SimpleSoftware

Simple solutions for document management

# SimpleView 5.1 MANUAL

www.SimpleIndex.com

**Revised January, 2013**

# Table of Contents

1 Introduction ..... 5
1.1 File-Based Document Management with SimpleView ..... 5
1.2 Image Quality Control with SimpleView ..... 6
2 Freeware Features & Licensing ..... 7
2.1 Compare Free & Full Features ..... 7
2.2 Running in Free & Demo Modes ..... 8
2.3 Activating the License ..... 8
3 Using the SimpleView Interface ..... 9
3.1 Using the Ribbon Menus ..... 9
3.1.1 Home ..... 9
3.1.2 Edit ..... 9
3.1.3 Properties ..... 9
3.1.4 Annotations ..... 10
3.2 The Dockable Panes & Windows ..... 10
3.2.1 Folders ..... 10
3.2.2 Files ..... 10
3.2.3 Thumbnails ..... 10
3.2.4 Pages ..... 10
3.2.5 Viewer ..... 10
3.2.6 Restore Default Layout ..... 10
3.3 Navigating Folders ..... 11
3.3.1 Folder Favorites ..... 11
3.3.2 Refresh Folder ..... 11
3.3.3 Add/Delete/Rename Folders ..... 11
3.3.4 Folder Thumbnail Size ..... 11
3.3.5 Back and Forward Navigation ..... 11
3.4 Viewing Documents and Thumbnails ..... 11
3.4.1 Document View ..... 12
3.4.2 Mouse Action ..... 12
3.5 File and Page Processing Modes ..... 12
3.6 Working with Folders and Files ..... 12
3.6.1 Working with Windows Explorer ..... 12
3.6.2 Drag-and-Drop ..... 13
3.6.3 Clipboard ..... 13
3.7 Email Files or Pages ..... 13

3.8 Application Menu ..... 13
3.8.1 Help ..... 14
3.8.2 Print ..... 14
3.8.3 Restore Default Layout ..... 14
3.8.4 Activate/Transfer License ..... 14
4 Searching Files ..... 16
4.1 Folder & Filename Search ..... 16
4.2 File Mask Search ..... 16
4.3 Auto-Search ..... 16
4.4 Search Text ..... 16
4.5 Regular Expressions ..... 16
4.6 Search Favorites ..... 17
5 Editing Images ..... 18
5.1 Processing Files or Pages ..... 18
5.2 Background Processing ..... 18
5.3 Automatic File Selection ..... 18
5.3.1 Even and Odd Pages ..... 18
5.3.2 Detect Blank ..... 19
5.3.3 Property Select ..... 19
5.4 Rearrange, Move and Copy Pages ..... 19
5.5 Image Enhancement Options ..... 20
5.5.1 Rotate Left and Right ..... 20
5.5.2 Deskew ..... 20
5.5.3 Despeckle ..... 20
5.5.4 Remove Border ..... 20
5.5.5 Crop ..... 20
5.5.6 Delete ..... 20
6 File Format Conversion ..... 21
6.1 Split ..... 21
6.2 Merge ..... 21
6.3 Export ..... 21
6.4 OCR ..... 21
6.5 Convert ..... 21
6.6 Resample DPI ..... 22
6.7 Convert to Black & White ..... 22

7 Scanning and Re-Scanning ..... 23
7.1 Scan New ..... 23
7.2 Rescan Page ..... 23
8 Annotating Documents ..... 24
9 Contacting Simple Software ..... 25

# 1 Introduction

SimpleView 5 (formerly SimpleQC) has a completely redesigned user interface that will form the foundation for the next generation of Simple Software applications. This redesign makes SimpleView more than just a scanning quality control application--it is one of the most user-friendly and cost-effective document management tools available!

## 1.1 File-Based Document Management with SimpleView

SimpleView lets you quickly scan, organize, search and view documents stored on your hard drive or file servers. Most document management systems use a database to organize and search for files. This forces you to laboriously import files into the system, then you must rely on that system anytime you access your files. SimpleView lets you use your existing folder and filing system to find, view and annotate documents. This has several advantages:

- No server systems to learn or maintain, only a desktop application
- No reliance on proprietary technology to access your files
- Uses built-in Active Directory file permissions
- Use existing access rights or edit them from SimpleView
- Files can be shared with other applications
- No need to import and tag files manually
- Use existing backup plans
- Users who view documents infrequently can still use Windows Explorer

Most companies that use their file servers for document management simply use Windows Explorer to find and view files. SimpleView is a much better solution for anyone that works with documents regularly.

- Integrated document scanning
- View multi-page documents without opening in Acrobat or Windows Picture and Fax Viewer
- Double-click files to open in default application for advanced editing
- Rotate, clean-up, re-order pages, split and merge multi-page TIFF and PDF files
- Convert documents to text or searchable PDF with OCR
- Annotations - make notes, highlights and other mark-ups without altering original

- More versatile file searching, including pattern matching (RegEx)
- Search large file shares in seconds instead of minutes
- Find text inside PDF files (also RegEx enabled)
- Dockable windows for customized viewing, including multiple monitors

## 1.2 Image Quality Control with SimpleView

Even though we think SimpleView 5 has broader appeal as a document management tool, it is also better than ever at document imaging quality control and rescan functions. We have added some very unique and useful features in this department, including:

- Instantly view page properties like resolution, color depth and compression type in the toolbar
- Auto-select files or pages based on above properties
- Automatically convert resolution, color depth, file type
- Select all even numbered, odd numbered or blank pages automatically
- Full support for drag-and-drop with pages, folders and files
- Splitting and merging files, reordering pages is faster and easier
- Multi-threaded processing lets you continue working while pages are processed in background

Of course all the standard QC functions from the previous version are all present as well:

- Rotate pages
- Deskew (straighten page)
- Despeckle (remove “snow”)
- Rescan
- Reorder pages
- Move or copy pages between multi-page files
- Delete pages
- OCR to Searchable PDF or Text
- Blank page detection
- Open PDF and other files in default application for review
- Integration with Windows Explorer right-click menu

# 2 Freeware Features & Licensing

## 2.1 Compare Free & Full Features

When SimpleView is first installed, it is automatically set to run in *Freeware Mode*, with only certain features enabled. The differences between the freeware and the full version of SimpleView are below:

| *Features* | *Free* | *Full* |
|---|---|---|
| Integrated Windows explorer style image browser | ✓ | ✓ |
| View thumbnails of files | ✓ | ✓ |
| View page thumbnails for selected file | ✓ | ✓ |
| Fast folder and file searching | ✓ | ✓ |
| Search text in PDF files | ✓ | ✓ |
| Support for Regular Expressions in file and text searches | ✓ | ✓ |
| Dockable view windows with multiple monitor support | ✓ | ✓ |
| Supports TIFF, PDF, JPEG, GIF, PNG and BMP format | ✓ | ✓ |
| TWAIN scanning to TIFF or PDF | ✓ | ✓ |
| Rescan pages | ✓ | ✓ |
| Rotate pages | ✓ | ✓ |
| Rearrange pages in multi-page files | ✓ | ✓ |
| Extract pages to new file | ✓ | ✓ |
| Append pages to files | ✓ | ✓ |
| Delete pages and files | ✓ | ✓ |
| Email files or extracted pages | ✓ | ✓ |
| Print files or pages | ✓ | ✓ |
| Integrated Windows file security | ✓ | ✓ |
| Deskew (correct image angle) | | ✓ |
| Despeckle (remove noise) | | ✓ |
| Remove black borders | | ✓ |
| Crop images | | ✓ |
| Detect blank pages | | ✓ |
| Split large files | | ✓ |
| Merge multiple TIFF and PDF files into one | | ✓ |
| Convert files between image formats | | ✓ |
| OCR to Text or searchable PDF Image+Text (Tesseract) | | ✓ |
| Resample image resolution | | ✓ |
| Convert between Black & White and Color formats | | ✓ |
| Select files/pages based on images properties (Color, DPI) | | ✓ |
| Annotate TIFF and PDF files | | ✓ |
| Select files/pages based on annotations | | ✓ |
| Automatically highlight or redact full text search results with annotations | | ✓ |
| Make annotations permanent | | ✓ |

If you want to use the full feature set, you can try the demo for 30 days or purchase the software to activate the full version with a serial number.

## 2.2 Running in Free & Demo Modes

Click the *Demo Full Version* button to launch SimpleView in demo mode. During the 30 day trial this option will enable all features of the full version.

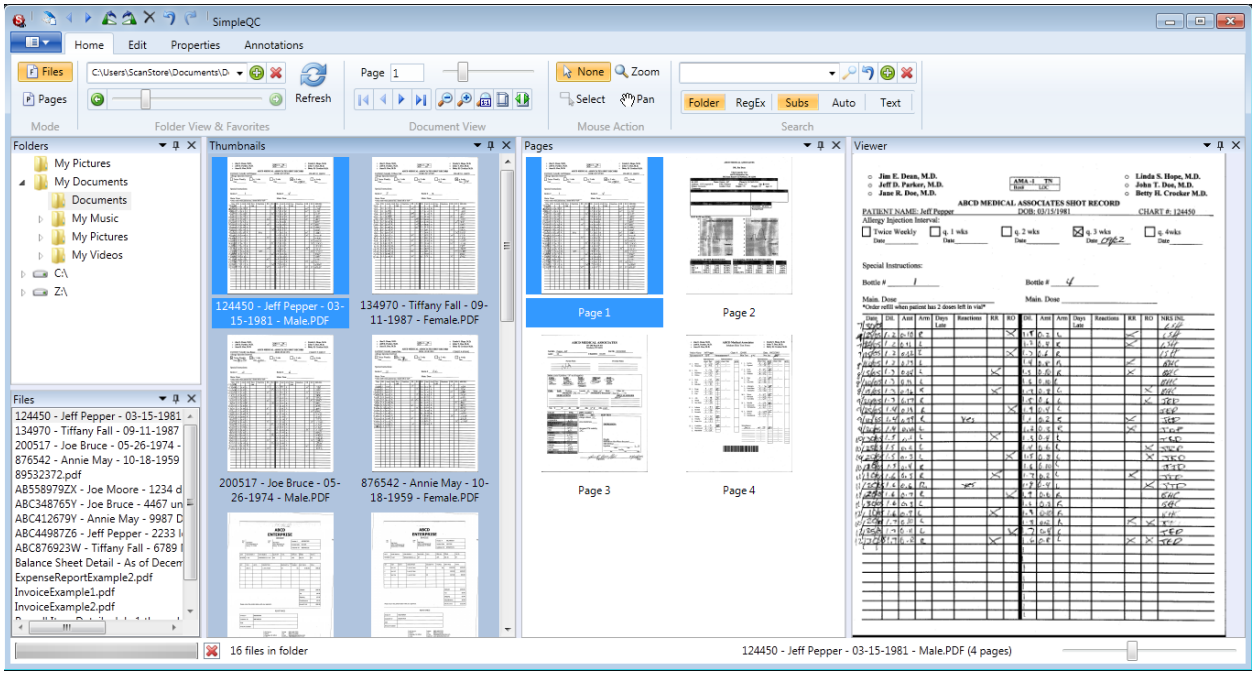
Click *Use Free Version* to launch SimpleView in free mode. This option never expires.

## 2.3 Activating the License

To activate the full version of SimpleView, enter your serial number in the box and click *Activate*. If you are connected to the Internet and no firewall is blocking it, SimpleView will connect to the activation server and register automatically.

If connectivity problems prevent communication with the activation server, you may activate offline by clicking the *Offline Activation* button and following the on-screen instructions.

# 3 Using the SimpleView Interface




## 3.1 Using the Ribbon Menus

All functions in SimpleView are accessed either through the ribbon menu or through context-sensitive right-click menus.

You can hover over any button to get a description of that button's function.

You can right-click any button to add it to the quick access menu at the top of the screen. These buttons can be accessed no matter which ribbon tab you are using.

### 3.1.1 Home

Folder and document navigation, mouse options and searching.

### 3.1.2 Edit

Image enhancement options like Deskew, Despeckle, Rotate, etc.. Document conversion options like Split, Merge, Convert, OCR, Export and Email. Clipboard functions.

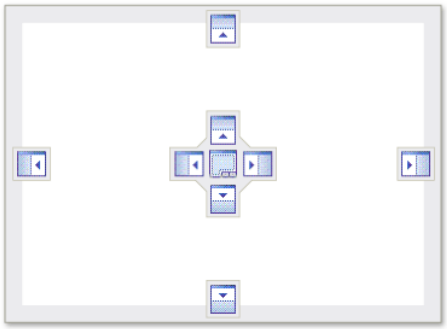
### 3.1.3 Properties

View image properties like resolution, color depth and compression. Select images based on properties. Resample DPI or convert color images to black and white.

### 3.1.4 Annotations

Allows you to mark-up, highlight, annotate and otherwise interact with the digital document the way you would with paper. Annotations are saved separately from the original page image, rather than modifying it permanently.

## 3.2 The Dockable Panes & Windows



SimpleView uses dockable panes or sub-windows to organize the visual and interactive elements. Each pane can be resized, moved, hidden or detached into a new window. When you click the header of any pane and drag it, arrows like the ones on the right will appear. Using the inner arrows will divide the current window. The outer arrows will divide the main window so the pane fills the selected side.

### 3.2.1 Folders

Navigate drives and folders on your network.

### 3.2.2 Files

List of files in the current folder or search results.

### 3.2.3 Thumbnails

Thumbnail images for the first page of each file in the current folder or search results.

### 3.2.4 Pages

Thumbnails for each page in a multi-page TIFF or PDF file.

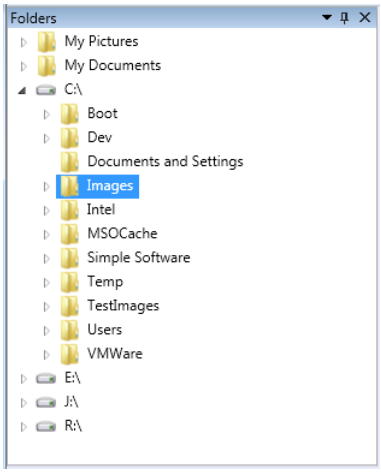
### 3.2.5 Viewer

Full page view of current page. Interactive zoom, pan, selection and annotation.

### 3.2.6 Restore Default Layout

This option (found in the *Application Menu*) allows you to restore all panes to the default layout. This will restore any panes that have been closed and dock any pop-out windows.

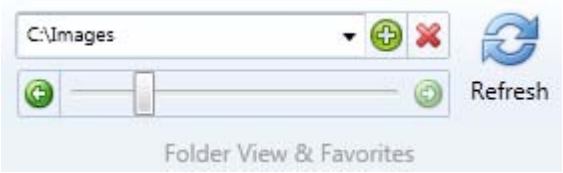
## 3.3 Navigating Folders




The *Folders* pane lets you browse folders on a local and network drive. Unlike Windows Explorer, any folders that are not accessible to the current user are hidden automatically. This makes navigating large file servers much easier.

### 3.3.1 Folder Favorites

Most users only access a small number of folders on a regular basis. The favorites bar lets you add frequently-used folders to the selection list and access them instantly. Use the + to add the current folder to your favorites list and x to remove it.




You can also enter a folder directly into the favorites bar to open that folder.

### 3.3.2 Refresh Folder

Updates the display for the current folder, showing any subfolders and files added by other programs and re-sorting the file list.

### 3.3.3 Add/Delete/Rename Folders

Right-click on a folder in the *Folders* pane to access the folder menu. All changes to the folder structure must be done by dragging folders to move or copy them or use the right-click menu to add, delete or rename folders.

### 3.3.4 Folder Thumbnail Size

Use the slider to adjust the size of file thumbnails.

### 3.3.5 Back and Forward Navigation

The arrows on either side of the slider are web browser style *Back* and *Forward* navigation buttons, letting you quickly jump between folders you previously visited.

## 3.4 Viewing Documents and Thumbnails

The *Document View* toolbar group contains options to navigate the pages of multi-page documents and options for viewing the current page.

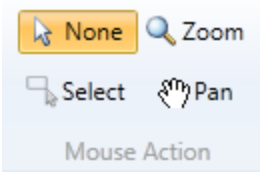
### 3.4.1 Document View

Standard *First, Previous, Next* and *Last Page* buttons let you browse pages, or enter a page number in the box above to go directly to that page.

Zoom options on the right let you zoom *Out* and *In* on the current page, view the *Actual Size* of the image, *Fit to Window* or *Fit Width*. The slider control in the bottom-right corner of the window allows you to control the zoom level of the current page as well.

The slider control lets you adjust the size of thumbnails in the *Page* pane.

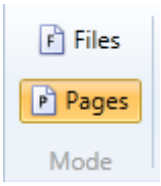
### 3.4.2 Mouse Action




This menu lets you control what happens when you click and drag the mouse in the *Viewer* pane.

***None***: use to select and edit annotations.
***Zoom***: draws a box around the selected area and zooms in on it. After zooming, the *Mouse Action* is automatically switched to *Pan*.
***Pan***: lets you move the image using click-and-drag.
***Select***: draws a selection box on the image, allowing you to copy the region to the clipboard.

## 3.5 File and Page Processing Modes




Each ribbon tab has a standard *Files* and *Pages* selector. ***This serves an important function!*** Anytime a processing option is selected, the process could be performed on the selected pages within the current file, or on the selected files in the file list. The value of the *Files* and *Pages* selector determines whether to process pages or entire files.

When selecting more than one page or file, the *Mode* is automatically switched. The *Mode* is also indicated by a shaded background in the corresponding thumbnail pane.

## 3.6 Working with Folders and Files

SimpleView is designed to interoperate fully with Windows Explorer drag-and-drop and clipboard functions for moving and copying files.

### 3.6.1 Working with Windows Explorer

When SimpleView is installed, a new option to *View in SimpleView* is added to the right-click menu in Windows Explorer when a folder is selected.

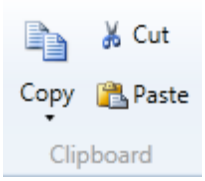
There is also an *Open in Explorer* option in the right-click menu of the *Folders* pane.

By easily switching back and forth from Explorer to SimpleView you can use the best sorting and searching features of each as needed.

### 3.6.2 Drag-and-Drop

File and page thumbnails can be moved or copied between SimpleView windows using drag-and-drop. You can also select files in Windows Explorer and drag them into the SimpleView *Folders* and *Thumbnails* panes. The reverse also works--dragging folders or files from SimpleView to Explorer.

### 3.6.3 Clipboard




*Cut*, *Copy* and *Paste* functions in SimpleView also works the same way they do in Windows Explorer to copy and move folders and files.

## 3.7 Email Files or Pages

The *Email* button uses your default email application (Outlook, Thunderbird, Notes, etc.) to create a new email message. SimpleView uses the MAPI email interface to create a new message, attach the selected files to that message, then display it for you to edit before sending.

Many webmail services provide a MAPI interface that lets you use it with SimpleView and other applications that use email. Here is the link for how to configure Gmail to use MAPI:

http://support.google.com/mail/bin/answer.py?hl=en&answer=10966

SimpleView also allows you to select one or more specific pages to email. Click the arrow below the email button and select *Email Page(s)* to email the selected pages rather than entire files. The pages will be saved to a temporary file, and that file is attached to the email.

## 3.8 Application Menu

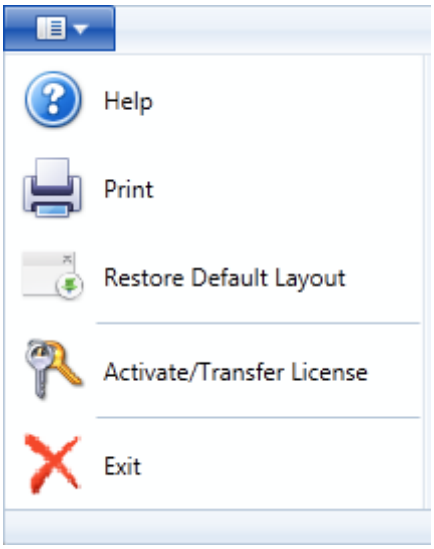
There are a few infrequently used commands available through the Application Menu.

### 3.8.1 Help

Opens this document in your default PDF viewer.

### 3.8.2 Print

*We do not recommend using this option!* Every time the *Print* button is clicked, a baby tree dies! We understand that there are some circumstances where printing a hardcopy is absolutely unavoidable, and we have included the *Print* option only for use in these emergency scenarios.

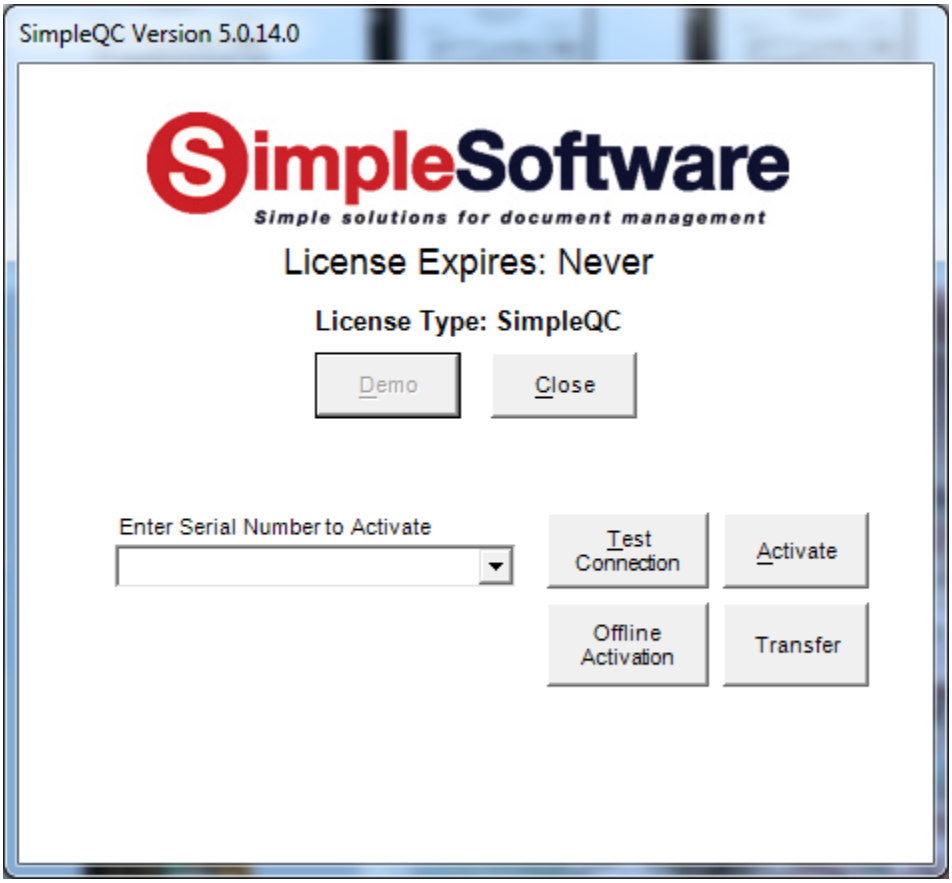



### 3.8.3 Restore Default Layout

See 2.2.6.

### 3.8.4 Activate/Transfer License

This option displays the demo screen, allowing you to *Activate* or *Deactivate* a serial number.



During the 30 day demo, this screen is displayed each time you run SimpleView. The *Demo* button will be enabled--click it to access the program.

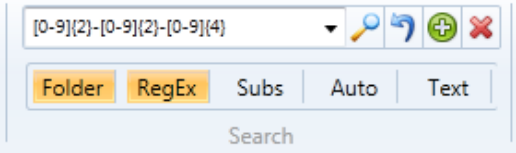
To activate SimpleView, enter the Serial Number that is emailed to you after you order and click the *Activate* button.

If you do not have internet access or a firewall prevents online activation, enter the serial number and click the *Offline Activation* button and follow the on-screen instructions.

To deactivate a serial number on this computer, allowing you to activate your serial number on another computer, select the serial number from the drop-down and click *Transfer*.

# 4 Searching Files

A powerful search function lets you quickly search thousands of folders and files for a specific text or pattern.




## 4.1 Folder & Filename Search

Enter any text in the search box and click the *Search* button to perform the search. Any file that contains the search term in any part of the filename will be returned. If the *Folder* button is checked, any file contained in any folder that matches the term will also be returned.

## 4.2 File Mask Search

Valid file masks like *.tif, m???.pdf, etc. will return the matching files.

## 4.3 Auto-Search

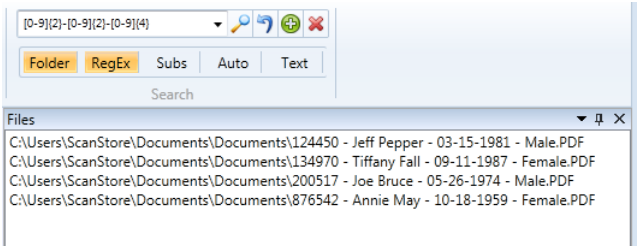
Automatically performs the selected search options whenever a new folder is clicked. If *Text* is selected, file text will be searched each time a new file is opened.

## 4.4 Search Text

If the current file is a PDF file that contains text, that text will be searched when the *Text* button is selected. All pages will be searched until the next match is found, then that page will be displayed with the matching term highlighted. Click the *Search* button again to find the next match in the document.

## 4.5 Regular Expressions

Regular Expressions (RegEx) is a whole language for pattern matching that is well-known by programmers and IT professionals. Using RegEx you can find files or text that contain complex patterns and not just specific values. For instance, you can use regular expressions to find all the files that contain any date in the filename.




There are many references available to help you learn and build Regular Expressions. Do a quick Google search to find out more!

## 4.6 Search Favorites

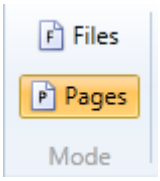
Because most users are not familiar with regular expressions, the search function also has a *Favorites* drop-down to let you save common search terms to the list so they show up automatically each time you run SimpleView. Administrators can develop complex searches and save them to the users' *Favorites*, allowing them to perform those searches whenever they need to.

# 5 Editing Images

A variety of image enhancement functions are available on the *Edit* tab. On the *Properties* tab there are options for changing resolution and color depth. Since each button has a detailed description that can be seen when you hover the mouse over it, this section will focus on general principles of image processing.

## 5.1 Processing Files or Pages

The *Mode* selection determines whether the edit function affects selected pages within the current file or every page in all selected files.




Use the *Shift* and *Control* keys to select multiple pages or files in the thumbnail viewers.

## 5.2 Background Processing

You can continue browsing, viewing and annotating files while files or pages are being processed. Progress will be tracked in the progress bar in the lower-left corner of the window.

The current file being processed cannot be viewed in the viewer, though other files can be viewed. Only one background process can take place at a time.

Click the red x button to cancel processing. The current page or file will finish processing before the background process is ended.

When processing is finished, the status bar will indicate how long the process took.

## 5.3 Automatic File Selection

There are several ways to automatically select files or pages based on various criteria.

### 5.3.1 Even and Odd Pages

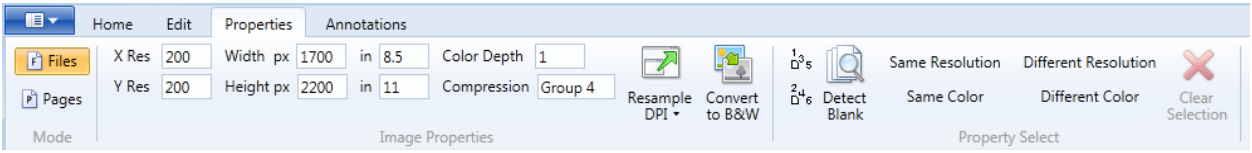
Use the *Select Odd* and *Select Even* buttons to automatically select every other page. Used to select front or back sides of every page when scanning 2-sided documents. Check both boxes to select all pages.

### 5.3.2 Detect Blank

Selects all blank pages. Detection may select some pages with a very small amount of content, so exercise caution before deleting the selected pages.

### 5.3.3 Property Select

On the *Properties* tab it is possible to auto-select all pages or files that have the *Same Resolution* as the current file, or all the ones that are *Different* than the current file. You can also do the same thing with the *Color Depth* property.




This unique feature lets you scan a wide variety of documents, that may have been scanned by different operators on different scanners and devices, and quickly see which files do not match the desired format.

The interface was designed to use the current file properties as the basis for comparison. However you can also manually type in a resolution or color depth setting before using *Property Select* and that number will be used as the basis for comparison.

## 5.4 Rearrange, Move and Copy Pages

Pages can be rearranged within a multi-page file as well as moved or copied from one file to another.

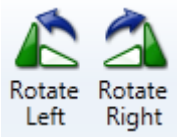
Select the page(s) you want to move, then click and hold the left mouse button to drag the pages to their destination. When you drag pages over the *Pages* pane you will see a position indicator showing where the pages will be inserted. Release the button to move the pages to that location.

When dragging pages over the *Thumbnails* pane, you can either release the mouse over one of the files or in a blank area where there is no thumbnail. If the mouse is over a file, a menu will give you the option to *Move* or *Copy* the pages to the selected file. Pages will be appended to the

end of the file. If no file is selected, you can *Move* or *Copy* the pages to a new file in the folder.

## 5.5 Image Enhancement Options

The following image enhancement options are available:

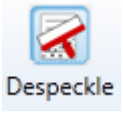



### 5.5.1 Rotate Left and Right

Rotate the selected pages 90 degrees to the left or right.

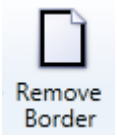
### 5.5.2 Deskew

Straightens pages that were scanned crooked.



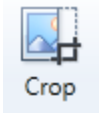

### 5.5.3 Despeckle

Remove "snow" that often appears on scanned or photocopied documents due to colored backgrounds, shading, dirt and other factors.




### 5.5.4 Remove Border

Eliminates the black border that often appears around the outside margin of scanned images. Some legal applications require this border to be kept in order to demonstrate that none of the page was cut off during scanning. However for most documents it simply causes the file to be bigger and the printer to use more ink when you print.




### 5.5.5 Crop

Manually select a region on the current page and crop the page down to that region.

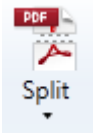
### 5.5.6 Delete

Delete the selected pages or files.

# 6 File Format Conversion

A variety of automated format conversion options are available.

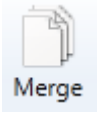
## 6.1 Split




Automatically split a multi-page file into single page files, 100 page files or any custom size. Files will be output with "_####" appended to each split file, where #### is the part number.

Splitting files over 300 pages into 100 page files is recommended, since performance decreases exponentially the larger a file gets. Performing the same function on 5x100 page files is often 10 times faster than performing the same operation on 1x500 page file.

## 6.2 Merge

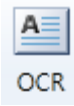



Allows you to select multiple files then quickly append each file to the first one. A common error in batch scanning is the accidental insertion or detection of a document separator before the end of the file. The *Merge* option quickly fixes this.

## 6.3 Export

Select multiple files or pages and save them to a new multi-page file. *Export* prompts you to enter the new filename using a *Save* dialog. All exported pages will be converted to the specified format and combined into one file (TIFF and PDF) or saved to numbered single-page files (all other formats).

## 6.4 OCR




Optical Character Recognition (OCR) converts text contained in a scanned image to searchable text that can be recognized by the computer. OCR results can be output to plain Text files, or Searchable PDF files.

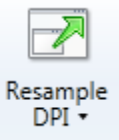
Searchable PDF files are unique in that they display the original scanned image but have searchable text in a hidden layer. You are able to find, highlight and even copy text in a PDF to the clipboard, but you are still able to view the original scanned document.

## 6.5 Convert

Automatically converts selected files to the specified format, using the current filename and removing the original file after conversion. This allows you to standardize the file format for many files in one

click.

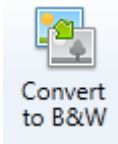
## 6.6 Resample DPI




Changes the resolution of all selected pages or files to the one entered in the *X Res* and *Y Res* boxes. New resolution value can be taken from selected page or entered manually. Standard conversions to 200 and 300 dots per inch are built-in.

Standardizing the input file resolution is essential to any OCR data extraction process.

## 6.7 Convert to Black & White

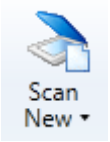



Selected pages or files will be converted to Black & White. This dramatically reduces file size when color is not needed. It also improves recognition for many OCR processes.

# 7 Scanning and Re-Scanning

Multi-page TWAIN scanning capabilities are built-in to SimpleView, letting you quickly scan single documents to a folder or rescan illegible pages in an existing document.

## 7.1 Scan New




Click the *Scan New* button to scan a new document to a multi-page TIFF or PDF file. A standard *Save* dialog will allow you to pick a folder and filename for the new file.

The default scanner settings dialog for your scanner will be displayed, allowing you to change the resolution, color, page size and other options before scanning.

While scanning, full page images will be displayed in the *Viewer* pane, and thumbnails will be shown in the *Pages* pane. When scanning is complete the new file will be displayed in the viewer.

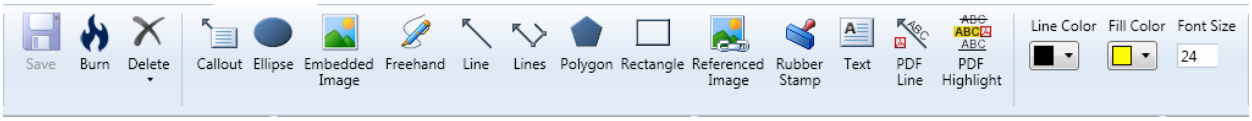
There are two ways you can append pages to an existing document. You can scan to a new document and drag-and-drop the pages you want to an existing file. Or, you can highlight the last page in an existing file and choose “Insert Scanned Pages” from the Scan New drop down.

## 7.2 Rescan Page

This option rescans the currently displayed page, replacing it with a newly scanned one. Scanner settings are displayed just like when scanning a new file, but only 1 page will be scanned. Hard-to-read pages may take several rescans with different brightness, threshold and other settings tweaked before a readable image is produced.

# 8 Annotating Documents

Annotations allow you to mark up electronic documents in similar ways to how people write on, post notes, stamps, highlights and otherwise work with real documents.




Select the appropriate annotation from the toolbar, then click and drag on the *Viewer* pane to draw the annotation on the current page. Once drawn, annotations can be moved, resized and otherwise modified.

Use the *Save* button to save changes to annotations. If you forget to save you will be prompted when opening another file.

Do delete an existing annotation, select the annotation with the mouse and click the *Delete* button.

# 9 Contacting Simple Software

SimpleIndex is a product of Simple Software from ScanStore. Simple Software and ScanStore are divisions of Meta Enterprises, LLC.

**SimpleIndex Website:** http://www.simpleindex.com

**Mailing Address:**

PO Box 548
Knoxville, TN 37901-0548

**Physical Address:**

500 West Summit Hill Drive, Suite 302
Knoxville, TN 37902

**Sales/General E-Mail:** info@SimpleIndex.com

**Tech Support E-Mail:** support@SimpleIndex.com

**Phone Number:** 877-355-4141