InfoScan

USER GUIDE

User Guide

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SYSTEM REQUIREMENTS

SERVER REQUIREMENTS
Infoscan Server requires Microsoft SQL Server 12+ Express, Standard or Enterprise to run. MS SQL

Minimum System requirements
CPU Requirements: Minimum: Quad Core Processor Recommended: Six Core Processor or more
Memory Requirements: Minimum: 6 GB of RAM Recommended: 8 GB of RAM
Operating System: Minimum: Windows 7 Recommended: Windows 8/10, or Windows Server 2008/2012
Network Configuration: Minimum: 100 Mbit/s Recommended: 1 Gbit/s
Disk Space: Depending on the number of images to be scanned and stored. Minimum recommended space 50 GB.

Installation Instructions for SQL Server
Step 1: Enable Microsoft .Net Framework 3.5 SP1. and Download and install Microsoft .Net Framework 4.0.

- Note: LocalDB does not require any .NET Framework installation.

- Note: SQL Server Express (with database engine only) can work with either .NET 3.5 SP1 or .NET 4, there is no need to have both enabled.

Step 2: Download Microsoft® SQL Server® 2012 Express by clicking the appropriate link below.

https://www.microsoft.com/en-za/download/details.aspx?id=29062.

Note: Microsoft® SQL Server® 2012 Express includes both 32-bit and 64-bit versions. SQLEXPR32_x86 is a smaller package that can be used to install SQL Server Express onto only 32-bit operating systems. SQLEXPR_x86 is the same product but supports installation onto both 32-bit and 64-bit (WoW) operating systems. SQLEXPR_x64 is a native 64-bit SQL Server express and supports installation onto only 64-bit operating systems. There is no other difference between these packages. Microsoft® SQL Server® 2012 Express is not supported on IA64 systems.

WORKSTATION REQUIREMENTS
CPU Requirements: Minimum: Dual Core Processor Recommended: Quad Core Processor
Memory Requirements: Minimum: 4 GB of RAM Recommended: 8 GB of RAM
Hard Drive Space Requirements: Minimum: 800 MB for the program alone
Operating System: Minimum: Windows 7 or Windows 8 Required Components: .NET Framework 4.5
Network Configuration: Minimum: 10/100 Mbit/s Recommended: 1 Gbit/s

IMAGE STORAGE
Space: *This depends on the number of batches being held in Infoscan at one time. Recommended: 50 GB and above.
The images can be held in the same server as SQL server or any other shared drive in the network.

INSTALLATION

SERVER

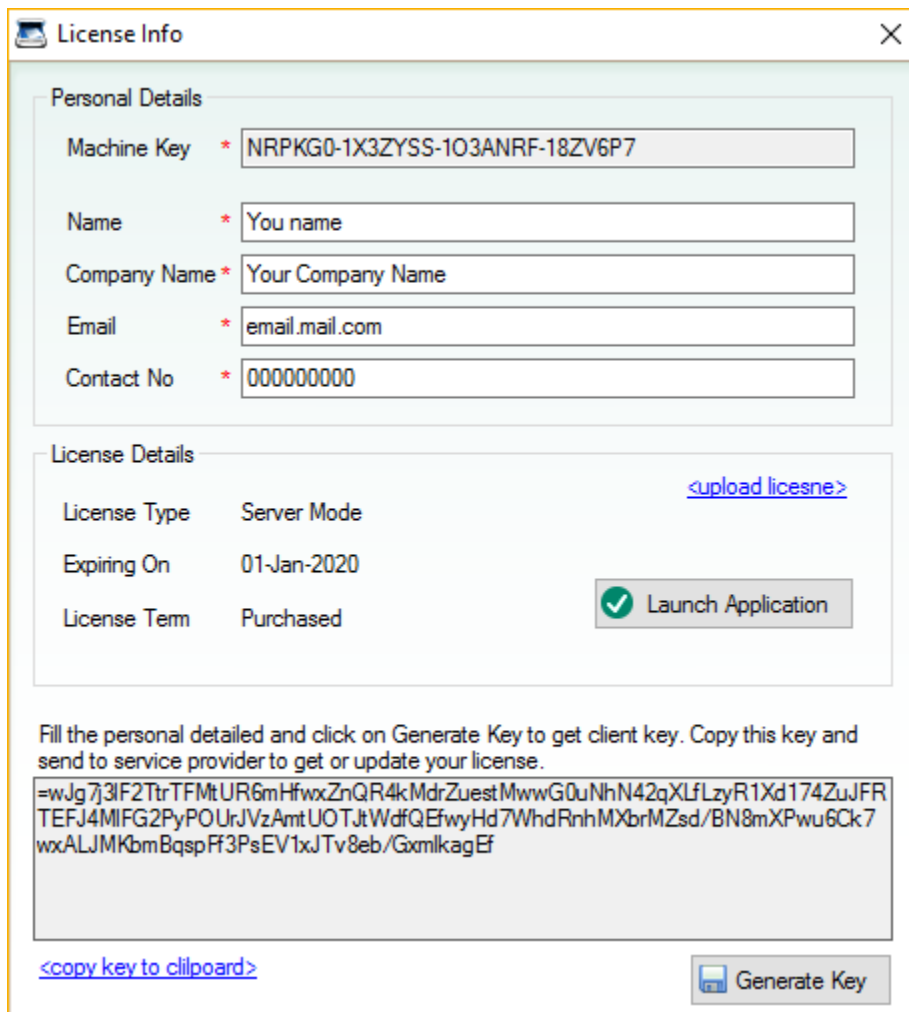Follow installation instructions for SQL Server as described <u>above</u> in minimum server requirements.

WORKSTATION

- Copy Infoscan installation files to a central location on a file server.
- Click on Setup to start the installation process.
- After Setup has completed a shortcut will be placed on the desktop.

First time run

- Click the Infoscan Icon on the desktop to start the application
- You will receive a License request screen
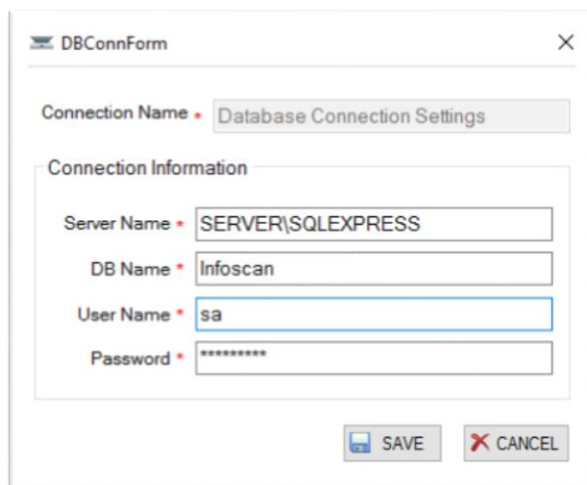- Complete all the required fields and click the *Generate Key* button

- Copy the key and paste in into your email program and send it to <u>support@infofilesolutions.co.za</u>

- You will receive an email back with a license file which you will use to activate your copy of Infoscan.
- Once you received the license file, use the *Upload license file* link to upload your license file.
- Exit Infoscan and restart to activate the license.
- When Infoscan starts, you will receive a Login screen.
- Click on the settings button at the bottom right of the login screen to configure the database settings.
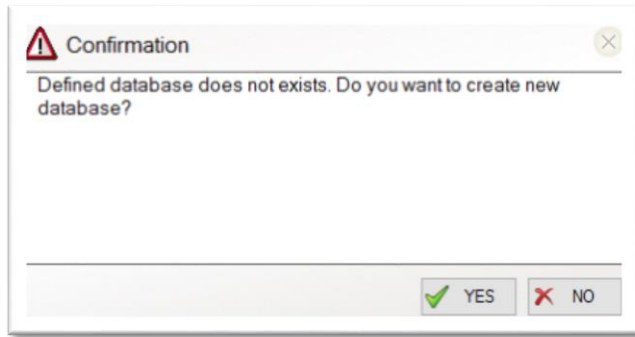

You will receive the following message

Click YES to create the database.

* Very Important
Please ensure that all workstations are configured with the same database settings otherwise multiple databases will be created and users will not be able to share job settings etc.

First time login
Login in with User Name: admin and Password: admin


CREATE NEW USERS
Infoscan comes standard with Admin user that has all the permissions to create and Manage Jobs, Clients etc. You can create additional users to perform Scanning, Indexing and Exporting functions.

To create additional users, navigate to the Home menu and click the Users Menu. Click Add to create a new User. Fill in all the required fields and select the permissions for the user.
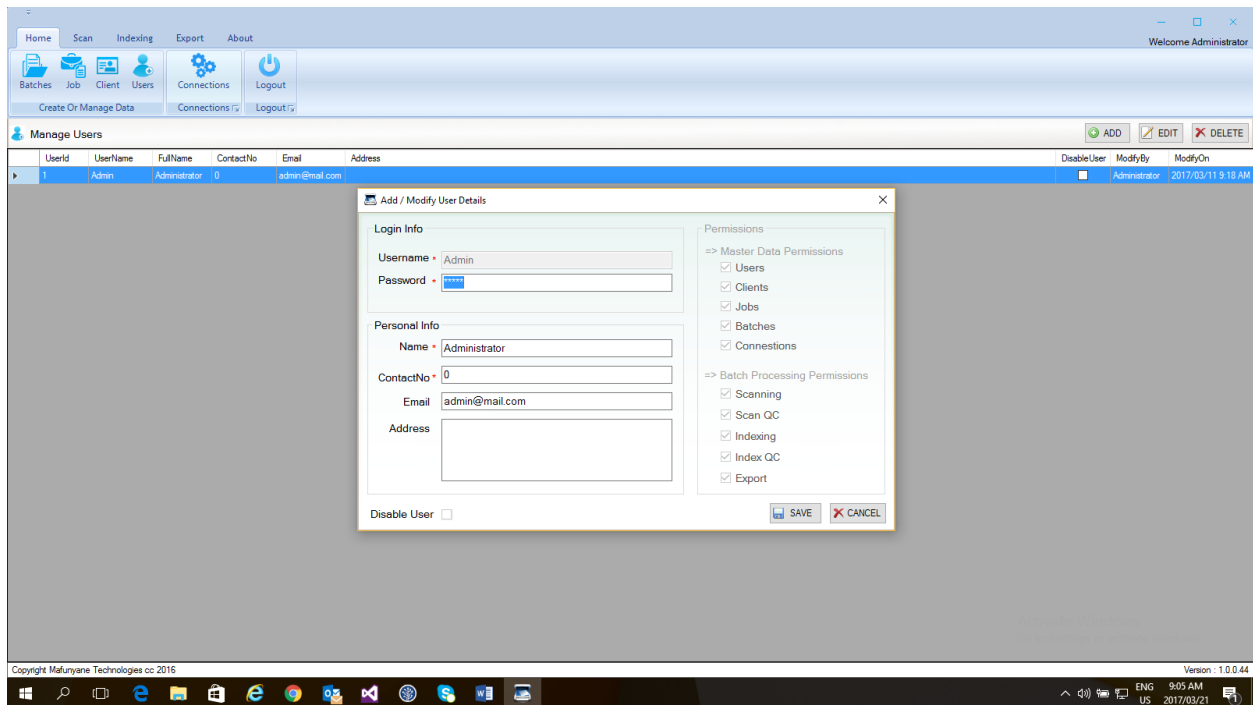
CREATE NEW CLIENTS

Infoscan is designed around bulk scanning for clients based on job profiles. The first step would be to create a new client for whom jobs will be defined.
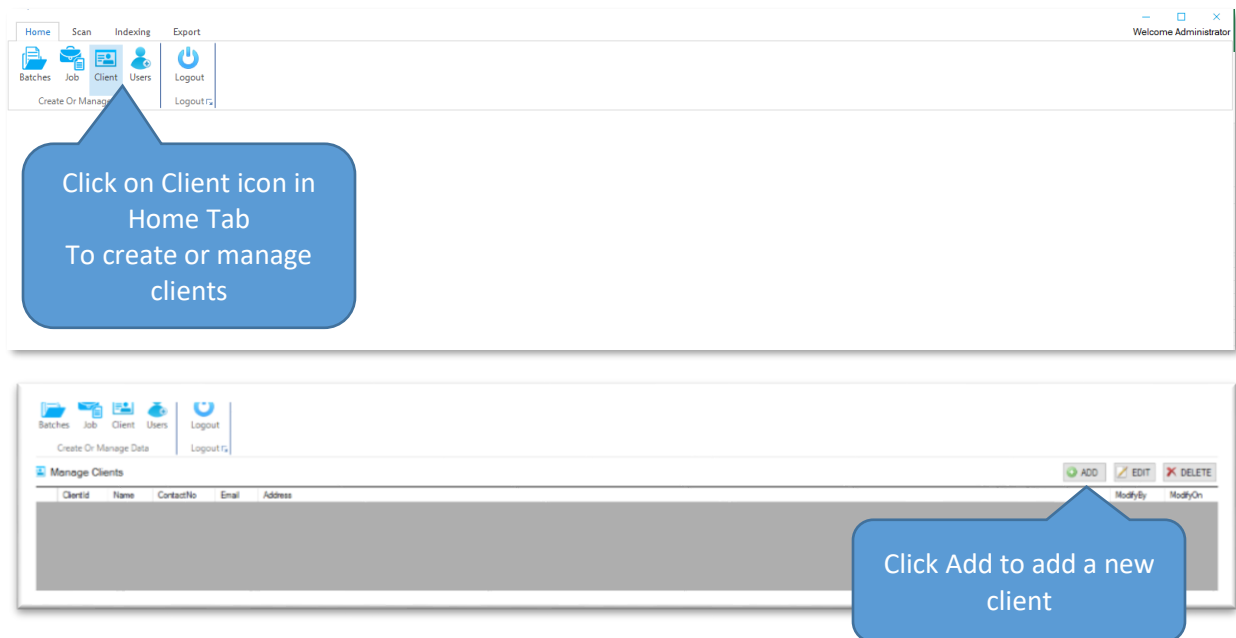
Click on Client icon in Home Tab
To create or manage clients

Click Add to add a new client

Complete client details as save.

CREATE NEW JOB

The next step is to create a Job Profile for the client. Job profiles define all the settings to standardize parameters to scan a specific job.
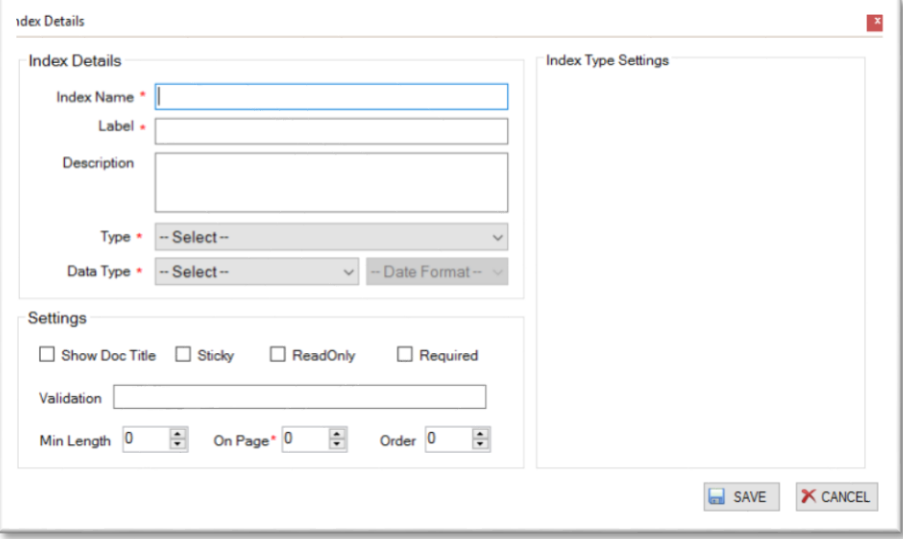

JOB DETAILS

On the job details screen capture the following details

- Job Name
- Select the Client
- Define an image location. This would normally be a shared network drive where the raw images will be saved during scanning. ***Important:** Users must have Read, write and modify permissions for this folder. ***Important**: Make sure you have enough free disk space in the folder to hold the scanned images
- Provide a description of the job and any special instructions relating to the job.
- Scan settings. Here you can specify the scanner and scan settings that apply to this job like
  - Resolution
  - Colour
  - Paper size
  - Show or hide scanner UI during scan
  - Duplex Scanning
  - Delete Blank Pages
  - Auto Rotate
  - You can also disable indexing during scanning to improve performance
- Document Separation – you can specify parameters to split scanned images into documents based on
  - Blank page
  - Every (x) no of pages
  - Barcodes

Click the Save button to save the Job Details.

INDEXES

The next step is to define index fields for the Job. Select the Job and click the Edit button. Click on the Index tab to add new index fields.
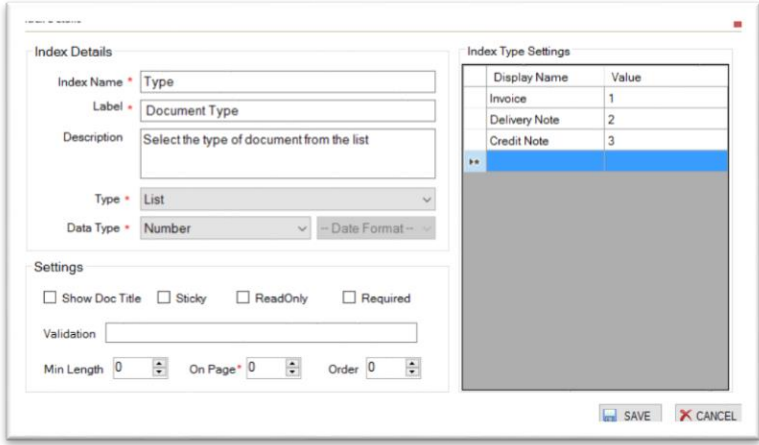

Index Details

- Specify a name for the index field. Eg "IDNumber"
- Specify the display name for that index field in the index explorer. Eg "ID Number"
- Enter a description for index field. Eg, "Enter the ID Number of the Applicant"
- Select the Type of Index the options are:
    - Normal,
    - List
    - OCR Zone
    - Barcode
    - Database Lookup

Normal

Normal will provide a text box during indexing and the user can type any value in the text box.

List

The List type index allows you to specify a list of values that can be selected during indexing. Define Display names and values. The Display field is a description and the value field will be the value that will be used to index the document.

OCR Zone

The OCR Zone Type index will allow you to define an area on the document that must be OCR'ed during indexing.

You can then upload a sample image of the document that will be indexed. Select the area that must be OCR'd

Barcode

The Barcode type index allows you to specify the types of bar codes to read.
Infoscan can read the following types of barcode
- Code 39
- Code 128
- QR codes

You can specify the index of the barcode on the page to read. Barcodes are read from left to right and top to bottom. Eg. Index 2 will be the second barcode from top left of the page.

In cases where the barcode is always in the same place on the page you can also specify the location. Use the Upload Zone Selection option to load a sample image and define the location by dragging the pink square over the barcode location. Please make sure you only include the barcode and not any other text.
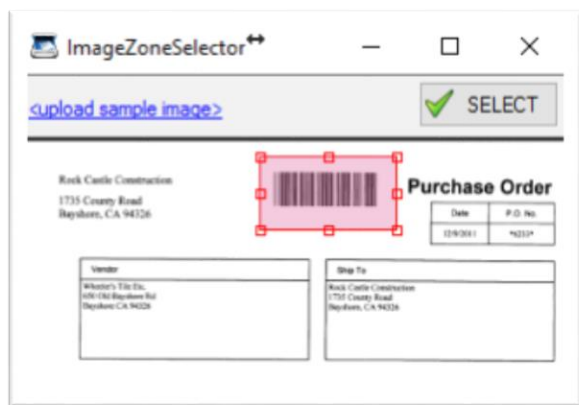
Database Lookup

The database lookup type index allows you to read additional index values from a database. Currently only SQL server databases are supported but other database types will be added in future.
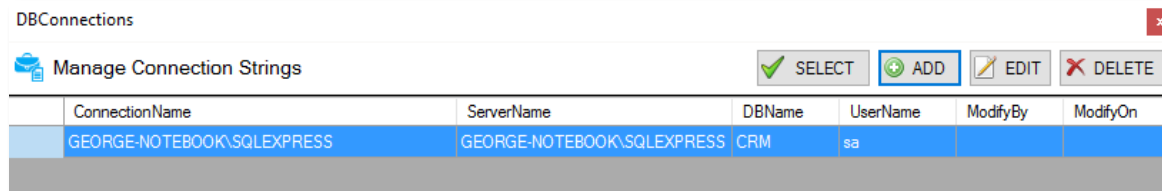

Specify the Index Details and Settings for this index. Next create or select a database connection.
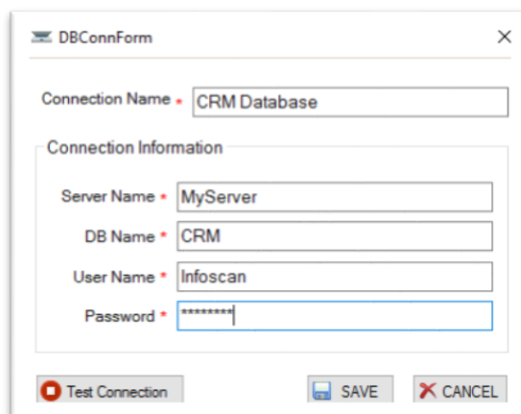
To create a new connection, click 'Add" and complete the Database Connection Form.

]

Once the Database connection has been selected you can enter any valid SQL statement to retrieve a value from the database to populate the index field form. You can use existing indexes as parameters to filter the results of your sql query. ***Tip: Please test your query to ensure it will return results otherwise you may receive empty values.**

Index Settings

Index settings allows you to specify additional settings for the Index.

Sticky

Select Sticky to repeat the same value for all documents. If you change the value in this index fields all subsequent documents will default to that same value until you change it again.

Read Only

The user cannot change the value in this field. This is normally used for Database Lookup type indexes.

Required

Use this to ensure the index field is completed. The user will not be able to complete indexing unless this field is populated.

Validation

Enter a regular Expression to validate the value captured in the index field. You can use this to ensure a user types only letters or only numbers etc.

For more info visit http://www.regular-expressions.info/ or http://regexr.com/

Min Length

Specify the minimum number of characters that must be captured in the index field. For example, if you are capturing Invoice Numbers and you know that all invoice numbers must have 10 characters, you can specify 10 as min length.

On Page

This is the location of the index on the page of the document. The default is 1 which refers to the first page but if the index is on the second or third page you can specify it as such. This will be used during indexing to automatically display the specified page for easy capturing.

Order

Specify the order in which indexes will be displayed in the index explorer.

IndexName	IndexValue
Invoice No	
Customer Name	

EXPORT SETTINGS

The Export settings allows you to specify one or more ways to export the scanned documents and associated index data.

Export to File

Specify the path to a folder where the exported documents should be saved. You can use parameters to define a file naming convention. Place your cursor inside the File Name box and double click the required parameter to create the file naming convention. ***Tip: You can combine different parameters as well as standard text to create a custom file naming convention.**

You can use the Quality slider to reduce the quality of the exported images. This will also reduce the size of the images. You need to test this setting to get the best acceptable balance between size and quality.

You can also choose to export an associated Index file that contains the index data. Choose the path and filename for the index data. You can also customize the path and filename with a combination of standard text and index field parameters. You can further select and re-order the index fields to include. You can also create additional fields with a custom value based on standard text and Index parameters.

Export to SharePoint

The SharePoint Connector allows you to export your documents to a SharePoint document Library.

Specify the URL of the SharePoint Site, User Name and Password. ***Important: currently Infoscan only support forms based security. The user must have Contribute permissions on the document library.**

Click on the Connect button to connect to the site. Select the appropriate document library from the list.   Al list of fields fill display in the grid below. Populate the Index field column by placing your cursor in the index field box and double clicking on the Parameter that you want to use to populate the field.
* Important: Use compatible data types to populate the SharePoint Fields

Specify the File Name Options. You can create a custom file name based on a combination of fixed text characters and Index Parameters.

Export to Email

With the Export to email connector you can send scanned documents directly to an email recipient. You can use index fields to automatically populate recipients, Subject etc.

You can also compose the email body with a combination of index fields. Just double click on any of the index parameters to include the index value in the mail.

Export to Database

The Export to Database connector allows for the exporting of images and index data directly to a database like SQL Server.

You can either export your image to the file system and insert a record in a database that points to the image location or you can directly export the image to an image field in a database table.

You can further update related tables with any of the index field parameters.

SCANNING MODULE

To start scanning a new batch, select the **Scan** tab and select **New Batch**. Select the **Client** and **Job.**
Enter a name for the batch and enter a description if required. Click **Save** to create the batch. You are now ready to start scanning.

You can either scan one page at a time or multi pages. Depending on your scan settings of the job you will be presented by your scanner's interface.

Use the *Scan Settings* menu to set your scanning preferences like Resolution, Color, Rotation etc.

You can also set your document separation settings from the *Document Separation* menu.
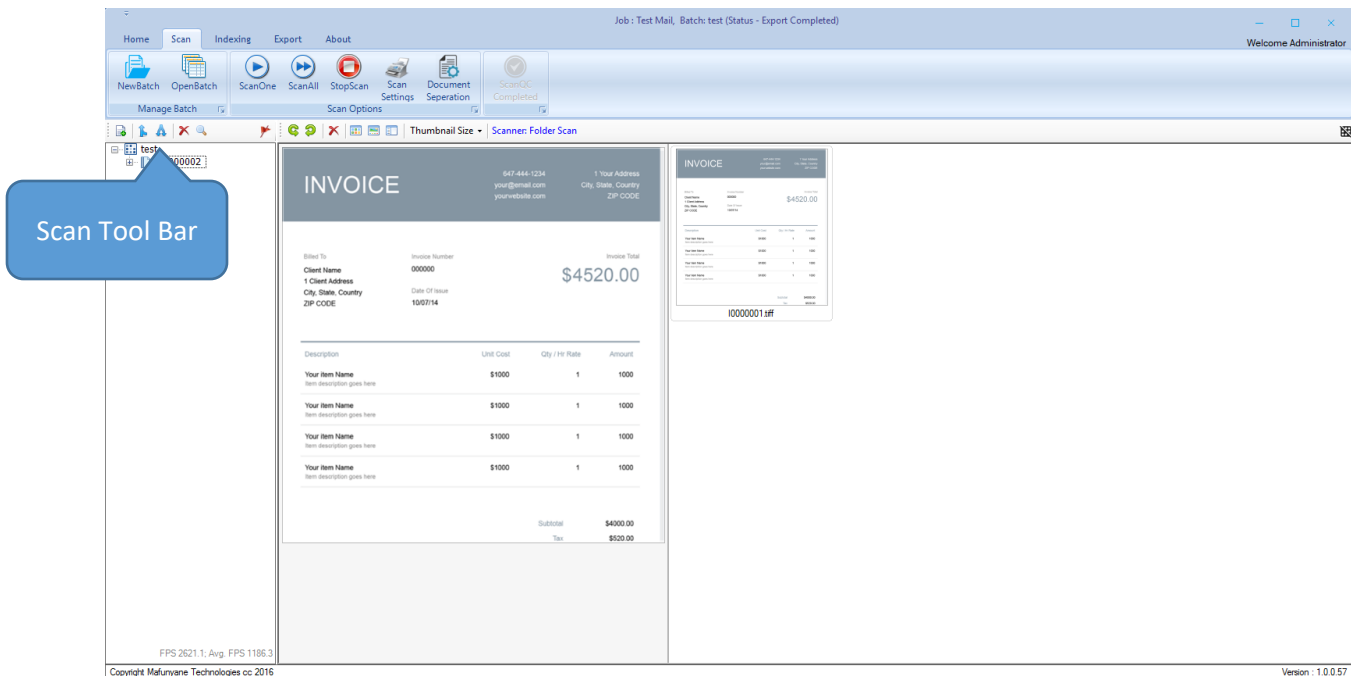
Scan Tool Bar

The user can complete the scanning process by clicking the *Scan Completed.* The next step is to do quality control on the scanned images.

On the toolbar, you have several tools that you can use during the Scanning/ Quality Control process:

- Add new document
- Merge documents
- Split documents
- Delete Document, page or image
- Flag document
- Rotate Left/Right

You also have additional tools on the context menu of each document, page or image. You can access the context menu by right clicking on the Document, page or image in the batch tree.
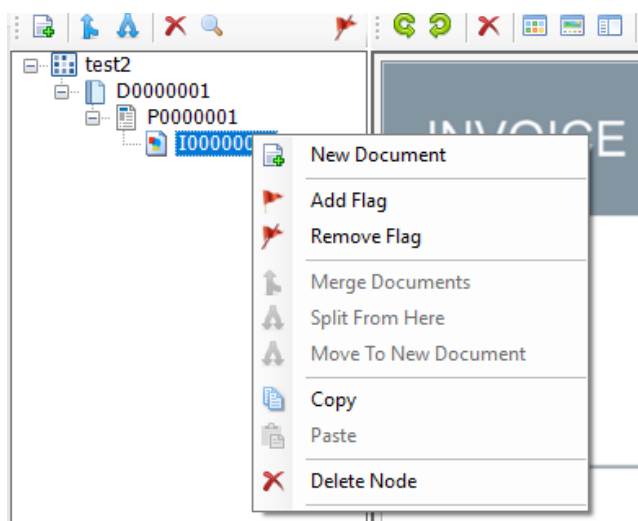
When you are satisfied with your images you can complete the *SCAN QC* process to continue to the indexing process.

INDEXING MODULE

Coming soon!