1SCAN User Manual

Notice

The information contained in this document is subject to change without notice. 1mage Software, Inc. shall not be liable for errors contained herein or for incidental or consequential damages in connection with the furnishing, performance, or use of this material.

This document contains information which is protected by copyright. All rights are reserved. No part of this document may be photocopied, reproduced, or translated to another language without the prior written consent of 1mage Software, Inc.

Copyright © by 1mage Software, Inc.

Printed in the USA

<div align="center">

1mage Software, Inc.
7200 S. Alton Way A260
Centennial, Colorado 80112
Telephone (303) 773-1424
www.1mage.com

Trademarks
</div>

1MAGE is a registered trademark and 1VIEW, 1Scan, Tool Scan, WinClient and 1Suite are trademarks of 1mage Software, Inc.

Microsoft and Windows are trademarks of the Microsoft Corporation.

Kofax, VirtualReScan, Adrenaline, ImageControls and the "VRS VirtualReScan" logo are registered trademarks of Kofax Image Products. VRS and the Kofax logo are trademarks of Kofax Image Products.

ISIS is a registered trademark of Pixel Translations, a division of Captiva Software Corporation.

Revision History

Date	Description
April, 2003	Release 8.1.3 Updated documentation to reflect new features and modifications: batch mode processing, duplex scanning, color scanning, and Windows XP compatibility. Removed obsolete bar code reference. Added note regarding VRS settings and patch codes.
March, 2004	Release 9.1.3 Revised to improve consistency of general format. Revised list of Disallowed special character for batch names. Updated screen shots and revised content to reflect the following new functionality-New ADF/Flatbed/Panel toggle button, Delete Page option for batch mode scanning, Logging Patch Code read options. Added *C to .dat file example. Added note about Display settings for duplex pages. Compressed table listing bar codes for use with patch codes. Added sections: If 1Scan is not reading all bar codes, Adding image to previously scanned image, To reorder images in a batch, To delete images in a batch.
April, 2004	Release 9.2.1 Updated screen shots to reflect to mnemonic keys. Updated all mnemonic references within the document to reflect changes to the key mnemonics. Removed note that required user to be in color mode to process color images in disk mode. Remove section on eliminating duplicate out of paper messages as is no longer an issue for 9.2.1. Removed note about starting 1Scan when it is already running.
May, 2004	Release 9.2.2 Updated Tool scan screen shots to reflect new verbiage for Filemove transfer method. Added text regarding adding comments to duplexed images.
September, 2004	Release 9.3.2. Added notes regarding disk mode processing and long file names. Added warning about using "panel' settings in continuous scan mode.
October, 2005	Release 10.2.1. Added discussion of Queue Security, Offline Scanning, types

	security, Type security. Reorganized Manual to reflect how 1Scan and ToolScan behave when connecting to 1mage server 8.1 or later, and 1mage server 8.0a or earlier.

Contents

Before you begin

Conventions

The following conventions are used in this manual:

Formatting convention	Type of information
◆	Step by step procedure
Plain courier type	Directory, record, file, and System messages

Assumptions

This documentation assumes that you know how to use a scanner and a PC, and that you are familiar with a mouse and the Microsoft Windows environment. It also assumes that an image server and 1Scan have been successfully installed. See the 1Scan Installation Manual for instructions for installing 1Scan and see the 1MAGE Installation Guide for instruction for installing 1MAGE.

Included in this manual are procedures for the use of both 1Scan and Tool Scan, 1Scan's configuration program.

Background

1mage's scanning software provides an efficient interface between a diverse range of production grade scanners and the 1MAGE server. In addition to scanning images, 1Scan appends information about each scanned image to an image .dat file. 1MAGE server uses this information to facilitate fast and accurate indexing of each image into the 1MAGE database.

1mage scanning software consists of two executables programs: 1Scan and its companion, ToolScan. ToolScan is used to configure 1Scan. It is used to specify the name of the image server to connect to and the local work area (capture path) where images are temporarily stored until they are transferred to the image server.

1Scan is 1mage's scanning application. 1Scan applies industry accepted compression standards to the digitized image of a document in order to decrease the amount of space needed to store the image. An image remains in this compressed form until it is uncompressed to be viewed, faxed, or printed. 1Scan also provides a windowed environment to be used by a scanning operator to "inspect" a digitized image before it is queued for indexing and archiving or removed from the queue to be re-scanned.

To help the image server store the digitized image, 1Scan software creates two records for each scanned document: an image record (image.tif) and a companion data record (image.dat).

Image record ⌐   ⌐ **Data record**

	image.dat	
image.tif		
	*B \<Batch code>	
	*D \<Date>	
	*T \<Time>	**Audit trail and**
	*O \<Operator's initials>	**indexing data**
	*I \<Image type>	
	*K1 \<Index key 1>	
	*K2 \<Index key 2>	
	*K3 \<Index key 3>	
	*BC \<Barcode read>	
	*WF \<Workflow queue>	
	*A \<Next page flag>	
	*C \<Comments>	
	*Z End of file flag	
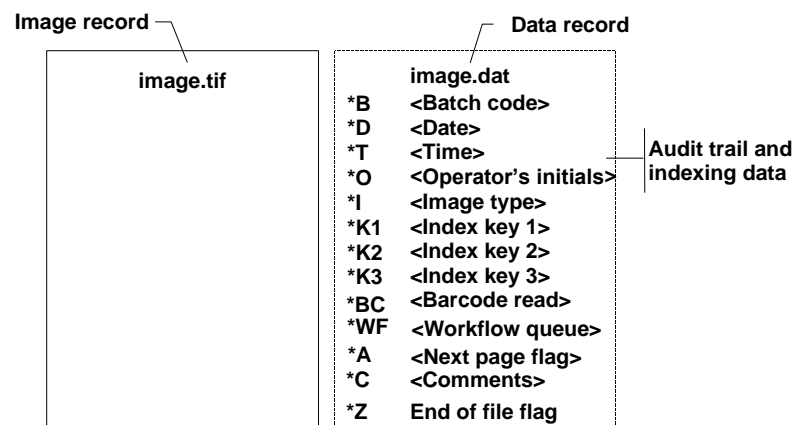
The *image record* stores a compressed digitized bitmap of the scanned image. The *data record* stores indexing and audit trail information until an image is indexed. Stored data is marked by an asterisk in the .dat file. After indexing, the data is filed in the

1MAGE.DETAIL and 1MAGE.MASTER files on the image server and the data file is deleted.

What's New

1Scan 10.2.1 is the first release of 1Scan that supports queue security. Queue Security is a new 1MAGE feature that allows only those users known to the image server to use ToolScan/1Scan, and only allows specific 1MAGE users access to predefined scan queues on the image server. Users with scanning privileges still have the flexibility to create their own batches to organize their scanning work. However, users must first pick from a list of scan queues when logging into 1Scan.

In order to enforce queue security, significant changes were made to the way 1Scan interacts with the image server and to the way scanned images are transferred and stored. These changes require that 1Scan now recognizes whether or not it is connecting to image server version 8.1. When 1Scan connects to 1MAGE 8.1, all the new queue security features are available. When 1Scan connects to 1MAGE 8.0a or earlier, 1Scan functions the same as in earlier releases.

Information in this user guide is organized into four parts. The first part covers information that users need to know when connecting to a 1MAGE 8.1 Server. The second part discusses what users need to know when using 1Scan 10.2.1 to connect to 1MAGE 8.0a Server versions or earlier. The third part discusses general 1Scan procedures. The fourth part discusses common troubleshooting procedures.

Connecting to 1MAGE 8.1+ server

ToolScan must be configured prior to running 1Scan. Use the following procedures to configure ToolScan

Accessing ToolScan

To start ToolScan click the ToolScan icon on the desktop.

ToolScan Login Setup

The first time ToolScan is run, the ToolScan Login Setup screen displays.

Use information in the following table to configure ToolScan. This table lists and defines each of the fields for this screen

Fields:

Image Host (required)	Enter either the IP address or hostname. Entering the IP address instead of the hostname assures connectivity even if the host file is not up to date.
Port – (required)	The default port number, 2222, displays. If you are already using port 2222 for another connection, enter an alternative port number here.
Login Name (required)	Enter a login name. Only user names defined on the imageserver are allowed to connect to login to ToolScan/1Scan.
Options	**Timeout** is the amount of time 1Scan will wait for a response from the image server. If

1MAGE takes longer than the amount of time defined here then 1Suite display a "recv () call timed out" message and 1Scan will close. Typically, the value is set to 60 (sec) but may be adjusted upwards if you think you will be undertaking lengthy cross-reference searches.

Tracing - records the communication traffic from ISP. Enable this option only if you are experiencing difficulty with ToolScan.

Proxy   Use Proxy settings if 1Scan will be connecting through 1Proxy. 1Proxy provides a way to connect to the image server through a firewall.

Proxy Host - enter the IP address of Proxy Host.

Port - The default port number, 4444, displays if you populate Proxy Host.

Once you have entered all of the required information, click OK. The ToolScan Login screen displays.

Enter a valid user name and password. Only user names defined on the image server are allowed to connect to login to ToolScan/1Scan.

Design (Tool Scan)

The configurations settings that display is different when connecting to 1MAGE server 8.1+ than it is when connecting to earlier 1MAGE versions. The following sections discuss the configuration options for connecting to different versions of the image server.

When using ToolScan to connect to a 1MAGE 8.1+ server, only the following three fields are required to connect to the image server.

Capture Path	Enter the path on the local machine are where scanned images will be stored before they are transferred to the image server.
Batch Enabled	Check this box to enable batch mode scanning.
Scanner ID Number	Enter two alphanumeric characters that will uniquely identify this scan station on your network. For example, S1.

The "Starting Sequence Number field is for reference only. This field displays then current number that will be assigned to the next scanned image.

Note: The options menu item contains one option to configure imprinting. This is an optional feature that is available only for Bell and Howell scanners. See the instructions for enabling Imprinting on page 25 for more information.

Accessing 1Scan

1Scan Login

Click the 1Scan icon on your desktop. The 1Scan Login screen displays.

Enter a valid user name and password. Only user names defined on the image server are allowed to connect to login to 1Scan.
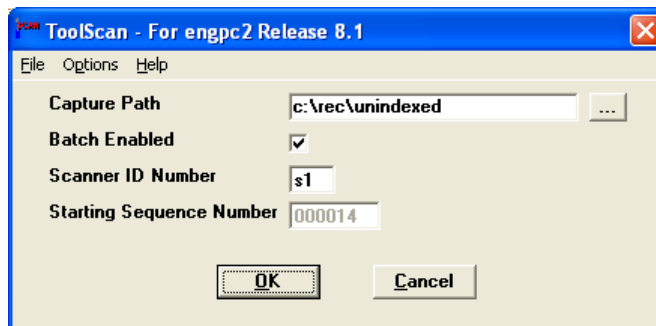
If you wish to view the 1Scan Login settings, click setup. Click Setup. The 1Scan Login Setup screen is similar to the ToolScan Login Setup screen.
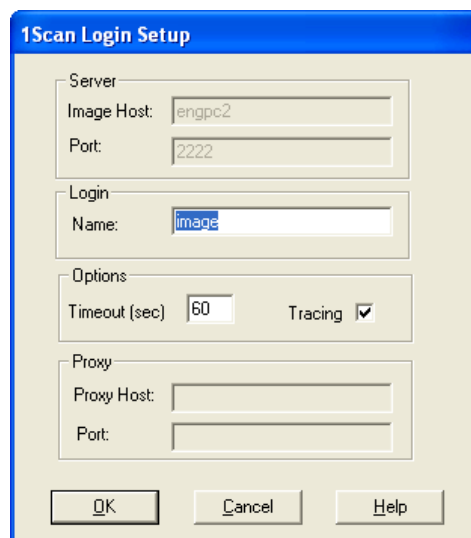
The fields are defined with settings that were entered from ToolScan. Only the Login Name and Options fields may be edited. The Server and Proxy setting must be defined in ToolScan.

Select Queue and Batch

Every user who logs into 1Scan is prompted to select a Scan Queue and (if Batch option is enabled) enter a batch name. Only scan queues defined in 1MAGE administrator's interface (Scan security by user) for this user display in the Scan Queue field.
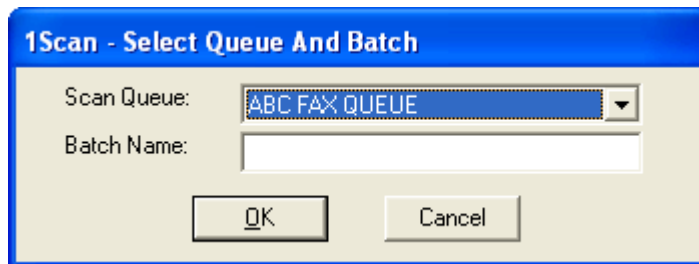
If the user has privileges to access more than one scan queue the Scan Queue field present the option to select a queue from a pick list.
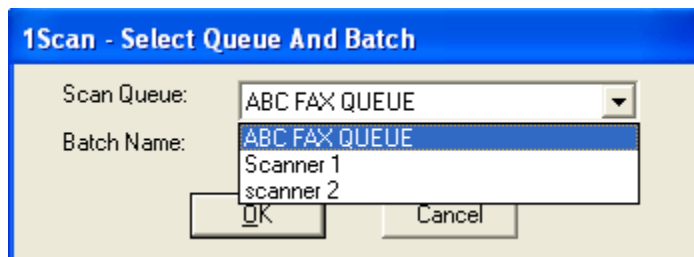
Enter a batch name. This can be any name you like. However, the name cannot contain spaces or special characters. See "To enter a batch code" on page 37 for more information on rule for batch names.

After a successful login, the main 1Scan view window displays.
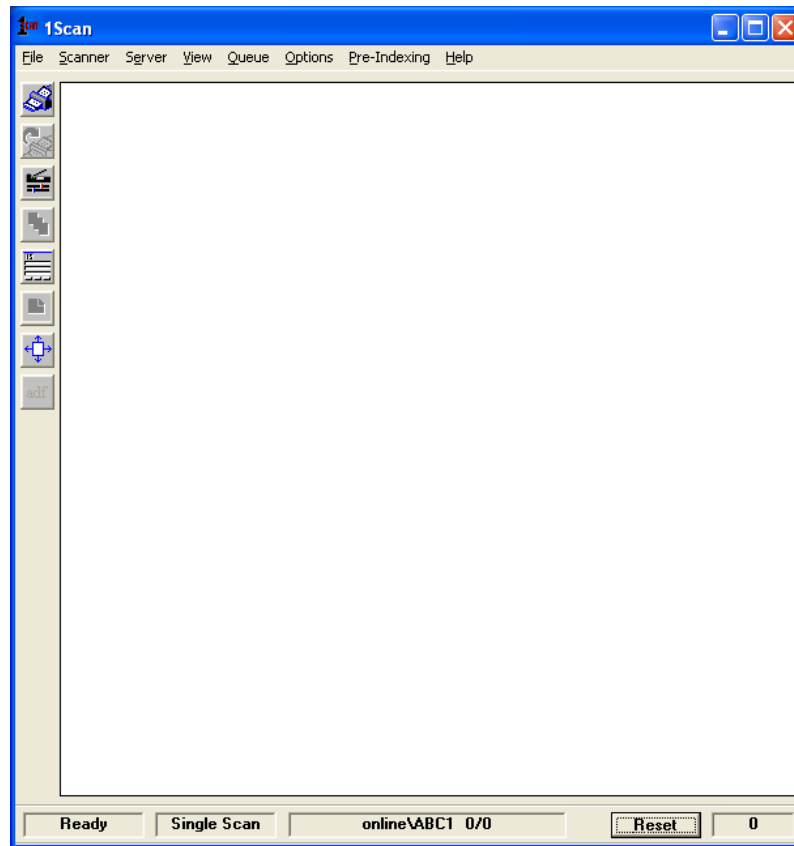
The bottom of the view window displays a status bar containing the following information:

- 1Scan status indicates whether 1Scan is initializing, ready to scan, or is in process of scanning.
- Scanning mode indicates whether 1Scan will scan in single scan mode or in duplex mode. When scanning in duplex mode both the front and back page displays side by side in the view window.
- Queue\Batch code name indicates the path where scanned images are stored. This path reflects the server connection state (online vs. offline), the queue name, and the batch name.
- Location within the batch indicates the location of the currently displayed image in the batch. For example, if you are viewing image 3 out of batch containing six images, this value would appear as 3/6.
- Image counter indicates the total number of images scanned in the current session.

Accessing 1Scan Offline

1Scan validates users against the image server. As a result, scanner operators connect directly to the image server when they log into 1Scan. However, there may be times where it is not possible to establish a connection with the image server and there is scanning work that still needs to be completed. 1Scan accommodates for this possibility by providing an "offline scanning" feature. Images can be scanned and stored locally on the scan station for as long as necessary. When connection to the image server is restored 1Scan prompts the user to transfer any or all of the batches available for transfer when the user logs into 1Scan.

To use 1Scan "offline" start 1Scan as you normally do. When the 1Scan login screen displays, click Offline.
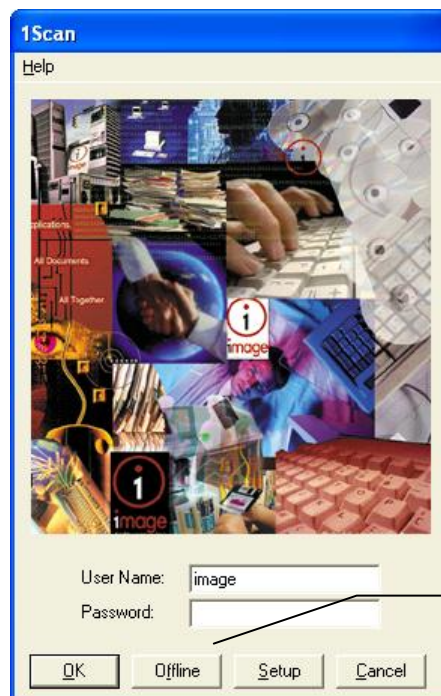
Click **Offline** to start 1Scan offline.

The 1Scan User Login for offline scanning displays.

1Scan User Login - Offline

User Name: image

OK   Cancel
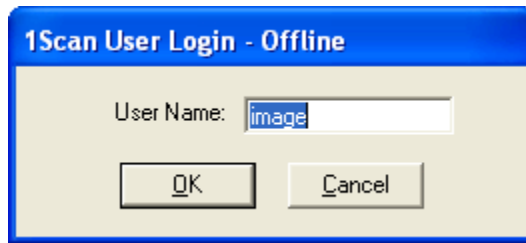
This screen displays the username for the last valid login. Press OK or enter a valid user name. If an invalid user name is entered a message displays stating 'User "<username>" has not been assigned a scan queue. Cannot continue.' 1Scan closes.

1Scan

User "imag" has not been assigned a scan queue. Cannot continue.

OK
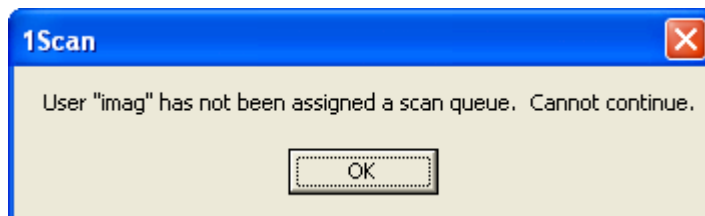
Once you have successfully logged into an offline 1Scan session the 1Scan Select Queue And Batch screen displays. If a user has privileges to access more than one scan queue, the Scan Queue field presents the option to select a queue from a pick list. Select the desired queue and enter a batch name. The main view window displays.

1Scan

File Scanner Server View Batch Options Pre-Indexing Help

Ready   Single Scan   offline\FAX2\batch1 0/0   Reset   0
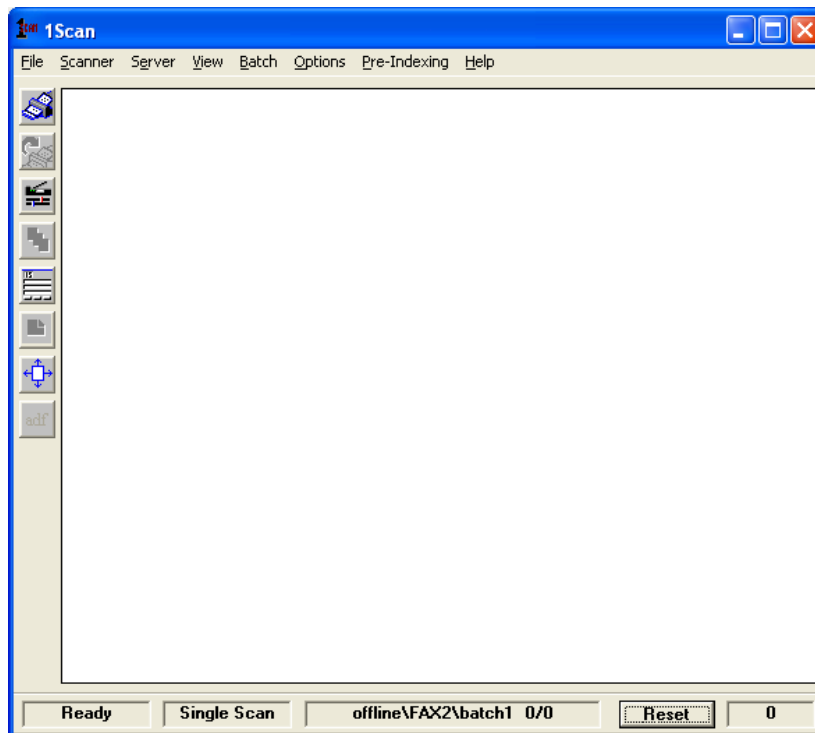
Users may scan in offline scanning mode, just as they would in online scanning mode. However, user will not be able to transfer scanned images to the image server until the next time the user logs into 1Scan in online scanning mode.
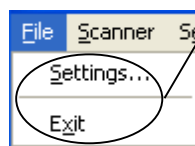
No Transfer option displays when 1Scan connects to 1MAGE 8.1 in offline mode.

Exiting 1Scan when scanning is complete

Select Exit from the File menu. If the user has logged into 1Scan in online mode and if there are images available to be transferred the Transfer Images dialog box displays.
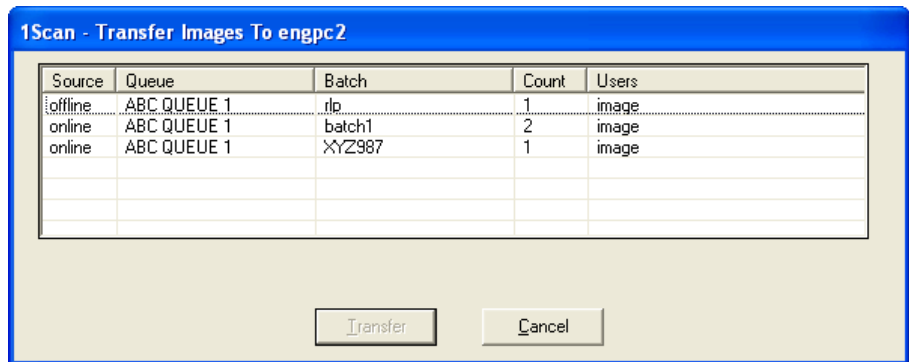
Select the batches to be transferred.

Note: Press the Ctrl key to select multiple batches or press Ctrl-A to select all of the batches.
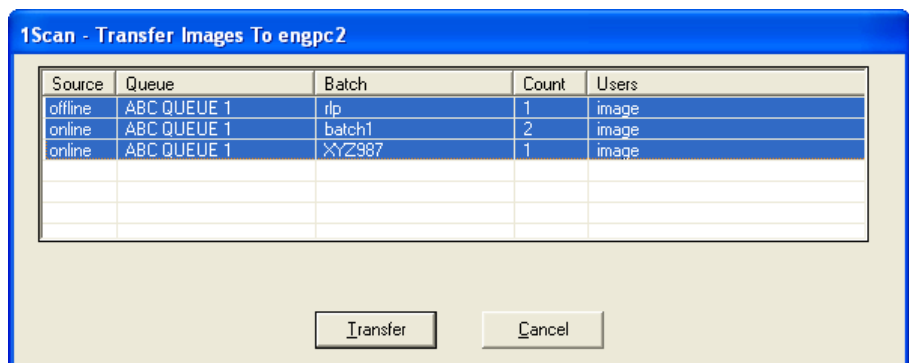
The Transfer button will be enabled. Press Transfer to send the batches to the image server. Once the transfer is complete, 1Scan closes.

Connecting to 1MAGE 8.0a (or earlier) server

When ToolScan or 1Scan connects to a 1MAGE server version 8.0a or earlier, the legacy interface for ToolScan or 1Scan displays. Scanned images must be transferred to the image server using one of the transfer methods available in ToolScan. The Transfer method must be defined and configured before using 1Scan. The following sections describe how to access and configure the legacy ToolScan interface.

Accessing ToolScan

ToolScan is a configuration utility for 1Scan. It defines the path to the image server and how image transfers will be managed. Tool Scan may be configured to accommodate special business needs, such as:

- Grouping images in batches by scanner ID
- Imprinting images at scan time with the system date, time, batch number and operator initials
- Modifying how images are transferred to operators for indexing.
- Establishing temporary holding locations — a drive or directory — for batches of images in order to implement recognition or enhancement technology

Access

To access Tool Scan, double click on its icon.

Tool Scan settings may be viewed in read-only mode from the Settings option of the 1Scan File menu.

Navigation

ToolScan settings may be accessed using the pull down menu and/or keyboard commands. This manual will document keyboard commands and the 1Scan tool bar.

To access main menu options using mnemonics, hold down the Alt key and type the item's mnemonic; to access a submenu option, simply type the mnemonic. For example, to access the Options menu, hold down the Alt key and type o.

Design

The Tool Scan dialog box displays three menu options: File, Options, and Help; a check box; and five data entry fields: Scanner ID Number, Capture Path, Transfer Method, Starting Sequence Number, and Root Server Path.
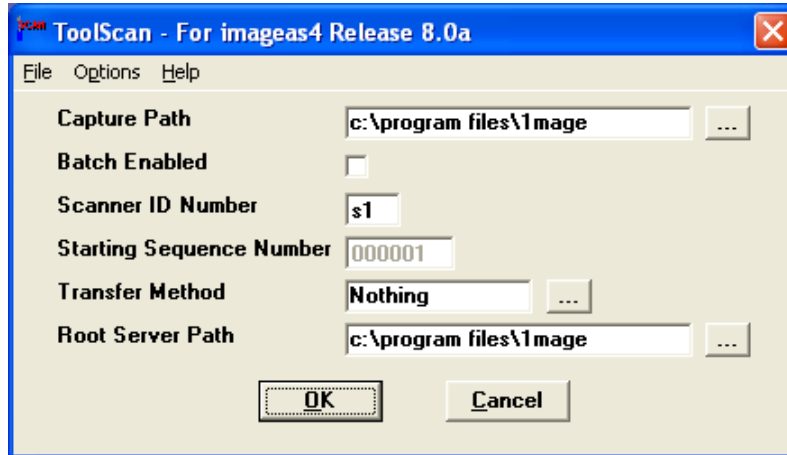
File submenu choice is Exit.
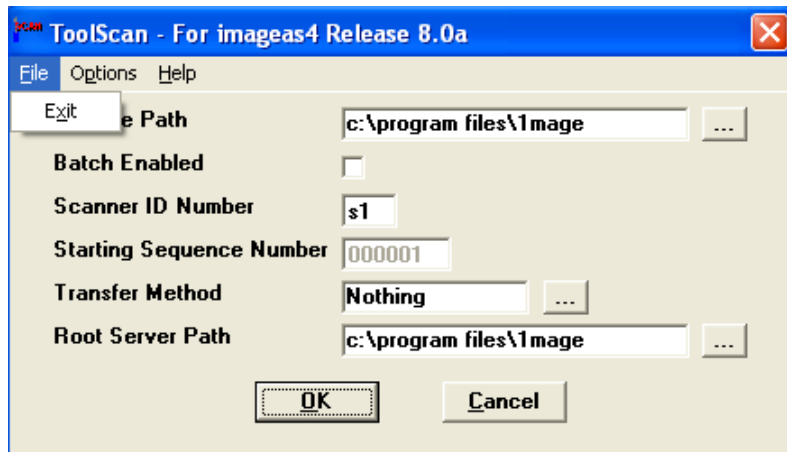
Options submenu choice is Imprint Setup….
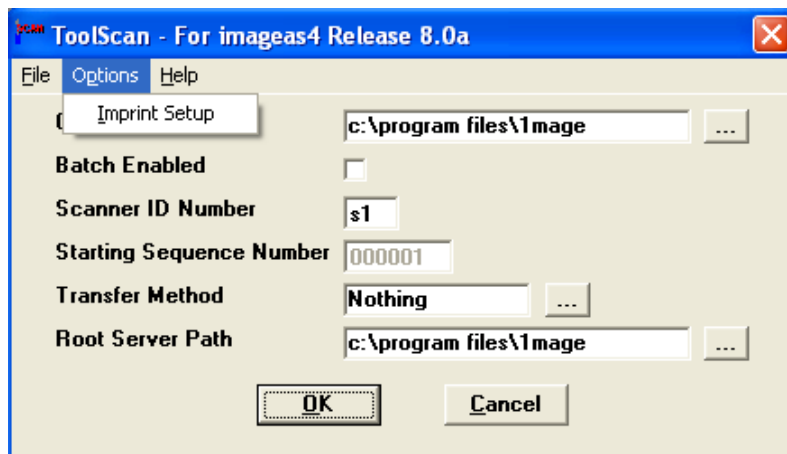
Help submenu choices are Index and About Tool Scan…
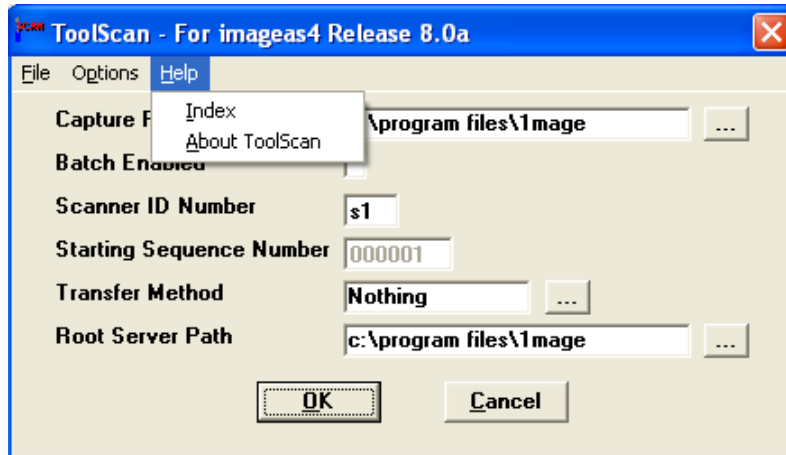
About Tool Scan provides release and version information.
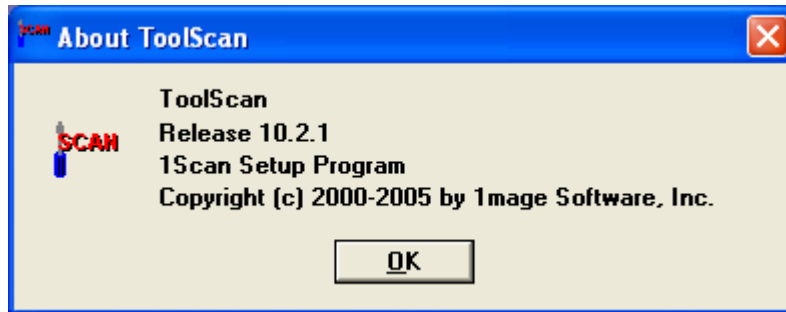
Using ToolScan to set up 1Scan

The following sections define each of the fields and configuration options for ToolScan.

Caution: Do **not** run Tool Scan when 1Scan is running!

If Tool Scan is running while 1Scan is active, changes made by Tool Scan may be lost when 1Scan exits and updates the initialization file. Whenever a scan station is powered on after initial set up, Tool Scan defaults its settings to those that were last saved.

Enable the Batch Code option

Batch mode scanning is an effective choice for 1Scan users who wish to organize their images into groups of images that can be recognized by name.

1Scan users may use batch mode features to ensure the quality of images before they are sent to the image server by reviewing and reordering their images, or by deleting selected images, or the entire batch.

When the Batch Code function is enabled in Tool Scan, 1Scan displays a Batch Code dialog box immediately after the Operator Name dialog box is populated. (See "To enter a batch code" on page 45).

Click on the box labeled Batch Enabled if you wish to attach a batch code to a group of scanned documents. A checkmark appears when the option is enabled and a *B <Batch Name> is written to the .dat file.

Batch Enabled	☑

Enter a Scanner ID Number (required)

Enter the name of the scanning station attached to your PC.

Use two alphanumeric characters in any combination, such as *lowercase* s followed by the number of the scanning station; for example, s1, s2. These characters become the first 2 positions in the file name of the image and data files created by 1Scan.

Name the capture path (required)

The capture path includes the drive and directories where images are captured. You may choose a local drive or any remote drive with an NFS mount to the scanning PC.

1.   Click on the ellipsis box. The Capture Path window displays.

Click on the arrow box to display a list of drives. Double click to select a drive and then select a directory beneath the drive.

This icon represents a hard drive.

This icon represents a CD-ROM drive.

This icon represents a mapped network drive.

This is the arrow box.
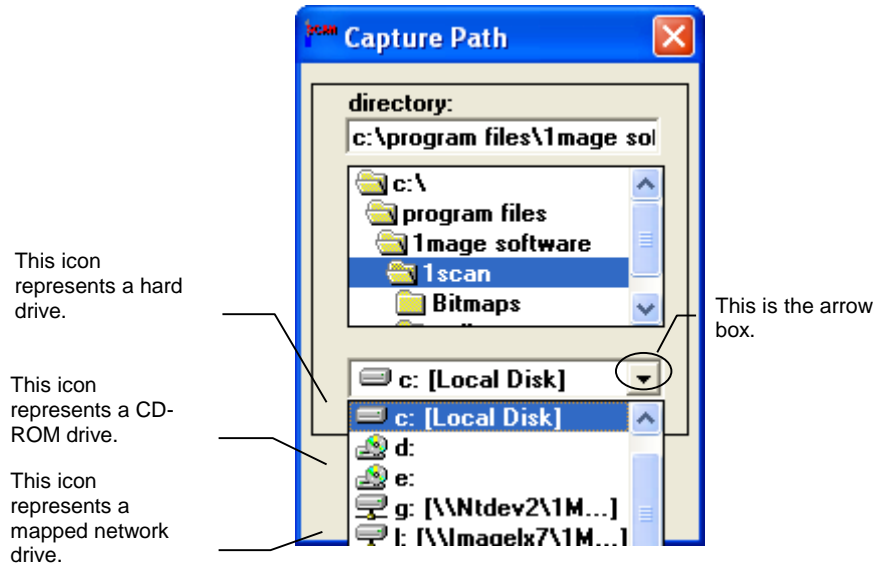
2. Confirm that the Capture Path displayed in the directory box is correct and click on OK.

Select a File Transfer method (required)

A transfer method identifies the manner in which images are moved from where they are captured to where they are held until they are indexed or stored.

1. Click on the ellipsis box to display the Transfer Methods dialog box.
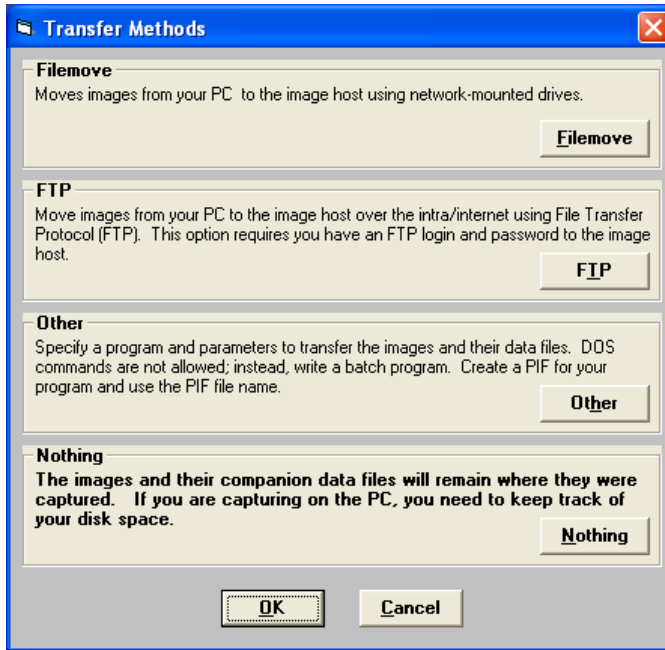
Note: Currently selected Transfer Methods are highlighted in bold font.

---

2. Select a transfer method.

Select	To
Filemove	Use Filemove when you wish to capture images:

Use Filemove when you wish to capture images:

- On your PC and transfer them to the image server.

- In a subdirectory of the 1MAGE indexing queue and then transfer them for auto-indexing.

You may move scanned images at any time while 1Scan is running using File > Transfer images. Each time you exit 1Scan, you will be prompted to transfer all images still resident in your capture path.

Filemove will detect *duplicate* names. If there is a file in the transfer-to path that is the same as a file in the capture path, Filemove will prompt Skip or Overwrite.

1. Click on Filemove. The Filemove dialog box displays.

This is the capture path.

Click here to display the Destination dialog box.
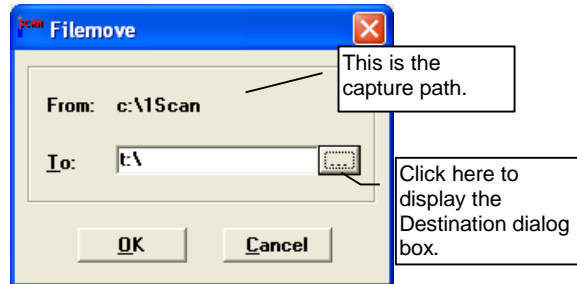
2. Click on the ellipsis. The Destination dialog box displays.
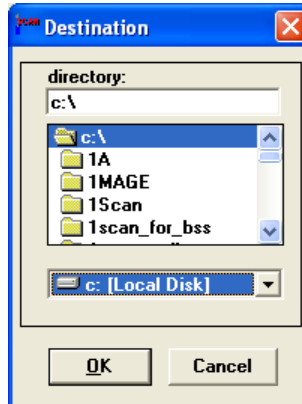
3. Select a destination drive.
4. Select a destination directory.
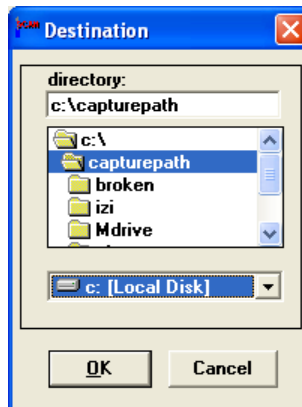
5. Click OK. The Filemove dialog box displays with the "To" field populated with selected destination directory.
6. Click OK. The Transfer Methods window displays. Click OK to return to the Tool Scan window.

Select	To
FTP	Use FTP to move files over the Internet or over an Intranet using the File Transfer Protocol (FTP). When you use this transfer method, FTP must be available on your PC and a FTP server must be running on the image server.

1. Click on FTP. The FTP dialog box displays.
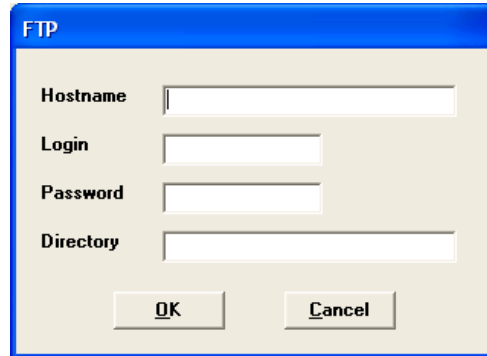
2. **Enter the following:**

   Hostname - Enter the host name of the image server.

   Login and Password - On UNIX systems it is possible to set up a login exclusively for FTP. This enhances the security of the image server but it isn't a requirement.

   Directory - Enter the name of the directory into which you want to transfer the images; for example, *1MAGE.SCANIN.*

3. Press Enter or click OK.

Select	To
	Use Other to specify a program and parameters that will transfer the images and their data files. Use "Other" if there is a required of preferred method for transferring files on your network.

Do not use DOS commands to write your program for Other; instead write a batch program. Enter the path and name of the batch file in the Other Method text area.

For instance, select Other

1. Click on Other. The Other Method dialog box displays.
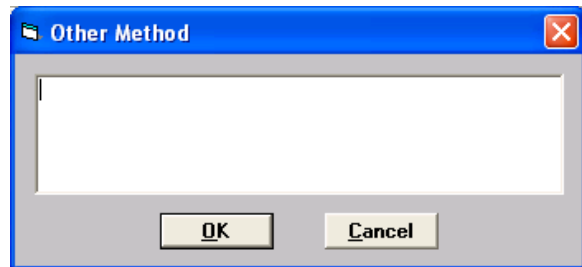
2. Place the cursor in the data entry field. Type an executable file name (including its parameters); do not exceed 128 characters (this method is equivalent to Run from the Start Menu in Windows OS) and click on OK. The Transfer Methods dialog box displays.

   Note: If the path or batch file name contains embedded spaces, put quotes around embedded spaces, or put quotes around the entire statement. For example:

   "c:\Program Files\1mage Software\1Scan\mybatchfile.bat"

3. Click on OK.

Select	To
Nothing	Use Nothing to leave scanned images and data files in the location specified by the Capture Path. Be aware of drive issues such as disk space or fragmentation because *both* .tif and .dat files remain where they are captured.

Use Nothing when you wish to capture images:

• Directly to a network drive (This would typically be the 1MAGE.SCANIN directory on the image server).

• When external operations will be processing scanned images.

1. Click on Nothing. No dialog box displays because there are no transfer parameters to be set.

2. Click on OK. |

Starting Sequence Number

✔ You may not reset the default starting sequence number.

1Scan advances automatically through numbers 000001 to 999999 and then rotates back to 000001. Because this six-digit number is part of the image's initial name, it plays a primary role in the indexing of the images.

If, while scanning documents, the sequence number wraps from 999999 *back* to 000001, indexing will occur out of sequence; the low numbered images will sort before the high numbered ones. Therefore, if you care that your documents are indexed in the order in which they were scanned (as in the case of multi-page or workflow documents, for example), monitor the starting sequence number and the documents that you are scanning so that you do not interrupt the logic of your indexing or workflow processes.

Root Server Path (required)

The Root Server Path is the path where 1Scan can find both udf.ini and docs.ini files. 1MAGE code file maintenance routines create these initialization files on the server. 1Scan uses the type codes and index keys in the udf.ini and docs.ini files when **pre-indexing** occurs at the scanning station.

These files can either reside on the image server; or they can be copied from the image server to a local drive on the local 1Scan machine.

If these files are to be used from a local directory, they will need to be copied from the image server. Defining a local path to the udf.ini and docs.ini files may reduce the amount of network communication that would be required at scan time.

If using the files on the image server the Root Server Path will typically be the 1MAGE/1MAGE.SCANIN location. This path is normally the capture path if you are capturing images on the server.   Defining a path to the udf.ini and docs.ini files on the image server ensures that the most current udf.ini and docs.ini files are used.

1. Click on the ellipsis box. The Root Server Path window displays.

2. Click on the "down arrow" box to display a list of drives. Double click to select one and then select a directory within it.

This is the down arrow box.

This icon represents a hard drive.

This icon represents a mapped network drive
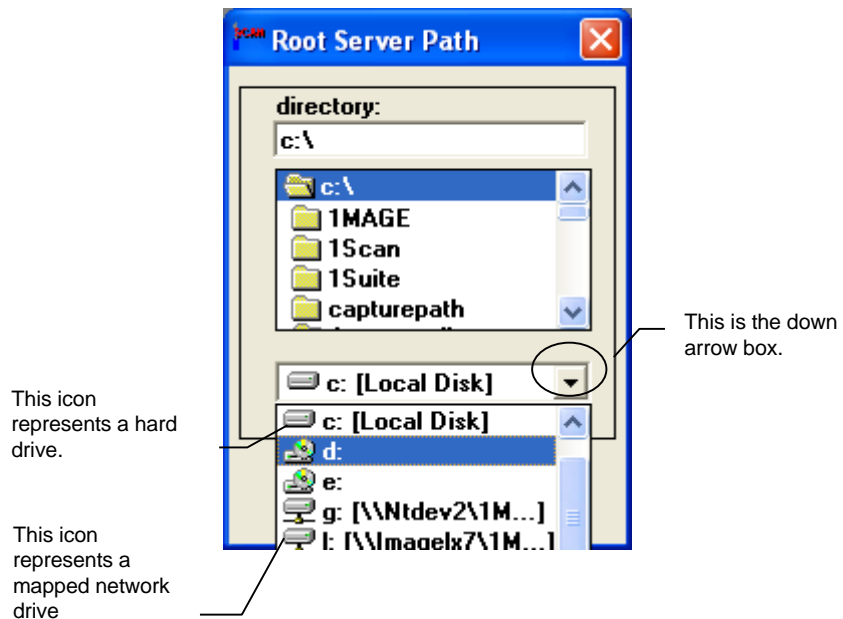
3. Confirm that the Root Server Path displayed in the directory box is correct and click on OK.

Enabling Imprinting (optional)

When enabled, the imprinting option permits a user to affix system information and/or static text to an image while the image is being scanned. Imprinted text is permanently attached to the image and displays (when it is viewed, printed, or faxed) in a horizontal or vertical fashion originating from or terminating at the upper left corner of the image.

Important   The imprinting option is NOT available if you are using a Kofax Adrenaline software engine or if you are using VRS with any scanner except the Bell and Howell 8000 series.

1. To enable the Imprint option, select Imprint Setup from the Options menu. The Imprint Setup window displays.
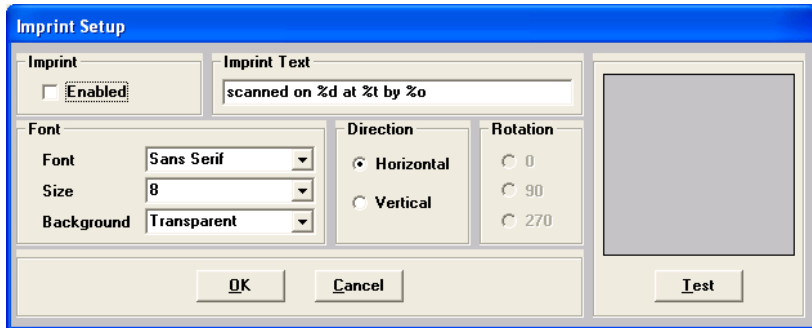
2. Place a check in the Enable check box.

Note: If Imprint is enabled in Tool Scan, it may be toggled on or off in 1Scan by using the Imprint Page option. If it is not enabled in Tool Scan, the Imprint Page option will not be active in 1Scan.

3. Select Serif or Sans Serif from the Font pull down menu.

A serif font displays short lines stemming from the upper and lower ends of the strokes of a letter; a sans serif font displays no lines. For example:

Serif font   Sans Serif font

d d
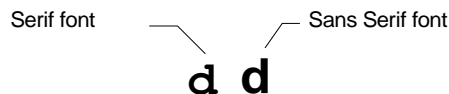
4. Select 8, 10, or 12-point size from the Font pull down menu.

5. Select Transparent or Opaque from the Background pull down menu.

If you select Transparent, the portion of the image beneath the imprint shows through. If you select Opaque, the portion of the image beneath the imprint does **not** show through.
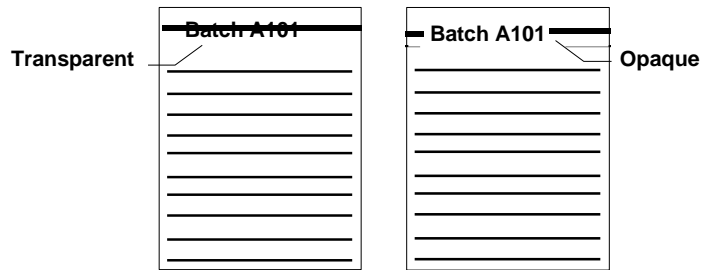
6. Select either Horizontal or Vertical imprint text display and then select the degree of rotation which suits the image you are scanning. See the example below for versions of display and rotation.
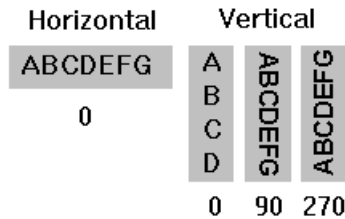
7. Populate the Imprint Text field with a variable and/or static imprinted text.

At scan time, *variably* imprinted text displays dynamic system information, such as batch name, operator name, system date, or system time. To include *dynamic* system information in an imprint, enter some or all of the following special characters in the Imprint Text field.

Enter this special character	To get this dynamic system information	For example
%B	Batch Code	A-100
%D	System Date (mmddyy)	08/01/00
%T	System Time (military)	16:30
%O	Operator's initials	PJA

Static imprinted text is text that does not vary with system changes; the same text appears in all imprints and is appended to a series of scanned images until the text is changed or deleted in the Imprint Setup window.

Static and variable text may be combined in the same imprint; for example, the imprint resulting from this combination of variable and static text, **%B scanned at COS by %O on %D at %T hours,** might display on the image or images as, **A-101 scanned at COS by LAB on 08/01/00 at 15:18 hours**.

8. Click on Test to display a model imprint using the options you selected.

9. Click on <u>O</u>K to save your changes to the Imprint option. Cancel exits the Imprint Setup window without saving your changes.

Select Save from the File menu, then select Exit from the File menu (required)

If you exit or close without saving, Tool Scan displays the following dialog box. Click on <u>Y</u>es to save your changes; <u>N</u>o to exit the Tool Scan program; and Cancel to return to the Tool Scan interface.
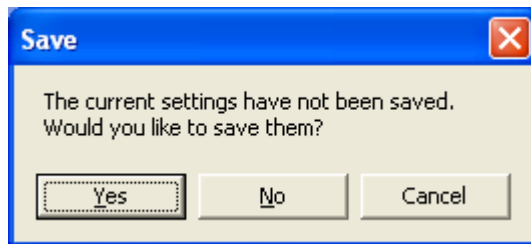
Accessing 1Scan

Note: This section describes accessing the legacy 1Scan Interface. This interface only displays when connecting to an image server version 8.0a or earlier. If you are connecting to an image server version 8.1 or later see section Accessing 1Scan on page 7.

Double click on the 1Scan icon. The 1Scan screen and the Operator Information dialog box displays.
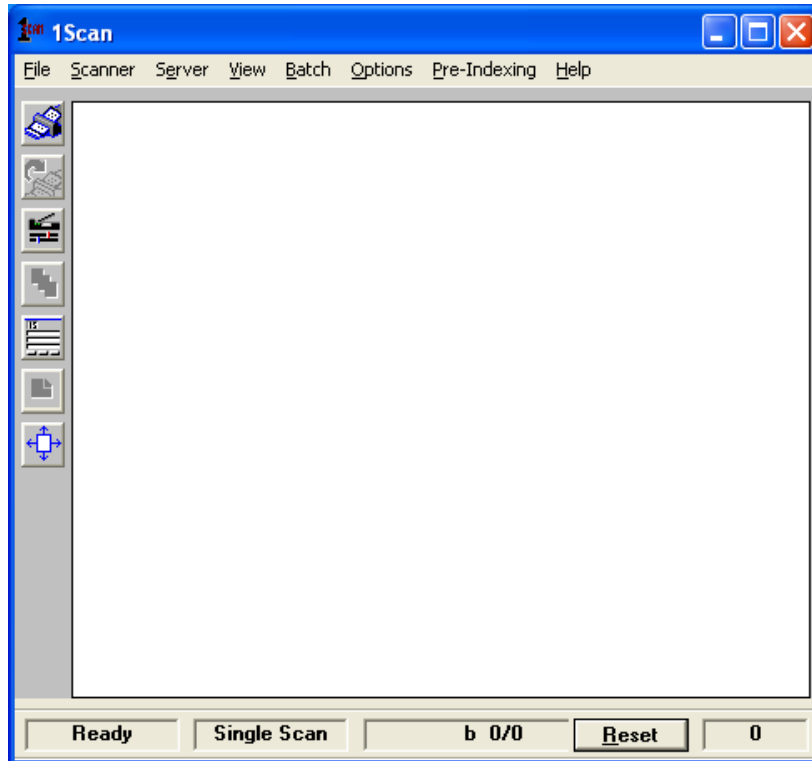
Type your initials and press Enter or click on OK.
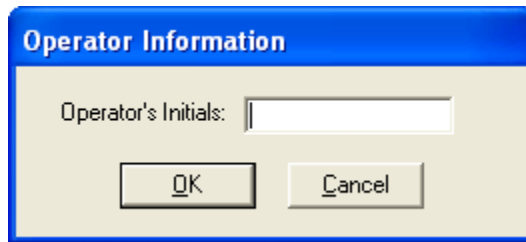
Your initials are stored in the 1Scan .dat file and transferred to the image server after the image is indexed and stored.

If the Batch Enabled flag is set in ToolScan, 1Scan displays a Batch Name dialog box immediately after the Operator Name dialog box is populated.
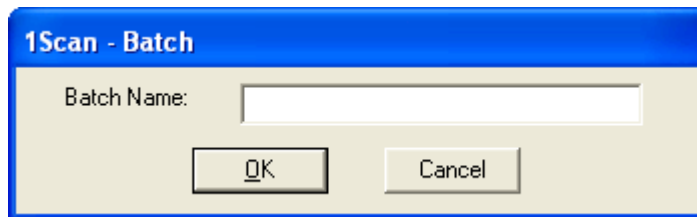
The batch name entered here will display in the batch list on the "1MAGE batches and default queues" screen in telnet, or on the "1Suite batches and default queues" dialog box in 1Suite.

Exiting 1Scan when scanning is complete.

Select Exit from the File menu. If you are in batch mode and Auto Batch Transfer is not enabled you will be prompted to transfer batch images from their subdirectory to the capture path.

If you are in batch mode and Auto Batch Transfer is enabled, images in the batch directory will automatically be transferred to the capture path.

Once the batch transfer process is complete then the images will be transferred from the capture path to the image server according to the transfer method defined in Tool Scan.

Transfer Method	Result
Nothing	1Scan quits immediately. The images remain in the defined capture path.
Filemove	1Scan displays an image transfer dialog box. Click on Start Transfer. 1Scan automatically transfers the images from the capture path (Source) to the destination directory; a progress bar displays.
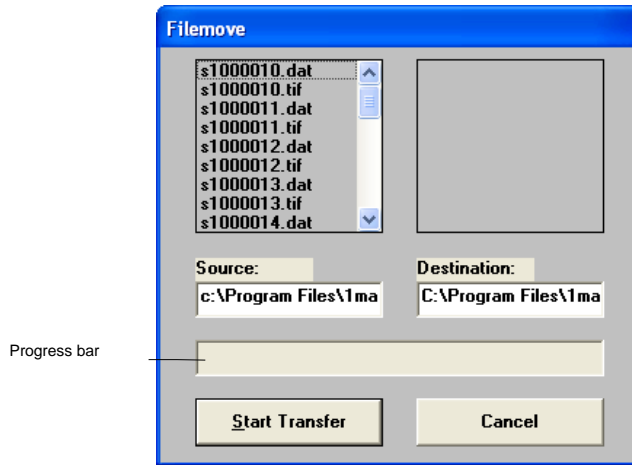
FTP or Other	Depending on the program and the parameters you set, 1Scan displays either a DOS shell or a windows program.

1Scan general procedures

The 1Scan interface presents differently depending on whether 1Scan is connecting to an image server 8.1 or an earlier version. The primary differences between these interfaces are how image are transferred. In general, the procedures for accessing all other 1Scan procedures remain the same.

Note: Check Tool Scan configuration settings before scanning to make sure that all settings are as you expect them to be.

The process for configuring 1Scan, scanning and transferring images typically involves the following Steps:
1. Configure the Scan Session (discussed on page 30)
2. Configure Scanner settings (discussed on page 62)
3. Select Device (discussed on page 70)
4. Select scanning mode (discussed on page 73)
        Regular scan versus Preindexing
        Single Scan versus Continuous Scan
5. Load document(s) in Scanner (discussed on page)
6. Scan Images (discussed on page 80)
7. Review Images (discussed on page80)
8. Transfer Images (discussed on page 29)
9. Exit 1Scan (discussed on page 29)

The following general procedures discuss in detail each of these steps. The following procedures are common to all 1Scan configurations except where noted:

Navigating 1Scan

1Scan screens may be navigated using the pull down menu, keyboard commands (mnemonics and function keys), and/or the 1Scan tool bar.

A mnemonic is any letter that is underlined. To access main menu options using mnemonics, hold down the Alt key and type the item's mnemonic; to access a submenu option, simply type the mnemonic. For example, to access <u>S</u>ettings, hold down the Alt key and type f to display the File menu, release the Alt key and then type s.
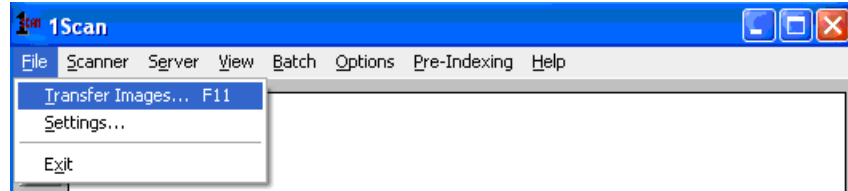
The following function keys are also available:

F1	Main Help Index	F7	View / Fit in Window
F2	Scan	F8	Pre-Index by Document
F3	Re-Scan	F9	Continuous Pre-Indexing
F4	Stop Batch Processing	F11	Transfer Images
F5	Scanner Setup	F12	Options / Add Page
F6	View / Actual		

Design: view window

The 1Scan view window displays an electronic image exactly as it is scanned; for example, if the image was scanned upside down, it displays upside down. 1Scan makes magnification or rotation modifications to the image, which displays in the *view window*, not to the *stored* image.

Note: The resolution at which you view the image is a function of the monitor on which you view it, not the 1Scan software.

The 1Scan window displays eight menu options: <u>F</u>ile, <u>S</u>canner, Se<u>r</u>ver, <u>V</u>iew, <u>B</u>atch, <u>O</u>ptions, <u>P</u>re-Indexing, and <u>H</u>elp. Some submenu items are mapped to a function key, which may be used instead of the mnemonic key or mouse to activate the item.

The bottom of the view window displays a status bar which mirrors the:

- 1Scan status
- Scanning mode
- Batch code name
- Location within the batch
- Image counter
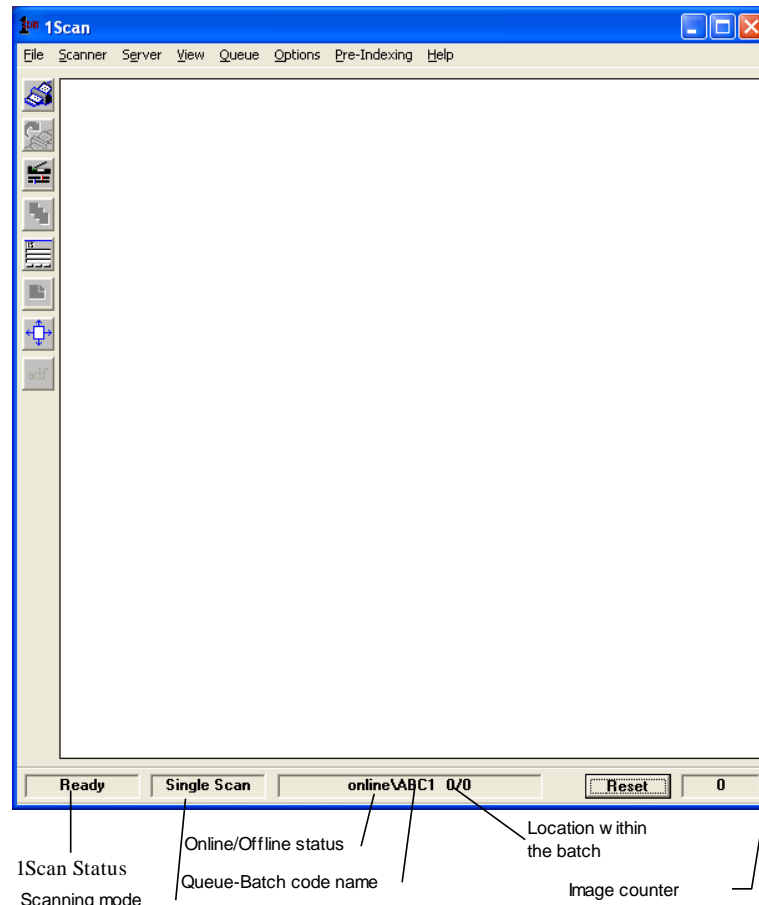
File submenu choices are Transfer Images, Settings, and Exit. Settings… displays the current Tool Scan settings in read-only mode.
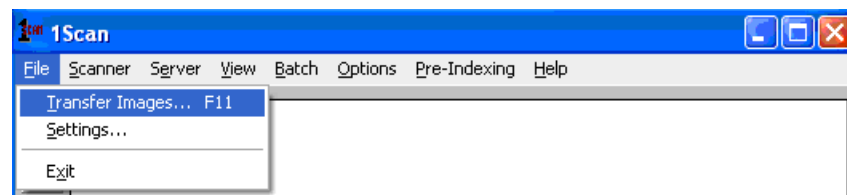
Scanner submenu choices are Scan, Re-scan, Continuous Scan, Scanner Settings…, Reset Engine, and Select Scanner.
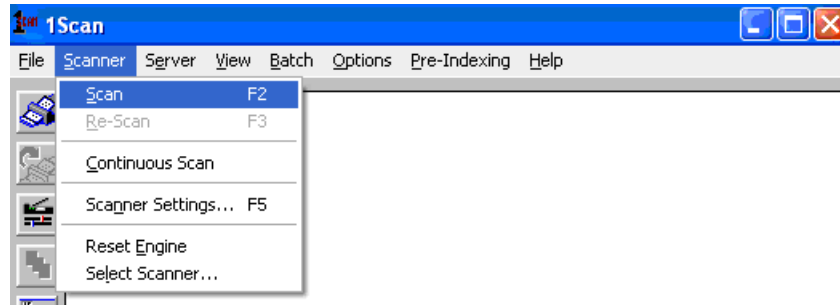
Server submenu choices are Scanner Device, Disk Device Start Batch Processing, and Stop Batch Processing.
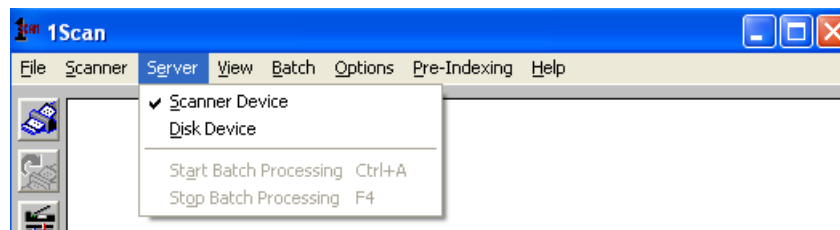
View submenu choices are Actual [1:1], Fit in Window, and Display Settings….
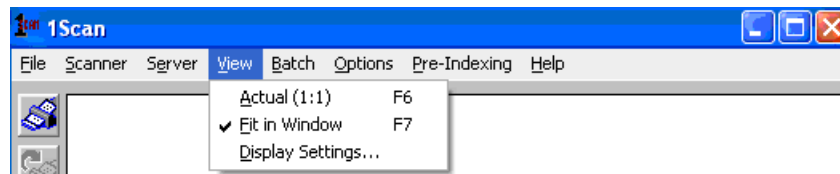
Batch submenu choices are New Batch, First Image, Previous Image, Next Image, Last Image, Go to Image …, Cut Image, Paste Image, Delete Page, Delete Image, Delete Batch.
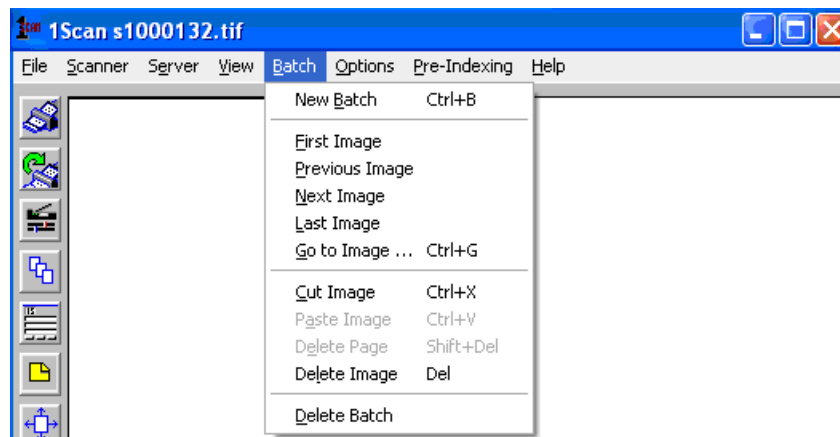
Options submenu choices are Add Comment, Auto Batch Transfer, Reset Counter when Changing Batch, Add Page, Imprint Page, Black Border Properties…, Deskew Properties…, Despeckle Properties…, Deshade Properties…, Line Removal Properties…, Bar Code Properties…, Patch Code Properties…, Log Patch Code Reads, and Save Settings on Exit.
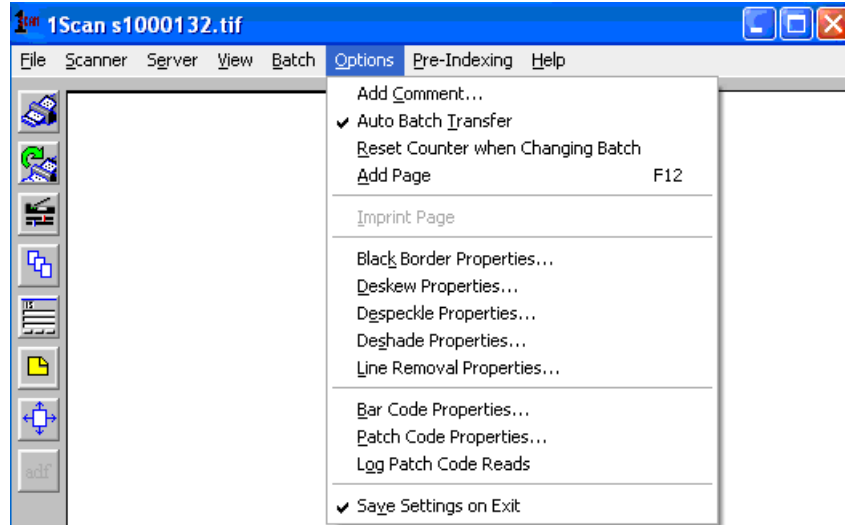
Note: When 1Scan is connecting to an image server version of 8.1 or later the Auto Batch Transfer option is not required. Therefore, the Auto Batch Transfer option is not listed in the options menu

Pre-Indexing submenu choices are by Document and Continuous Pre-Indexing.
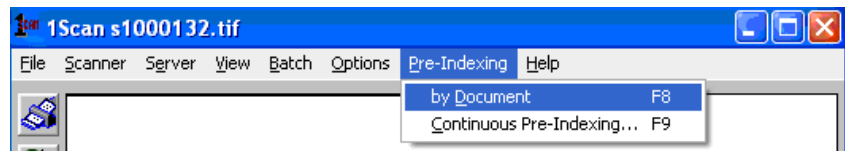
Help submenu choices are Main Index and About 1Scan.
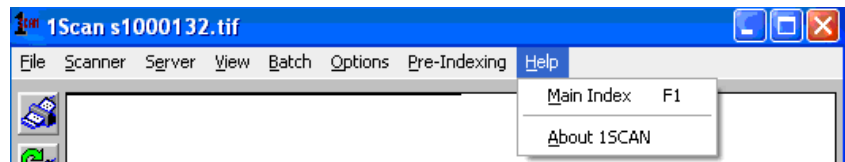
<u>A</u>bout 1Scan… provides release and version information.
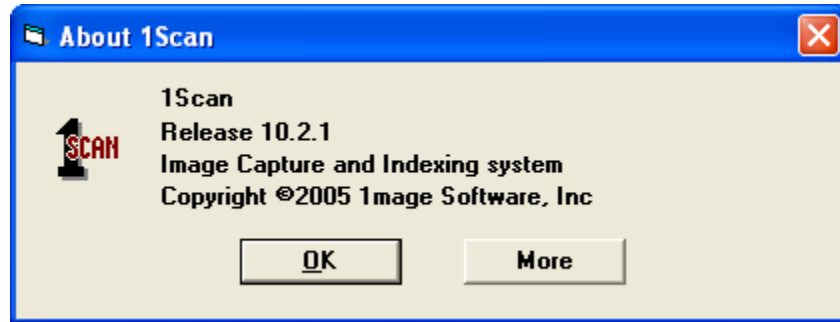
When you click on More, the About… window displays the Engines and Module Revisions available for your software release and installation.
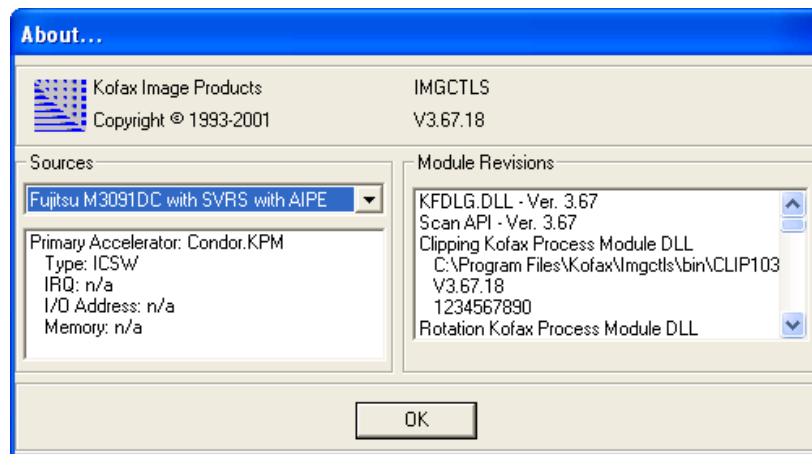
Design: tool bar

In addition to the view window, 1Scan displays a tool bar with eight buttons. Those options that are currently active are highlighted and as the cursor passes over a tool bar button, the name of the tool displays in the status bar at the bottom of the 1Scan view window.

The following is a list and a brief description of each of the tool bar buttons and their functions:

	Scan	Activates scanning
	Re-Scan	Replaces last scanned image with current scanned image (single scan mode only).
	Settings	Displays the Scanner properties dialog box.
	Add Page	Adds the scanned image to the currently

displayed image or (single scan mode only).

	Pre-Indexing	Displays the Pre-Indexing by Document dialog box (single scan mode only).
	Add-Comment	Displays the Comments dialog box. This allows comments to be added to the image. These comments are a part of the indexing information for this image and can be reviewed, edited or deleted after indexing.
	All	Adjusts the size of the image to fit the display area.
adf	Scan Source	Toggles between the scan sources available to your scanner: ADF, Flatbed, or Panel. If only one source is available for your scanner then this button will be grayed out.

Note: When Flatbed is enable the continuous scan option on the pull down menu is grayed out.

Configuring your scan session

1Scan offers a variety of configuration options designed to both facilitate the scanning process and meet your company's specific needs. 1Scan permits the scanning operator to

- Set up the scanner for paper size, source, and destination; scan mode; scanning DPI, contrast, and intensity; orientation, picking rectangle size; and other parameters specific to each type of scanner.
- Enhance, rotate, and magnify an image for viewing.
- Deskew, despeckle, deshade, and remove lines from scanned images in order to enhance and clean up the images.
- Populate the image record with a document type and up to three index keys to an image.
- Enable and configure bar code characteristics.
- Enable and configure patch code characteristics.
- Proof each image within a batch.

Many of these options are found in the main menu under Scanner | Scanner Settings and under Options. Below is a list of specific scanner options.

- Re-size the 1Scan view window

- Set up scan session for duplex mode scanning (See "To configuring duplex scanning" on page 40)

- Set Auto Batch Transfer option (See "To enable/disable Auto Batch Transfer" on page 45)

- Activate the Imprint Page option (See "To activate/deactivate Imprint Page" on page 45)

- Set up Black Border Removal (See "To set up black border removal" on page 46)

- Set up deskewing correction (See To set up deskewing correction on page 47)

- Set up despeckling correction (See "To set up despeckling correction" on page 48)

- Set up deshading correction (See "To set up deshading correction" on page 48)

- Set up line removal (See "To set up line removal" on page 50)

- Enable and configure bar coding (See "To enable and configure bar code characteristics" on page 51)

- Enable and configure patch coding (See "To enable patch code logging" on page 57)

- Enable patch code logging. (See "To enable patch code logging" on page 61)◆ **To enter a batch code**

1. If the Batch Code function is enabled, the Batch Name dialog box displays.
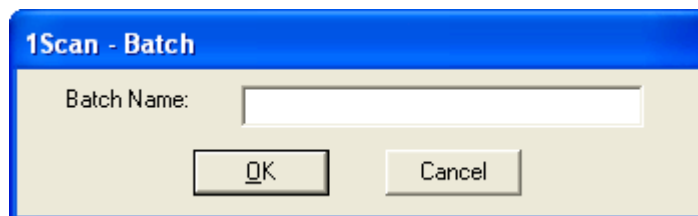
2. Type a New Batch Code. You may use alpha or numeric characters; do not use special characters such as stars (*), slashes (/ \), ampersands (&), dollar signs ($), or pound signs (#). Also, do not put spaces between characters.

Caution: When connecting to image server version 8.0a or earlier, do not use the same batch code simultaneously from multiple scanners. The BUILD.BATCH process will be compromised.

3. Click on OK to accept your entry. Click on Cancel to exit 1Scan.

◆ **To alter the magnification of an image**

1Scan makes magnification modifications to the image, which appears in the view window, *not* to the stored image. Use this feature as needed to inspect image content.

Do *one* of the following:

- From the View menu option, select Actual [1:1] or Fit in Window.

This menu option	Does this
Actual [1:1]	Displays the document image at 100% magnification in the window. The entire document will not be visible. Recommended for quality checking.
Fit in Window	Adjusts both vertical and horizontal dimensions to fit the image into the window.

- Zoom the page in or out.

Type	To do this
I	Zoom the current page in by x2
O	Zoom the current page out by x2

- Use the Rubber band zoom to magnify an area.

Rubber band zoom can be executed at any time. Subsequent scanned documents will display the same zoomed location until another view is selected.

To do this	Do this
Magnify a rectangular area of a page.	1. Position the mouse at one corner of the desired rectangular area.
	2. Depress and hold the left mouse button.
	3. Drag the mouse to the opposite

Drag from here

Image displays

to here
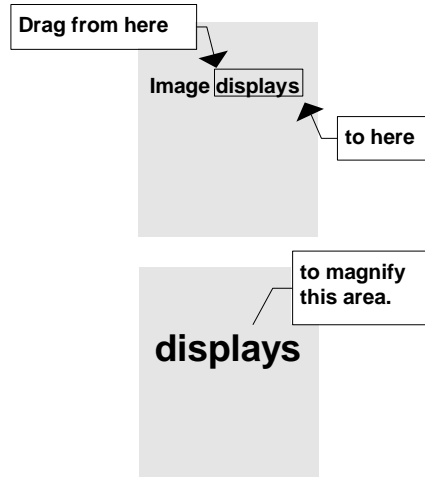
corner of the desired rectangular area.

4. Release the left mouse button.*

to magnify this area.

displays

*Pressing the right mouse button before releasing the left mouse button terminates the operation with no zoom.

Click on OK to save your changes. Cancel exits the window without saving your changes.

◆ **To rotate an image**

All rotations begin from the image's *original* display position; for example, if an image displays upside down, rotate it 180º so that it displays right side up. Remember, 1Scan makes rotation modifications to the image, which appears in the view window, *not* to the stored image.

1. From the View menu, select Display Settings. The Display Settings window displays.

Display Settings

Rotation
- 0
- 270
- 90
- 180

Attributes
- Scale-To-Gray
- Horizontal Emphasis
- Vertical Emphasis

OK   Cancel
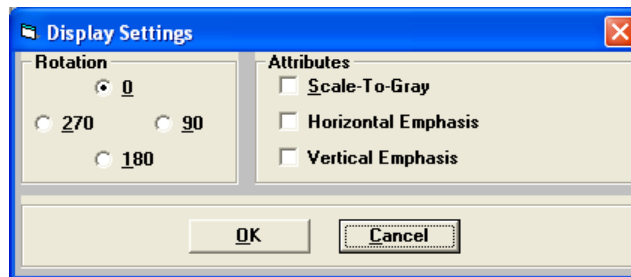
2. Do *one* of the following:

- Select 0, 90, 180, or 270, and press Enter.

This rotation	Does this
0	Returns the image to its original position in the view window.
90	Rotates the image one-quarter of a turn

> to the right (90°) from its original position.

> 180   Rotates the image one half of a turn to the right (180º) from its original position.

> 270   Rotates the image three-quarters of a turn to the right (270º) from its original position.

3. Click on OK to save your changes. Cancel exits the window without saving your changes.

◆ **To improve the appearance of an image in the view window**

These settings change only the image as displayed in 1Scan. They do *not* change the stored image.

1. From the View menu, select Display Settings. The Display Settings window displays.
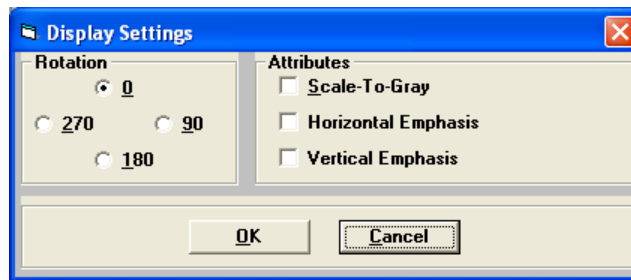
2. Select **one or more** of the following to *darken* the image which appears in the view window:

   - Select Scale-To-Gray.
   - Select Horizontal Emphasis to enhance the horizontal plane.
   - Select Vertical Emphasis to enhance the vertical plane.

3. Click on OK to save your changes. Cancel exits the window without saving your changes.

   Note: If scanning in duplex mode, the display settings for the front and back pages are adjusted separately. Complete the above steps for improving the appearance of the image for both the front and back pages.

◆ **To configuring duplex scanning**

1Scan supports duplex scanning. When in duplex scan mode, both left and right pages display in the 1Scan display window.

This facilitates proofing of double-sided document images by allowing the user to view both sides of a scanned page.
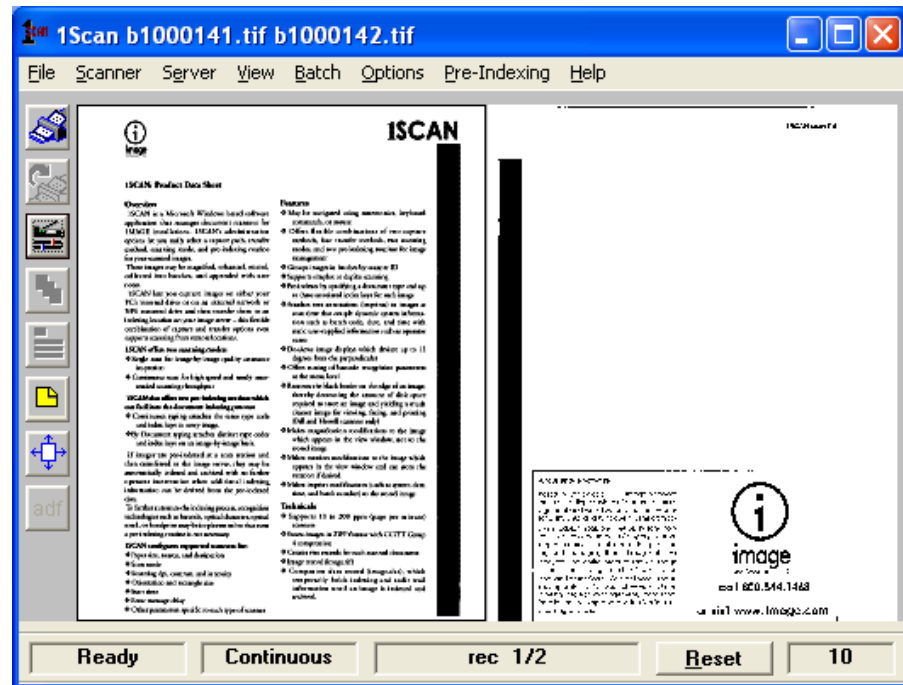
When scanning in duplex mode both front and back pages are treated as a pair. This means that rescanning an image in duplex mode will rescan both front and back pages. An image that is cut and pasted in duplex mode will cut and paste both front and back pages.

Individual pages scanned in duplex mode may be removed from the scanned batch by one of the following methods:

- Configure Back Page Delete (See "To configure back page delete" on page 42)
- Configure Front Page Delete (See "To configure front page delete" on page 44)
- Use Delete Page option from Batch menu. (See "To delete images in a batch" on page 84.)

Complete the following steps to configure 1Scan for duplex scanning:

1. Click Scanner > Scanner Settings. The Scanner Properties screen displays.
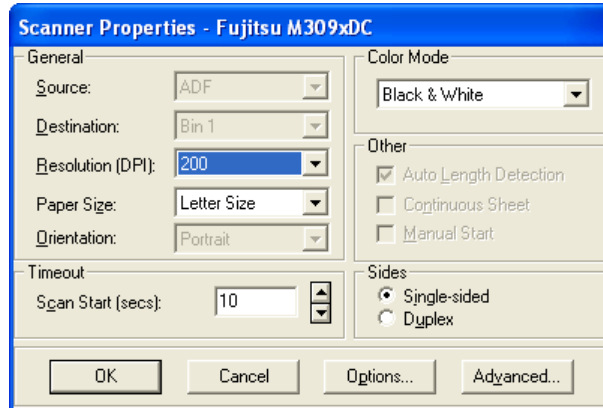
2. Select Duplex and click OK.
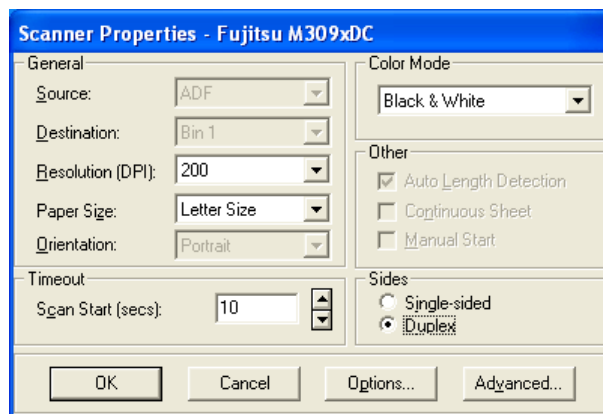
1Scan now displays all scanned images in duplex mode.

◆   **To configure back page delete**

When scanning in duplex mode some users may prefer to throw out blank images that may occur while scanning a batch of images. Typically, these blank images will be the backside of a single page document or a blank page before the start of a new section. 1Scan provides the option of throwing out these intermittent blank pages without throwing out valid images as well.

Complete the following steps to configure 1Scan to throw out empty back pages:

1. Click Scanner > Scanner Settings. The Scanner Properties screen displays.

2. Click the Options button. The Source Properties screen displays.
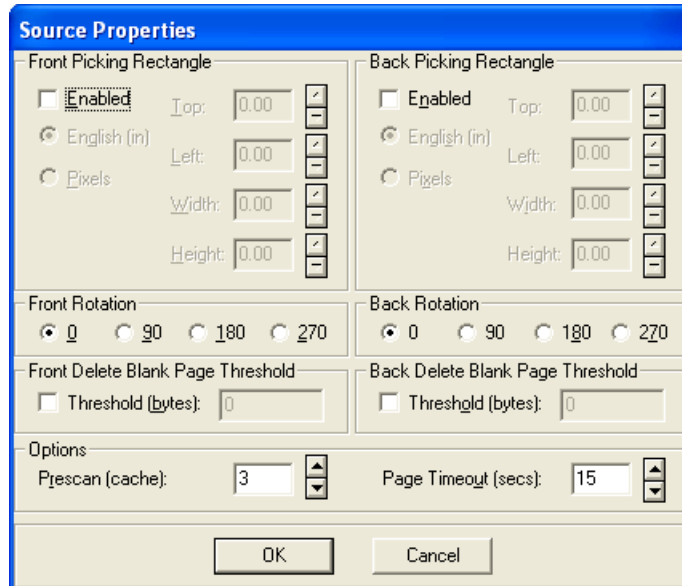
3. Check the Threshold (bytes) box under "Back Delete Page Threshold." The Threshold (bytes) field becomes active.
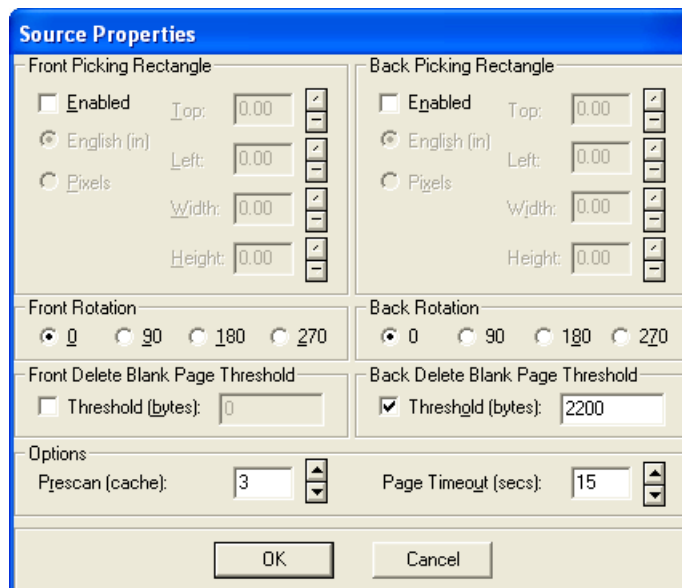
4. Enter a file size value (in bytes) between 0 and 65000.

Note: Blank images vary in file sizes anywhere from 1000 bytes (1k to 3000 bytes (3k) depending on the stock of paper used, on how clean the actual image is at scan time and the resolution used to scan the images. To ensure that only the desired images will be thrown out, scan one to three sample blank images and one to three images with a minimal

amount of content. Compare the file sizes of these scanned sample images and pick a number that is just higher than the file sizes of the sample blank images, but less than the file sizes of the image containing minimal content.

5. Click OK to close the Source Properties dialog box.

6. Click OK to close the Scanner Properties window.

1Scan is now configured to delete back pages.

◆   **To configure front page delete**

Complete the following steps to configure 1Scan to delete blank front pages:

1. Click Scanner > Scanner Settings. The Scanner Properties screen displays.

2. Click the Options button. The Source Properties screen displays.
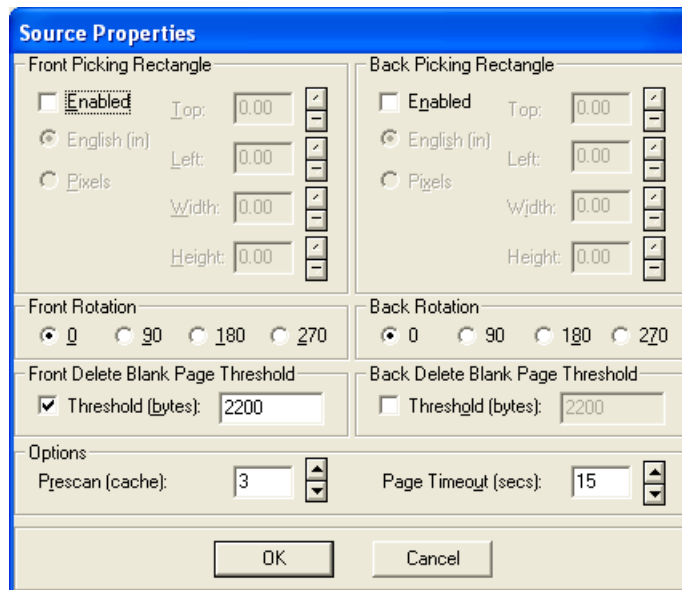
3. Check the Threshold (bytes) box under "Front Delete Page Threshold." The Threshold (bytes) field becomes active.

4. Enter a file size value (in bytes) between 0 and 65000. Click OK. 1Scan is now configured to delete front pages.

Note: Blank images vary in file sizes anywhere from 1000 bytes (1k to 3000 bytes (3k) depending on the stock of paper used, on how clean the actual image is at scan time and the resolution used to scan the images. To ensure that only the desired images will be thrown out, scan one to three sample

blank images and one to three images with a minimal amount of content. Compare the file sizes of these scanned sample images and pick a number that is just higher than the file sizes of the sample blank images, but less than the file sizes of the image containing minimal content.

5. Click OK to close the Source Properties dialog box.

6. Click OK to close the Scanner Properties window.

   1Scan is now configured to delete front pages.

◆ **To enable/disable Auto Batch Transfer**

(Legacy interface only)

Batch transfer refers to the process of transferring image and data files from the batch directory to the capture path. Some configurations may require the user to respond to two sets of image transfer confirmation messages. In these instances users may want to disable the batch transfer confirmation messages when they have completed scanning and reviewing a batch.

Enabling Auto Batch Transfer will automatically transfer batch images from the batch directory to the capture path when the user does one of the following:

- Clicks File > Transfer Images
- Clicks Batch > New Batch
- Exits 1Scan.

To enable Auto Batch Transfer	Select Auto Batch Transfer from the Options menu by clicking it to display a check mark.
To disable Auto Batch Transfer	Select Auto Batch Transfer from the Options menu by clicking it to remove the check mark.

◆ **To activate/deactivate Imprint Page**

Note: Imprinting must be enabled in Tool Scan in order to activate the Imprint Page option in 1Scan. This feature is only available on Imprint capable scanners.

To turn on Imprint Page	Select Imprint Page from the Options menu by clicking it to display a check mark.
To turn off Imprint Page	Select Imprint Page from the Options menu by clicking it to remove the check mark.

◆   **To set up black border removal**

Black borders can appear on images as a result of capturing the images on scanners with black belts or drums, such as the Kodak ImageLink or Bell+Howell Copiscan II scanners. These scanners display black borders if the paper being scanned is smaller than the defined scanned region. To compensate for this, a black border removal option is provided in 1Scan.

Note: Black Border removal is not an issue for many newer scanners since these scanners do not produce images with black borders.

To enable black border removal

1. Click Options > Black Border Properties. The Black Border Properties dialog box displays.
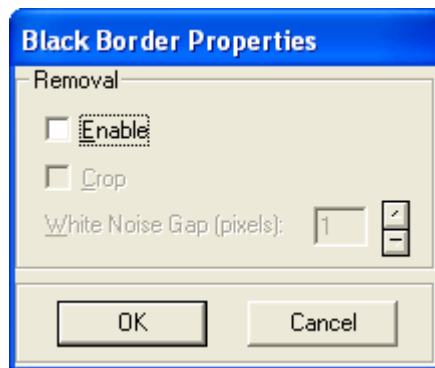
2. Click the Enable check box.
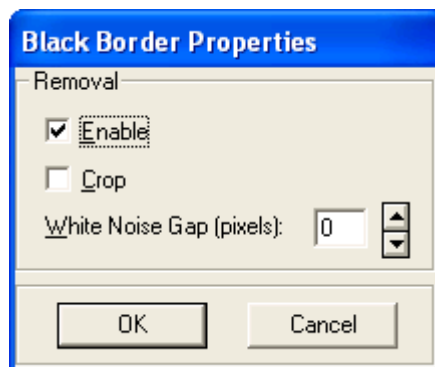
3. Select the desired value between 0 and 10 for white noise gap.

Note: The "White Noise Gap" setting controls how much noise is tolerated before the noise is determined to be a part of a black border and is thus removed. If black borders still display, then adjust the white noise gap value accordingly.

◆ **To set up deskewing correction**

Deskew is the automatic correction of image alignment as a result of the scan process. Enable deskew detection and correction option only if documents might be fed through the scanner in a slanted fashion. When these options are enabled, 1Scan corrects the image display by realigning those images which deviate less than 12 degrees from the perpendicular.

For more detailed help, press F1 while in the Deskew Properties window.

1. Select Deskew Properties from Options to display the Deskew Properties window.
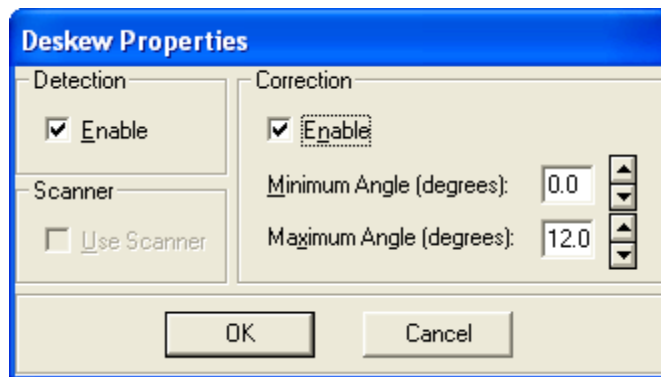
2. Enable both Detection and Correction in the Deskew Properties window.

3. Set the minimum and maximum angles from the perpendicular that are to be deskewed. The minimum angle is 0º and the maximum angle is 12º; an image with a skew greater that 12º will **not** be corrected.

4. Click on OK to accept the changes and return to the Main Menu or click on Cancel to register no change.

◆ **To set up despeckling correction**

Speckles are defined as groups of black pixels surrounded by white pixels (or white pixels surrounded by black pixels). Enable removal to eliminate unwanted speckles that satisfy the height and width characteristics that you define. Use caution when using this option: if the height and width properties are set too high, 1Scan will remove portions of your image that you want to keep, such as periods and commas.

For more detailed help, press F1 while in the Despeckle Properties window.

1. Select Despeckle Properties from Options to display the Despeckle Properties window.

2. Enable Removal in the Despeckle Properties window.

3. Define the *maximum* height and width in pixels of the speckles you want to remove. The default setting, four pixels high by four pixels wide, is a good definition to begin with when you scan a test image.

4. Click on OK to accept the changes and return to the Main Menu or click on Cancel to register no change.

◆ **To set up deshading correction**

Image shade is defined as shaded areas on an image made up of a pattern of black speckles. Enable the deshade detection and removal option if you wish to remove large shaded areas from your image while preserving the text inside the shaded areas. The deshade property removes shading that satisfies the height and width characteristics that you define. Because shaded areas are not usually uniform in size or shape, you can define a compensation value in order to adjust for the variance.

For more detailed help, press F1 while in the Deshade Properties window.

1. Select Deshade Properties from Options to display the Deshade Properties window.
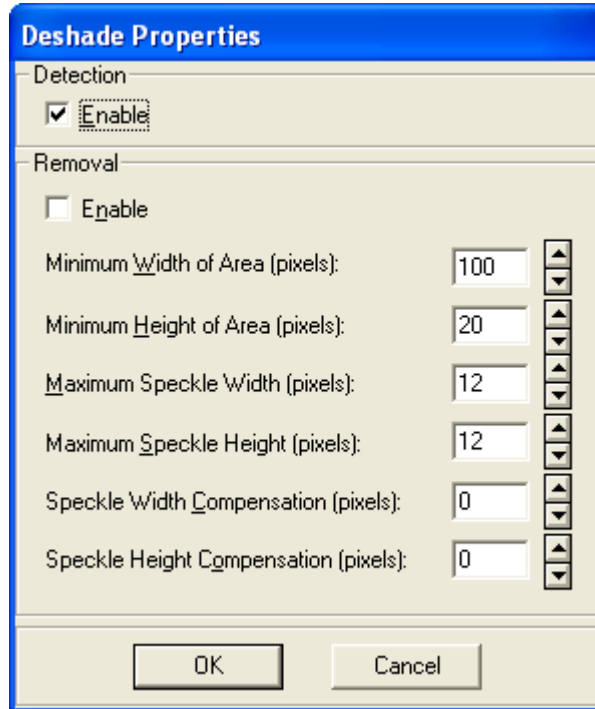
2. Enable both Detection and Removal in the Deshade Properties window.

3. Set the *minimum* width and height, in pixels, of the area from which shading is to be removed. Define these values as large as possible without making the values larger than the smallest shaded area on your document.

4. Define the *maximum* width and height, in pixels, of the speckles that you want to remove from the shaded area. The default setting, four pixels high by four pixels wide, is a good definition to begin with when you scan a test image.

5. Define the width and height compensation. Leave these properties at their default value of "1" when you begin.

6. Click on OK to accept the changes and return to the Main Menu or click on Cancel to register no change.

◆ **To set up line removal**

Enable the horizontal and/or vertical line removal property when your document has unnecessary lines that might increase the size of the compressed image file. 1Scan can remove both horizontal and vertical lines in the same scanning process.

For more detailed help, press F1 while in the Line Removal Properties window.

1. Select Line Removal Properties from Options to display the Line Removal Properties window.
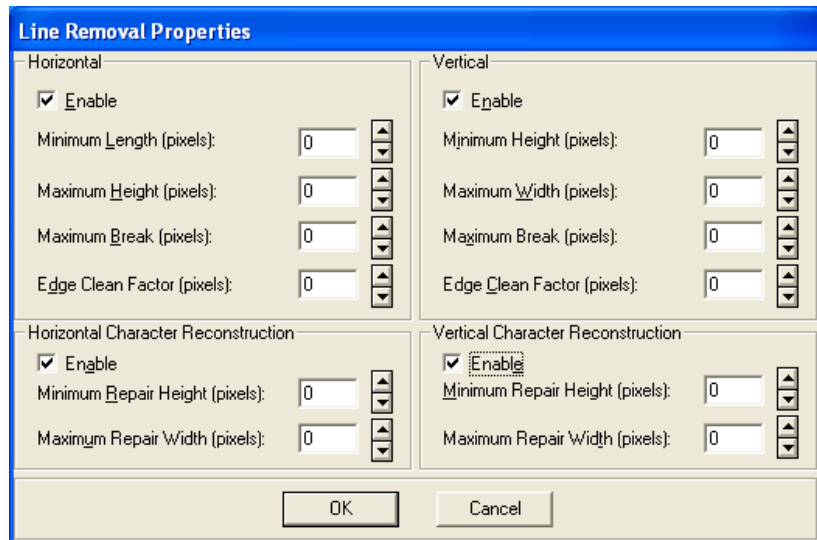
2. Enable horizontal and/or vertical line removal.

3. Set the minimum length and maximum height of unnecessary horizontal lines and the minimum height and maximum width of unnecessary vertical lines.

4. Define the maximum break, or gap size allowed, to be considered part of the line. Accept the default for your first test scan.

5. Define the Edge Clean Factor, or noise on the edge of the line. 1Scan will remove these speckles along with the line. Accept the default for your first test scan.

6. Click on OK to accept the changes and return to the Main Menu or click on Cancel to register no change.

◆ **To enable and configure bar code characteristics**

Note: For additional information about the values entered in the Bar Code Properties and their impact on the bar code recognition accuracy rate and speed, customers who have purchased the 1Scan bar code option are referred to

- ImageControls Manual

- Kofax Application Notes: Bar code Recognition

- 1MAGE Technical Bulletin: Bar code Recommendations

About bar codes

The following bar code components and their physical and quality attributes are essential to the bar code configuration process:

Components

Bar	A single black element
Space	The lighter element found between bars
Element	Either a bar or a space

Physical attributes

The physical properties of a bar code describe its dimensions and characteristics; once correctly defined, these properties remain the same and are independent of the manner in which the image is scanned. Physical attributes are:

Type
: The format of the bar code; for example, Codabar, Code 3 of 9, etc.

Bar width
: The physical width of the smallest element found within the bar code; the larger elements are calculated by applying the ratio value to this width.

Ratio
: Either a 2:1 or 3:1 ratio between the smallest and the largest element in a bar code; has meaning when the bar code type is Code 3 of 9, 93, Interleaved 2 of 5, and Codabar.

Length (minimum characters in a bar code)
: The smallest size bar code (in terms of characters) the bar code driver should return; if the length is variable, set the value to 1.

Checksum
: An additional character added to the bar code that determines the integrity of the bar code read; meaningful for Code 3 of 9 and Interleaved 2 of 5 only.

Quality attributes

Quality
: The unwanted noise surrounding the bar code, such as speckles, and the quality of elements within the bar code, such as jagged edges.

Height
: The distance between the top of a bar and the bottom of a bar. 1Scan uses the height field to determine the distance between probes that the driver must use when searching for a bar code. The height value can be adjusted to speed up the bar code driver. To produce smaller probe distances, decrease the height value. As the probe distance becomes smaller, the driver slows down but the read accuracy rate improves. As the probe distance becomes greater, the driver speeds up but the read accuracy declines.

For more detailed help, press F1 while in the Bar Code Properties window.

1. Select Bar Code Properties… from Options to display the Bar Code Properties window.
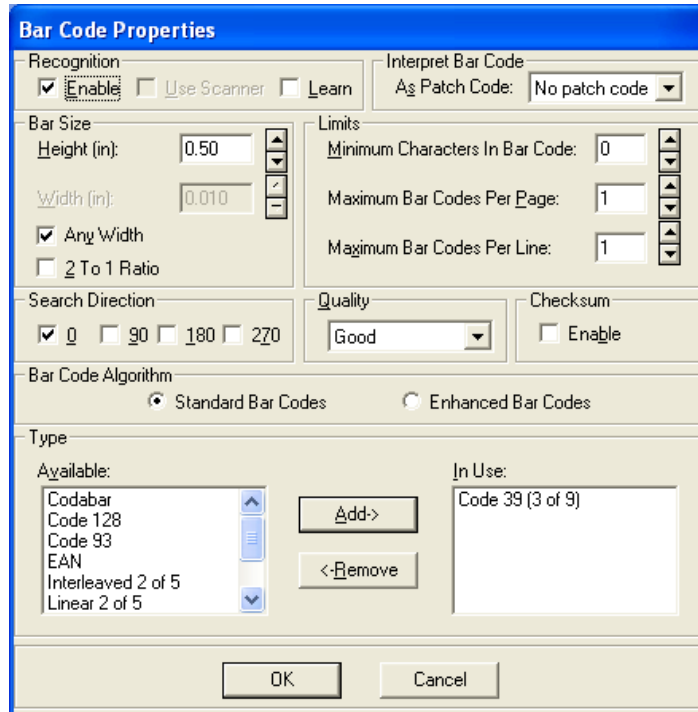
2. Enable Recognition in the Bar Code Properties window.

   Do not enable Learn when doing bar code *reading*; see "To use Learn Recognition" on page 56.

3. Enter the Bar Size. Set the following:

   Height   Set the value equal to the actual height of the bar code, then raise or lower this value in order to adjust the probe distance beyond the range provided by the quality value; for multiple bar codes, use the height of the *smallest* bar code.

   Width   *For multiple bar codes,* the Any Width attribute is automatically set when multiple bar codes are listed in Type In Use. *For a single bar code,* set the Bar Size Width to that which was returned to you by Learn Mode.

2 To 1 Ratio	The default is 3:1. Do not check this box unless Learn mode set the attribute to (2:1).

4. Enter the limits of the bar code.

Minimum Characters in Bar Code	*If you know the smallest value,* set the field to that value; *if you do not know the smallest value,* set the field to 1.
Maximum Bar Codes Per Page	Set to the likely number of bar codes per image; this value should be as small as possible so that the driver can stop searching as soon as the correct number of codes is found.
Maximum Bar Codes Per Line	Set to 1 or set to the actual number of bar codes on the same probe axis. This attribute tells the bar code driver to continue probing until the edge of the image is encountered or the number of bar codes set in Maximum Bar Codes Per Line has been read.

5. Enter the search direction of the driver.

The search direction governs how the bar code driver searches for bar codes (for a horizontal bar code at 0 degrees and 180 degrees; for a vertical bar code at 90 degrees and 270 degrees). Set only those orientations that are necessary to obtain a read.

Note: These values are <u>not</u> set by the Learn setting; they must be identified by a user. Use the human readable characters below your bar code as your clue as to which orientations you should use. In the examples below, the probe direction is depicted by an arrow.
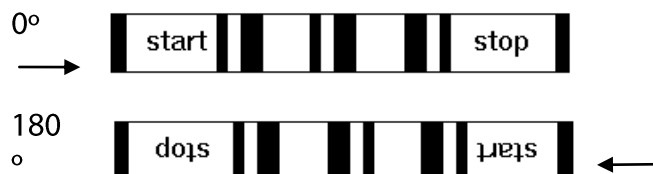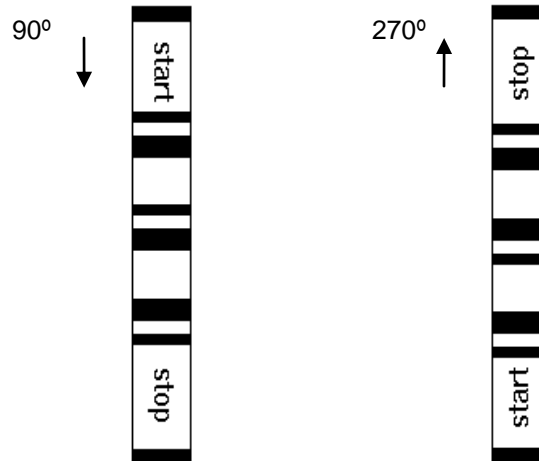
6. Enter the quality of the bar code.

   Select normal for most bar codes. Select poor for bar codes with obviously missing elements and poor delineation; select good for bar codes with excellent delineation.

   Note: Setting bar code quality to "high" allows the scanner to read bar codes faster. Setting this to "poor" will cause the scanner to read slower. This will reduce the scanner's overall scan speed performance.

7. Enable Checksum if necessary.

   Checksum (for Code 3 of 9 and Interleaved 2 of 5 only) If you do not know if the checksum exists or not, turn *off* the attribute; if 1Scan finds a checksum character, it returns it as extra data.

8. Enter the type of bar code or codes you will be scanning.

   To add a bar code type, select the type or types of bar codes listed in Available and click Add. The selected name(s) move to the In Use list.

   To remove a bar code type, select the bar code type from the In Use display and click Remove. The selected name(s) move to the Available list.

   Please note when attempting multiple bar code readings with multiple types active**:**

   - Code 2/5 cannot be distinguished from Code 2/5 interleaved.
   - Code 2/5 can sometimes read Code 39.
   - EAN is a superset of UPCA.

- Postnet should be done stand-alone.

9. Press Enter or click on OK.

◆ **To use Learn Recognition**

Use the bar code learn feature to determine the most appropriate property values associated with bar codes on an image. If the correct bar code type is in use, and Learn is enabled, then the learn action automatically populates the Bar Code Properties window with the bar height, bar width, ratio (if 2:1), and quality of the bar code.

Note: Learn will not return the name of the bar codes in use. After you have run the learn action several times, it can be disabled and the values it returns can be used when scanning documents with like bar codes.

Learn will *not* work on skewed bar codes or on more than one bar code on a page.

For more detailed help, press F1 while in the Bar Code Properties window.

1. Do the following:

   - Select the type of bar code that you are scanning and display it in the In Use window. *If you do not know the type of bar code you are scanning, place a probable bar code type in the* In Use window.

   - Select the search direction attribute that matches the orientation of the bar code you are scanning. If you suspect that the bar code is skewed, enable the Deskewing function after you enable Learn Recognition and before you scan.

   - Set the height value to the *lowest* value available.

   - Set the width value to the *lowest* value available.

   - Set the quality to normal.

   - Press Enter or click on OK.

2. Enable Learn in the Bar Code Properties window.

3. Scan a document. Look in the scanned image's .dat file for a *BC entry to confirm that the bar code was read. Do the following:

- If the bar code was not read, continue to change the Type In Use until a read is obtained.

- If the bar code was read, access the Bar Code Properties screen and make note of the values returned. Scan several times more using the same document or different documents with the same type of bar code. This activity is especially important for determining variations in the width: while the bar code driver allows for some overlap, the width value should be as accurate as possible to insure the best read accuracy rates.

4. Disable Learn in the Bar Code Properties window; the values obtained during your last scan using the learn action are saved.

◆ **To enable and configure patch coding**

About patch codes

A patch code is a distinct pattern of *horizontal* black bars and spaces used to maximize scanner throughput and to minimize operator intervention.

All patch codes are made up of narrow and wide bars:
- The entire patch code must be 0.80 inch in height.
- The entire patch code should be at least 2.0 inches in width.
- The narrow bars must be 0.08 inch in height.
- The wide bars must be 0.20 inch in height.

1Scan can identify two distinct types of patch codes when processing images from the scanner.

Note: Instead of creating your own patch codes, you may obtain examples of patch codes from the 1MAGE document, patchcode.doc, created in Microsoft Word 97. Copy the types you need and stretch each horizontally at least 2.0 inches. Do *not* adjust the height of the patch code or patch code recognition will be compromised.

To implement patch coding, place a single patch code on the leading edge of a separator sheet; place a separator sheet between a series of documents that may be of different types, sizes, or print quality.
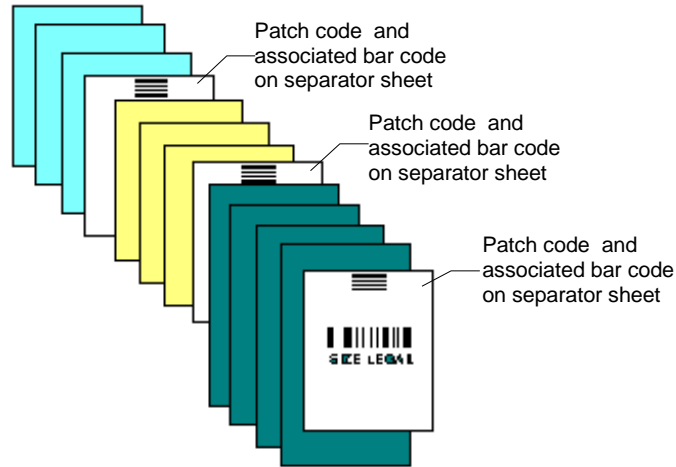
While the use of patch codes might require more time in document preparation, time will be recovered in faster scanner throughput and in reduced operator intervention and indexing requirements.

1Scan and patch codes

1Scan reads a patch code before it does any other image processing. It can identify two types of patch codes: I, II.

A Patch Code of this type:	Tells 1Scan to do this:
I	Read the bar codes on this page. Include persistent data elements in the .dat file of *only the page scanned immediately after* the patch code separator sheet; do not include persistent data in the .dat file of pages scanned beyond this page.
II	Read the bar codes on this page. Include persistent data elements in the .dat files of *all pages scanned following* this patch code separator sheet.

To be detected, a patch code must be positioned correctly on the separator page.
- It must be placed horizontally.

- It must be located at least .20 inches from the leading edge of the patch code sheet.
- It must not extend beyond 3.75 inches from the leading edge of the patch code sheet.
- For duplex scanning operations, it must be placed only on the *front* side of a patch code sheet.

As of release 8.1.1, 1Scan supports the use of patch codes I and II while "batch processing images from disk." To utilize this feature, Patch Code Sheets must be pre-scanned (with patch code recognition turned off) along with the rest of the images to be processed in batch processing from disk.

About bar codes associated with patch codes

Bar codes may be present on *any* Patch Code separator sheet. They are used to change "persistent" data elements.

Note: To ensure maximum scanner throughput, 1MAGE recommends that all bar codes on a separator page be
- The same type.
- Set to "any width." (a bar size setting on the Bar Code Properties dialog box)
- At least 1/2 inch (.5) in height.

For use with patch codes, each bar code typically contains a code identifier followed by a hyphen and then the code value; for example: DATSTRING-123456.

<code identifier>-<code value>

Valid settings, functions, and persistent data elements follow:

Functions

Code identifier	Code Value	Action
CLEARDATA (or "CD")	NONE	Clears the "persistent data entries: Type, Datstring and Workflow
MULTIPAGE (or "MP")	START	Defines a multi-page document; all pages except the first have a *A entry inserted in their .dat file.

MULTIPAGE (or "MP")	STOP	Defines the end page of a multi-page document. Cancels the previous MULTIPAGE START instruction.
BATCHCODE (or "BCODE")	<New Batch Code>	Changes current batch code. All images in batch will have a *B followed by the new batch code.
OPERATOR (or "OP")	<New Operator Code>	Changes the current operator code. All images will have a *O followed by the new operator code.

"Persistent" data

Code identifier	Code Value	Action
TYPE	<PC Key Code>	Places a *I entry in the .dat file.

Warning: When preparing patch code sheet that define type codes, be sure the scanner operator has privileges to the scan to those type codes. If 1Scan detects a type code that the scanner operator does not have privileges to scan to the scan operation will stop and display the message "You are not authorized to apply type code: <###>" No further scanned images can be saved until a valid patch code sheet is used or until 1Scan is restarted.

WORKFLOW (or "WF")	<Workflow name>	Places a *WF entry in the .dat file (requires API integration)
DATSTRING (or "DS")	<Any data string>	Places a *DS entry in the .dat file (requires API integration)

For more detailed help, press F1 while in the Patch Code Properties window. Use the Search function to find Patch…

1. Enable Bar code Detection.

2. Select Patch code Properties… from Options to display the Patch Code Properties window.
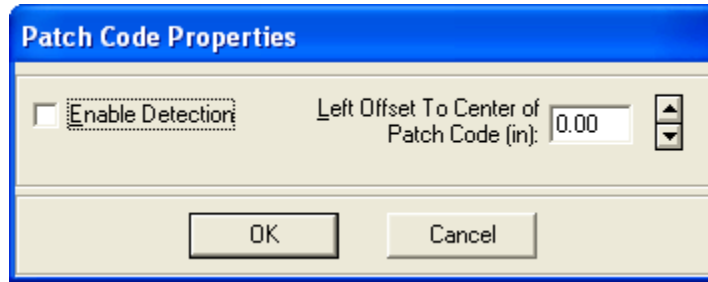
3. Enable detection in the Patch Code Properties window.

4. Set the Offset to Center property and press Enter or click on OK.

The value may be set between 0 and the maximum page width in inches; we recommend however, that it be set to a value no greater than that which defines a point that falls near the *center* of the patch code. This value allows the detection feature to quickly locate the patch code on the page.

A value of 0 specifies that the detection feature will search anywhere in a horizontal direction from the left edge of the page.
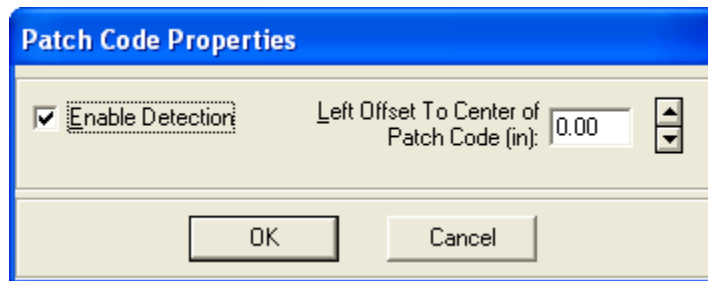
5. Enable "Log Patch Code Log Reads" Set this flag to enable Patch code logging. When enabled all patch code reads will be noted in a file called patchcode.log. This file will be written the 1Scan home directory (c:\Program Files\1mage Software\1Scan)

◆ **To enable patch code logging**

Patch code logging is used to verify that patch codes and bar codes are being read. When enabled, all patch code reads will be noted in a file called patchcode.log. This file will be written the 1Scan home directory (c:\Program Files\1mage Software\1Scan). The following is a sample of a patch code log file:

Patch 2

    CLEARDATA

    MP-STOP

    MP-START

    TYPE-407

Patch 2

    CLEARDATA

    MP-STOP

    MP-START

    TYPE-408

Patch 2

    CLEARDATA

    MP-STOP

    MP-START

    TYPE-409

Patch code logging is a debugging tool and should only be enabled when needed. If patch code logging is left enabled for long periods of time the patch code log file will grow large and consume disk space. This may impede the workstation's performance.

Click Options > Log Patch Code Reads to enable patch code logging:
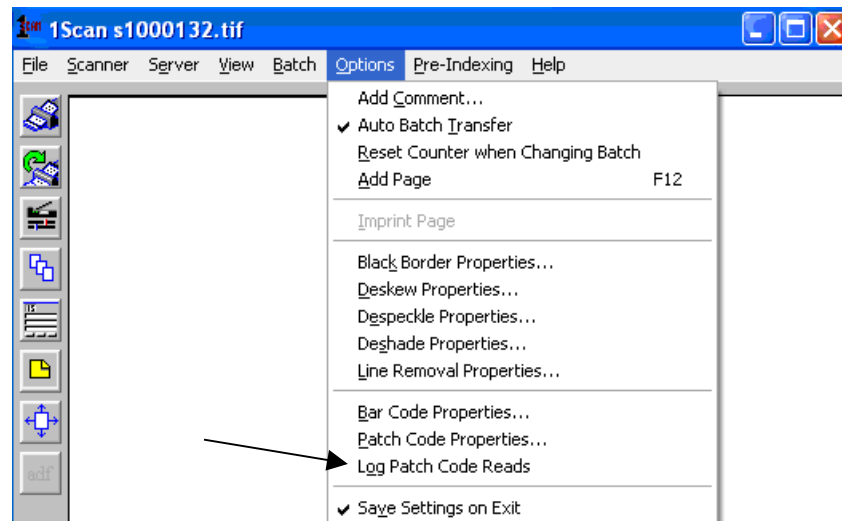
Set up your scanner

When you exit Scanner Properties, 1Scan saves the parameters for the current 1Scan session. When 1Scan is closed the Scanner Properties settings are saved in the 1Scan.ini file.

This file is located in the directory where the 1Scan.exe file is located (c:\Program Files\1Scan).

◆ **To set up your scanner**

1. Select Scanner Properties from the Scanner menu. 1Scan displays the name of your scanner in the Scanner Properties title bar.

   Note: Each pull down menu displays only those parameter values that are valid for your attached scanner. For instance, in the following Scanner Properties example, the ADF source and the Destination option are not active because the Fujitsu M309xDC is a manual feed scanner that only scans to one destination. .
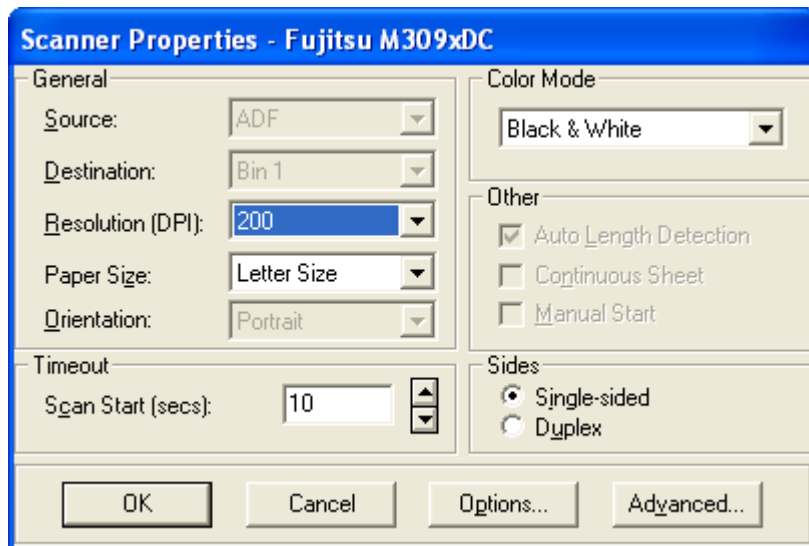
2. Select your desired scanning characteristics from those scanner properties options that are highlighted in the groups below. Remember, only those parameter values that are valid for your attached scanner are active or displayed. This means, for instance, that if your scanner can only scan at 200 DPI, then 200 DPI is the only Resolution option displayed.

General

Specifies input and output characteristics for scanning.

Source	Designates the scan source: Flatbed, ADF (Automatic Document Feed), Panel, or Manual.
Destination	Designates the output tray capabilities: Bin1 or Bin2.
Resolution	Designates resolution capabilities for the current scanner: DPI 75, 100, 150, 200, 240, 300, 400, or 600.
Paper Size	Designates paper size capabilities for the current scanner: A 0-5, B, Letter, B 0-6, Legal, Coupon, Personal, or Business.
Orientation	Specifies the format in which a page is to be scanned; either standard format (8.5 x 11) or wide format (11 x 8.5).

Portrait: Specifies tall (vertical) orientation capability.

Landscape: Specifies wide (horizontal) orientation capability.

Timeout

Scan Start (secs)	Specifies the number of seconds you are allowed to load paper into the scanner after starting a scan operation. The process will report an out of paper error if the timer expires before paper is added.

Important: Scan Start value must always be *less* than Page Timeout value (defined on the Scanner Properties dialog box).

Color Mode

The color mode setting specifies whether to scan in color or in black and white. When scanning in color, all scanned images will be saved to .jpg format. When scanning in black and white, all scanned images will be saved in a .tif format.

Other

Auto Length Detection	If Auto Length Detection is enabled when ADF is selected as the Source, the stored image for a document shorter than the Paper Size setting will be only as long as the scanned document.
Continuous Sheet	Specifies a continuous scanning operation for long documents (up to 32,767 scan lines). When enabled, the paper width setting must equal the width of the paper and the Auto Detection Length must be disabled.
Manual Start	Not available

Sides

Specifies if a scanner is to capture one or two images at a time.

Single-sided	Specifies a single-sided scanning operation.
Duplex	Specifies a two-sided (front and back) scanning operation.

3. Select Source Properties options by clicking on the Options button. The Source Properties window displays. Choose from those scanner properties options that are highlighted in the groups below. Remember, only those parameter values that are valid for your attached scanner are active or displayed.
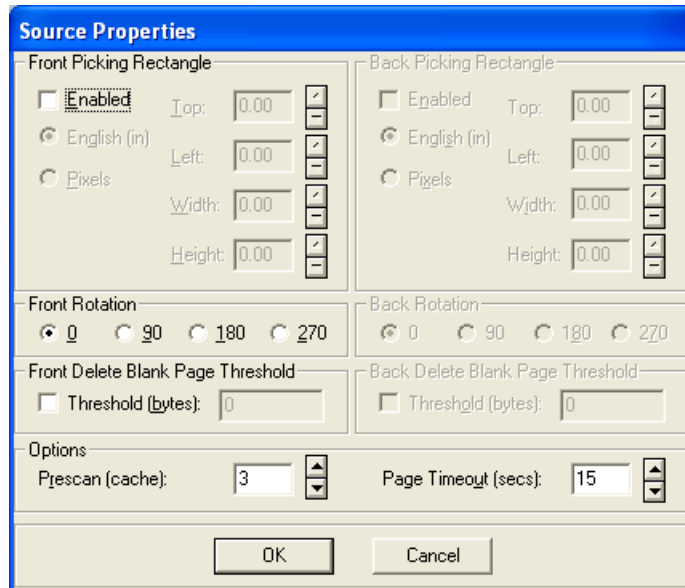
Front Picking Rectangle/ Back Picking Rectangle

Specifies the specific area of an image that you want clipped and saved. The Top and Left properties define the starting position or upper left corner of the picking rectangle; the Width and Height define the size of the picking rectangle.

English (in) Pixels	Specifies the unit of measurement.
Top	Specifies the distance from the top edge of the image.
Left	Specifies the distance from the left edge of the image.
Width	Specifies the width of the rectangle.
Height	Specifies the height of the rectangle.

Front Rotation/ Back Rotation

Specifies the rotation angle for scanning; the image is saved in its rotated state.

0, 90, 180,	Specifies, in degrees, the *clockwise* rotation of

270   a scanned image from the direction it is scanned.

Front Delete Blank Page Threshold/Back Delete Blank Page Threshold

Allows you to set a value for determining if an image should be deleted.

Front (Bytes)	Specifies a threshold value for determining if an image on the front side of a page should be deleted.
Back (Bytes)	Specifies a threshold value for determining if an image on the back side of a page should be deleted.

Options

Specify scanning operation and memory configurations.

Important **:** For optimal throughput, tune Prescan Cache to the highest number that your Kofax card will tolerate. Typically, the *more* 1Scan features that you enable, the *higher* you must set the cache.

Prescan Cache (pages)	Specifies the number of images (0-6 pages) to cache on the Kofax board; caching occurs only if there is memory available on the board. **Caching defaults to 3 at installation.** Increase the Prescan Cache value when you enable additional features such as deskewing, etc.
Page Timeout: (secs)	Specifies the device timeout value in seconds (0-120). Use this setting to define the maximum time allowed to completely process a page.
	Warning: Setting this value to 0 could cause the system to hang indefinitely.
	If processing is not completed in less than the specified number of seconds, the process will report a timeout error.
	Important: Page Timeout value must always be *more* than Scan Start value.

4. If the Advanced… button is active, click on it to display the Advanced Setup dialog box.

The Advanced… button calls a scanner-specific dialog box. Refer to your scanner's user documentation for information on the property options displayed in the dialog box.

Image attributes

Specifies contrast and brightness capabilities for a small number of scanners that do not display Advanced Setup windows.

Contrast   Specifies contrast capabilities; that is, the degree of difference between the lightest and darkest parts of an image: 1 specifies the least amount of contrast and 8 specifies the most amount of contrast; Auto adjusts the contrast automatically, Panel specifies that the contrast be controlled on the scanner; and Percent specifies a percentage.

Brightness   Specifies brightness capabilities; that is, the ability to reflect light: 1 specifies the least amount of brightness and 8 specifies the most amount of brightness, Auto adjusts the brightness automatically, Panel specifies the brightness be controlled on the scanner, and Percent specifies that a percentage of brightness be specified.

5. When you are finished defining your scanner set up, click on OK; the settings are saved.

◆   **To scan in color**

1. Click Scanner > Scanner Setting from the main 1Scan screen. The Scanner Properties screen displays.

2. Click the drop down button in the Color Mode field. A drop down list of color mode setting displays.

3. Select "Color (true color)" and Click OK.

All images scanned in color will use a JPEG file format.

Note: Images scanned in color will typically produce larger file sizes than images scanned in black and white. If disk space is a concern then JPEG file sizes can be adjusted in one of two ways. One is to increase the compression ratio that JPEG is using. See the "To adjust JPEG Compression" for more information on page 70. The second is to decrease the scanner resolution. However, decreasing scanner resolution will degrade the image quality. This can be done from the Scanner Properties screen. See "To adjust Scanning Resolution" on page 70 for more information.

◆ **To adjust JPEG Compression**

1. Click Scanner > Select Scanner… The Select Scan Source dialog box displays.

2. Click the Advanced button… The Advanced Source Properties screen displays.

3. Enter a number between 1 and 100 in the JPEG Compression Quality field.

   > **Note:** The higher the number the better image quality will be provided and larger the file size. The lower the number entered here the more image compression will be applied to the file. Typically, a setting of 90 will produce a quality image while maintaining smaller file sizes.

4. Click OK to close the Advanced Source Properties screen.

5. Click OK to close the Select Scan Source dialog box.

◆ **To adjust Scanning Resolution**

1. Click Scanner > Scanner Settings from the main 1Scan screen. The Scanner Properties screen displays.

2. Click the drop down button in the Resolution (DPI) field. A drop down list of resolutions available to the scanner displays (for example: 100, 200, 240, 300…).

3. Select the desired resolution and Click OK.

Select a server device

Your server device may be Scanner or Disk.

- When you select Scanner, your imaging source is the default scanner with KSM (Kofax Source Manager). Scanned images are captured in the capture path (or in a subdirectory of the capture path) defined in Tool Scan and are subject to the image processes (such as despeckling, etc., and bar or patch code reading) that you enabled in either Tool Scan and/or 1Scan.

  > **Note:** In Batch Mode, all scanned image files are stored in a temporary subdirectory created in the capture path. This temporary directory is named the same as the batch name and will be deleted when all batch images are transferred.

- When you select Disk, you may import images with image processing (Kofax Hardware - Import from disk with image

processing) or without image processing (Kofax Hardware - Import from disk without image processing). Images are imported using the path you define as Input Path, and are transferred (in a fashion similar to Filemove) using the path you define as Output Path.

◆   **To configure a server device**

1. Display the Server menu and select a device.
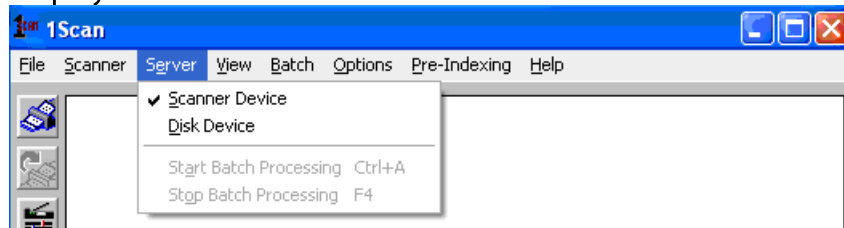
2. Do one of the following:

If you selected Scanner as a device

The Select Scan Source dialog box displays. This box will only display if there is more than one source defined (See 1Scan Installation Manual for more information). If only one source is defined then 1Scan will automatically load that source and will not display the Select Scan source dialog box.
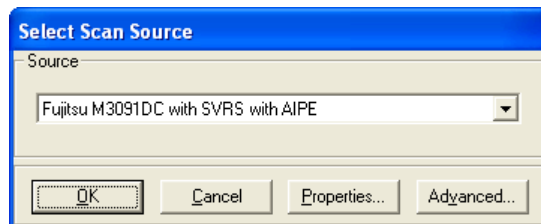
If you selected Disk as a device

If more than one import from disk source is defined in the KSM the Select Disk Source dialog box displays. Click the drop down button ( ) to display the drop down menu to display a list of available sources. Make a selection and press Enter or click OK. This enables "batch processing from disk."

Available sources will typically be any of the following: Kofax Software Import Source, Kofax Software – Import from disk with image processing, and/or custom defined sources. The actual source names displayed here will depend upon what has been configured in the Kofax Source Manager (See 1Scan Installation Manual for more information). If no disk source is defined then the Disk Device option will be grayed out and cannot be selected.
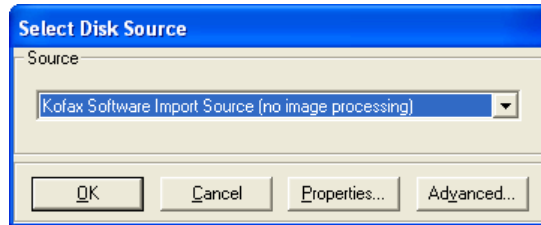
If only one import from disk source is defined in the KSM. The Select Disk Source dialog box will not display. The existing import from disk source will be used.

Select Server > Start Batch Processing.
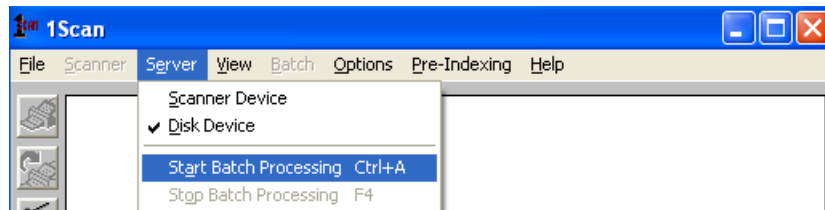
The Select Input and Output Path dialog box displays. Browse the available drives and directories to define both input and output paths.

Note: Images can be processed from a mapped network drive.
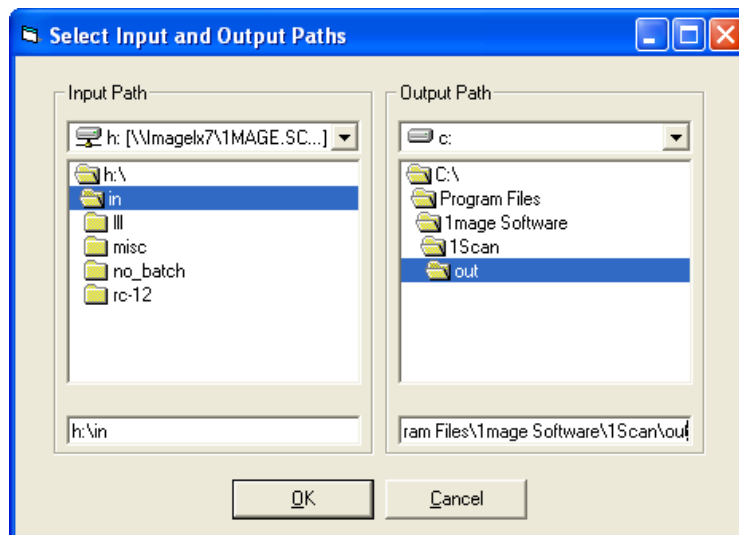
1Scan will look in the Input Path for any file with a .tif or .jpg extension and import it to the Output Path.

Select Server > Stop Batch Processing to stop the process.

Note: As of 1Scan version 9.2.3 1Scan disk mode scanning handles long file names. However, file names must adhere to

a numeric format with a 1 or 2 digit alphanumeric prefix. For example, *f1234567890123456789.tif*

Select a scanning mode and pre-indexing option

1Scan has two scanning modes that operate as a toggle: *single* and *continuous*; when Continuous Scan is turned on, single scan is turned off.

Single scanning mode displays an image in the view window until another page is scanned. Continuous scanning mode displays an image in the view window for a brief time and then *automatically* displays the next image. The functions Add Page, Add Comment, and Rescan are disabled when Continuous Scan is selected.

◆　**To select a scanning mode**

Do *one* of the following:

- For single scanning mode, a check mark does **not** display before the Continuous Scan option in the Scanner menu. Click the option to remove the check mark if it does appear.
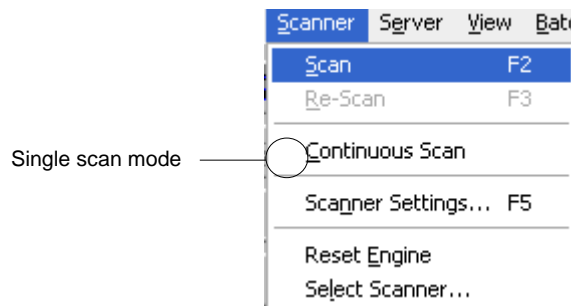
For continuous scanning mode, begin by scanning one document in *single* scan mode to ensure all settings are correct, then click Continuous scan to display a check mark before the option.
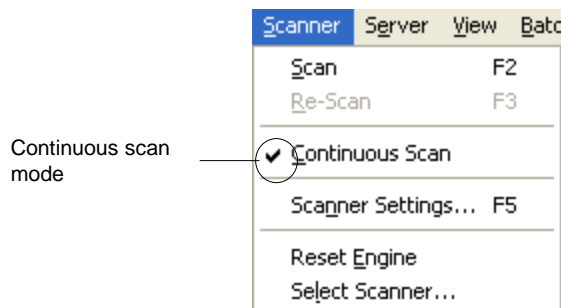
◆ **To determine a pre-indexing option**

If you do not select a Pre-indexing option, a scanned image is not assigned an image type or index key code(s). 1Scan defaults to this option when you exit 1Scan after pre-indexing.

1Scan has two pre-indexing options: by Document, or Continuous Pre-Indexing. . . By Document is available in single scan mode only; Continuous Pre-Indexing. . . is available in single or continuous scan mode. Both pre-indexing options place a *I or *I and *K(s) in the 1Scan .dat file.

Use the following table to determine the scanning modes and pre-indexing options you wish to use. Some 1Scan configuration combinations are mutually exclusive; for example, pre-indexing by Document is not available when Continuous scan is selected.

| When you want to	Set 1Scan to this	
	Scanning Mode	Pre-indexing option
• Scan quickly without inspecting document readability	Continuous Scan on	None
• Scan quickly without inspecting document readability • Attach the same type code (and, optionally, pre-index keys) to each scanned image	Continuous Scan on	Continuous Pre-Indexing
• Inspect document readability	Continuous Scan off (single scan)	None
• Inspect document readability • Attach variable type codes (and, optionally, pre-index keys) to each scanned image	Continuous Scan off (single scan)	by Document

• Check document readability • Attach variable type codes (and, optionally, pre-index keys) to each scanned image	Continuous Scan off (single scan)	Continuous Pre-Indexing

Continuous Pre-Indexing

> 1Scan's continuous pre-indexing feature enables 1Scan users to index documents at scan time while in continuous scan mode. This feature allows the user to enter Type and Key data once. That information will then be applied to every image scanned.
>
> 1. Press F9 or select <u>C</u>ontinuous Pre-Indexing. . . from the Pre-Indexing menu; the Continuous Pre-Indexing dialog box displays. When <u>C</u>ontinuous Pre-Indexing. . . is selected, each scanned image will be assigned the *same* image type code and index key information.
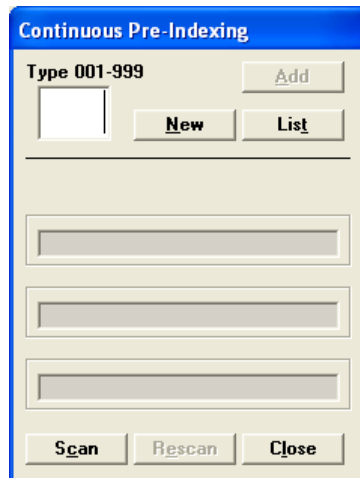
> **Caution:** If you want all images scanned to have the same type and keys, then use Continuous Scan / Continuous Pre-Indexing.
> If you want to change the index data then use Single Scan / Continuous Pre-indexing

> 2. When the Continuous Pre-Indexing dialog box displays, do *one* of the following:
>
> • Click on <u>N</u>ew to clear all fields.
>
> • Enter a valid Type between 1 and 999.

Note: Some servers may have a type code list ranging from 1 through 99. In this case, enter a valid two-digit type code number.

- Click List. The "Document Type List" dialog box displays. Select a type and click on OK. The document type you choose is active until you change it. To navigate the list window, use the mouse or the up and down arrow keys (↑,↓).
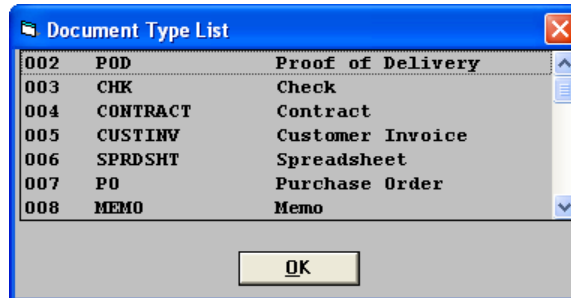
Note: The document types that actually display here depends on the current user's image type security privileges. If you do not see a type code here that you expect to see, contact your 1MAGE system administrator to verify that image type security has been set correctly.

The dialog box for your selected type code displays. If any pre-index keys are associated with the code, they also display. Press Tab to move from field to field. Click on New to clear all fields.

3. Review the image and populate the displayed pre-index fields.

If you neglect to populate a pre-index field that matches a *required* key, the following message displays.

Pre-index field name

If entered data does not conform to validation parameters, an error message box, similar to the example below, displays.

When you have populated all required fields, go to Step 9.   If you have completed the Continuous Pre-Indexing session click on Close to cancel this Continuous Pre-Indexing session.

Note: The Rescan button is grayed out in Continuous Pre-Indexing mode.

Pre-Index by document

1Scan's pre-index by document feature enables 1Scan users to index documents at scan time while in single scan mode.

1. Press F8 or select by Document from the Pre-Indexing option; the Pre-Index by Document dialog box displays.
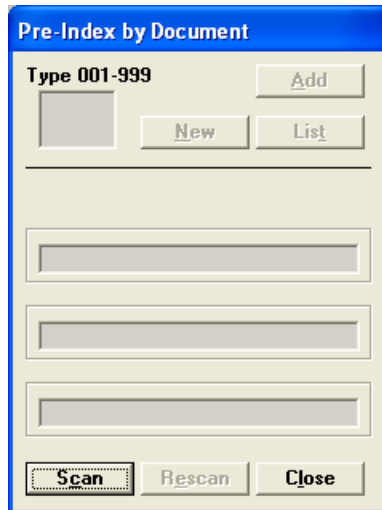
2. Do *one* of the following:

- Click on New to clear all fields.

- Enter a valid Type between 001 and 999.

- Click on List. The Document Type List dialog box displays; this list is derived from the docs.ini file. Select a type and click on OK. The document type you choose is active until you change it.
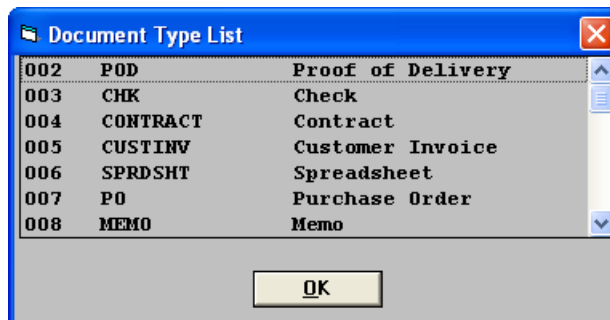
Note: The document types that actually display here depends on the current user's image type security privileges. If you do not see a type code here that you expect to see, contact your 1MAGE system administrator to verify that image type security has been set correctly.

3. Review the image and populate the displayed pre-index fields. Press Tab to move from field to field. Click on New to clear all fields.

> **Note:** Required keys will have a white background in the Key field. Keys that are not required will have a gray background. This is for pre-indexing by document in single scan mode only.

If you neglect to populate a pre-index field that matches a *required* key, the following message displays.

Pre-index field name

If entered data does not conform to validation parameters, an error message box, similar to the example below, displays.

4. When you have populated all required fields, do one of the following:

- click Scan to continue
- click Rescan to scan the current image again

Begin scanning

Click the Scan icon on the toolbar or press F2 to begin scanning. If you are Pre-Indexing, then click the Scan button on the Pre-Indexing by Document screen or on the Continuous Pre-Indexing screen.

The counter is incremented by 1 and the scanner takes the next piece of paper from its bin, scans it, and writes the digitized record to the capture path. When the image is scanned, the date and time stamp from the PC's CPU is stored in each image's data record (image.dat).

Continuous scan mode	If you selected Continuous scan mode, then the scanner continues to feed documents and scan until it runs out of paper, becomes jammed, or an error occurs. You may be unable to break out of continuous scanning because this is hardware dependent; therefore, it is best to remove all remaining documents from the feeder to stop continuous scanning.
	The way your scanner detects the "out of paper" message depends on your scanner type. Some scanners immediately display the 1Scan error message box with the message "Scanner Out Of Paper" while other scanners send the message after trying to feed a document for the time period entered in the Timeout field in Scanner Properties.
Single scan mode	If you selected Single scan mode, then the scanner scans one document and stops. If you have chosen to pre-index, do so at this time.

Review Images Scanned in Batch Mode

Batch mode scanning is an effective solution for 1Scan users to retain batch name information at scan-time. This batch name information is made available to the image server so that it can organize images to be indexed into easily identifiable batches.

As of 1Scan version 7.3.3, this feature also provides 1Scan users the ability to review their images, reorder the images, delete selected images or even delete the entire batch. This enhances 1Scan's ability to ensure the quality of images that are being sent to the image server. All images scanned in batch mode now have access to this feature.

This feature adds an additional step to the image transfer process. Batch mode scanning creates a temporary directory that contains the batch images. When the batch session is terminated, the images are transferred from the batch directory to the capture path.

To access batch mode features select "Batch" on the menu bar.
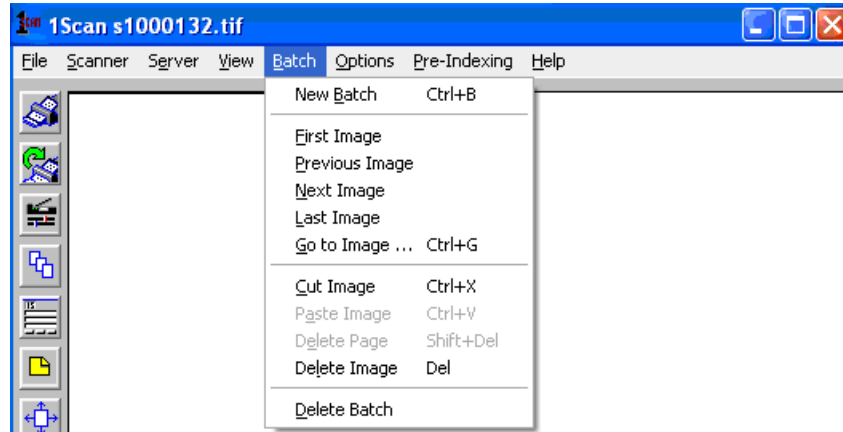
This menu item provides the following functions related to Batch handling:

Batch Menu Item	Function
New Batch	Opens a new batch.
First Image	Displays first image in batch.
Previous Image	Displays previous image in batch.
Next Image	Displays next image in batch.
Last Image	Displays last image in batch.
Goto Image	Allows user to specify which image in batch to display.
Cut Image	Copies the current image into memory to be pasted in another location within the same batch.
Paste Image	Pastes an image that has been cut.
Delete Page	Deletes a single page from a displayed duplex image. This option is only available in duplex mode.
Delete Image	Deletes the currently displayed image. If in Duplex mode, this will delete both front and back of the displayed image.

Delete Batch   Deletes entire contents of current batch.

◆   **To scan in batch mode**

1. Open 1Scan in batch mode. See "Enable the Batch Code option" on page 16 for information about configuring 1Scan for batch mode.

2. Enter Batch name when prompted.

    Note: If the name of an existing batch is entered, then the first image of that batch displays.

3. Scan images. Images will be placed in the named batch until a new batch is opened.

4. Inspect images by doing any of the following:

    - Review images - Click Batch > Next Image or Batch > Previous Image to display each image in the batch, or press the Page Up and Page Down keys.
    - Move an image in a batch. See "To reorder images in a batch" on page 83.
    - Delete image from a batch. See "To delete images in a batch" on page 84.
    - Delete the batch. See "To delete a batch" on page 84.

5. Transfer images to the capture path as defined in Tool Scan by clicking File > Transfer Images or by pressing F11. A message box requesting confirmation to transfer the images from the current batch will display.

    Note: Once the images have been transferred from the batch, they are no longer available for inspection.

    The user is prompted to transfer batch images when they attempt to exit the current session. If the user chooses to exit their current session without transferring the batch images, the batch images will be available for inspection or for adding new images the next time the user opens that same batch.

    Click No to cancel this request and to return to the batch session. Click Yes to transfer the images.

    On pre 8.1 image server environments the images are then transferred to the capture path defined in Tool Scan. A message box displays requesting confirmation to transfer the

images to the directory as defined by the Transfer Method in Tool Scan. If "Nothing" is defined as the transfer method then the user will not be prompted.

Note: When Auto Batch Transfer is selected, the user is not prompted to transfer batch images to the capture path. Images are automatically transferred whenever the user exits 1Scan or changes to another batch.

On 8.1 image server environments the images are transferred directly into the specified queue directory on the image server

6. Click Yes to transfer images from the capture path to the directory as defined by the Transfer Method in Tool Scan. Click No to leave the image in the capture path.

Note: If the user clicks No, they will be prompted again to transfer any images left in the capture path the next time the user exits 1Scan.

◆   **To reorder images in a batch**

Batch mode scanning allows the reordering of images within a batch. After images have been scanned, they can be "cut" from their current location, then "pasted" to a new location within the same batch. Images may not be "cut" from one batch and "pasted" to another. Use the following procedure to move an image from on location to another:

1. Select the image to move by paging up or down to display the image in the 1Scan display area.

2. Cut the image from its current location by either clicking "Cut" from the Batch menu, or by pressing CTRL-X on the key board. The image will be copied into memory.

Note: the image will still display in it original location until the "Paste" operation has been completed.

3. Page up or down to the location where the image will be placed. Display the image that will immediately follow this placement.

4. Paste the image to its new location by either clicking "Paste" from the Batch menu, or by pressing CTRL-V on the keyboard. The selected image will display in its new location.

◆ **To delete images in a batch**

Deleting images allows you to remove poor quality images from the batch. When scanning in single scan mode Delete Image will delete the image that is currently displayed. Use the following procedure to delete an image:

1. Select the image to delete by paging up or down to display the image in the 1Scan display area.

2. Delete the image by either clicking "Delete Image" from the Batch menu, or by pressing Delete on the keyboard.

When scanning in duplex mode Delete Image will delete both the front and back page of the image that is currently displayed. If you wish to delete a single page of a duplexed image then click on the page to be deleted and click "Delete Page" from the Batch menu. The selected page will be deleted. If the front page of a duplexed image is deleted, then the back page will be redisplayed in the front page panel.

◆ **To delete a batch**

Use the Delete Batch option to delete the entire contents of a batch. This option may be helpful in deleting a set of images that have not been scanned correctly resulting in poor image quality or wrong patch code / bar code information. Use the following procedure to delete a batch.

1. Click File > Delete Batch. A message box displays requesting confirmation delete the batch.

2. Click No to cancel the delete batch request. Click Yes to delete the batch. A Batch Code dialog box displays prompting the user to enter a new Batch Name.

3. Enter a new batch name. A new batch session displays.

Note: If the user enters the name of an existing batch, then the images in that batch will display and will be available for review.

◆ **To rescan a document**

Rescan if:

- The document is scanned wrong side up, bottom first, or while folded or crumpled.

- The scanner does not make a readable image. (If rescanning does not work, adjust the settings on the scanner.)

- The scanner jams, runs out of paper, or goes off-line.

If you are scanning a batch of documents when you experience some system problem, resolve the problem and resume the scanning process. To ensure that the image last displayed in the view window is captured for indexing, use this rescan procedure:

1. Return the document to the scanner's bin so that it is the next document to be scanned.

2. Do one of the following:

   - Click on the button on the tool bar
   - Click Scanner > Re-Scan from the main menu
   - Press F3
   - Click on the Re-Scan button on the Pre-Index by Document window

   The previously scanned image (the unacceptable one) is replaced with the rescanned version. The sequence number is not incremented.

**Adjustments to a 1Scan .dat file**

.dat files are data files that store information about each image file to be used for indexing. These files are created by 1Scan at scan time. Each image file created will have an associated .dat file. The following procedures discuss some of the ways the information is written to the .dat files

◆ **To change batch code names**

The procedure for changing batch code names is slightly different for 1Scan connecting to an 8.1 image server than it is for connecting to an 8.0a or earlier image server.
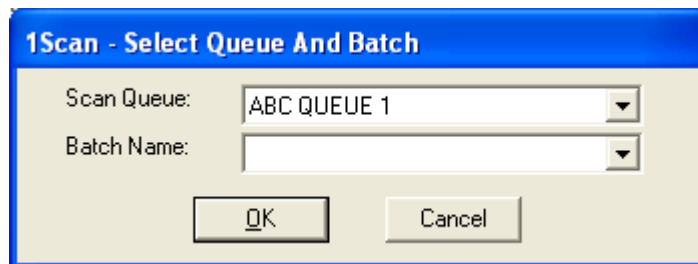
If you are connecting to an 8.1 image server

If Batch Code is *enabled* in Tool Scan, the user has the option to change both the batch and the queue. Users may only change queues if the have more than one queue they can access.
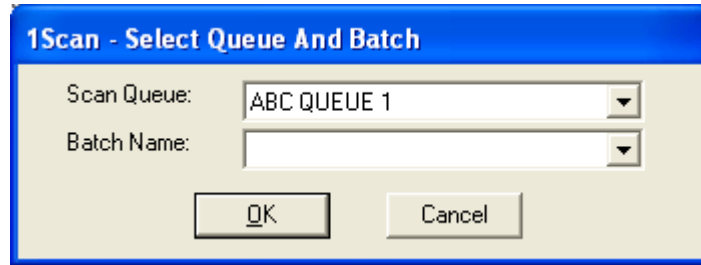
To change the batch and or queue,

Select New Batch from the Batch Menu item
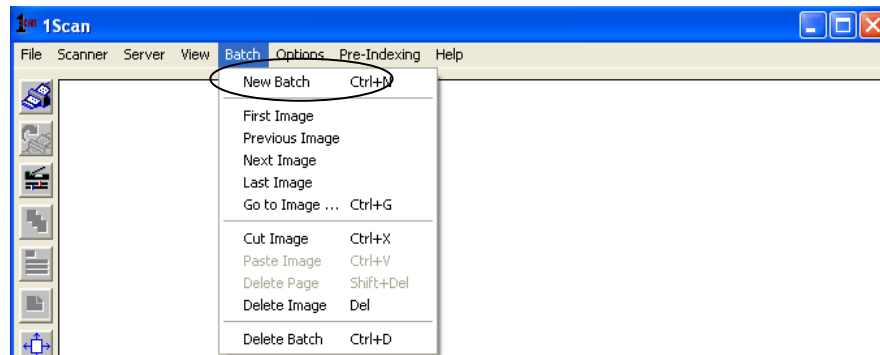
1. The Select Queue and Batch dialog box displays.

2. Click the pull down button in the Scan Queue field to reveal the complete list of scan queues available to this user. Select the new queue from this list.

3. Select a new batch from the list of available batches by clicking the pull down button in the batch name field or enter a new batch name.

4. Click OK

If Batch Code is *not enabled* in Tool Scan, the user still has the option to change the queue. Users may only change queues if the have more than one queue they can access
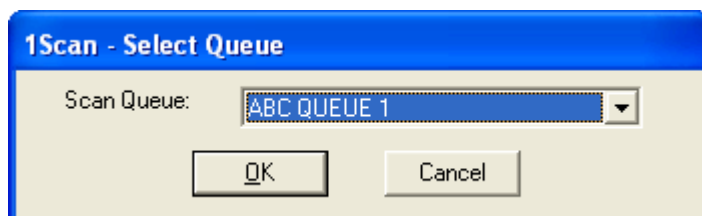
To change queue,

1. Select New Queue from the Queue menu item.
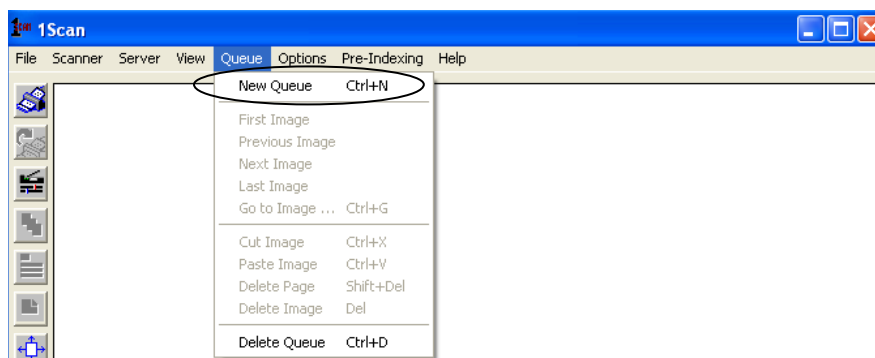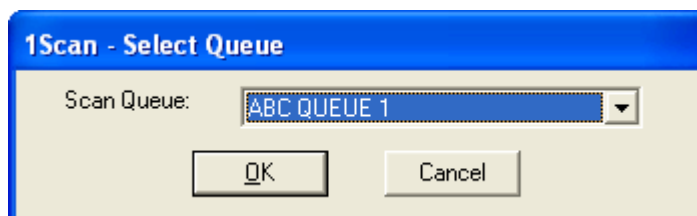

The Select Queue dialog box displays.

2. Click the pull down button in the Scan Queue field to reveal the complete list of scan queues available to this user. Select the new queue from this list.

3. Click OK

If you are connecting to an 8.0a or earlier image server

If Batch Code is *enabled* in Tool Scan, then the Batch menu is enabled.

1. Select <u>N</u>ew Batch from <u>B</u>atch. The Batch Code dialog box displays.
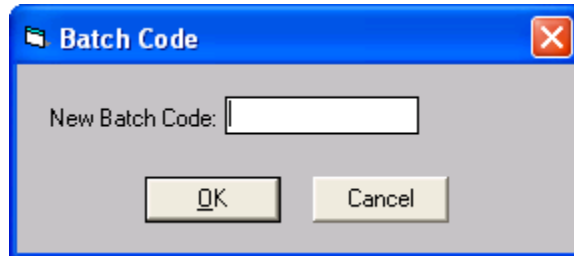
2. Enter a New Batch Code. You may use alpha or numeric characters. Do not use spaces or special characters.

3. Do *one* of the following:

   - Click on <u>O</u>K to accept. The new batch code name is saved in the *B field in all .dat files created by this batch.

   - Click on Cancel to leave without saving your changes.

◆   **To attach a comment to an image (single scan mode only, no pre-indexing)**

If you have selected single scan mode and no pre-indexing, you can attach an unlimited number of characters per comment to an image. Comments are recorded in the data file (image.dat) and will display in the 1NOTES window for this document after indexing.

1. Click Add Comment on the 1Scan Options menu. The Comments dialog box displays.
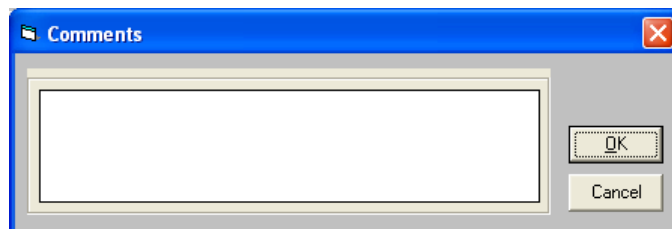
2. Type a comment.

3. Click on OK. The comment is recorded in the * C field of the .dat file.

   Click on Cancel to exit without saving your changes.

Note: Previously entered comments do not appear if you re-display the COMMENTS dialog box. However, changes can be made to a previously recorded comment by adding an additional comment.

In duplex mode, comments may be added to the front, back or both pages of a duplexed image. To add a comment to a duplexed page, single-click either the front or back page in the 1Scan display area to give focus to the desired page. Then click the Add Comment icon from the Tool Bar.   Any text entered in the Comments dialog box will be applied to the .dat file associated with the selected page.

◆　　**To link images together when scanning multi-page documents**

　　1Scan permits you to link multi-page documents during the scanning process; however, if you choose **not** to link documents during the scanning process, you have a *second opportunity* to link them either by using IM110, Index Entry in the telnet interface or by using 1MAGE's manual indexing process in 1Suite.

1Scan puts a *A into the .dat file of the page that is added.

1. In single scan mode, scan the first page of a multi-page document.

2. Scan the next page of a multi-page document.

3. Click on Add. The message, "Add this page to previous page?" displays.

4. Click on OK or press Enter.

   Repeat steps 2 to 4 for all pages of the document.

◆　　**To add an image to a previously scanned image**

When scanning in batch mode, 1Scan allows the user to add a page to a previously scanned image within the current batch. To add an image to any other image within the batch:

1. Scan an image.

2. Press the Page up key or click Batch > Previous to display the page to add the newly scanned image.

3. Click the Add Page button on the tool bar or click Options > Add Page. 1Scan puts a *A into the .dat file of the page that is added.

Common problems and their solutions

If image processing seems exceedingly slow

Most image processing speed problems are the result of a less than optimal pre-scan cache setting in Scanner Properties.

The Prescan Cache setting defaults to 3 when 1Scan is installed. Tune up or down from that number to get the optimal setting for configuration of Kofax card, RAM, scanner, and 1Scan features.

If 1Scan exits abnormally

Check the Prescan Cache setting in 1Scan > Scanner Properties > Options. If pre-scan cache is set too high, the software will simply close because the memory on the Kofax card is insufficient. Tune the setting down and test to get the optimal setting for your configuration of Kofax card, RAM, scanner, and 1Scan features.

Important: 1Scan settings are saved when you exit normally. If you exit abruptly or abnormally, the sequence number is not updated. Clear all images from the current session that remain in your batch directory (or capture directory if appropriate), re-configure the settings, and scan the documents again. If you do not do this, you risk overwriting images scanned, but not yet indexed.

If communications lock up

Do *one* of the following:
- Check the connections between the PC and scanner
- Press the Clear or Stop buttons on the scanner.
- Turn the scanner off and then on again.

One of these might recover communications, in which case you can go back to 1Scan by pressing any key. If communications are still locked up, re-boot your computer.

If you get a communication error

Open KSM (Kofax Source Manager) and confirm that your scanner is listed as the default scanner.

If you switched capture directories and 1Scan does not work (when connecting to 1MAGE Server versions 8.0a or earlier)

If you switched your capture directory to a Network File System (NFS) mount and 1Scan does not work, switch the capture directory to the PC's hard drive and scan to a directory there. If 1Scan works with this configuration, then you have a network problem, not a software problem. See your System Administrator.

If 1Scan is not reading patch codes

Patch codes follow a much more stringent set of specifications than bar codes. This factor, and because the patch code image is much larger than a bar code image, makes patch code recognition much easier than bar code recognition.

If the patch codes meet specifications, the patch code pattern should be recognized even with poor quality images. If the patch code is not being recognized due to poor quality, then the image itself will probably be unacceptable to 1Scan.

However, if Patch Codes are not being read, confirm that the "Left Offset to Center of Patch Code" setting on the Patch Code Properties screen is set to 0. This will enable 1Scan to read patch codes under most conditions.

Data from patchcode page not written to dat file.

Verify the following:

- The Maximum Bar Codes Per Page setting on the Bar Codes Properties screen is greater than the number of bar codes on the PatchCode sheet.
- Bar code reading is enabled.

If 1Scan is not reading barcodes

Confirm that Bar Code Recognition is enabled.

Confirm that bar code property settings for height, width and type are valid for the bar codes being scanned.

Confirm that VRS settings for Erosion / Dilation Filter and Speckle Removal Filter are not removing bar code elements from the image.

If 1Scan is reading some, but not all barcodes on a patch code page

Confirm that the Max Bar Codes Per Page setting is greater than the total number of bar codes present on the patch code page.

If FTP does not work (when connecting to 1MAGE Server versions 8.0a or earlier)

> Ask your System Administrator to check login, permissions, and server's availability.

If you received an error message and re-booting the scanner did not solve your imaging control problem

> Reset the engine. See Resetting the image control board (engine) on page 94 for instructions on resetting the engine.

If the Type Code List dialog box does not display all the Type Codes in Pre-Index mode (when connecting to 1MAGE Server versions 8.1 or later).

> Ask your System Administrator to confirm whether you have access to the missing type code.

If message "You are not authorized to apply type code: <###>"   (when connecting to 1MAGE Server versions 8.1 or later).
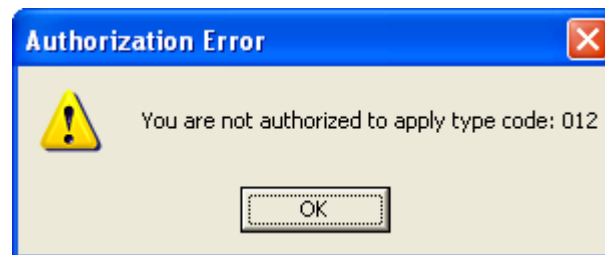
> If you received this message while using patch code sheets to apply type code information to the image at scan time, you have scanned a document containing a Document Type bare code that is not authorized for your 1Scan login name. 1Scan stops scanning as soon as it detects a bar code that attempts to apply a type code to an image that the current user is not authorized to view. All documents following the offending patch code sheet are deleted.

> Remove all documents from the scanner's document feeder and verify that a different patch code sheet is in place before clicking OK. If an out of paper message displays, you will also need to click Cancel on this message box as well.

> If you received this message while pre indexing, then you have attempted to enter a type code in the Types field on the Pre Index dialog box that is valid, but that you do not have privileges to access. Click List to display a list of valid type codes for 1Scan login name. Select a valid type code from the list and click OK.

Table of common error messages

The following table contains error messages that might be encountered while scanning.

To fix this error	Do this
Access violation	If using an NFS mount, ask your System Administrator to check the directory for appropriate user permissions.
Data overflow	Appears if the DPI is set too high and the scanner board could not handle the size of the image. Use Scanner Set up to switch to a lower DPI or increase the memory on the Kofax board.
Disk or directory is full	Appears if images are stored on the PC: check to see if the images need to be transferred, try to scan again; if not successful see your System Administrator.
Peripheral not configured	Appears if the scanner was not turned on and initialized before the PC was booted. Boot the scanner and then re-boot the PC.
Peripheral not ready	Wait for the scanner to initialize and try to scan again.
Scanner is jammed	Free the paper jam and re-scan the jammed document.
Scanner Out of Paper	Fill the paper tray and continue scanning.
System memory allocation error	Close other applications and continue scanning or check your memory configuration requirements. If you cannot recover, exit and restart Windows.
Timeout waiting for engine or device	Check the scanner to see if it is functioning properly and scan again.

Troubleshooting procedures

Resetting the image control board (engine)

A scanner's image control board, or engine, is *automatically* configured and its memory is cleared whenever the scanner is booted or re-booted. The board may be *manually* configured and its memory cleared without re-booting the scanner by selecting the option Reset Engine. To reset the engine:

- From the Scanner menu, select Reset Engine. The Reset window displays the current status as the board's memory is cleared and it is reconfigured. The message Kofax Engine Loaded Successfully displays when the engine is reset.
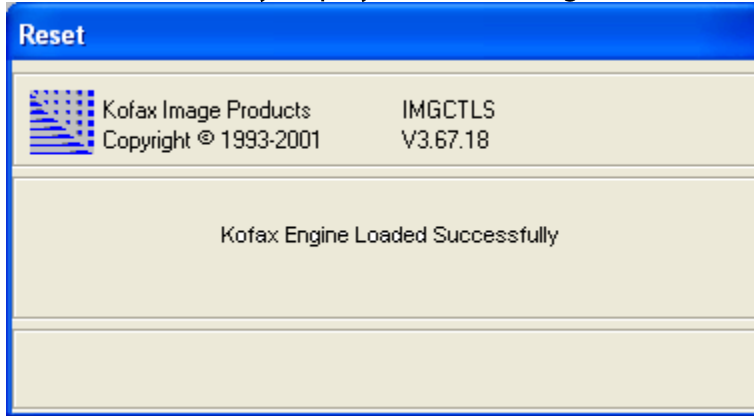
Note: This window may display too quickly to be viewed