SCANNERVISION
DOCUMENTSOLUTION

Desktop Client

User Guide
&
Manual

Table of Contents

Foreword

Scope

This publication describes using the ScannerVision™ Processing Engine application in an enterprise environment. This document provides users of the Processing Engine with the knowledge to configure the application best suited for their needs.

Intended Audience

The intended audience of this document are for all ScannerVision™ Processing Engine users. This document may be used by NDS partners, their dealers, sales representatives and end users.

Product Information

For current documentation, release notes, software updates, as well as information about NDS and ScannerVision™, visit the NDS website at http://newdynamicsolutions.com or email us at partners@newdynamicsolutions.com.

1   Welcome

Thank you for choosing ScannerVision .

ScannerVision is an advanced, user-friendly document capture solution which enables users to scan, digitize, route, store and optimize their business critical information. Created with the philosophy of manageability, reliability and flexibility, but above all simplicity, ScannerVision can operate from the panel of many popular multifunctional devices, or from the PC desktop.

With a touch of a button, even inexperienced users can start to utilize document workflows, formatting and correctly tagging critical information and ensuring it reaches the right destination: automation promotes efficiency, reduces errors, and saves money.

To familiarize you with your new ScannerVision Desk Top Client application, we suggest that you read this entire operation manual, before attempting to operate it.

2 Getting Started

Getting Started

The following section have been designed to familiarize users with the operation of the ScannerVision Desktop Application. In this section, you will find an overview on the following topics:

- Overview

- Desktop Client User Interface

- Using Desktop Client

2.1   Overview

ScannerVision Overview

ScannerVision is an advanced document capture middleware solution which is easy, affordable and secure to implement streamlined document workflow and business process management. With ScannerVision, users will be able to file, retrieve and use information with far more ease than before and dispense with time consuming searches for important documents or information.

ScannerVision can save, store, and share your documents in a very structured, easy, and customized manner. ScannerVision also allows the addition of extra meta data to your documents. All this is accomplished in three basic steps being capture, process and store.

ScannerVision specifically supports users who deal with a multitude of documents, daily. The user interface is very intuitive, and easy to navigate and configure. ScannerVision Processing Engine allows users to create bespoke templates, to deal with documents in a manner specific to the user's daily business processes. Templates are used to build a set of rules, which will be applied to each type of document. These templates can be configured to support multiple input methods, bespoke image enhancements and output in various formats to multiple output destinations including Windows file systems, email, ftp and various document management systems.

Output integration to most business systems can be achieved by a feature-rich export module allowing meta data to be exported with associated images by various methods including xml, text files and HTML. Input integration allows ScannerVision to use data from business systems by presenting structured data for indexing and classification purposes.

2.2   ScannerVision Support

New Dynamic Software NV offers tier 3 support to our global network of resellers. Users seeking technical support for ScannerVision™ should contact their point of purchase.

In the event that you are no longer able to contact your reseller, feel free to email us at partners@newdynamicsoftware.com so that we may introduce you to another partner in your region who is able to support you.

Alternatively, contact our Live Support system. Available via the front page of the NDS website, the Live Support system   offers a direct line of communication to our support team and customer service department.


Resellers and partners may use the system to request technical support or information for pre-sales enquiries. Existing end users will be assisted in contacting the technical teams of the sales partner, whilst prospective customers will be directed to regional partners.

The objective of this system is to offer support for those situations where an immediate response is required.

newdynamicsolutions

2.3   Desktop Client User Interface

Desktop Client User Interface

The ScannerVision Desktop Client user interface is divided into the following sections:
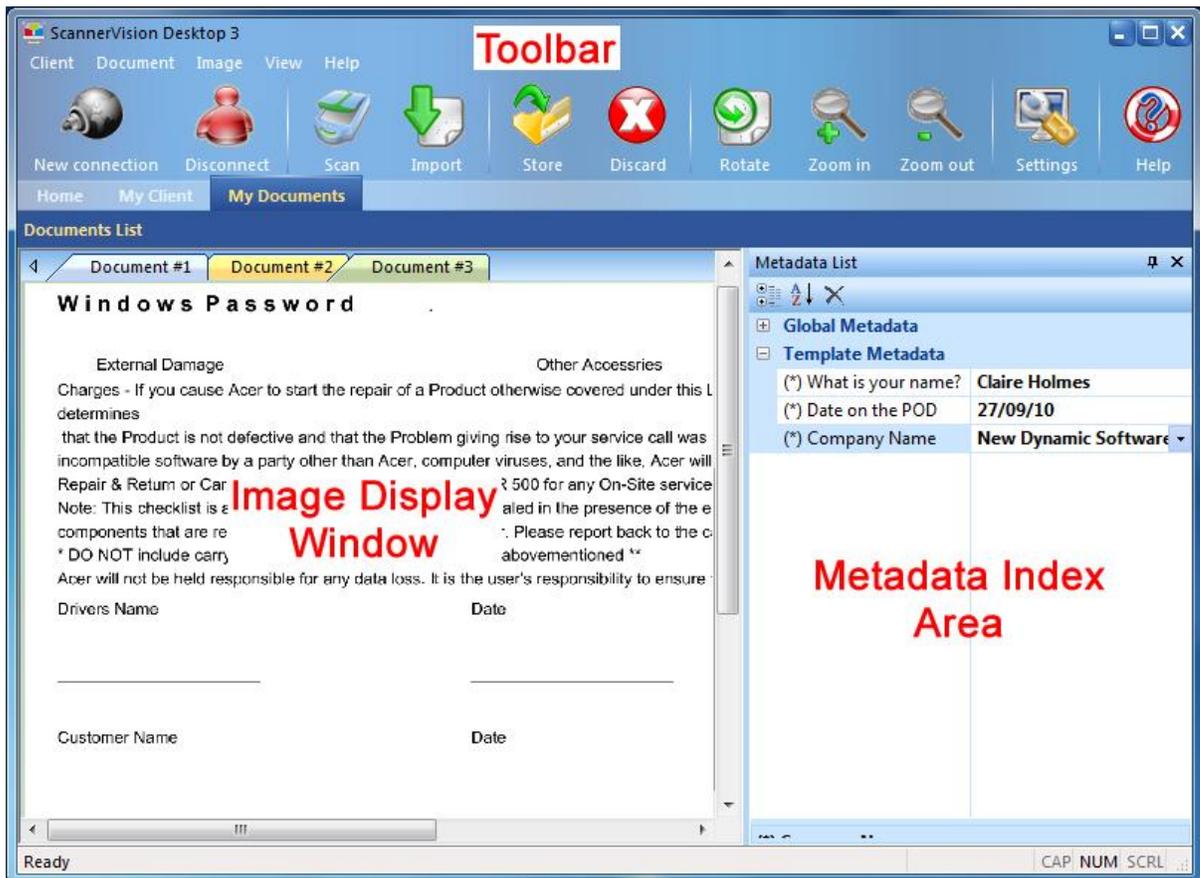
Toolbar
- Server Connection
- o New Connection - Click this option to create a connection to the ScannerVision Processing Engine. All templates configured for Desktop Client connections, and allocated to the specific desktop client, will be presented.
- o Disconnect - Disconnect the ScannerVision Desktop Client from the ScannerVision Processing Engine.

- Image Acquire
- o Scan - Used to scan directly from any TWAIN enabled device. The correct TWAIN driver must be loaded to use this function.
- o Import - This feature can be used to import images from a Windows shared folder.

- Image Actions
- o Store - Once an image(s) have been scanned, and the metadata fields have been filled (if requested), use this option to send the image and the associated metadata to the allocated destination that was

selected when configuring the Document Store Settings in the Processing Engine application.
o Discard - Used to discard any acquired image(s) without sending the images to the ScannerVision Processing Engine.

- Image View
o Rotate - Clicking this button will cause the viewed image to rotate in a clock-wise direction.
o Zoom In - Used to Zoom into an acquired image
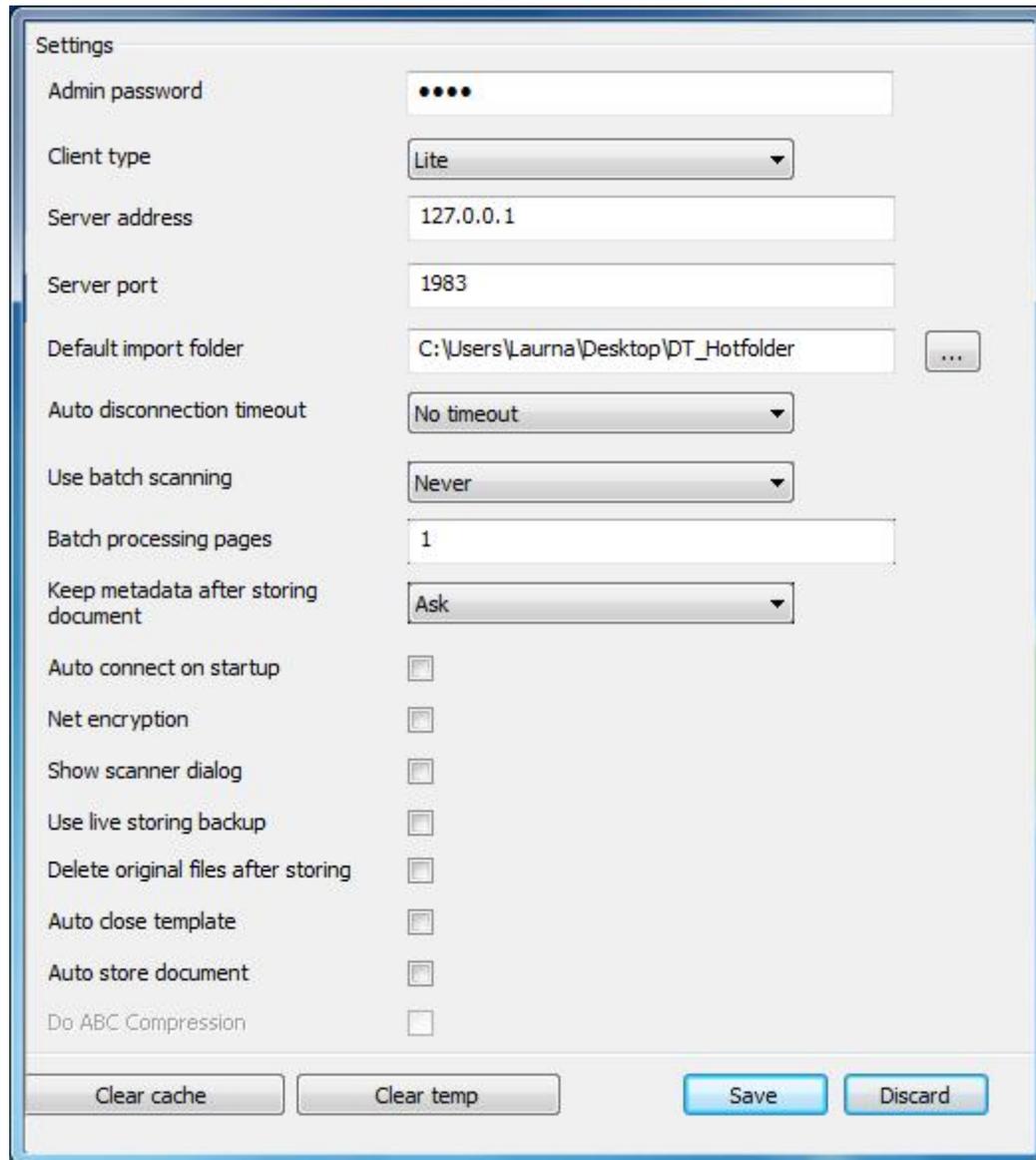o Zoom Out - Used to Zoom out of an acquired image

The following section have been designed to familiarize users with the operation of the ScannerVision Desktop Application and Processing Engine for processing.

- Client Settings

- Help - Will launch this help manual

- Metadata Selection/Index Area

2.3.1   Desktop Settings

ScannerVision Desktop Settings

The Settings dialogue contains the user preferences for the Desktop Client such as the server IP address, language options, batch processing selection and automated actions:

To access the settings, you will need to enter the **Admin password** at the top of the dialogue. The default password for ScannerVision is **0000**.

Once activated with the Admin password, the following options can be configured:

- **Client Type** - From which a user can chose one of the following;

newdynamicsolutions

o **Automate** - The Automate edition of the Desktop Client implements on-the-fly zone OCR into the scanning client. This is of particular use to scanning operators who are required to index large amounts of data using information on the document. With the Automate option the operator simply needs to select the required metadata question and draw a marquee around the area of the document which requires the information. Automate will perform rapid OCR on that document area and put the resulting data into the selected metadata question, negating the need for the operator to type in the data and thus removing the potential for errors and saving time.

o **Boost** - The Boost version of the Desktop Client incorporates advanced bi-tonal compression technology (ABC) inside the client. This has a positive impact on the performance of scanning 1-bit (monochrome) data over long distances as the scanned data is compressed up to 8 times more than standard PDF encryption. Upon reaching the destination server the proprietary ABC format is automatically decrypted and converted into whichever format is specified in the workflow template.

o **Expert** - The Expert option combines the Boost and Automate options into one, fully-featured desktop client capable of scanning, indexing and transmitting large volumes of data, directly into document systems.

o **Lite** - The DeskTop Lite client is a Windows application which connects to the ScannerVision™ server and guides the operator through the document capture process. Documents may be acquired by scanning with an installed TWAIN driver, or by importing existing electronic files (e.g. files from a TIFF archive).

Users may browse the document after the acquisition and, if required, may answer any metadata questions defined in the template to complete the process. Some metadata questions can be flagged as requiring an answer before scanning can proceed, ensuring that files with missing information are a thing of the past

- **Server Address** - The IP Address of the ScannerVision Processing Engine

- **Server Port** - The port specified and configured for communication between the ScannerVision Processing Engine and the Desktop client

- **Default Import Folder** - To be used in instances where images are to be imported. The default folder where the images are to be located can be specified here

- **Auto Disconnect Timeout** - Select the timeout setting to be applied for communication between ScannerVision Processing Engine and the desktop client

- **Use Batch Scanning -** Select one of the options; always, never, or ask from the drop down screen to activate batch scanning.
  For more information on batch scanning, please refer to Appendix A Batch Scanning

- **Batch Processing Pages -** Select how many pages you require per batch.

- **Keep Metadata After Storing Document -** If one wishes to keep metadata to use for future documents.

- **Show Scanner Dialog** - This option will prompt the TWAIN driver options and dialog

- **Use live storing backup** - All images stored via the ScannerVision Processing Engine, will be backed up

newdynamic**solutions**

SCANNERVISION
DOCUMENTSOLUTION

- **Delete original files after storing** - Files imported will be deleted after stored by the ScannerVision Processing Engine

- **Auto close template** - The template selected will automatically be closed when the image have been sent to the ScannerVision Processing Engine

- **Auto store document** - Images scanned/imported will automatically stored, without the prompt being presented to the user

- **Do ABC Compression** - Compress scanned image to save on bandwidth usage and file server space. This field is only available once a Desktop Expert license is registered and only allows bi-tonal images to be compressed.

2.3.2   Metadata Selection/Index Area

Metadata Selection/Index Area

Metadata questions defined in the ScannerVision Processing Engine will be posed in this area. Questions could be configured to require selection of an option, typing in of a metadata answer or a combination of both.

Metadata questions which are mandatory, will be marked by an asterix (*).

newdynamic**solutions**

3   Using the Desktop Client

Using ScannerVision Desktop Client

The first task is to initiate a connection with the ScannerVision Processing Engine, by selecting the **New Connection** button.

You may need to authenticate with the application, if the workflow template has this option configured.

You will then be presented with a view of all templates associated to your user profile and scan device. The templates can be viewed either in "Buttons" view or in a "List" view. Selecting a template, will set the Desktop Client to the rules specified for the particular template in the ScannerVision Processing Engine Setup.
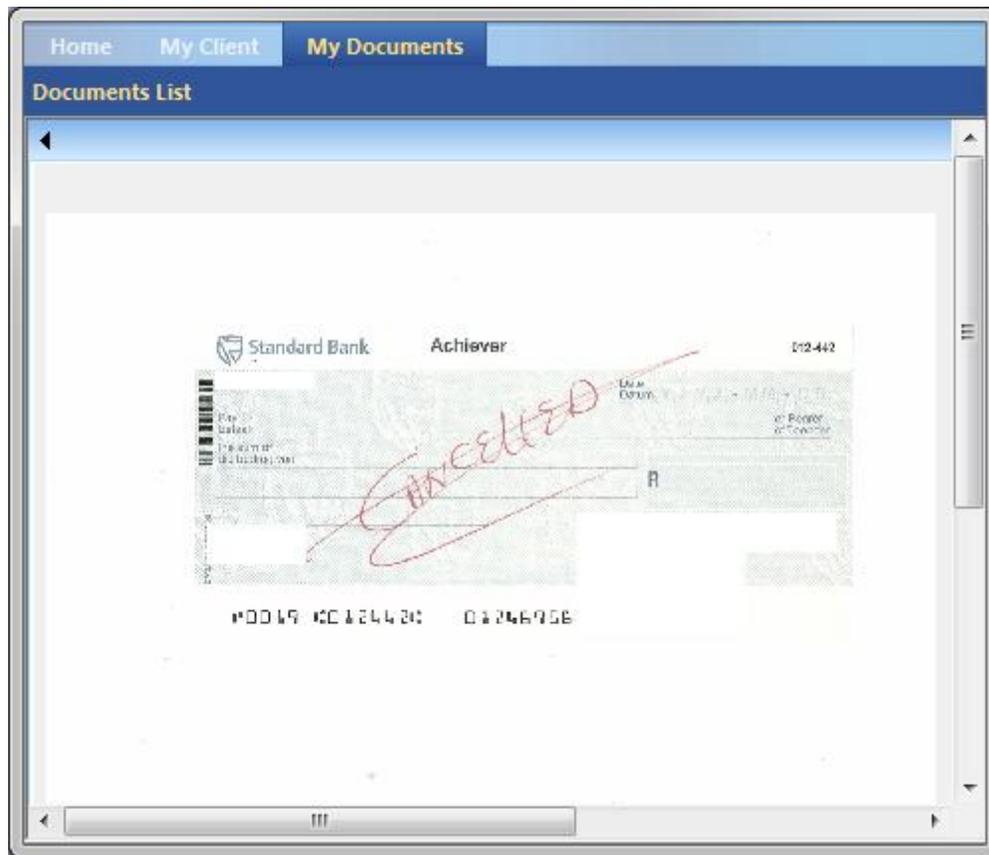
Button View

List View
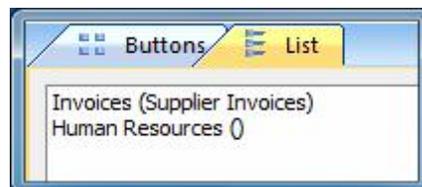
You can now acquire an image to process with the selected workflow template. An image can now be either scanned (via a compatible, connected TWAIN scanning device) or imported from an existing electronic document stored on the computer.

After acquiring the image a preview will appear in the image display area:

If the workflow template has any metadata questions configured, these should now be answered as explained in Metadata Selection/Index Area

Upon completion of the image indexing, the image can be sent to the ScannerVision Processing Engine for final process and storing as required for the template concerned, simply by pressing the **Store** button. After the document is submitted you will be asked whether to retain the metadata information you have supplied and submit another document.

4   Appendix A - Batch Scanning

**Appendix A - Batch Scanning**

What is batch scanning?

Batch scanning is the commonly referred to process of turning paper into digital documents. The use of batch scanning in the proper manner can increase productivity and ensure success in the implementation of the EDMS (Electronic Document Management System) .

There are three ways of separating batches of scanned pages into individual PDF documents using barcodes.

1. Batch Scanning Type 1 - Documents that have barcodes on the 1st page of each batch;
   a. Every time a new barcode is read a new PDF document is started.
   b. The PDF document is named using the Barcode Value on the first of the scanned pages.
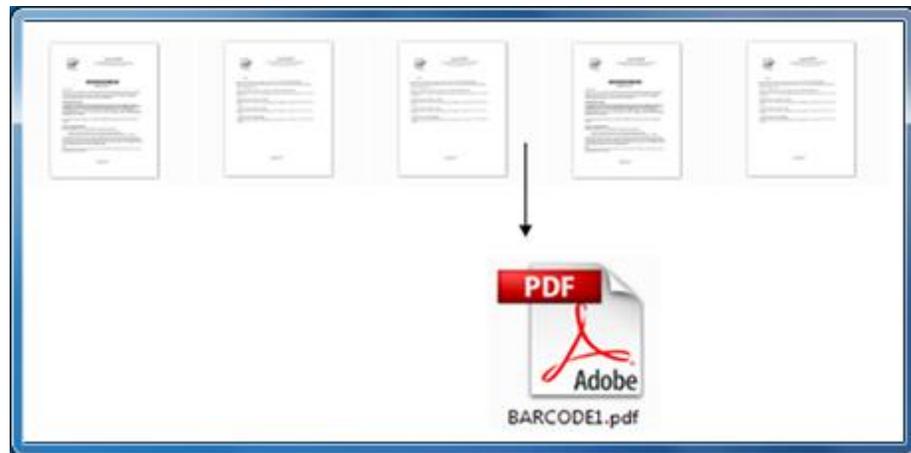
2. Batch Scanning Type 2 - Each and every page of your batch of scanned pages has a barcode.
   a. Every time a page is scanned a document is created using the barcode value as the name of the file.
   b. If a barcode is read more than once, ScannerVision can add the page to the existing document (at the beginning, end or any place you configure it)
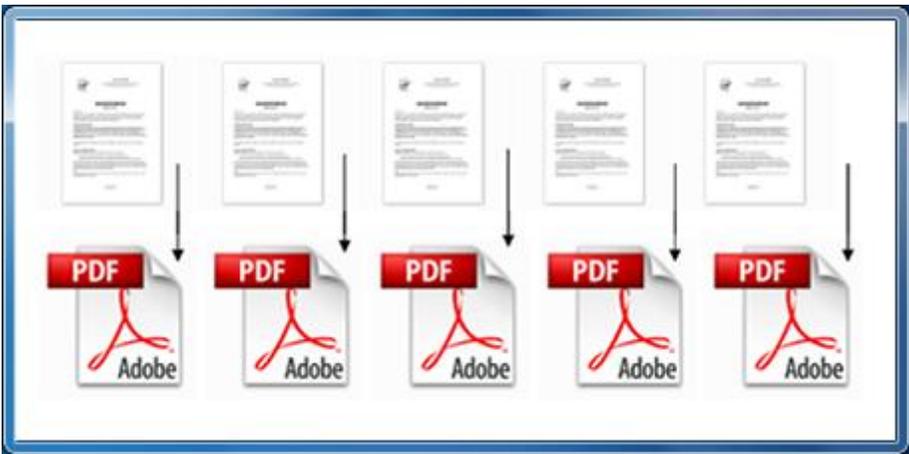
3. Batch Scanning Type 3 - Documents do not have barcodes so you need a barcoded separator page.
   a. Every time a separator page is detected a new PDF document is started.
   b. The document can be named using the barcode on the separator page, or with other methods using Metadata values.

newdynamicsolutions

New Dynamic Solutions BVBA
Metrologielaan 10/15
1130 Brussel
Belgium

partners@newdynamicsolutions.com
http:/www.newdynamicsolutions.com

NewFormat®

Appointed reseller of ScannerVision™ Nordic and
Baltic Region

New Format AB
Smörblommegränd 14, SE-165 72 Hässelby,
Sw eden
+46 (0)70 631 53 01 / +46 (0)8 89 29 07
scannervision@new format.se
w w w .new format.se
w w w .openformat.se

newdynamicsolutions
part of the NDS Group