highlight the name by clicking on it and then click on the ***Delete*** button below the folder list.

## ***Update Schedule***

The days, time period and frequency of the Retention Control scheduler can be set by choosing the Scheduler option at the left of the main screen. The values set determine when the documents in the selected folders will be processed according to their retention settings assigned to them in ScanFile.

To select the days for the update to be performed, tick the checkboxes alongside the days required.

You can set the start and end period during the day during which the update will be performed by entering the start time and end time in the **From** and **To** fields.

You can then select how often during the selected time period the update will be performed, by putting a value in minutes in the **Update every...** field.

### ***Update Now***

This functionality gives you the opportunity to perform the defined retention actions for the documents fast and out of schedule. Pressing the **Update Now** button will cause the Remote Services to perform an update with the next update loop.



# *ScanFile VNP*

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## Overview

ScanFile VNP is a virtual network printer to print documents into a specified Location. The documents are stored as TIFF files and can be imported into any ScanFile folder. This can even be done automatically by using the ScanFile Scheduler.

With the VNP a document can be archived from any program just by printing it via VNP.

In most cases the VNP is used to archive external correspondences. Typesets like invoices or delivery notes with a similar structure can be printed via the VNP and automatically indexed with the Zone OCR Scheduler. Thus the indexing is very safe because the documents are finished electronically without the loss of quality through manual scanning.

## Installation

To install ScanFile VNP some necessary preparations have to be made. The VNP can only be installed in conjunction with ScanFile. The Installation of the VNP will be cancelled if the setup program is not able to localise a licensed ScanFile version on the local system. In order to install the VNP you have to install ScanFile and license ScanFile as well as the VNP.

ScanFile VNP also requires the **Microsoft .Net Framework 1.1**. It can be downloaded from the Microsoft website for free. An installation guide is also available on the Microsoft website.

*Please note that **Microsoft .Net Framework 1.1** is required to run ScanFile VNP. It is not included in later Versions of the Microsoft .Net Framework. The installation of Microsoft .Net Framework is insufficient.*

*The ScanFile VNP Service based on Microsoft .Net can only be used with ScanFile version 8.0.3 and later. All earlier Versions have to use older VNP versions.*

## Setup

The ScanFile VNP is no longer installed during the ScanFile setup. The VNP has to be installed out of his own setup program. To install ScanFile VNP open the **VNPSetup.msi** in the **Software\VNP** folder on the ScanFile CD.

## **Location**

In the first step you will be asked to choose the drive and directory that ScanFile VNP will be installed into. A default of **C:\Program Files\VNP** will be offered, this can be changed to the server location you wish to install ScanFile VNP to. Once you have chosen the drive and directory, press the **Next** button.

*The folder that is used by ScanFile VNP to archive it's files has to be shared in order to provide ScanFile Schedulers the opportunity to get the VNP archived files.*

*Please make sure that in case of a network installation the folder **bin\temp** in the VNP installation path is shared with all Users to make the VNP accessible from every ScanFile client.*

## **VNP Service**

After finishing the installation a new service named VNP Manager appears in the Windows Services. This service is started automatically and runs the process VNPMan.exe. To use the VNP this service must be started.

# **Configuration**

## **Virtual Printers**

The virtual printers are using so called Ports or VNP Forwarder. These ports can be set with the Configuration Tool.

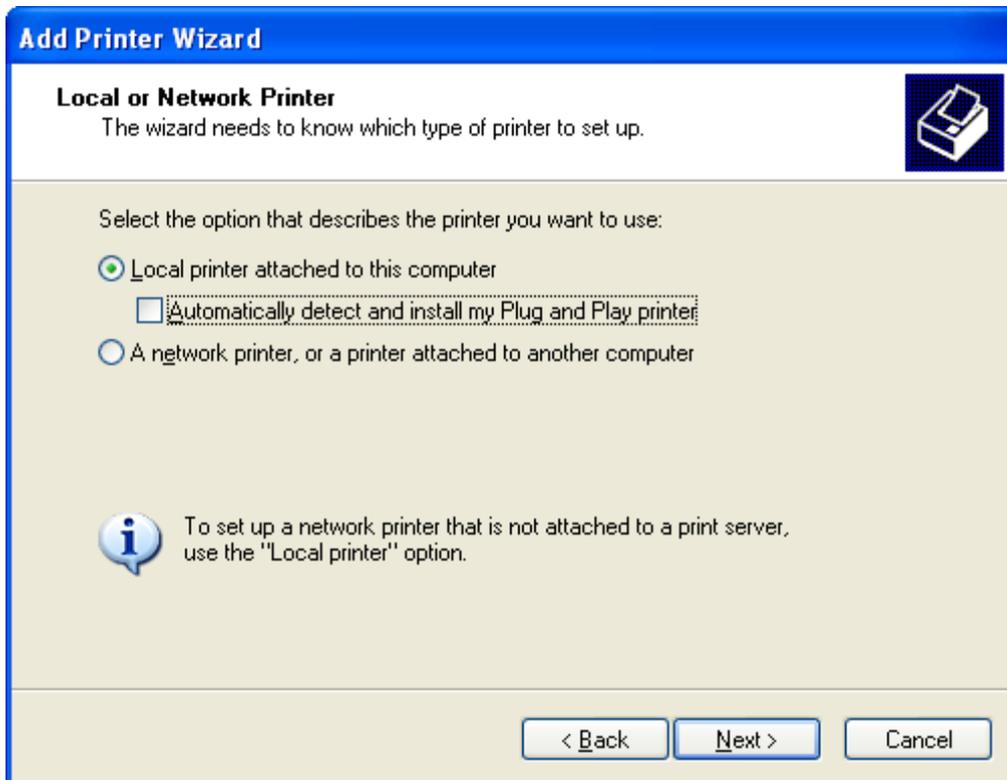
Every Port represents an archive path of ScanFile VNP. The number of Ports is not limited. After installing ScanFile VNP a Port named **VNP\_001** already exists. It refers to the **Archive** folder in the ScanFile VNP installation path.

### **<Installation path>\Archive**

The path for a port can be changed in the Configuration Tool. The Configuration of Ports is described later in this chapter.

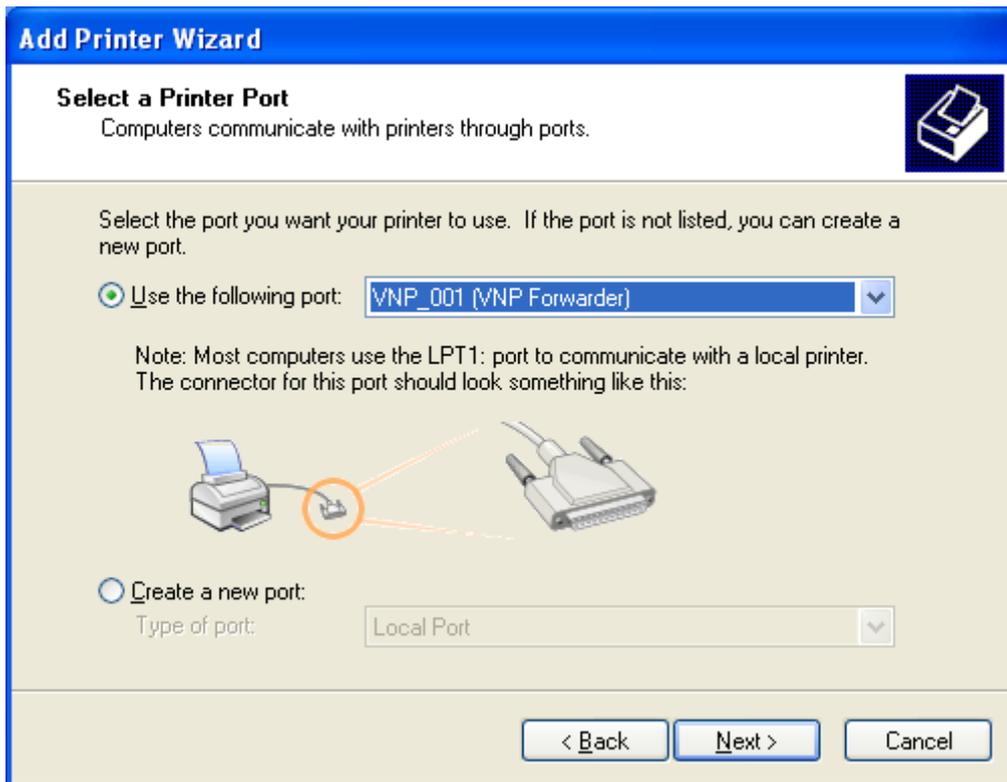
To install a new virtual printer just open the Add Printer Wizard. Choose **Start -> Settings -> Control Panel -> Printers and Faxes -> Add Printer**.

Press the Next Button and choose **Local Printer attached to this computer** in the following dialog. Please take care that the option **Automatically detect and install my Plug & Play printer** is not selected.

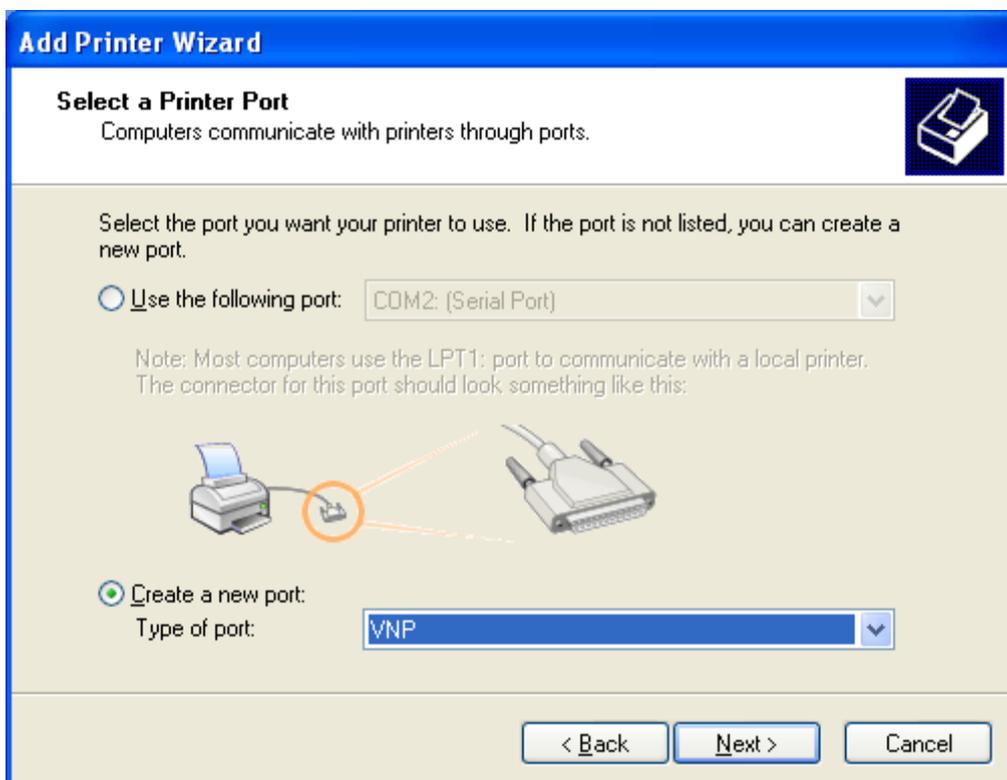


Once you have chosen the needed settings, press the **Next** button.

In the next step the printer port has to be selected. At this point you can decide either to use an existing port or creating an new one. To use an existing port choose the option **Use the following port** and select the preferred port.



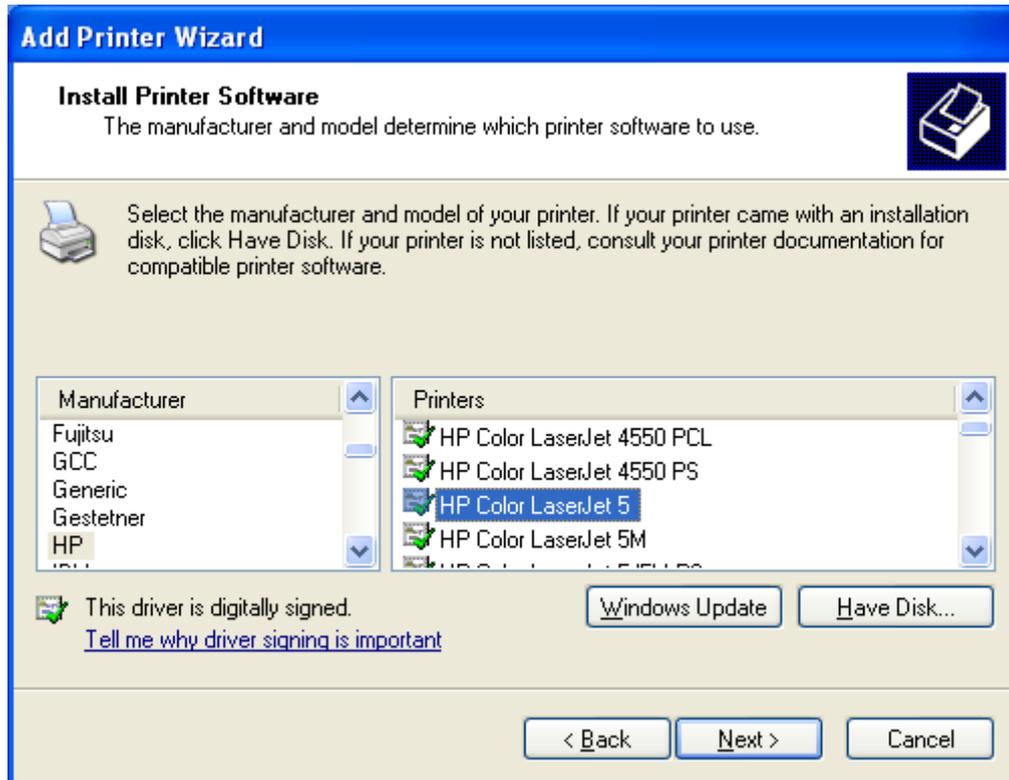
If you wish to create a new port choose the **Create a new port** option and select **VNP** as **Type of port**.



*As every Port represents an archive path it is recommend that ever virtual printer should use it's own port. The archive paths can be set in the Configuration Tool later on.*

Click on Next to proceed with the installation.

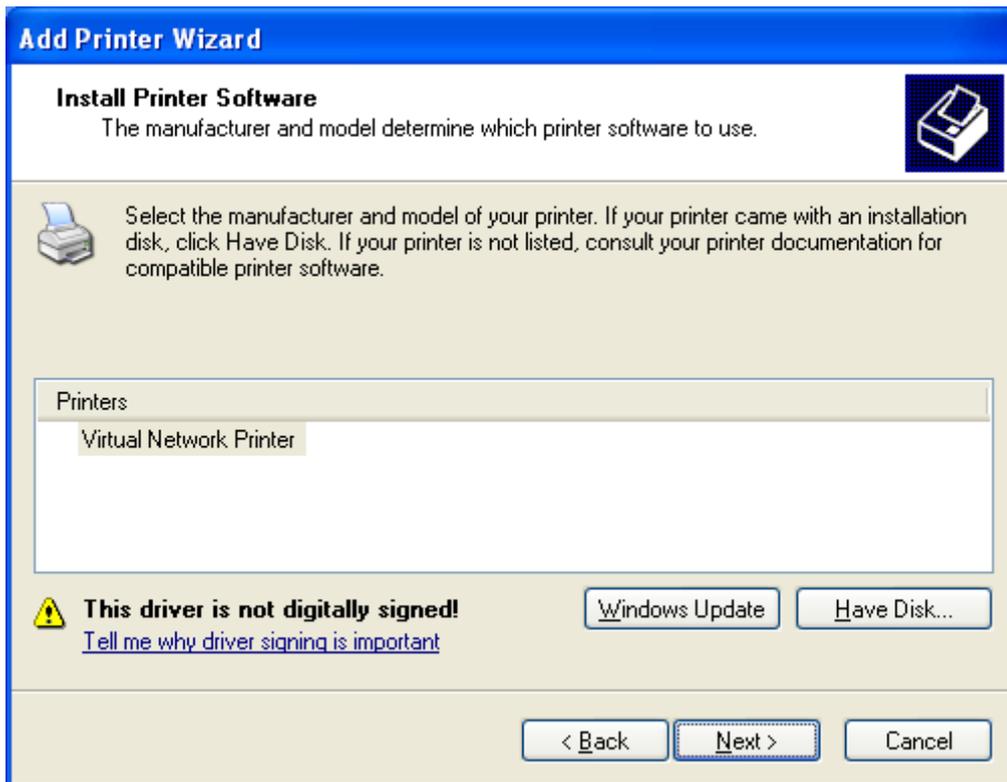
The next dialog selects the printer driver. This has two options.



If you want to keep your documents as TIFF files select the **HP LaserJet 5** from the list of available printers, and press **Next**. If there is already an HP LaserJet 5 printer configured, choose to keep the existing driver.

The other option uses the Rapid 32 printer driver supplied with VNP, and will convert printed output to TIFF files and create data files containing the text of the printed output, which can then be imported to allow for Full text searching of the documents.

Instead of using the **HP LaserJet 5** click on the **Have Disk...** button open the **Rapid** folder that is located in the ScanFile directory. Select the INF file and when the printer list is displayed, select **Rapid 32**, and press **Next**.



You can then give the printer a meaningful name that will identify it as a virtual printer used by ScanFile for importing documents. You can also choose whether the printer will be the default printer. Once you have done this press **Next**.

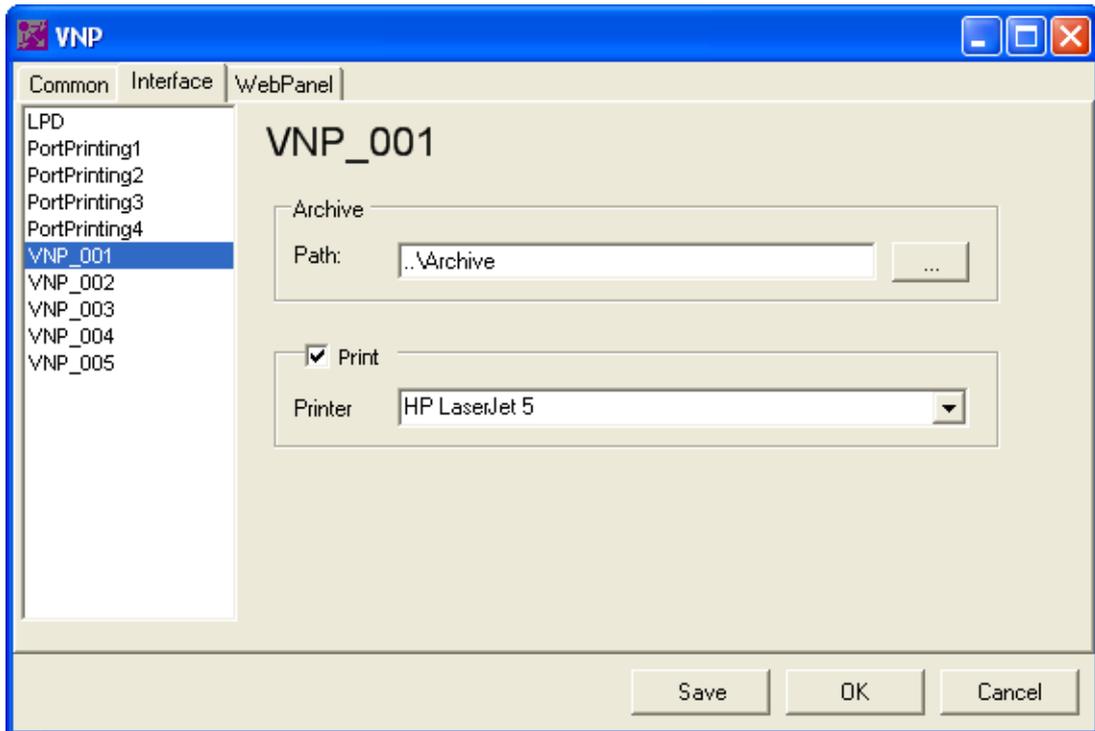
If you are creating the virtual printer on a server, you can share the printer to network users. Once you have chosen whether to share the printer or not, press **Next**.

As you were installing a virtual printer you do not need to print a test page, so select **No** and then press **Next**.

The last dialog shows a summary of the chosen printer settings. Press **Finish** if the settings are correct. The new virtual printer is then created by the system.

## ***Configuration of VNP Ports***

To set up the configuration of an existing VNP Port use the VNP Configuration Tool. Open **Start\Program Files\ScanFile\VNP** and select the **Interface** tab.



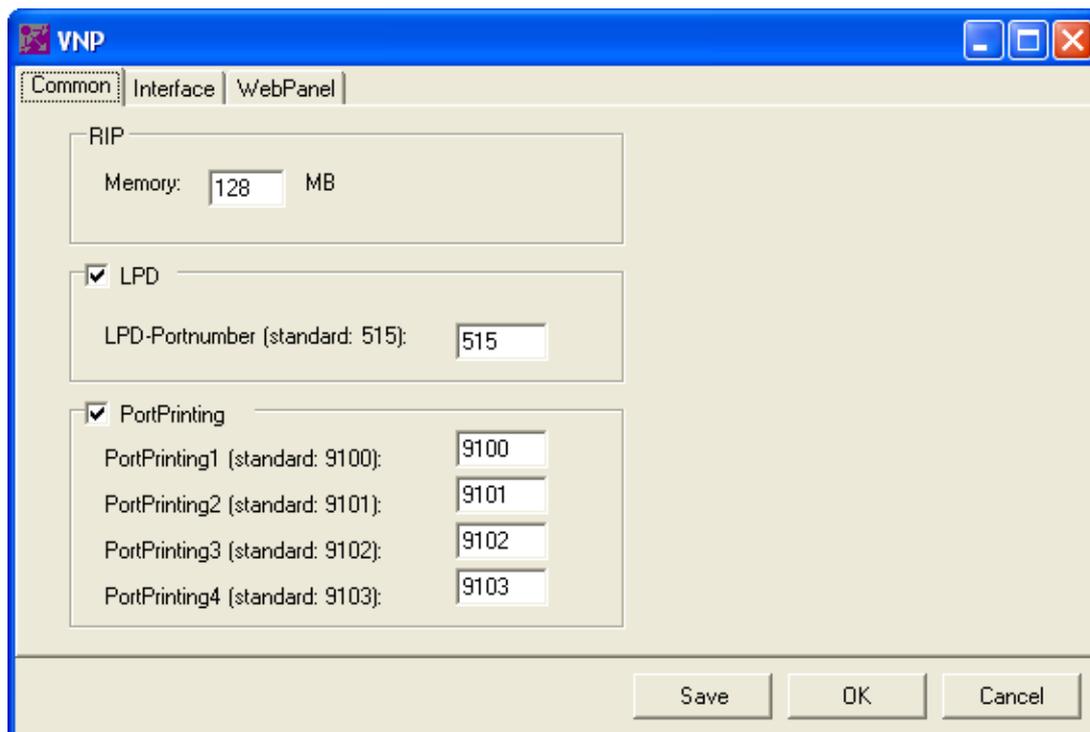
Choose the Port to be configured from the list on the left. To change the archive path type the new path into the **Path** field or click on the Button “...” to open an open dialog.

With the option **Print** you will be able to set up a Printer to archive and print out the document within one step.

## **LDP Configuration**

By using LPD the VNP gets accessible from workstations that do not use Microsoft Windows as operating system. If there are only windows workstations within a network it is not necessary to make use of the LDP option.

The LDP function can be set up and activated with the Configuration Tool. To start the tool open **Start -> Program Files -> ScanFile -> VNP** and select the tab **Common**. By default the option LDP is activated and works on Port 515. This is the default port for printers on a linux or unix based system.



*Please make sure that the used port is open. Maybe it is necessary to reopen the port after installing a Service Pack (for example Windows XP Service Pack 2) because the port is blocked by the Windows integrated firewall.*

To set up the folder for LPD select the **Interface** tab and choose LPD from the list. The LPD settings can now be changed. The configuration is equal to the setup of the VNP Ports that are used by the virtual printers. Read the **Configuration of VNP Ports** for further information.

Once you have set up the configuration you may test if all settings are correct. This can be done with the Command Prompt and a spool or print file (\*.spl or \*.prn).

Open **Start -> Program Files -> Accessories -> Command Prompt** and change to the folder where the spool file is saved. The following command sends a print job via LDP to the VNP:

***lpr S [IP address of the server] -P [queue name] -J [job name] [filename]***

Example: ***lpr -S 127.0.0.1 -P VNP\_001 -J „Job001“ testspool.prn***

After committing this command the VNP will archive the printed date in the selected folder.

## Portprinting Configuration

The Portprinting makes the VNP accessible to systems that support neither Windows printer sharing nor LPD. In this case the files can be send via raw TCP/IP.

The Portprinting can be set up and activated with the Configuration Tool. To start the tool open **Start\Program Files\ScanFile\VNP** and select the tab **Common**. By default the Portprinting is activated and works on the Ports 9100 to 9103.

*Please make sure that the used ports are open. Maybe it is necessary to reopen the ports after installing a Service Pack (for example Windows XP Service Pack 2) because the ports are blocked by the Windows integrated firewall.*

To set up the Portprinting folder select the **Interface** tab and choose the used Port from the list. The settings can now be changed. The configuration is equal to the setup of the VNP Ports that are used by the virtual printers. Read the **Configuration of VNP Ports** for further information.

Portprinting sends a coherent data stream to the VNP. Therefore it is not possible to set the beginning or the end of a file. This could lead to difficulties if a connection fails. In this case it might be helpful to set a manual form feed. This can be done in the Configuration Tool on the **WebPanel** tab. Use the following key to set a manual form feed:

Online **[Userlevel1]** -> Enter (Button) -> Next -> Next -> Next **[Normal-Print/FF]** -> Enter (Button)

*The Portprinting should only be used in exceptional cases. It does not support any functions to control the running process. Its is recommend to use the virtual Windows printer or the LPD option if possible!*

## RIP

The RIP option defines the memory or the virtual printers. The VNP uses a dynamic memory allocation. Printing large files or pages with a high resolution the memory should be at least 128 MB.

An undersized memory could result in a lesser quality or even incomplete documents.

The memory size can be set in the Configuration Tool on the **Common** tab.

## WebPanel



The WebPanel can be used in exceptional cases to set up printer emulations. If you are using a printer that has no GUI print driver the WebPanel allows you to change the printer settings. When using windows print drivers the WebPanel is not required.

The WebPanel is designed to allow you to set setting such as resolutions, page width etc. that can't be configured as the printer driver has no GUI to set such settings. An example of this would be an AS400 printer.

These features are not described in this manual. Please ask our support team for further information.

## Import scheduler

The TIFF Spooler or other import scheduler can be used to automatically import VNP printed files into ScanFile. Please read the **Remote Services** chapter for more information.



# ***ScanFile WebServer***

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## Overview

Companies are rapidly embracing Internet technologies, supporting remote and mobile users and implementing corporate intranets using the web browser as the universal desktop client application. As this trend continues, internal and external users, such as customers and partners, are demanding Internet access to corporate document repositories. ScanFile WebServer is uniquely positioned to deliver the vast benefits of Internet technology to users.

With ScanFile WebServer, you can give anyone, anywhere in the world access to your document libraries. ScanFile WebServer is an Internet server based application that allows the retrieval of documents using just a web browser. Whether you wish to make documents available over the Internet or an intranet, ScanFile WebServer is the fast, secure, reliable and easy way to do it.

Used together with ScanFile, you have everything to store and reference your documents, and then retrieve them no matter your location.

## Features

- Full search, display and download options on ScanFile document libraries, including full text search
- Users only have access to authorized libraries
- Fully automatic update of libraries
- No additional client software required - just use a web browser
- Any type of document stored in ScanFile can be displayed or downloaded.
- Complete audit trail report on accessed documents

## Before Installing

ScanFile WebServer requires that the person installing and configuring WebServer is fully conversant with both Microsoft Windows NT4/2000/XP and Microsoft Internet Information Server.

As the majority of internet/intranet servers are separate to a company's main server, links between the servers will have to be established with the appropriate rights given to those links to allow users of WebServer access to libraries and documents. The default user account created for Internet Information Server (IIS) – IUSR\_<machine name> - will have insufficient permissions to allow ScanFile WebServer to function correctly. As changing

the permissions for the default user could cause security problems for other applications you may be running via IIS, or the server running IIS is not the same server as that running ScanFile or where the folders/libraries reside, the best course of action is to create a new user specifically for use with ScanFile WebServer.

## ***Permissions***

The user you create should be a Local User, not a Domain user. If the ScanFile location, or the folders/libraries are on a separate server then you will need to create a local user on each server, using the same name and password. This user requires permissions to the following locations:

- ScanFile WebServer program directory and subdirectories
- WebServer image cache directories (if different from the default)
- ScanFile program directory
- ScanFile folders drive(s)/directories
- ScanFile libraries drive(s)/directories

The type of permissions you can apply will be dependant upon the location of the programs and data, and what format of partition they reside on. You should create the user account and permissions for the ScanFile program directory and data locations prior to installing WebServer. After WebServer has been installed, the permissions to the WebServer program directory can be applied.

# **Installation**

To install WebServer, select **Run...** from the Windows **Start** menu and then choose **SetupSWS.exe** from the **Software** directory on the ScanFile CD. Press the **OK** button.

The first step is to choose the language that you wish WebServer to be in. Choose the desired language and press **OK**.

## ***ScanFile Location***

ScanFile WebServer must have access to a Licensed installed copy of ScanFile. It needs this to enable it to use the User security information when users access libraries via WebServer. Select the ScanFile program directory and then press the **Next** button.

*The ScanFile path can also be entered as a UNC path*  
**Example:** \\<machinename>\path.

## ***Location***

You must then choose where ScanFile WebServer is to be installed. The default directory, can be used, but this assumes that WebServer is not being installed on the same server as ScanFile. Please ensure that WebServer is not installed as a sub directory of the ScanFile program directory, as no users require direct access to the WebServer directory. Once you have chosen the location to install WebServer, press the **Next** button to carry on with the installation.

## ***Backup***

If you are updating an existing copy of WebServer, you can choose to backup any files that are replaced during the installation. If you select **Yes**, it will be possible to perform a Rollback to the previous version if necessary. If you choose **No**, the previously installed copy will be overwritten, and a rollback will not be possible.

## ***WebServer API***

WebServer has an API that allows you to integrate it's functionality into your own web sites. You can select whether you want to install the API or not. Contact your supplier on how to obtain a full description of the WebServer API.

ScanFile WebServer is now ready to be installed. Pressing the **Next** button on the screen shown right will install WebServer into the selected directory. After this has completed, the Internet Server must be configured.

# **IIS Configuration**

After installing ScanFile WebServer your Internet Server must be configured to allow users access to WebServer. The following installation instructions are for Microsoft Internet Information Services supplied with Microsoft Windows 2000.

## ***Virtual Directory***

After you have started Internet Services Manager, you must create a new Virtual Directory for WebServer in your web site. To do this, right-click on your web site and then select **New -> Virtual Directory**.

A welcome screen will then be displayed. Click on **Next** and you will then be prompted for the name that you wish to give to the ScanFile WebServer part of your site. This can be anything, but a short name is more useable. After typing in a name and pressing **Next**, you must then enter the path to the ScanFile WebServer Directory for the content of the site. You can either type in the location or use the **Browse** button to locate the directory.

The next part to configure is the Access Permissions. This will determine what rights users will have when they access the WebServer site. For standard access, you do not normally need to change from the default permissions. Once you have set the permissions, the WebServer setup is complete.

## **WebServer user**

If you have created a user account for WebServer to use in IIS, this must also be configured. To do this open the **Properties** screen for the WebServer virtual directory, and select the **Directory Security** tab. You must then edit the **Anonymous access and authentication control** properties. Click on the **Edit** button, and the **Authentication Methods** screen will open.

You must then edit the Account used for anonymous access property. This can be done by clicking **Edit**. This will then open the **Anonymous User Account** screen, which allows you to select the user account that you previously created from WebServer to allow access to ScanFile libraries.

You must also disable the **Allow IIS to control password** option. Once you have done this, the WebServer configuration within IIS is complete.

# Configuring WebServer

Once you have created and configured the Virtual Directory, you can then log on to the WebServer site you have just created by opening your browser software and typing in the name of the site together with the alias you selected for the WebServer Virtual Directory.

Example:

If the Virtual directory has been called **SFWeb**, and the site is called **scanfile.com**, entering **http://www.scanfile.com/sfweb** will display the ScanFile WebServer login screen.

To access ScanFile libraries via WebServer, each user must log in. The user names, passwords, and the libraries the users are allowed access to is defined within the Security setup of ScanFile.

The first time you use WebServer, it will report that it is unlicensed. Please see the WebServer section in the Licensing chapter on how to license WebServer.

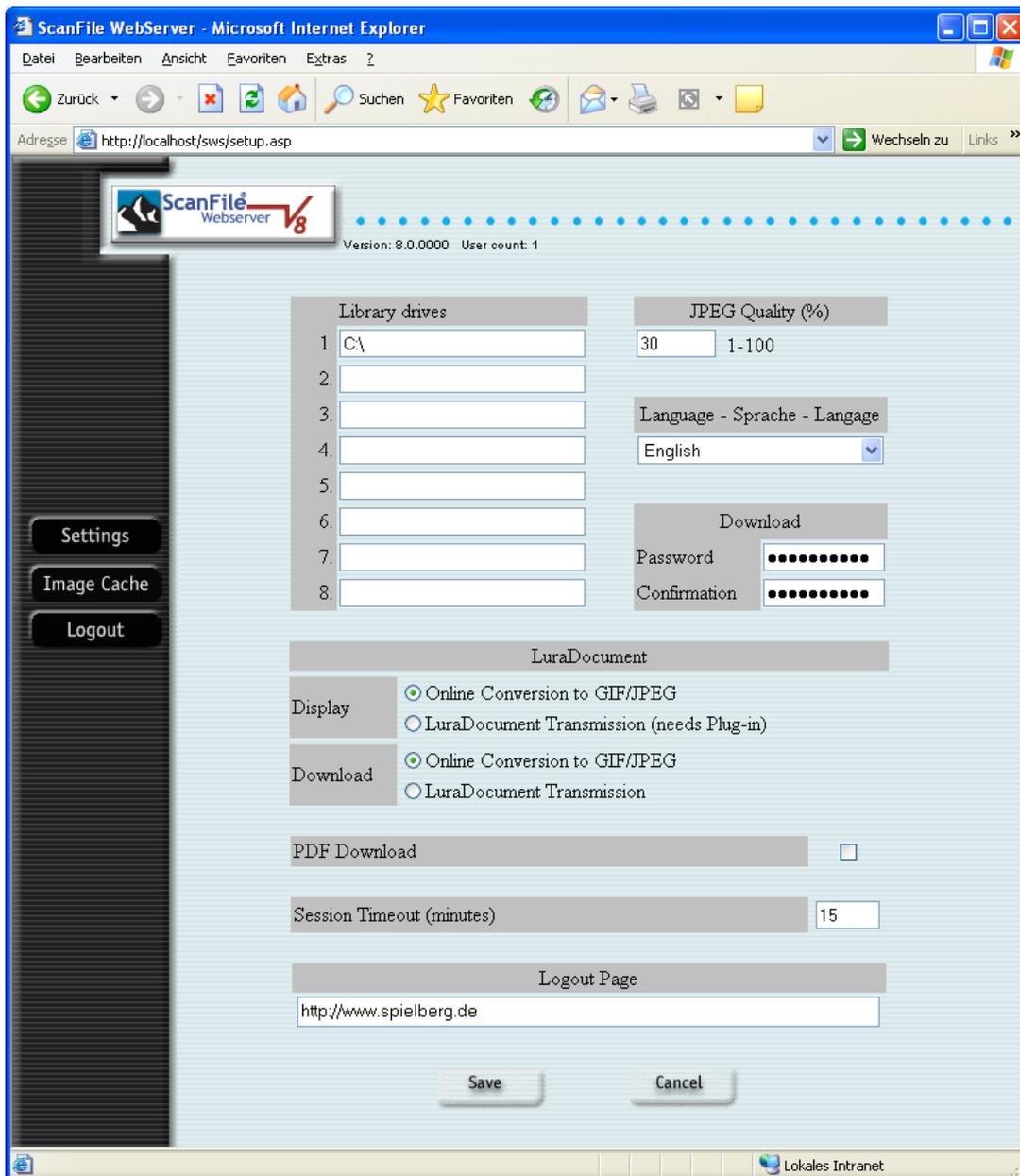
*To licence and configure WebServer, you must login as using the **ADMIN** user.*

## ***Library Drives***

The first time you load WebServer, no libraries will be displayed in the **Open Library** list box. This is because WebServer does not yet know where to look for the ScanFile libraries. To configure WebServer, press the **Settings** button. The different settings are described below.

## ***Settings***

Only Administrator users will get this Settings screen displayed. All other users are only able to set their language and JPEG quality threshold, along with a download password.



The WebServer application can search up to 8 drives for ScanFile libraries. These can be specified in the Library Drives section of the Settings screen. The drive references must correspond to the drives the WebServer is able to manage.

If the libraries are held on a separate server and no drive mappings exist, the Universal Naming Convention (UNC) can be used. The format for this is: \\<servername>\<sharename>

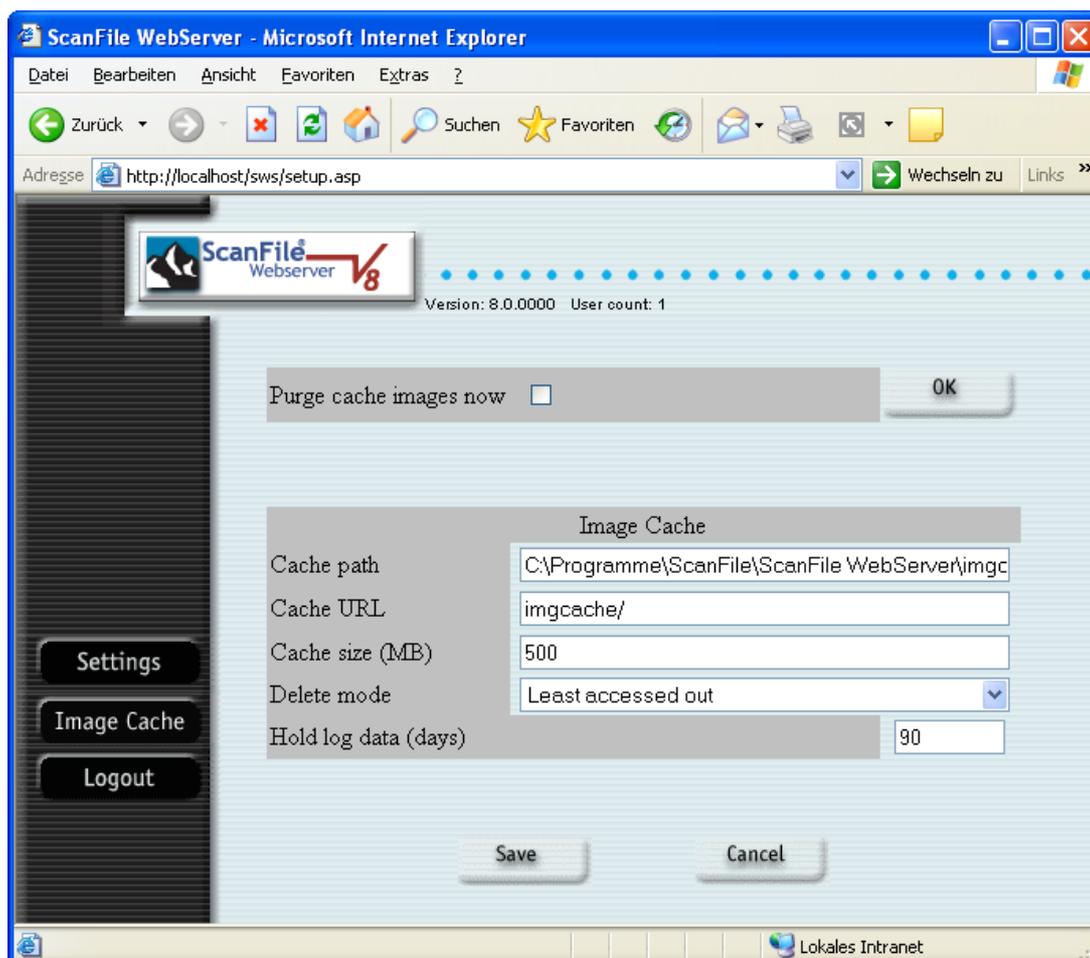
The Settings page used to configure the Library Drives also includes other settings, which are described below:

| Option          | Description  |
|-----------------|--|
| JPEG Quality    | This is a user specific setting that determines the quality of JPEG images that WebServer will display. The lower the setting, the lower the quality of the displayed image. This can be useful for viewing large JPEG's over a slow modem link.   |
| Language        | This is another user specific setting, which allows you to select the language that the page text will be displayed in. The available languages are English, German, French and Japanese. Please note that you will have to be running a Japanese version of Windows to view Japanese text correctly.  |
| LuraDocument    | The LuraDocument settings allow you to specify how documents saved in the LuraDocument format are displayed and downloaded. To display Lura format documents in Lura format, you will need the Browser plug-in loaded. This is available for download from <a href="http://www.scanfile.com">www.scanfile.com</a> , on the Updates page. Alternatively, you can select to have them converted to GIF/JPEG form before display or downloaded, in which case, your standard browser will be able to display the documents. |
| Session Timeout | This allows you to specify the period of inactivity after which a user will be required to log in again. This also frees the user license.   |
| Logout Page     | You can set a URL that WebServer will go to when a user logs out of ScanFile. You must specify a page location.  |

## Image Cache

Each time a user views a document using ScanFile WebServer, a copy of that document is made in the Image Cache. This can significantly enhance document retrieval times.

The location of the image cache will, by default, be set as a subdirectory off the WebServer program directory. You can however choose a different drive and directory by typing the location into the **Cache path** setting box.



The **Cache URL** is the name of the directory you have selected to set for the cache, following by a forward slash.

The maximum size that the image cache will be allowed to reach can be dictated by entering a value in Megabytes into the **Cache Size** settings box.

When the Cache reaches its predefined size, it will make room for new documents by deleting documents held in the cache. You can choose the criteria by which the documents to be deleted are selected. The Delete Mode has two options:

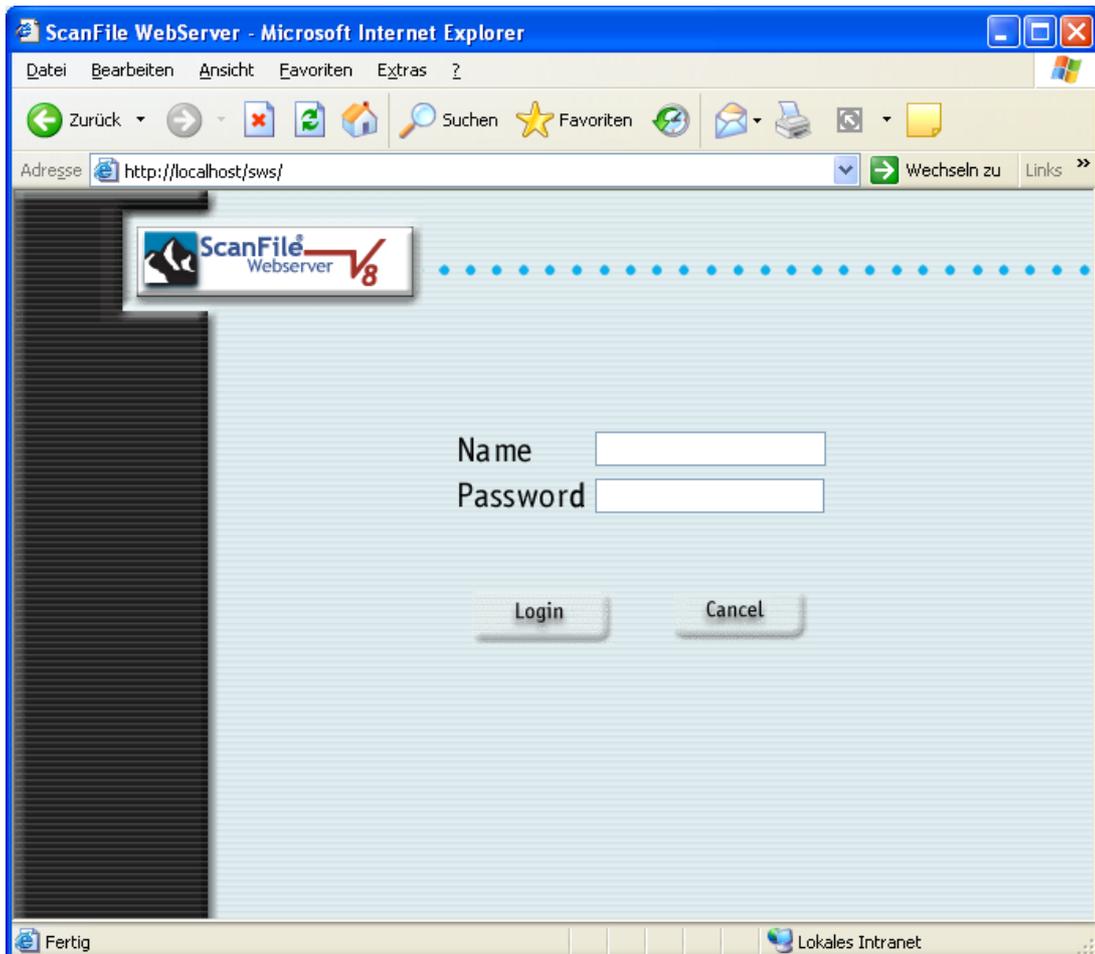
| Option             | Description   |
|--------------------|---|
| Least Accessed Out | The documents that have been accessed least will be removed from the cache                      |
| Oldest Out         | The documents that have not been accessed for the longest period will be removed from the cache |

Each time a user retrieves a page of a document, not only is the page cached, a record of the retrieval is also written into a log file, called **CACHE.MDB**, which will be in the **IMGCACHE** directory of the selected Image Cache location. The time that a retrieval record is kept can be set by typing in the number of days it is to be kept in the **Hold log data (days)** field. The default value is 90 days.

If you wish to remove all cached documents, selecting **Purge cache images now** and pressing the **OK** button will do this.

## Opening WebServer

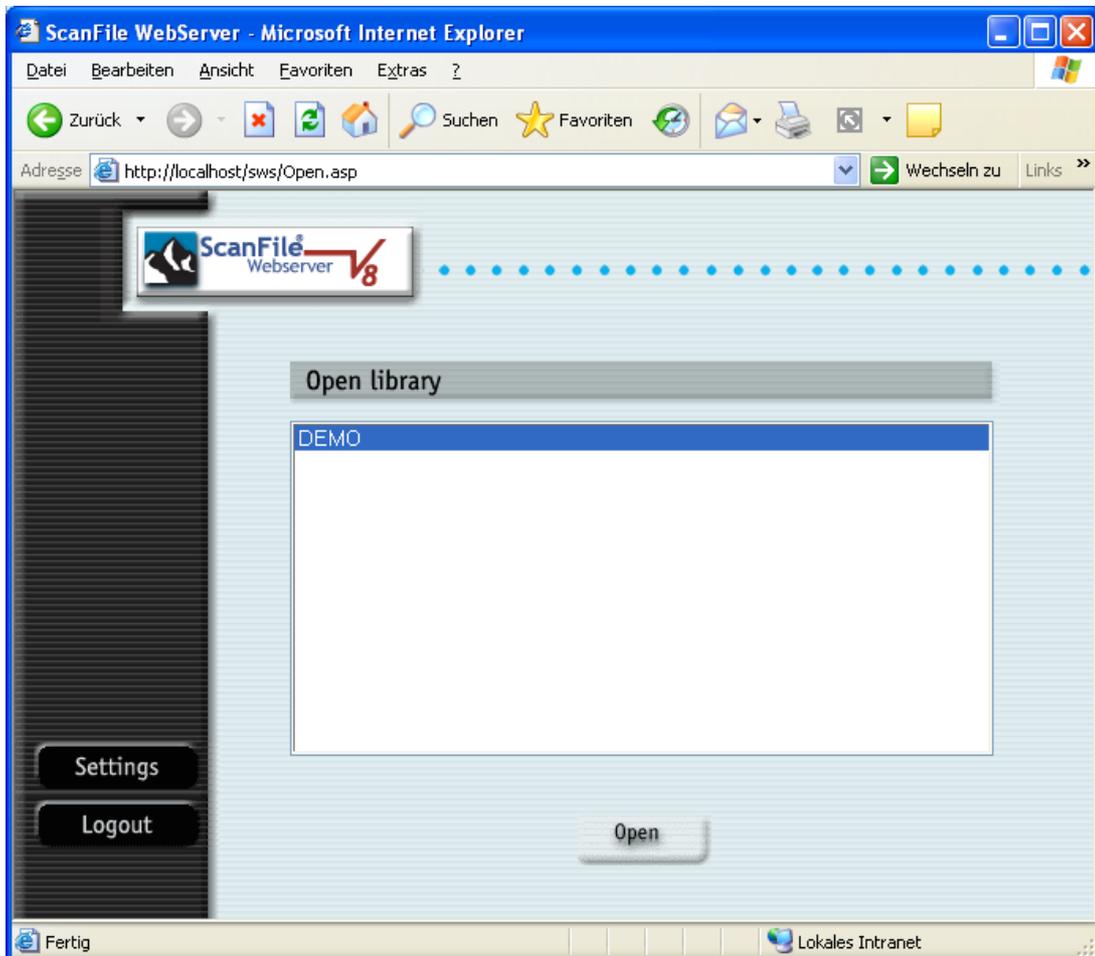
To access WebServer, the address of the WebServer site needs to be entered in the browser software, which will then display the WebServer login page.



Enter a valid ScanFile user name and password and then press the **Login** button. If the details are correct, the Open Library page will then be displayed.

## Open Library Page

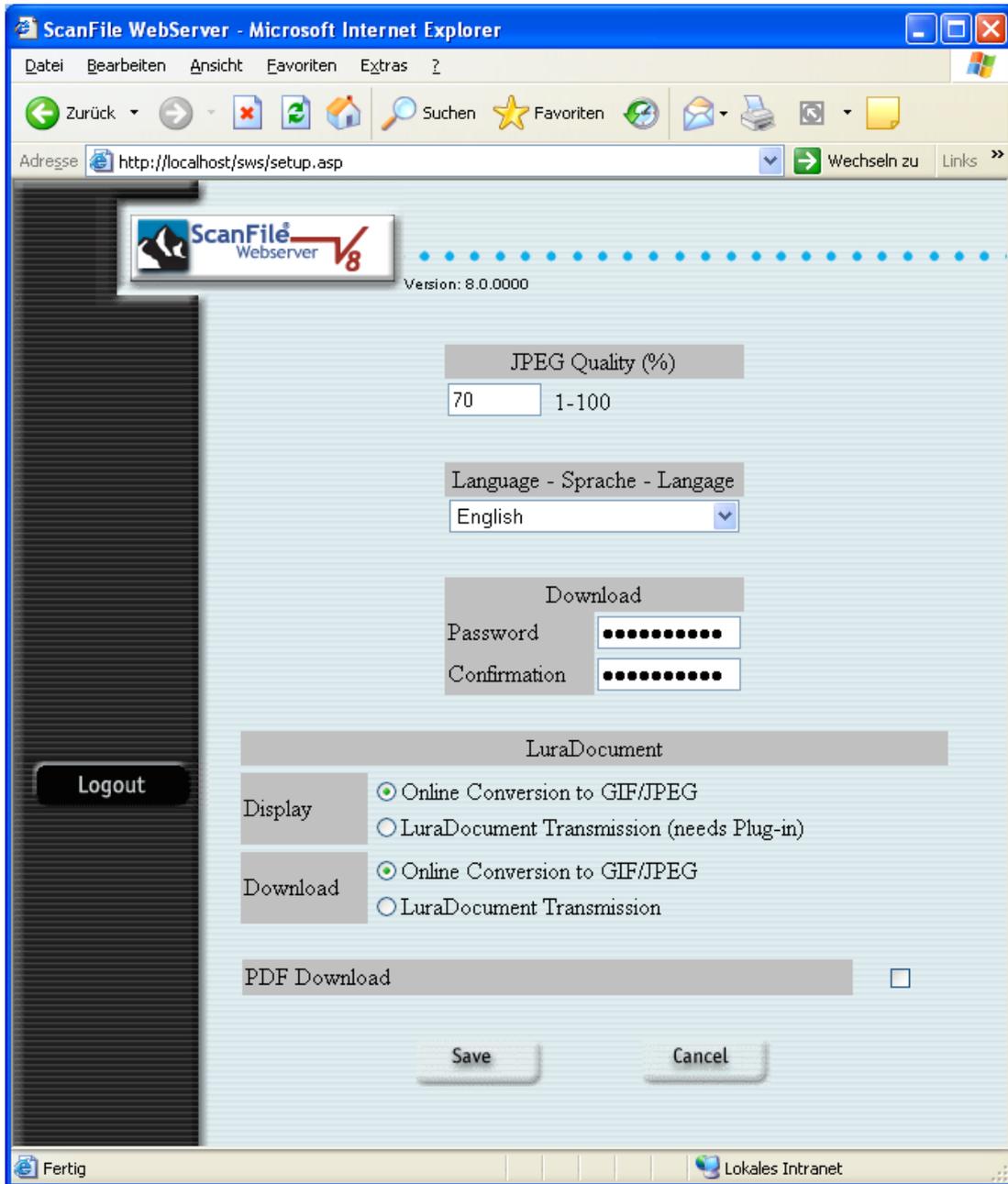
From the Open Library Page, you can select the ScanFile Library you wish to open by highlighting the Library name in the list, which only shows the Libraries that the ScanFile user is allowed access to.



You can also choose to set your user preferences by clicking on the **Settings** button, which will then display the Settings page.

### **Settings**

The screenshot below shows the setting page with the options a normal user.



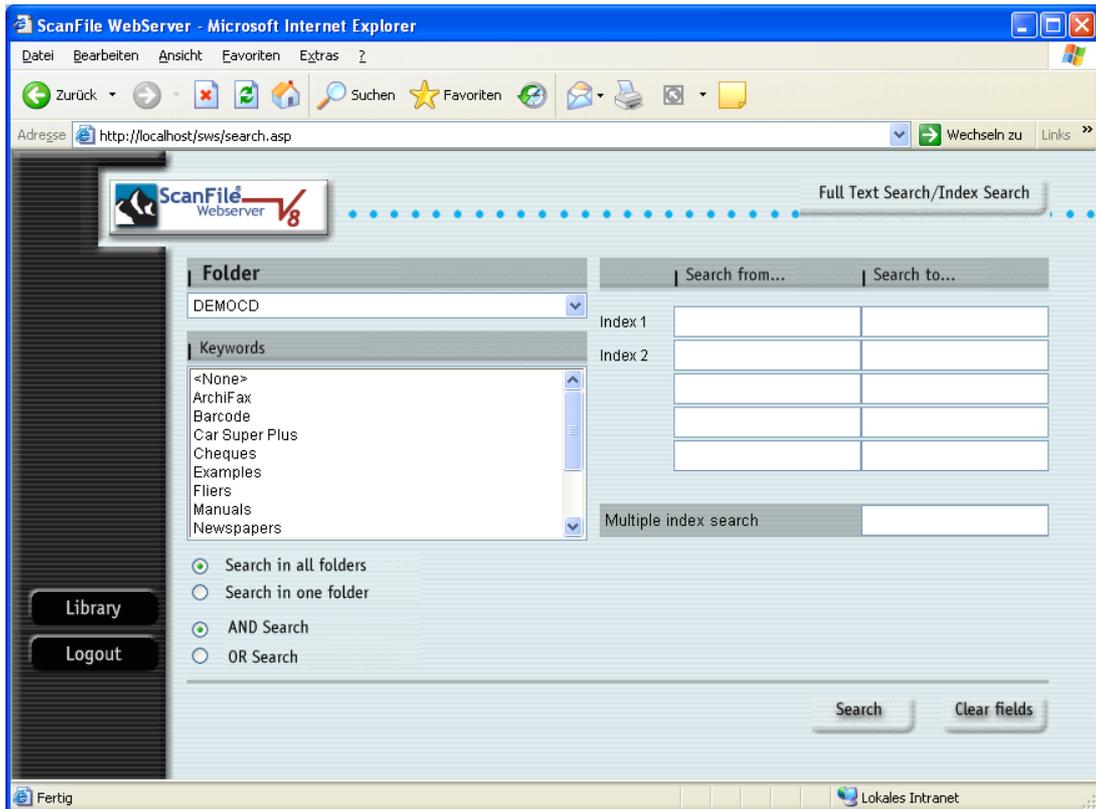
| Option       | Description  |
|--------------|--|
| JPEG Quality | The JPEG Quality setting will affect the time taken to view colour images, and can be set from 1 to 100 with 100 being the best quality. |

|              |  |
|--------------|--|
| Language     | This is another user specific setting, which allows you to select the language that the page text will be displayed in. The available languages are English, German, French and Japanese. Please note that you will have to be running a Japanese version of Windows to view Japanese text correctly.  |
| LuraDocument | The LuraDocument settings allow you to specify how documents saved in the LuraDocument format are displayed and downloaded. To display Lura format documents in Lura format, you will need the Browser plug-in loaded. This is available for download from <a href="http://www.scanfile.com">www.scanfile.com</a> , on the Updates page. Alternatively, you can select to have them converted to GIF/JPEG form before display or downloaded, in which case, your standard browser will be able to display the documents. |

## Library Search

When you open a Library, the Library Search page will open. This allows you to enter the search criteria for the documents you wish to retrieve. The fields associated with the library will be displayed as well as the keyword list, if any. The list of folders imported into the library will also be displayed.

Wildcard and range searches can be performed, and you can also choose to search across all folders in the library, or just a specific folder. Multiple keyword selections are also supported. When you have entered your search criteria, click on the **Search** button, which will then produce a Hitlist of matching documents.



The **Clear Fields** button will clear any search information previously entered. You can return to the Open Library page by press the **Library** button, or logout by pressing the **Logout** button.

## OCR Search

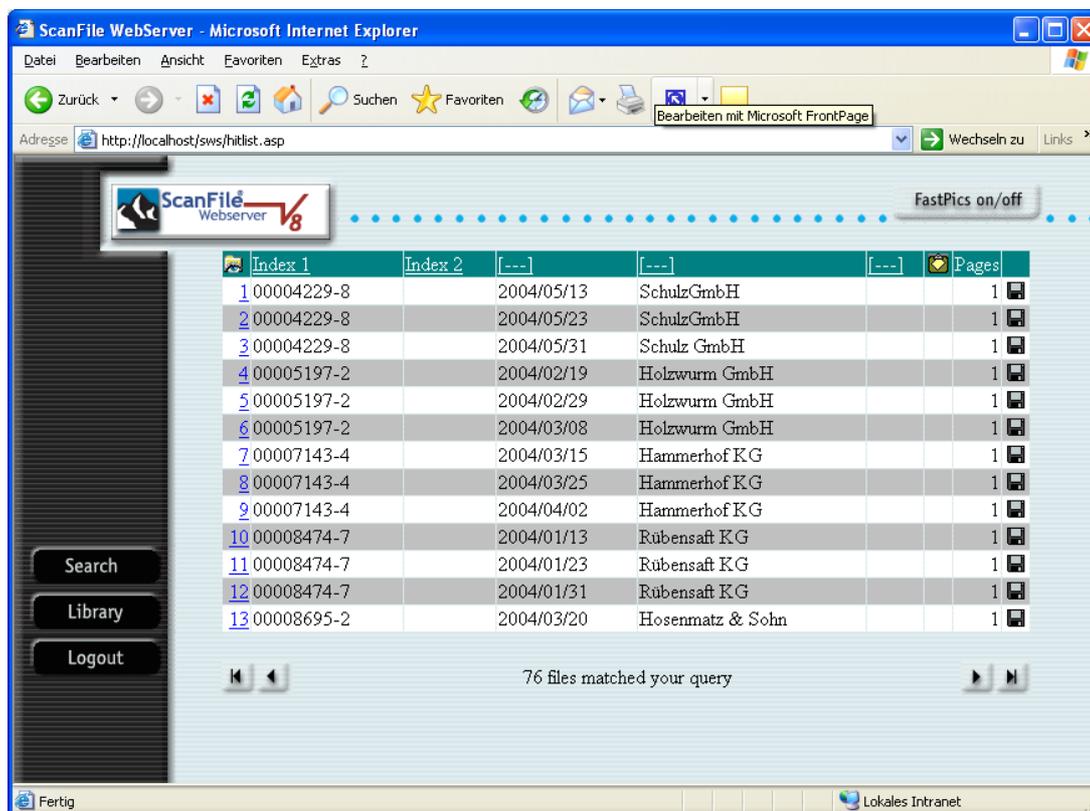
You can also perform full text searches on the library, if full text OCR recognition has been performed on the folders within the library. Clicking on the **Full text search/Index search** button at the top of the Search page will display the search page.

You can search on multiple words, or a phrase, and this can be an **AND** or an **OR** search.

## Search Results Page

The results of a search will be displayed on the Hitlist page, with up to 13 hits displayed on a page. For a standard search, each hit will refer to a complete document whereas for a full text search, each hit refers to a page within a document, so there may be several hits that reference the same document. The Hitlist can be sorted by any of the fields, by clicking on the Field name at the top of the Hitlist.

If more than 13 hits are found, you can page through the hits by using the navigation buttons at the bottom of the Hitlist.



## FastPics

By default, the Search results page will display thumbnail representations of the pages of a record at the bottom of the page. You can choose whether these are displayed or not by pressing the **FastPics on/off** button at the top of the page. If there are more pages in the document that can be displayed in the FastPics frame, a scrollbar will appear on the right of the frame.

## Memos

If a document has had a memo attached to it from within ScanFile, this will be indicated in the memo column by a tick. Clicking on the tick will then show the contents of the memo. You can return to the Search Results page by pressing the **Back** button.

## Download

Clicking on the Disk icon at the end of each record, will allow you to download the document to your PC. As complete documents can consist of a

mix of file types, such as scanned images, MS Word and Excel documents etc, these will be bundled together within a ZIP file.

## Viewing Documents

When you select a document for viewing, the first page of the document selected will be displayed, or the page selected from the FastPics or Full text search.

How a document is viewed will be dependent upon the type of document being viewed, and which browser software you are using. All black & white and scanned documents can be viewed directly within the Document View page.

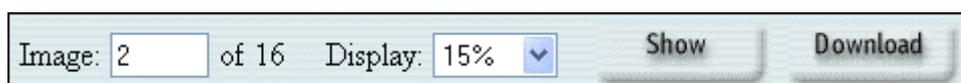
Electronic format documents such as MS Word & Excel documents require that the source application be present. Applications such as Microsoft Word and Excel can be opened within Internet Explorer, and therefore these format documents will be viewed with the Document View page. For Netscape, these applications will be opened independently of the browser.

## ***Document Viewing Tools***

On the left of the Document View page are a number of tools that allow you to alter how a document is viewed, and to select the document, or page of a document to be viewed.



In addition to the tools above, you can select the page number to view and the zoom level using the options at the top of the Document View Page. You can choose which page to view, and its zoom level by typing the page number and clicking on the **Show** button. The zoom level can be selected from the drop down list.



The **Download** button will download, in ZIP format the currently displayed page.

You can return to the Hitlist or the Search pages by pressing the appropriate button on the left of the Document View page, or you can Logout by pressing ***Logout.***

# ***ScanFile RemoteStation***

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# Introduction

ScanFile RemoteStation is a client-server application that allows you to store documents to a central ScanFile store from any location. Using TCP/IP connectivity, combined with ScanFile security, client workstations can send documents to the RemoteStation Server, which will then store them to the selected ScanFile document folders. In addition, the RemoteStation Client can be used for retrieval from your ScanFile document store. RemoteStation is an ideal application for centralised scanning workstations and to allow remote offices access to your ScanFile document store.

An advanced function of RemoteStation Server is its ability to act as a master server, allowing users to store documents to slave RemoteStation Servers, therefore allowing a central user access point for storing documents, which can then be distributed to ScanFile document stores located elsewhere.

RemoteStation features include the scheduled sending of documents to the RemoteStation server, support for TWAIN scanning devices and the sending of electronic format documents, and when scanning, to select between single and multi page file scanning.

This chapter explains how RemoteStation Server is installed and configured, and also covers the installation and configuration of the RemoteStation Client.

## Key Features

The Key Features are:

- TCP/IP based Client/Server architecture
- Scan or Send Documents directly to:
  - Remote ScanFile Document Stores
  - ScanFile registered users
  - Email
  - Networked Printers
  - Local printers
- Support for the following Canon scanners:
  - DR-3020      DR-3060
  - DR-3080c    DR-5020
  - DR-5080c    DR-5060F
  - MS300        MS350
  - MS400        MS500
  - MS800
  - TWAIN Devices

- Comprehensive Security
  - Logon by username/password
  - Full Audit log of all activity
  - Encrypted document transmission
  - IP Range Restrictions

## Requirements

RemoteStation Server and Client are 32bit applications that have been designed to use a minimum amount of server/workstation and network resource. Special attention should be paid to ensuring that the specification of any Client workstation is sufficient to meet the requirements of any attached scanner, and the types of documents being scanned and/or viewed. Further details on these are given below.

### ***RemoteStation Server***

RemoteStation Server must be installed on a Microsoft Windows 2000 or 2003 Server with TCP/IP protocol loaded. Please ensure that the latest service packs for the operating system have been applied. RemoteStation Server will require access to the ScanFile program directory and to the location of your ScanFile folders.

### ***Clients***

The specification of RemoteStation Client workstations is very important, and if incorrectly configured can affect the scanning and retrieval performance. The specification is dependent upon which operating system you run, what other applications you may be running and which scanners you may have attached to the workstation and what type of scanning you are performing. Much of this will also apply to workstations that are only used for retrieval purposes.

If colour scanning and viewing is a requirement, you must also ensure that the graphics adaptor and monitor are suitable for viewing the documents, and that the workstation has sufficient RAM to allow for data to be processed. If there is insufficient RAM in the workstation, the operating system will use the hard disk as virtual memory. This however will dramatically affect the performance of the workstation.

The minimum recommended specification for a workstation is as follows:

- Personal computer using a 400Mhz Pentium II Processor
- 128MB RAM
- 17" Display
- CD-ROM Drive
- 4GB Hard Disk Drive.
- MS Windows 2000 Professional

## Before Installing

RemoteStation server consists of a server service that utilises the local system account to access its resources. If the server running RemoteStation Server is not the same as that running ScanFile or where the folders/libraries reside, you must create a new user specifically for use with RemoteStation. This is also necessary if you intend to use the Printing option which allows Clients to scan & print documents to printers that the RemoteStation server has permissions for.

### *Permissions*

The user you create must have Logon Locally rights and have permissions to the following locations:

- ScanFile RemoteStation Server directory and subdirectories
- ScanFile program directory
- ScanFile folders drivea(s)/directories
- Printers

The type of permissions you can apply will be dependant upon the location of the programs and data, and what format of partition they reside on. You should create the user account and permissions for the ScanFile program directory and data locations prior to installing RemoteStation. After RemoteStation has been installed, the user account can be applied to the service and the RemoteStation server program directory.

## Server Installation

To install RemoteStation Server, select **Run...** from the **Start** Menu and then choose **SetupSRSServer.exe** from the **Software** directory on the ScanFile CD. Press the **OK** button.

The first step is to choose the language and press **OK**.

## **ScanFile Location**

RemoteStation server must have access to a Licensed installed copy of ScanFile. It needs this to enable it to use the User security information when users access folders using the RemoteStation Client. Select the ScanFile program directory and then press the **Next** button.

*The ScanFile path can also be entered as a UNC path*  
**Example:** \\<machinename>\path.

## **Location**

After you have chosen the language, you will be asked to choose the drive and directory than the RemoteStation Server software will be installed into. A default of **C:\ScanFile\SRS** will be offered, however, this assumes that RemoteStation is not being installed on the same server as ScanFile. Please ensure that RemoteStation is not installed as a sub directory of the ScanFile program directory, as no users require direct access to the RemoteStation directory. Once you have chosen the drive and directory, press the **Next** button.

## **Backup**

You will then be asked whether the install program should backup any files that the installation process will replace. These can be older versions of RemoteStation components - if you are installing over an existing installation - and common Windows components held in the **Windows** or **Windows/System** directories. If you choose to backup these components, you will be offered a default location of **<Installation path>\Backup**.

*Please note that the installation process will only replace older versions of common Windows components.*

RemoteStation Server is now ready to be installed. After this has completed, the application must be configured. At the completion of the installation you will be asked to reboot the server.

## **RemoteStation Service**

When RemoteStation Server is installed, the ScanFile RemoteStation service will be added to the list of server services. By default, this will be configured to use the local system account for its permissions. However, if the ScanFile and/or the ScanFile folders it requires access to are on a different server, the use of the local system account will be inapplicable. The RemoteStation service will require full access to the ScanFile program directory and to the

ScanFile folders to be used with RemoteStation. Please see the Before installing section above. For information about creating a user account for the service to utilise.

## Server Configuration

When RemoteStation server is first started, it will report that it is not licensed. Please see the RemoteStation section of the Licensing chapter in the manual for instructions on RemoteStation licensing.

RemoteStation Server is in two parts; the RemoteStation Service, which will be automatically loaded, and the RemoteStation Server application, which is used to configure the RemoteStation Service and can also be used to monitor the service activity. Once the RemoteStation service has been configured the server application need not be running for the RemoteStation server to be active.

When starting the RemoteStation Server application a screen with 5 tabs will be displayed. To configure the server service select the **Configuration** tab.

### **Identification**

This section is used to set the **IP address** and the **Port** to be used by RemoteStation Server. The server Computer name will be automatically shown, and the IP can be selected by choosing from the available server IP addresses shown in the drop down list. The default Port is 2042, but this can be changed if required. If the IP address is changed from the default value, the RemoteStation server service will have to be stopped and restarted.

Pressing the **Advanced...** button allows you to enter some descriptive information concerning the RemoteStation Server.

The **Description** entered will be the one used by all RemoteStation Clients connecting to this server to identify the server.

Contact details for the support of the server, consisting of **Telephone** and **Fax** numbers, and an **email** address can also be entered.

### **Local Settings**

RemoteStation Server holds a log of transmissions from clients, and the **Days** field under **Hold Transmission log** determines the period that this log can be held for. If a client fails to complete a transmission to the server, details of this are held within the log. You can select whether this information

is kept, even though the transmission log is cleared by selecting the **Preserved Failed Transmissions** option.

Pressing the **Advanced...** button will open a settings screen, from which you can set the location of the ScanFile folders and configure SMTP mail settings.

RemoteStation Server needs to know the location of the ScanFile folders to be made accessible to RemoteStation Clients. The entries can refer to local drive paths or to UNC paths. Pressing the Add button will allow you to enter the appropriate path. Please note that the network user account used by the RemoteStation service (default: local system account) must have permissions to the drives and or UNC locations.

The location of the ScanFile 2003 program directory is shown in the **ScanFile Path** field, and can be amended if required.

The SMTP settings of your mail server can be entered to enable RemoteStation Client users to email non-ScanFile users. You will need to enter the Domain name, Host name and the Port (default: 25).

## **Server List**

RemoteStation servers can be linked to one another, allowing users to store and retrieve documents from more than one ScanFile document store. When a user logs on to a RemoteStation server, the server will attempt to validate the user name and password using the local security database. If the user name is not found locally, the server will then attempt to validate the user name on one of the additional servers defined within the server list. If it is successful, then the permissions that have been assigned to the user on that server will be applied.

For each additional server, a user name and password must be created on that server to be used as the Share user, which enables users who are not registered on that server to store and retrieve documents from the server depending upon the permissions assigned to the share user.

To create an additional server, press the **Server list** button and then select **Add**. You can then assign the additional server a **Description**, which is used to identify the server to users.

You must then enter the **IP Address** and **Port** being used by the additional RemoteStation server, as well as the name of the **Share User** of that server and the share users **Password**.

Additionally, contact details for that server may be added, which consist of **Telephone** number, **Fax** number and **Email** address.

The additional RemoteStation server's details can be edited by choosing the **Edit** option on the Server list, or deleted by choosing the **Remove** option.

## Security

Specific IP Addresses or IP ranges can be added to the Security option to either allow or not allow them access to the RemoteStation server. Each time a RemoteStation Client attempts to connect to a RemoteStation server, the IP address of the Client will be checked against the entries in this list.

You can select whether the IP addresses added to the list will be **Granted access** or **Denied access**, by choosing the appropriate option.

To add an IP address to the list, select the **Add** option, and then enter a valid **IP address** and **subnet** mask.

The entries in the list can be edited by selecting the **Edit** option, and removed using the **Remove** option.

## Connections

The list of users currently logged on to the RemoteStation server can be monitored using the Connections option. Additionally, a **Session Timeout** period can be set (default: 20 minutes) which will automatically log out users which have been inactive for the timeout period, and therefore freeing up a license for other users.

## Events

The Events display will list all activity that occurs on the RemoteStation server, such as connection requests, searches, and document transmissions. The number of Events that the list will hold at any one time can be selected by entering a number between 1 and 999999 into the **Events to hold** field. The Events display will also show the number of concurrent licences the server is licensed for and the number currently being used.

# RemoteStation Client

The RemoteStation Client allows users to connect to RemoteStation servers and retrieve and store documents to those servers.

To install RemoteStation Client, select **Run...** from the **Start** Menu and then choose **SetupSRSCClient.EXE** from the **SOFTWARE** directory on the ScanFile CD. Press the **OK** button.

The first step is to choose the language and press **OK**.

## ***Location***

After you have chosen the language, you will be asked to choose the drive and directory than the RemoteStation Client software will be installed into. A default of C:\Program Files\SrsClient will be offered and this should normally be accepted. However, if you wish to install it on a different drive and directory, then you can browse or type in the required path.

The Destination directory selection dialogue will also display the available disk space on the chosen drive, as well as the space available after RemoteStation has been installed. Once you have chosen the drive and directory, press the **Next** button.

## ***Backup***

You will then be asked whether the install program should backup any files that the installation process will replace. These can be older versions of RemoteStation components - if you are installing over an existing installation - and common Windows components held in the **Windows** or **Windows/System32** directories. If you choose to backup these components, you will be offered a default location of **<Installation path>\Backup**.

*Please note that the installation process will only replace OLDER versions of common Windows components.*

RemoteStation Client is now ready to be installed. After this has completed, the application must be configured. At the completion of the installation you may be asked to reboot the workstation.

# **Client Configuration**

Selecting the option created in the ScanFile program group can start the RemoteStation Client. When the Client is started for the first time you will be asked to enter a password to be used to access the configuration options. Once you have entered this password, the Configuration screen will be shown

Whenever you wish to configure the client, you can access the configuration screen by just entering the password you created above into the password field on the Client Login screen, without entering a user name. If the correct configuration password is entered, the configuration screen will be displayed.

## ***Local Station settings***

The Client configuration will automatically detect the workstation Computer name and it's IP address and subnet mask. The subnet mask can be amended if required.

## ***Server Settings***

To enable the client to access a RemoteStation server it needs to know the computer name or IP address of the server. For private networks, either setting may be used, but for connections via the Internet, the IP address of the RemoteStation server must be entered.

The Port the RemoteStation server uses must also be set. This will default to Port 2042.

Once you have entered the server details, press the Tick icon at the bottom of the window, and the RemoteStation Client configuration is complete.

# **Starting RemoteStation**

To start RemoteStation, select the RemoteStation Client from the ScanFile program group. You will then be required to login using a valid ScanFile user name and password. Once logged in the main RemoteStation menu will be displayed, showing 3 options:

- View Protocol
- Search
- Scan/Send

## ***Keyboard***

If the RemoteStation does not have a keyboard attached, and is using a touch screen, a screen based keyboard can be used anywhere within RemoteStation by pressing the Keyboard picture at the bottom left of the RemoteStation screen.

## ***Tools***

RemoteStation uses standard icons throughout to navigate through the application. The main tools are described below.

| Tool   | Beschreibung           | Tool  | Beschreibung           |
|--|------------------------|---|------------------------|
|   | Logout                 |  | Search                 |
|   | Previous screen        |  | Next screen            |
|   | Single Page Scan       |  | Mutli Page Scan        |
|   | Server or Workstation  |  | Internet Email         |
|   | Scan Document          |  | Select Document Source |
|  | Send Document to Queue |   |                        |

## View Protocol

This option can be used to monitor the status of scanning jobs waiting to be sent to a server, and also the history of specific types of jobs sent to the server.

The time taken for scanning jobs to be sent to the server can be affected by several factors, the main one being the speed of the connection between the client and the server.

### ***Local Sending State***

This will show any documents queued locally that are waiting to be sent to the RemoteStation server.

### ***Serverside***

This option will show the job history for a user on a RemoteStation. All the jobs sent by a user to the Server can be listed. If there is more than one

RemoteStation server available to a user, you must first select the server you want to view the history on. You can then select the user.

On the Settings screen, you can select to view the history for each of the four Send option:

- Folder
- User
- Email
- Printer

Select one of these, and optionally add a single date or date range and then press the **Forward** button, and the send history will then be displayed.

## Search

The Search option from the main RemoteStation menu will display the list of folders that the currently logged in user has rights to access.

If there is more than one RemoteStation Server registered, then you will need to select the server that holds the folder you wish to search first.

### **Search Screen**

Selecting the folder will display the Folder Search screen that will show the folder fields. Searching within RemoteStation gives the option to perform range searches within the selected folder, the first value being entered in the first field alongside a field name, and the second value in to the second field alongside the field name.

You can also choose whether the search is to be an AND search or an OR search.. The AND search will result in producing a list of documents that match the search criteria entered into ALL fields. The OR search will list those documents that match the criteria entered into ANY of the folder fields.

Once the search criteria has been entered, pressing the Search button will show the list of matching documents.

### **Hitlist**

The Hitlist will show all documents that matched the search criteria entered. Each documents complete index information will be shown within its own separate 'box'. To view a specific document, click on the box. If a document has more than one page, FastPics of the pages will be displayed, but if the document only has one page, it will be immediately displayed.

You can return to the Search screen by clicking on the **Back** button.

## ***FastPics***

The FastPics display allows you to view in thumbnail format all the pages of the selected document, and then to select the page to view by clicking on the thumbnail.

## ***Viewing a Page***

The image viewing page can display one page of a document at a time. The page can be zoomed up or down, rotated or made to fit the display window.

# **Scan/Send**

The Scan/Send option allows you to scan documents and then send them to one of four destinations:

- Printer
- Folder
- User
- Email

## ***Printer***

This option enables you to scan documents and have them sent to a local printer or a printer that the RemoteStation server has access to. The available server printers will be dictated by the configuration of the RemoteStation server.

### **Printer List**

When selecting the Printer option, you must first select the location of the printer. This can be on the local workstation or on a RemoteStation server. Once selected, the available printers will be shown. If there is only one printer configured on the selected location, the Printer List will be skipped.

### **Document Header**

After selecting the printer, you will be able to create a print header sheet onto which you can enter the following information:

- Recipient
- Originator

- Message

Once this information has been added, press the Scan button to open the Scan screen

## ***Folder***

The Folder option allows you to scan documents to ScanFile folders that the currently logged in user has permissions to. If there is more than one RemoteStation Server registered, then you will need to select the server that holds the folder you wish to scan to first. If the logged in user only has access to one folder on the server, a folder list will not be displayed.

### **Folder Fields**

Once the folder has been selected, press the forward button to show the Folder fields. If the user only has access to one folder, the fields will be displayed automatically, without having to select the folder.

From this screen you can enter the index information related to the document you wish to scan. You can also select the date and time that the document will be scheduled for sending to the RemoteStation server. This can be set at the bottom of the Folder fields display. Once this has been done, press the appropriate Scan button to open the Scan screen.

You can select to scan single or multi-page documents. Selecting the Single page option will create a folder record for each page scanned. Selecting the Multi-page option will create a single folder record for all scanned pages.

## ***User***

This option allows you to send a scanned document to a registered ScanFile user. The documents will be sent to a user's personal hitlist so that they can be accessed from within ScanFile. If there is more than one RemoteStation Server registered, then you will need to select the server that the user is registered on first. The list of users on the server will be displayed, and you can select one or more users to send the document to. Once you have selected the users, press the Forward button to show the index screen.

### **Index Screen**

As the index data is not related to any ScanFile folder, the field names will be called Field 01 to Field 10. Any information entered will be shown in the user's Personal Hitlist. Press the Forward button to open the Scan screen once you have entered the index information.

## ***Email***

The Email option will send the scanned document to an internet email address.

### **ScanFile Users**

When a user is created in ScanFile, an email address can be entered as part of the user information. This gives the option to send a document to a registered ScanFile users email address rather than to that users ScanFile Personal Hitlist.

If there is more than one RemoteStation Server available, then you will need to select the server that the user is registered on first. The list of users on the server will be displayed, and you can select one or more users to send the document to. Once you have selected the users, press the Forward button to show the Email message screen.

### **Internet Email**

This option will display the Email message screen, which will allow you to send a document to any valid internet email address.

### **Email Message Screen**

On this screen, you can enter email addresses to send the document to. If you are sending to a ScanFile user, the Email field will be automatically filled. You can also select to copy the document to another user by entering the email address into the CC field.

A Subject and email message can be added by typing them into the appropriate fields.

Once you have completed the email message, press the Scan button to open the Scan screen.

## **Scan Screen**

There are several options that can be set prior to scanning or importing, relevant to the type of document being scanned, and the source of the documents. Once these options have been selected, press the Scan button to scan the documents.

## ***Document Source***

If you have a Canon DR range scanner attached to the workstation, this will be automatically detected, and you can start scanning immediately. If you wish to use a TWAIN device as the scanning source, you must first configure this. Pressing the **Document Source** button allows you to select whether the source is a Canon DR scanner, a TWAIN device, or an electronic document located on the workstation, such as an MS Word document.

### **Canon DR Scanner**

If the selected source is a Canon DR range scanner, this scanner model is automatically detected, and the scan options available will be set accordingly.

### **TWAIN Source**

When selecting the TWAIN source option, you will then have to select the device from the displayed list. You must ensure that the TWAIN driver for the device is installed correctly. When this option is used, pressing the Scan button in the RemoteStation Scan Screen will display the TWAIN source scan settings screen.

### **EDOC**

This option allows you to select an electronic document from a storage device on the workstation. These can then be added to the current queue to be sent to the selected destination.

## ***Colour***

Three settings are available:

- Black and White
- Greyscale
- Colour

## ***Resolution***

Three settings are available, and these will be dependant upon the attached scanner. The settings are **Low**, **Medium** and **High** resolution, which for the Canon DR5020/80c scanners would be 200, 300 and 400dpi.

## ***Brightness***

The scan brightness can be set from 1 to 255. for greyscale & colour, and 1 to 7 for black & white

## ***Text-Photo***

The Text option should be selected if the scan is black and white and it is not important as to the quality of any graphic elements contained on the document.

The Photo option should be used when the documents contain graphic elements, such as photographs. This will scan the graphics at a higher quality than the Text option.

## ***Simplex-Duplex***

This option allows you to set whether the documents to be scanned are single or double-sided.

## ***Priority***

The Priority option allows you to set a level between 1 and 3 for a document. If many documents are waiting to be sent to the RemoteStation server, the documents with the highest priority will be sent first.

## ***Preview***

Any documents scanned can be previewed on the Scan screen before sending them to the RemoteStation server. They will be shown on the left side of the screen, and display tools are available to allow you to rotate and zoom the displayed image. If more than one page has been scanned, you can move between the pages by using the **Up** and **Down** arrows under the **Documents** option. The **X** under documents will delete the displayed page.

## ***Send Document***

Once you are happy with the scanned document, press the **Send** button, which will queue the document locally before sending it to the RemoteStation Server. Whilst sending, if the connection between the client and the server is broken, once it is re-established the document will once again be sent. The documents are queued locally until a **successful transmission** message is received from the server.

## Scheduled Sending

When scanning or importing documents to a ScanFile folder, you can select the date and time that the documents are to be sent to the RemoteStation server for adding to the folder.

At the bottom of the Folder indexing screen, the current date and time will be displayed. You can amend this to the date and/or time that you wish the documents to be sent. Once you have completed the scanning and/or importing of documents, they are held in a queue locally until the scheduled date and time is reached, when the RemoteStation Client will attempt to send them to the server.

You do not have to be logged into the RemoteStation Client for the documents to be sent, but the RemoteStation Client must be open. Additionally, if you are using a Dial Up connection to the RemoteStation server, this must be connected prior to the Client sending.

# ***ScanFile Connector for ShareScan***

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## Introduction

With the ScanFile Connector for ShareScan, any eCopy enabled device can be used to scan and send documents to ScanFile Folders. Using TCP/IP connectivity, combined with ScanFile security, ScanStation can send documents to the RemoteStation server, which will then store them to the selected ScanFile document folders. RemoteStation Server with the ScanFile Connector for ShareScan is an ideal application for centralised scanning stations and to allow remote offices access to your ScanFile document store.

An advanced function of RemoteStation Server is it's ability to act as a master server, allowing users to store documents to slave RemoteStation Servers, therefore allowing a central user access point for storing documents, which can then be distributed to ScanFile document stores located elsewhere.

Please refer to the previous chapter on RemoteStation for instructions on how to install and configure the RemoteStation Server.

## Installing the Connector

The ScanFile Connector for ShareScan is an add-on to the main eCopy ScanStation application. This must be installed and running correctly prior to the installation of the ScanFile Connector.

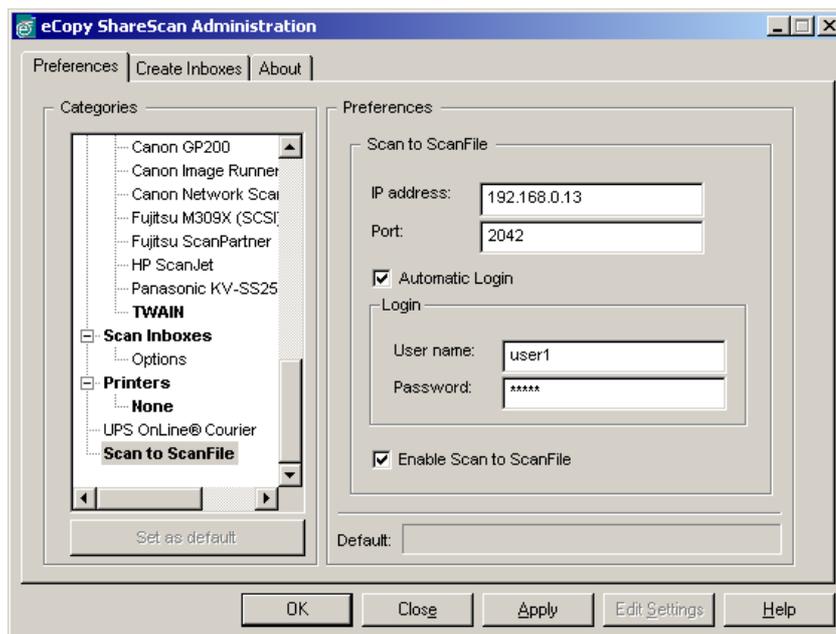
To install the Connector on the ScanStation, select Run from the Start menu, and select setupScanFileConnector.exe from the Software directory on the ScanFile program CD. If the ScanStation does not have a CD drive, the installation program can be copied to a network location and run from there.

You will be asked to select the language and the installation location for the Connector, and then the program files will be installed.

Once installed, the Connector can be configured.

## Connector Configuration

Before the ScanFile Connector can be used, it must be configured by using the eCopy Administration application. For ShareScan, this can be accessed by running the ShareScan Administration program from the eCopy Applications program group.



In the Categories list select the Scan to ScanFile category, and the Connector Preferences will be shown.

## ***IP & Port***

The IP address and Port settings should be set to those that the RemoteStation server has been configured to use. If these are not set correctly, the Connector will not be able to communicate with the RemoteStation server.

## ***Login***

The Connector requires a valid ScanFile user name and password to be able to login to the RemoteStation server. The users must have permission for RemoteStation and the ScanFile Folders that documents will be saved to

If the Automatic Login feature is not enabled, each user of the Connector will have to enter a user name and password each time they use the Connector

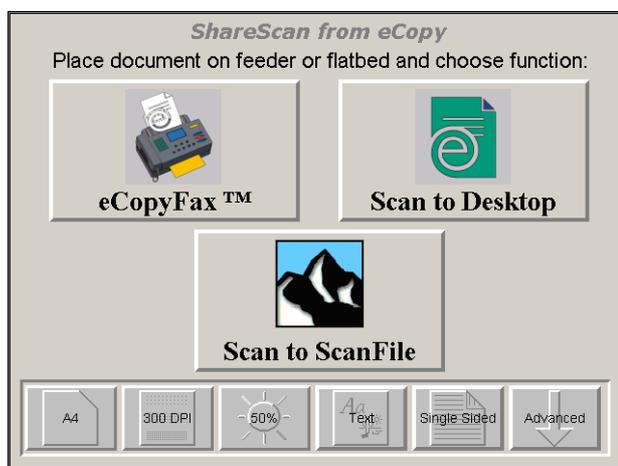
With Automatic Login enabled, users of the ScanFile connector will not have to login. You can enter a user name and password that will be used by all users of the Connector, which will have been set with permissions for RemoteStation and ScanFile Folders.

## Enable Scan to ScanFile

The ScanFile Connector can be enabled or disabled with this option. If the Connector is enabled, the Send to ScanFile button will be available on the ScanStation. If disabled, the button will not be shown.

## Using the Connector

On the ScanStation main screen, select the Scan to ScanFile button, after placing the document in the scanner feeder.



## Preview Screen

Once the document has been scanned, the preview screen is displayed, where you can review the scanned pages, scan more pages, delete the document or select to Send to document to ScanFile.



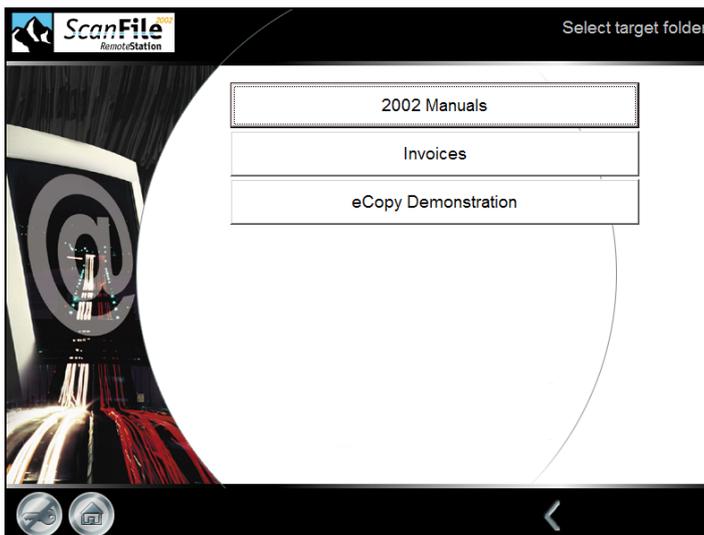
## Login

If the Automatic Login feature is disabled, each user will have to login using a valid ScanFile user name and password. If the ScanStation being used only has a touch screen, a screen based keyboard is available. Pressing the ESC key will close the keyboard



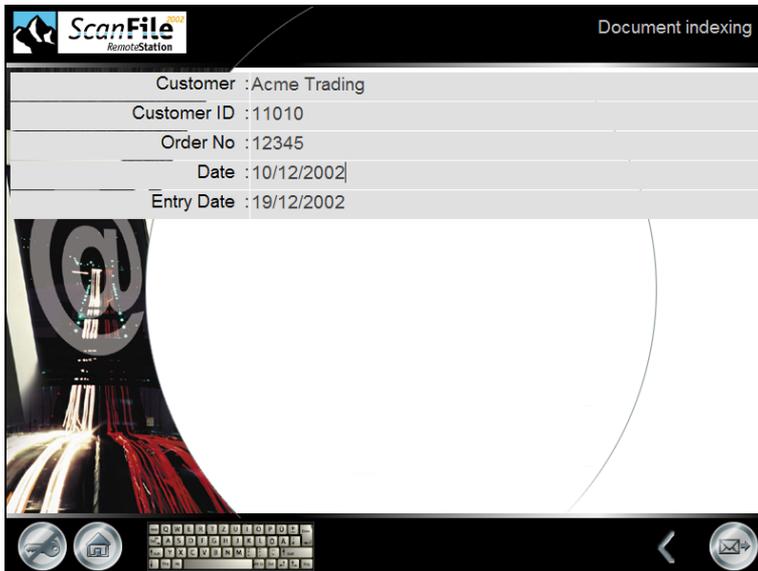
## Destination

You can select to send the scanned document to either a ScanFile user or a ScanFile folder. When you select to send to a ScanFile Folder, the following screen will be displayed, which allows you to select the folder you want to send to document to.



## Index and Send

Once you have selected the ScanFile Folder, the index fields for that Folder will be displayed, allowing you to type in the document details prior to sending. If the ScanStation being used only has a touch screen, a screen based keyboard is available



Once you have entered the index information, the document can be sent to ScanFile by pressing the Send button, and the Connector will then close.

