IRIS Powerscan™ 9

(Build 9.6)

User Guide

Table of Contents

Copyrights

IPS9(b9.6)-adel/dgi13032012-02

I.R.I.S. detains the copyrights of the IRISPowerscan software, of the on-line help system and of this publication.

The information contained in this document is the property of I.R.I.S. Its content is subject to change without notice and does not represent a commitment on the part of I.R.I.S. The software described in this document is furnished under a license agreement which states the terms for use of this product. The software may be used or copied only in accordance with the terms of that agreement. No part of this publication may be reproduced, transmitted, stored in a retrieval system, or translated into another language without the prior written consent of I.R.I.S.
This manual utilizes fictitious names for purposes of demonstration; references to actual persons, companies, or organizations is strictly coincidental.

Trademarks

The I.R.I.S. logo and IRISPowerscan are trademarks of I.R.I.S.
OCR ("Optical Character Recognition"), Linguistic technology, ICR ("Intelligent Character Recognition") technology, MICR ("Magnetic Ink Character Recognition") technology, BCR ("Bar Code Reading") technology, and iHQC ("intelligent High Quality Compression) technology by I.R.I.S.

All other products mentioned in this user's guide are trademarks or registered trademarks of their respective owners.

iHQC™ patent-protected. US Patent No. 8,068,684.

About this guide

Important note about this guide's contents

IRISPowerscan's complete user guide is available in English, French and German.

A shorter version of the user guide is available in Dutch, Italian, Spanish, Portuguese, Finnish, Korean, Japanese, Simplified and Traditional Chinese. These versions are limited to the main start-up steps for installing and using the software.

CHAPTER 1
ABOUT IRISPOWERSCAN

WHAT IS IRISPOWERSCAN?

IRISPowerscan is a powerful scanning and OCR software solution that offers to:
- **scan** all your documents at an extremely high speed,
- **sort and index** them,
- **enhance** the document **images**,
- convert them into **fully searchable files**,
- generate a **variety of output files** : PDF files, highly compressed color **iHQC**™ PDF files, JPEG 2000, XML, HTML, etc., as well as **index** files in CSV or XML format.

High-Speed Scanning
The scanning is fully automatic and handles pre-processing operations such as document deskew, cropping, page orientation, blank page deletion, split & merge, etc. The scanned documents are automatically distributed into a logical document structure of "batches", "documents" and "pages". Various types of separator can be used to separate the documents such as: barcodes, patch codes, OCR zones, blank pages, etc. After the scanning, images can be easily manipulated and edited. The user can rescan the documents, rotate them, rename them, etc., and he can freely reorder them by using common commands such as splitting, merging, Drag&Drop, Cut&Paste, etc.

Sorting & Indexing
The software handles the automatic sorting of documents. It uses pre-defined identifiers such as barcodes, type-written data (OCR),

the document layout, etc. to identify the document types.
The software not only sorts the documents but also indexes them. The indexing values are directly extracted from the documents (barcodes, type-written data (OCR), hand-written data (ICR), etc.), and/or picked up from the system data. The user validates the data on screen. He can easily modify, replace or complete the indexing fields, either manually or using the "On the Fly" OCR feature.

Quality Control and Validation
A full range of tools are available for post-scanning operations. All scanned documents directly appear in the application explorer where they are divided up into batches, documents and pages. The corresponding images are displayed in the viewer. The operator can act on the displayed objects: he can reorder them, remove them, split or merge them, and carry out post-processing operations such as: rotation, cropping, adjustment, etc.

OCR
IRISPowerscan is able to recognize 23 types of barcodes (all standard 1D-barcodes), including the PDF 417 high density barcode. It integrates the latest OCR (Optical Character Recognition) engine developed by I.R.I.S. and is able to recognize typewritten data in up to 125 languages. All American and European languages are supported, including Central-European languages. Greek, Turkish, the Cyrillic ("Russian") and the Baltic languages are also supported. Optionally, IRISPowerscan reads 4 Asian languages (Japanese, Simplified Chinese, Traditional Chinese, Korean), as well as Hebrew and Arabic. The recognition of hand-printed data (ICR) covers handprinted numbers and handprinted capital letters in languages using the Latin alphabet, as well as the dot, comma and hyphen symbols. The MICR (Magnetic Ink Character Recognition) technology (optional) offers to read banking fonts such as OCR-A, OCR-B, E13B and CMC7.

High Compression
IRISPowerscan is able to produce highly compressed files, including the unrivalled iHQC™ (intelligent High Quality

Compression) technology that offers extremely high image compression.

Output formats and connectors
IRISPowerscan is able to generate a wide range of output formats via the IRISDocument Service. It generates PDF and hyper-compressed PDF files, XPS and hyper-compressed XPS files, Word files (in doc, docx and rft), htm and xml files, and so on. Detailed information about the IRISDocument Service can be found in the **IRISDocument for IRISPowerscan user guide**.

IRISPowerscan is also able to export the processed documents to various ECM (Electronic Content Management) and Cloud systems via a series of connectors called IRISConnect. IRISPowerscan exports to Therefore, Microsoft SharePoint, FileNet, IRISNext, GoogleDocs, Evernote, Dropbox, ODBC, CMIS, and so on. Detailed information about IRISConnect can be found in the **IRISConnect Administration and User Guide**.

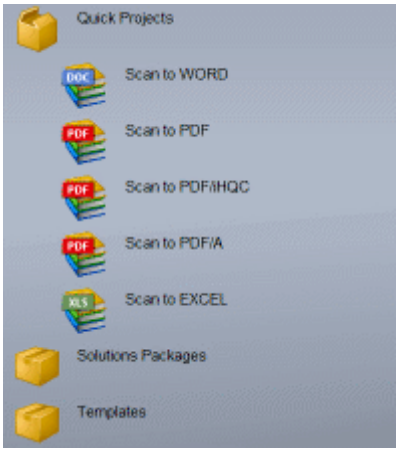
IRISPowerscan's full list of features

The full list of IRISPowerscan's features is detailed in the IRISPowerscan datasheet. This datasheet is available on the I.R.I.S. website: http://www.irislink.com/irispowerscan

HOW TO USE IRISPOWERSCAN?

1. Choose the appropriate pre-configured project

IRISPowerscan is provided with 3 types of pre-configured projects: **Quick Projects**, **Solution Packages** and **Templates**. The first thing to do when starting IRISPowerscan is to have a look at these projects and check whether any of them fits your particular needs. The available projects are listed in the **Start up** window:



Quick Projects
Quick projects offer to use some standard features of IRISPowerscan in just a few mouse clicks. You will simply open a project, scan your documents, and export them to whatever format proposed in the list (Word, PDF, Excel). (See: Starting up, Using a Quick Project).

Solution Packages
If you wish to use IRISPowerscan to further process your documents in a third party application, you will choose a project among the solution packages. These projects have been set to perfectly fit the requirements of the third party application. (See: Starting up, Using a Solution Package).

Templates
If you wish to perform more specific tasks with IRISPowerscan, you will preferably go for a template project. The template projects offer to use a wide range of advanced features such as sorting, indexing, compression, etc. (See: Starting up, Using a Template).

New project
If no pre-configured project fits your needs, you can still create and set up a project from scratch. In this case, the **Demo** project must be used as a starting point. (See: Starting up, Creating a project)

Once you have opened your project in the Start up window, you proceed to the actual **user interface** from which you can launch any of the required processing. See: Starting up, User interface.

2. Refine or modify the default settings (Project Setup)

If the pre-configured project you have chosen does not totally match your needs, you can refine or change some of its default settings. The project settings can be accessed from the user interface, in the **Project Setup** window. See: Project Setup.

3. Launch the required processing steps

Once you have chosen a project and possibly refined its settings, your project is ready for use. You can then launch any of the required processing operations from the user interface. See: About IRISPowerscan, IRISPowerscan processing steps.

IRISPOWERSCAN PROCESSING STEPS

Here are the main processing steps that can be carried out in IRISPowerscan. Depending on your project configuration, you will launch one, two or more of the described steps. All processing steps can be launched from the user interface.

Scanning

Before you start scanning, you must make sure your scanner has been properly installed, then set your scanner settings (resolution, color, image pre-processing, etc.). You will then put your documents in the scanner feeder then start scanning. Your scanned documents will directly appear in the image viewer as well as in the explorer. See: Scanning: Scanning operations.
If some automatic indexing has been set for the project, it will take place during the scanning. This automatic step is totally transparent for the user.

Index validation
(if required)

As soon as the documents have been scanned (and automatically indexed), their index cards are ready for validation in the user interface. You will then be able to check the displayed index values, then correct them by means of the available indexing tools. See: Index validation.

Post-scanning operations (if required)

Once scanned, all documents appear in the explorer where they are divided up into documents and pages. Their corresponding images are displayed in the viewer. At this stage, you can act on the objects: you can reorder them, remove them, split or merge them, as well as carry out post-processing operations such as: rotation, cropping, adjustment, etc. See: Post-scanning operations.

Processing

Once the images have been scanned and validated, you can convert them into whatever output format (TIFF, JPEG 2000, PDF, PDF iHQC, XML, etc.) and possibly send to the available connectors. This is the "Process" operation. Remember that the settings related to the output processing are defined at **Project Setup** level. See: Output processing

SOFTWARE VERSIONS

IRISPowerscan is available in several versions. Please visit the I.R.I.S. web site to get more information about those versions (http://www.irislink.com/irispowerscan)

Full version
– Full version giving all functionalities of the product
– Hardware key required to run the application

– Licensing dependent on the speed

Demo version

– Same as IRISPowerscan Full but without hardware key and the ability to scan or import files

– Used in emulation mode with the in-built image sets

– Allows the user to 'experience' IRISPowerscan™ for free

Startup version

– Software protected version for OEM bundling

– Has many limitations that can be customized

Site version

– Special for "Site Licensing" (for large clients only)

– Software protection through registration

SUPPORTED SCANNERS

IRISPowerscan is able to communicate with all scanners equipped with a **Twain driver**, with an **Isis driver** (through an Add-on to IRISPowerscan), as well as with the scanners supported by **Kofax Virtual Rescan** 4.2 or higher. This means that it supports all popular high-speed scanners from Kodak, Fujitsu, Canon, HP, Epson, Böwe Bell&Howell, Inotec, Avision, and many more.

TWAIN driver

If your scanner is equipped with a Twain driver, note that **version 1.9 or higher** is highly recommended. Version 1.9 actually offers a dedicated user interface and provides profile management options as well as a series of advanced settings.

Please check with your scanner manufacturer whether version 1.9 of your scanner driver is available.

CHAPTER 2
INSTALLATION

SYSTEM REQUIREMENTS

Here is the minimum system configuration required to use IRISPowerscan:

- An Intel® Pentium® or equivalent. An Intel® Pentium® IV 2GHz or equivalent is recommended.
- 512 MB RAM. 1 GB RAM is recommended.
- 400 MB free disk space for the software, plus the space necessary for the image files.
- Operating system: Windows® 7, Windows® Vista, Windows® XP.

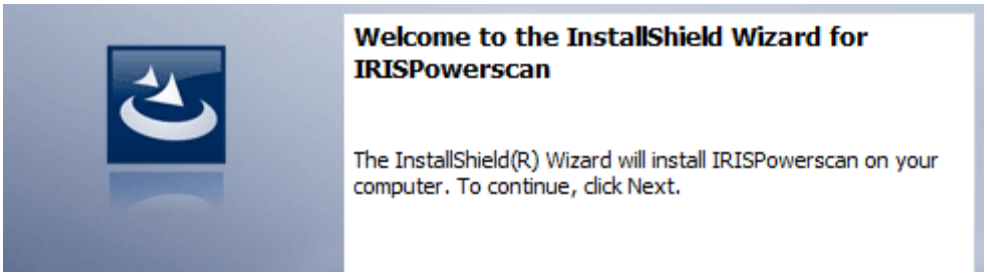
INSTALLING IRISPOWERSCAN

IRISPowerscan is delivered on a self-running CD-ROM.

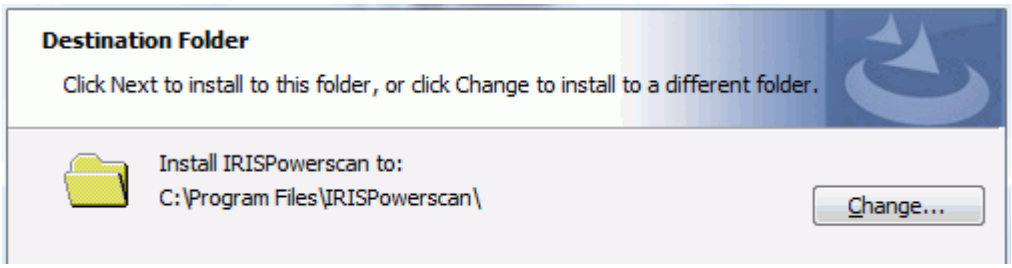
To install the software, simply insert the CD-ROM in the CD-ROM drive, then follow the on-screen instructions.

Caution: You must log on as administrator or make sure you have the required administration rights to install the software.

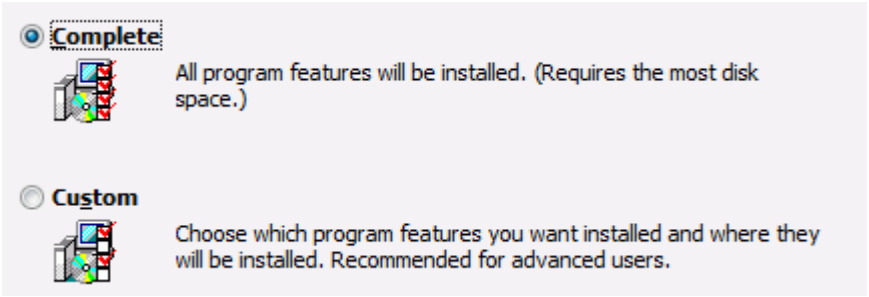
- Click on **Install IRISPowerscan Software**.



- Choose the language of the software user interface.
- Choose the destination folder for the software. Click **Next** to install to the default folder, or click **Change** to install to a different folder.



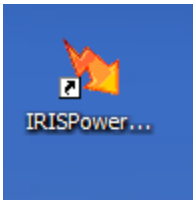
- Choose the setup type for the installation: **Complete** is recommended.



- Click on **Install** to actually launch the installation. Wait until the installation is complete, then click on **Finish** to close the installation program.

The software is dongle protected. Once the installation is complete, you must insert the hardware key provided with the CD-ROM into the parallel or USB port of your PC. The hardware key determines the maximum scanning speed (in number of images per minute) of IRISPowerscan. To increase the scanning speed, please get in contact with your Value Added Reseller or contact I.R.I.S. at var.opt@irislink.com

The submenu "**IRISPowerscan**" under the "**Programs**" menu is created automatically by the installation program.
The same holds for a shortcut to **IRISPowerscan** on the Windows desktop. You are thus able to start **IRISPowerscan** directly from your desktop.



Should this be necessary, install the **Adobe Reader** software required to access the software documentation.

The electronic version of the user guide is by default copied to your hard disk.

INSTALLING YOUR SCANNER

1. Install your scanner driver

Your scanner is provided with scanner drivers that must be installed on your computer.
To install your scanner, you must first insert your scanner driver installation CD-ROM into your computer CD-ROM drive and run the installation.
Once your scanner is installed, it is recommended to make a few scanning tests with a standard scanning application.

> Note:
> If your scanner is equipped with a Twain driver, note that version 1.9 or higher is highly recommended. See About IRISPowerscan, Supported scanners.

2. Plug in your hardware key

Do not forget to plug the hardware key provided with your software package. This key determines the maximum scanning speed (in number of images per minute) of IRISPowerscan.
Insert the key into the parallel or USB port of your PC.

Further steps

Scanner selection

When running IRISPowerscan, you will be automatically prompted to confirm the scanner selection. If you want to scan documents, do not forget to confirm the selection. This will disable the **Emulation Mode*** that is set to run by default in the application. See: Scanning, Scanner selection

(*) A series of emulation images are provided with the application for demonstration and testing purposes. The Emulation Mode that enables to run these emulation images is activated by default. If you do not connect a scanner to IRISPowerscan, the Emulation Mode remains activated.

Scanning parameters

Before you start the actual scanning, you will have to define the scanning parameters. Refer to the section on Scanning operations, Page setup.

Twain user interface

When using a scanner equipped with a Twain driver 1.9 or higher for the first time, do not forget to configure the scanner **Twain user interface**. See: Scanning, Page setup.

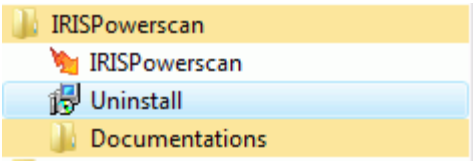
UNINSTALLING IRISPOWERSCAN

There are only two correct ways of uninstalling IRISPowerscan: using the IRISPowerscan "uninstall" program or using the Windows (un)install wizard. You are strongly recommended *not* to uninstall IRISPowerscan or any of its components by manually erasing the program files.

To uninstall IRISPowerscan:

Use the IRISPowerscan uninstall program:

- From the Windows **Start** menu, select **Programs**, **IRISPowerscan**, **Uninstall** to start the "uninstall" program and follow the on-screen instructions.



Or:

Use the Windows (un)install wizard:

- From the Windows **Start** menu, select **Control Panel**, and access the list of installed programs.
- Select IRISPowerscan from the list and click the **Uninstall** button to remove the software.
- Follow the on-screen instructions.

HOW TO GET PRODUCT SUPPORT?

To get technical support, please visit our website at www.irislink.com/support

HOW TO REGISTER?

You are automatically prompted to register your application when starting the application for the first time.

To register:

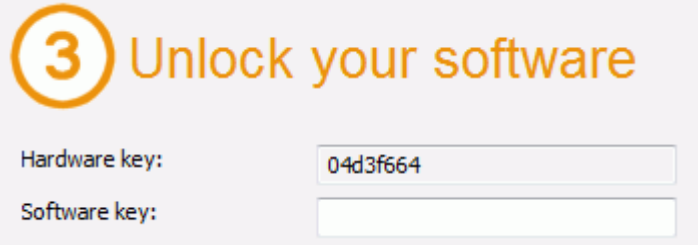
- Fill in the required fields in the **IRISPowerscan Registration** window.

- Secondly, either "Register via Internet" (this can be directly made on the I.R.I.S. Web site: http://www.irislink.com/register),

"Copy the message to clipboard" to send an e-mail to I.R.I.S., or phone I.R.I.S. during working hours, and you will receive your software key*.

(*) Another way of registering your software is to send in or fax the registration card provided with your DVD box.

- Once you have received your software key from I.R.I.S., introduce it in the **Software key** field and click **OK**.

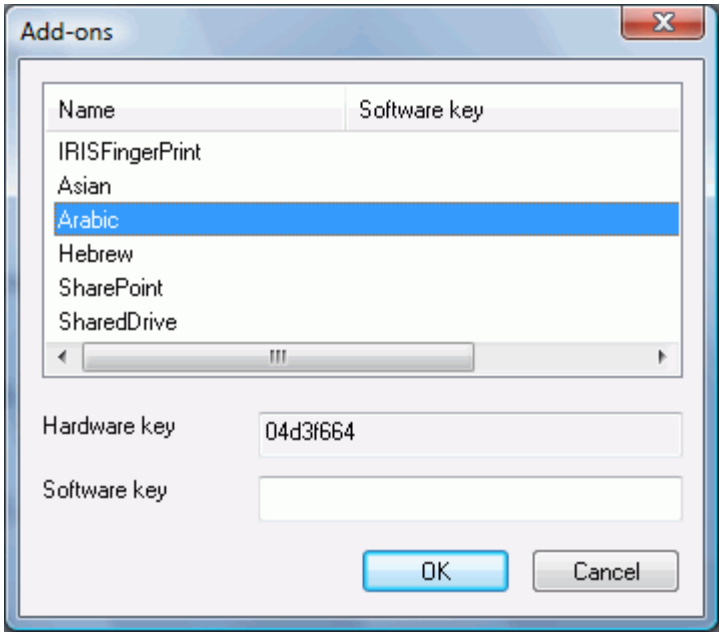


Registration of software Add-ons

If you have acquired an Add-on to IRISPowerscan, you will also have to register it.

To register an add-on:

- In the **Help** menu, click on **Add-ons**.
- Select the add-on of your choice from the list.
- Copy the hardware key and send it to **irispowerscan@iriscorporate.com**.
- You will receive the software key in return.
- Enter the software key you received from I.R.I.S. in the Software key field, then click O**K**.


Add-ons
Name
Software key
IRISFingerPrint
Asian
Arabic
Hebrew
SharePoint
SharedDrive
Hardware key
04d3f664
Software key
OK
Cancel

CHAPTER 3
STARTING UP

CONFIGURING YOUR ANTI-VIRUS

The anti-virus installed on your PC scrutinizes all the files that are being written on your hard disk. This may dramatically slow down the writing speed of the images being scanned with IRISPowerscan. Your target production level may thus not be reached.

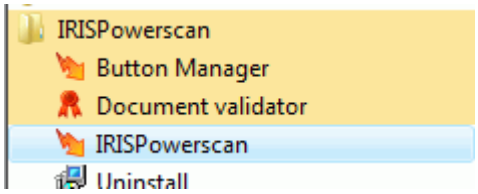
In order to avoid such problem, you must properly configure your anti-virus and exclude from the process the list of folders into which your images are being placed. This configuration depends on the anti-virus used. Please refer to your anti-virus manual to define the required settings.

In IRISPowerscan, the folder to be excluded is: C:\IRISPowerscan

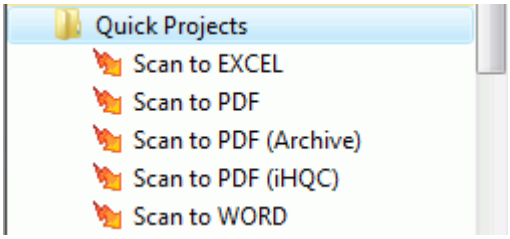
STARTING UP

To start IRISPowerscan:

- Select **IRISPowerscan** in the **IRISPowerscan** menu under the Windows **Start** menu or click the application shortcut on your desktop. The application opens on the **Start up** window.



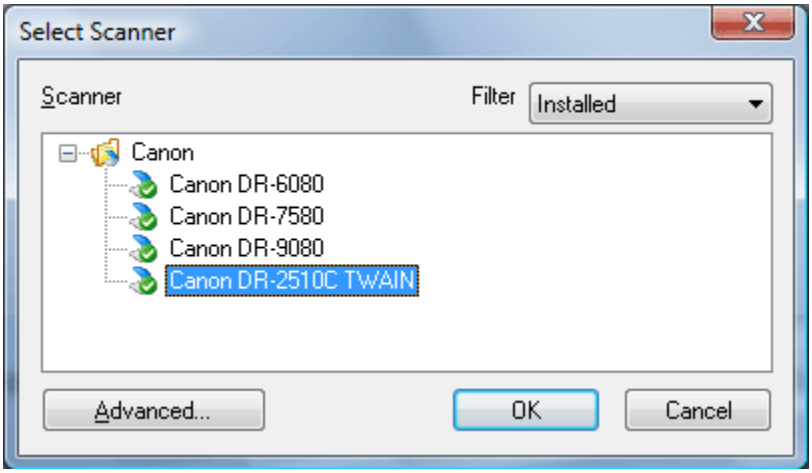
Tip:
You may also launch one of the **Quick Projects** available in IRISPowerscan and directly start the scanning. See: About IRISPowerscan, How to use IRISPowerscan, and Starting up, Using a Quick Project.



- If you start IRISPowerscan for the first time, you are automatically prompted to register the application. Fill in the required fields in the **Registration** window (see: Installation, How to register?).

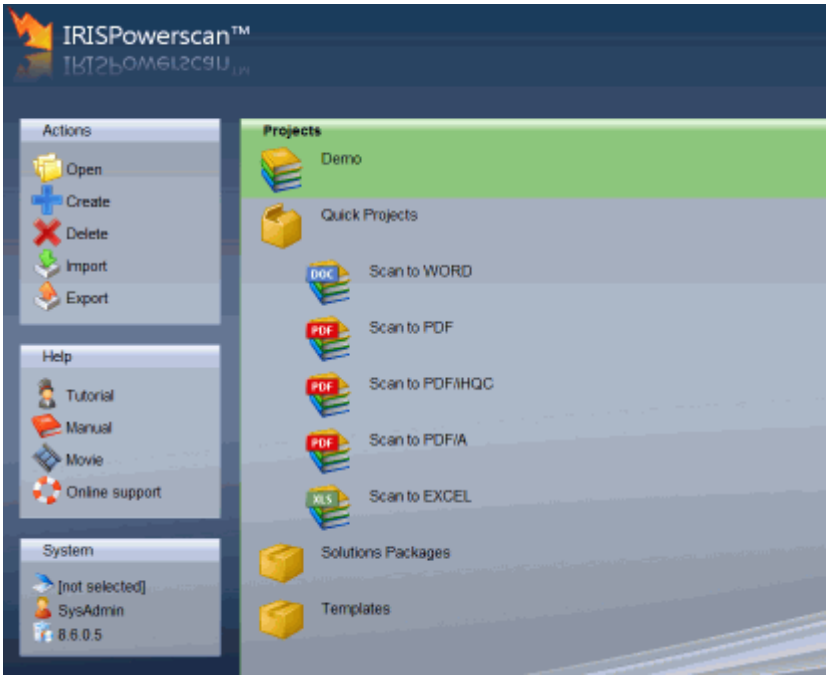
  Once you have received your software key from I.R.I.S., introduce it in the required field of the **Registration** window and click **OK**. This will unlock your software.

- The scanner selection window pops up on your screen. The scanner installed on your computer is automatically displayed (if not, click on **Advanced**, and select the right source). Select the scanner and click **OK** to connect your scanner.
  If you wish to use the application in Emulation Mode*, click **Cancel**.
  (*) A series of emulation images are provided with the application for demonstration and testing purposes. The Emulation Mode is activated by default. If you do not connect a scanner to IRISPowerscan, the Emulation Mode remains activated.



START UP WINDOW

The **Start up** window contains five windows: **Actions**, **Help**, **System**, **Projects**, and **About** (at the bottom)



The Actions window (on the left)

The **Actions** window offers to act on the project selected in the

Projects window. The available actions are:
- **Open** a project,
- **Create** a project, based on an existing project,
- **Delete** a project,
- **Import** a project,
- **Export** a project.

The Help window (on the left)

The **Help** window gives access to:
- The **Tutorial**
- The user **Manual** (in the language chosen for the user interface),
- The **Movie** that gives a short presentation of IRISPowerscan,
- The **Online support** addresses and phone numbers.

The System window (on the left)

The System window gives access to:
- The **Scanner selection** window,
- The **Login** window,
- The IRISPowerscan's splashscreen.

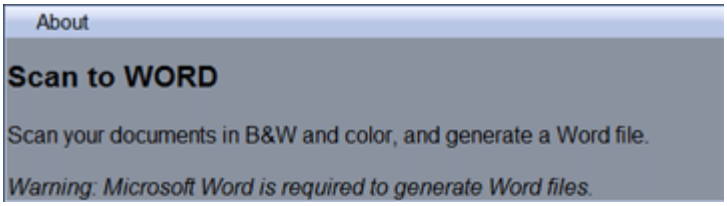
The Projects window (on the right)

The **Projects** window displays:
- a **Demo** project,
- five **Quick Projects**,
- two **Solution Packages**,
- a series of **Template Projects**.

A double-click on a quick project or solution package opens the referred project, a double-click on a template opens the project creation dialog box.

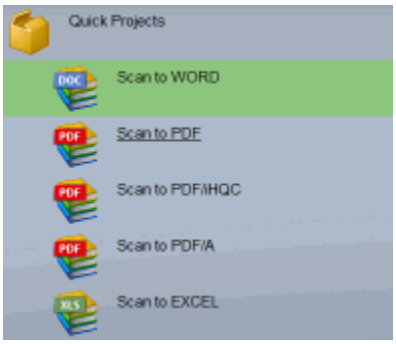
The About window (at the bottom)

The **About** window displays the detailed settings and objectives of any shortcut/template selected in the **Projects** window.



USING A QUICK PROJECT

Five **Quick Projects** are available in the **Start up** window. These projects can be used as such. You will thus be able to directly scan and convert your files into one of the proposed output formats (Word, PDF, PDF/iHQC, PDF/A, Excel).



The quick projects are pre-configured as follows*:
(*) Check the **About** window in the **Start Up** window to get the detailed description of the settings

- **Scan to Word**: Set to scan documents in color and black&white and generate a Word file. Resolution : 200 dpi
  IRISDocument options: OCR: activated

- **Scan to PDF**: Set to scan documents in color and black&white and generate one PDF file. Resolution : 200 dpi

- **Scan to PDF/iHQC**: Set to scan documents in color and black&white and generate one PDF/iHQC file. Resolution : 200 dpi

- **Scan to PDF/A**: Set to scan documents in color and black&white and generate one PDF/A file. Resolution : 200 dpi

- **Scan to Excel**: Set to scan documents in color and black&white and generate one SpreadsheetML file. Resolution : 200 dpi

How to use a Quick Project?

A quick project is set to be directly ready for use, without having to go through project configuration. To open it, simply double-click on it.

The whole processing can be handled in 3 main steps:

1. **Check the default scanning parameters**
   Before you start scanning, you must carefully check the scanning parameters. This is done in the **Page Setup** window. See: Scanning, Page Setup.

2. **Launch the scanning**
   You can then launch the scanning: put your documents in the scanner paper feeder and launch the scanning. See: Scanning, Scanning operations.

3. **Process your documents**
   Once the scanning is complete, the application automatically prompts you to process the documents. Click **Yes** in the displayed dialog box. The output processing takes place.

What to do if the quick project does not exactly fit my needs?

Let's imagine, for example, that you want to produce a Word file in Portuguese, rather than in English, French, German, Spanish (which are the default languages settings for the OCR)*. In this case, the **Scan to Word** project as such will not work properly.
(*) The default settings of each project are described in the **About** window of the **Start up** window.

You must thus:
1. Create a new project
You must create a new project based on the chosen quick project. See: Starting up, Creating a project. The settings remain the same as

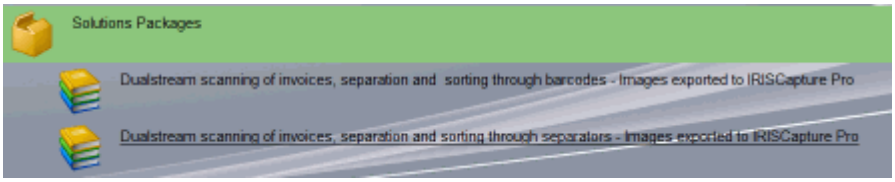
for the chosen quick project.

2. Change its project setup

In the new project, change the project settings according to your needs. See the chapter on Project setup.

USING A SOLUTION PACKAGE

Two **Solution Packages** are available in the **Start up** window. These solutions can be used as such. You will thus be able to scan and convert your files into the needed formats. The resulting files will be available for further use in the third party solution.



The solution packages are pre-configured as follows*:
(*) Check the **About** window in the **Start Up** window to get the detailed description of the settings

- **Dualstream scanning of invoices**, separation and sorting through barcodes. Images are exported to IRISCapture Pro fro Invoices.
- **Dualstream scanning of invoices**, separation and sorting through separators. Images are exported to IRISCapture Pro fro Invoices.

How to use a Solution Package?

A solution package project is set to be directly ready for use, without having to go through project configuration. To open it, simply double-click on it.

The whole processing can be handled in 3 main steps:

1. **Check the default scanning parameters**
   Before you start scanning, you must carefully check the scanning parameters. This is done in the **Page Setup** window. See: Scanning, Page Setup.

2. **Launch the scanning**
   You can then launch the scanning: put your documents in the scanner paper feeder and launch the scanning. See: Scanning, Scanning operations.

3. **Process your documents**
   Once the scanning is complete, the application automatically prompts you to process the documents. Click **Yes** in the displayed dialog box. The output processing takes place.

What to do if the solution package does not exactly fit my needs?

Let's imagine, for example, that you want to separate your invoices using a blank page, rather than a barcode*. In this case, the solution package as such will not work properly.
(*) The default settings of each project are described in the **About** window of the **Start up** window.

You must thus:
1. Create a new project
You must create a new project based on the chosen solution package. See: Starting up, Creating a project. The settings remain the same as for the chosen solution package.
2. Change its project setup
In the new project, change the project settings according to your needs. See the chapter on Project setup.

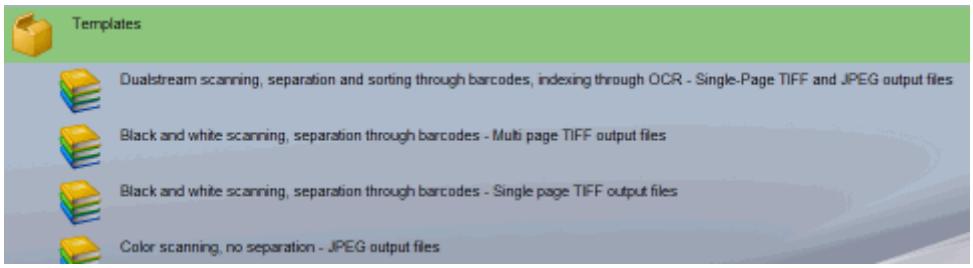
USING A TEMPLATE PROJECT

A series of **Template Projects** are available in the **Start up** window. These projects offer to use the advanced features of IRISPowerscan such as: document sorting, automatic indexing, etc. Some of the projects can be used as such, but many will have to be refined if you want to make them fit your very particular needs.

Emulation images

A series of emulation images are provided with the application for demonstration and testing purposes. The emulation images show good examples of the way indexing and sorting values can be set in the application.

The **Emulation Mode** is set by default in the application. If you connect a scanner to IRISPowerscan, the **Emulation Mode** is disabled. You can revert to the **Emulation Mode**, by selecting **Scanner**, **Setup** from the **Settings** drop-down menu (either the Start up window or from the user interface) and check the box **Emulation Mode**.



How to choose a Template Project?

You must choose the template project that best fits your needs. To do so, you must first carefully examine your documents, set your objectives, and make up his mind about the following issues:

The types of documents to be processed...
- Are there several types of documents to be dealt with?
- Do they contain blank pages?
- Should the document types be sorted automatically?
- Should there be any image pre-processing such as image adjustment, image rotation, cropping, page merge or split?

The types of images to be generated...
- Do you wish to generate color, bitonal or/and black&white images?
- What should their resolution be?
- What is the output format required: JPEG2000, PDF, PDF iHQC, etc.?
The document identification method...
- Do the documents bear a barcode or an OCR zone that can be used to identify them?
- Could they alternatively be identified according to their layout?
The document hierarchical structure...
- How should the documents be organized (in batches, documents, pages)?
- What should the maximum size of a batch/document be?
- How should they be named?
The document separation method...
- Do the documents bear a barcode, an OCR zone, or a patch code that could be used to separate them?
- Could their layout be used?
- Could blank pages be used as separators?
- Should the separation be made according to page count?
The batch/document indexing values...
- What should be the indexing values of each type of batch/document?
- Should they be extracted from barcodes or from OCR zones?
- Should they be automatically validated through mask formulas?
- Should there be special default values?

How to use a Template Project?

You must first open the project that best fits your needs, have a look at the emulation images and examples, then make a few tests with your own documents. You will further be able to create your own project, with your own settings, then start the actual processing steps.

> **To open a template project:**
> Select the project in the list and click on **Open** in the **Actions** window or in the context menu.
> **To create a new project based on a template project:**
> Select the project in the list and click on **Create** in the **Actions** window or on **New** in the context menu.

Here are the main steps to follow when using a template project:

1. **Create a project based on the chosen template**
   You must create your own project, rather than change the template itself. By doing so, the template will still be used as such. Your project will have its own name and configuration. See: Starting up, Creating a project.

2. **Refine the project settings in the Project Setup**
   Once your project is created, you can make tests with your own documents, then refine the project settings in the Project Setup window. See: Project Setup.

3. **Check the default scanning parameters**
   Before you start scanning, you must carefully check the scanning parameters. This is done in the Page Setup window. See: Scanning, Page Setup.

4. **Launch the scanning**
   You can then launch the scanning: put your documents in the scanner paper feeder and launch the scanning. See: Scanning, Scanning operations.

5. **Carry out index validation (if required)**
   If the application has been set to index your documents, the index values are ready for validation just after the scanning is complete. The operator can check and possibly correct the index fields in the Index pane. See: Index validation.

6. **Carry out post-processing operations (if required)**
   Once scanned, the documents are appear in the explorer and their corresponding images are displayed in the viewer. If necessary, the operator can act on the explorer, as well as carry out post-processing operations such as: rotation, cropping, adjustment, etc. See: Post-scanning operations.

7. **Process your documents**
   Once all the required processing steps have been completed on the images, these are ready for the output processing. Refer to the section on Output processing.

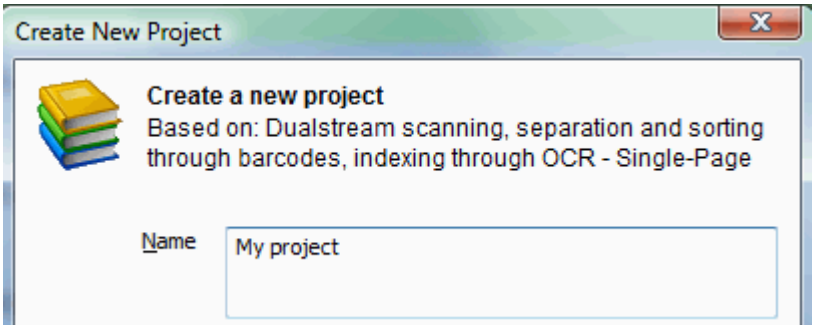
CREATING A PROJECT

Why create a new project?

Most of the projects proposed in the **Start up** window can be used as such. You can simply open them and directly start with the scanning and processing. However, if you intend to change the default settings of a project, it is highly recommended that you first create your own project - based on the chosen project -, then change the settings. Your project will thus have its own name and its own settings. And the source project will still be available as such in the list of projects.
Once created, your own project will appear at the top of the project list (in the **Projects** section, before the **Demo** project).

To create a project:

- From the **Start up** window, select the project to be refined.
- Click on **Create** in the **Actions** window or click on **New** in the context menu.
- Introduce your project name and location in the creation dialog box and click **OK**.
  The **Location** is the folder name of the physical location of the project (see: Project Setup, General options).



- Your project becomes listed at the top of the **Projects** window. You can now open it (either double-click or select it and click on

Open in the **Actions** window), check and refine its settings in the **Project Setup** window (see: Project setup), then start the actual production workflow in IRISPowerscan.

IMPORTING/EXPORTING A PROJECT

! Feature available in **IRISPowerscan Full Version** only

The Import/Export feature of IRISPowerscan will be used if:
- you want to share the same project configuration with several people, or if
- you want to import a project that was created with a previous version of IRISPowerscan, or if
- you want to import a project that was created on another workstation.

It will also enable you to import into IRISPowerscan any project created with Kodak Capture Software 6*.
(*) This is only possible if Kodak Capture Software is installed on the same workstation as IRISPowerscan.

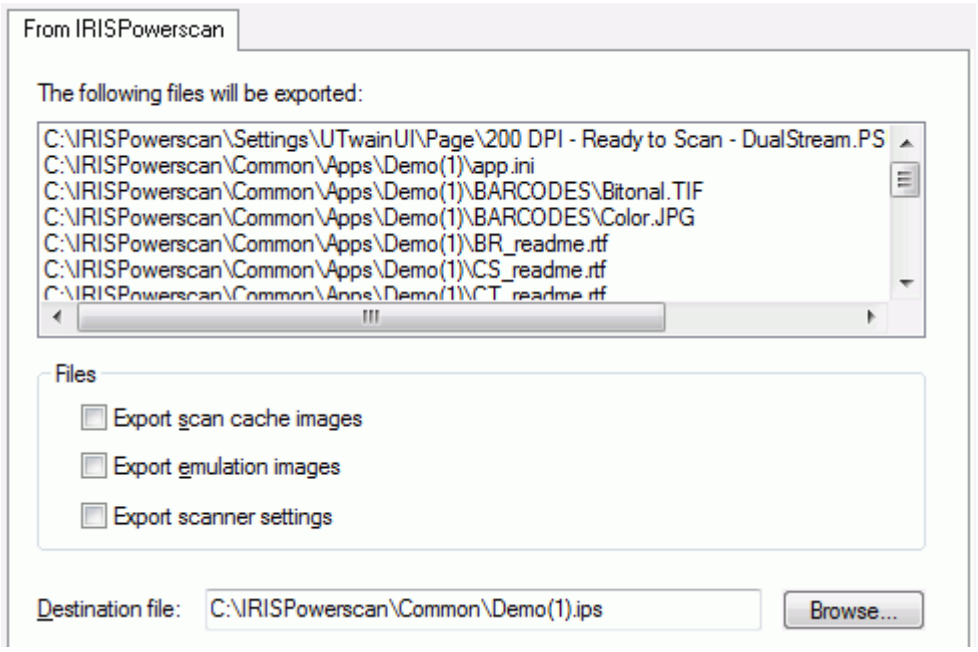
! Any project must first be ***exported*** *before it can be imported* into the application.

To export a project:

- From the **Start up** window*, first select the project to be exported, then click on **Export** (**Export selected project**) in the **Actions** window.
  (*) To import a project into an upgraded version of IRISPowerscan, first export the project from the previous version of IRISPowerscan.

- Select the required options in the **Project Export** window and choose a destination folder for the export.
  - **Export scan cache images**: select this option if you want the scan cache images to be exported (this is necessary if you still need to work on the images).
  - **Export emulation images**: select this option if you want to import the emulation images of IRISPowerscan.
  - **Export settings of scanners**: select this option to import the scanner settings of your project.

- Click on **Export**. The project is exported and becomes available as a *.ips file*.
  (*) In case of a project to be shared with other users, transmit the *.ips file to the other users.



Tip:
If the project to be imported into IRISPowerscan was created with Kodak Capture Software 6*, you must also make an export/import using the IRISPowerscan interface. In the **Project Export** window, select the tab **From Kodak Capture Software**., then click on **Export**.
(*) This is only possible if Kodak Capture Software is installed on the same workstation as IRISPowerscan.

To import a project:

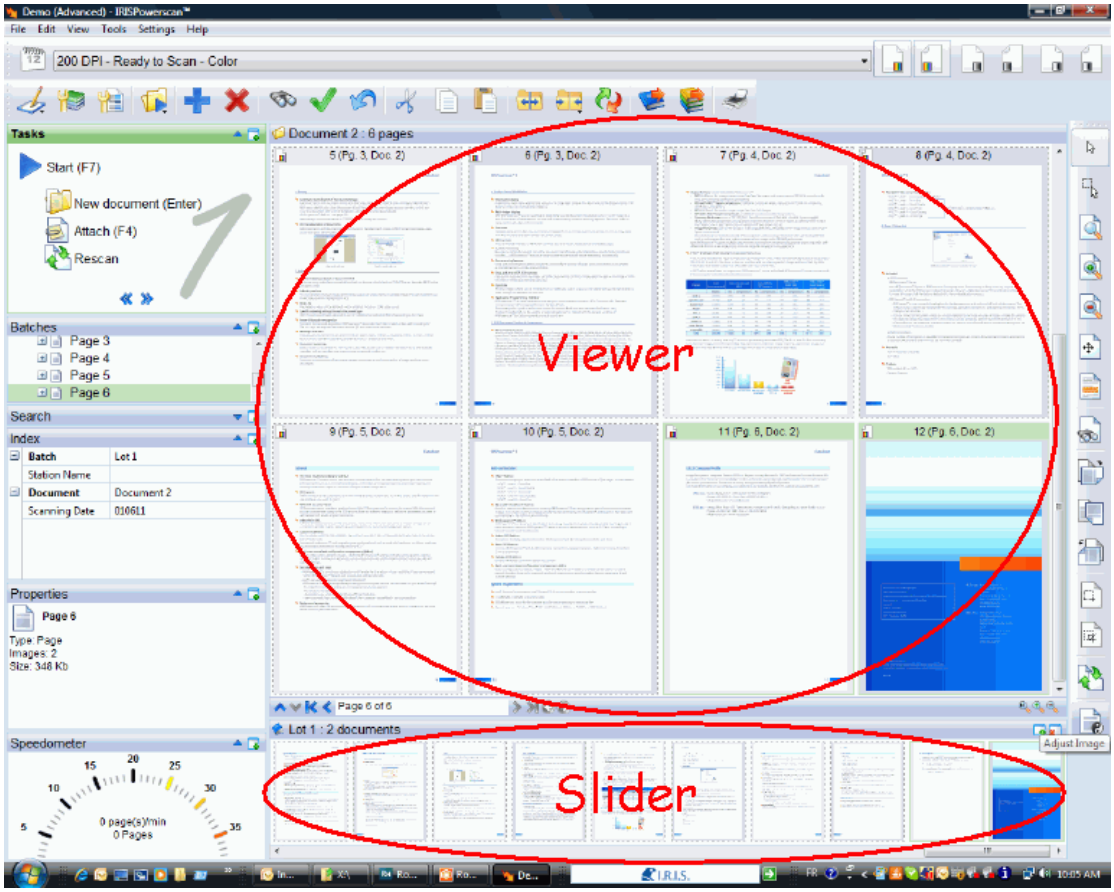
- From the **Start up** window*, click on **Import** in the **Actions** window.
  (*) If you import a project into an upgraded version of IRISPowerscan, open the new version of IRISPowerscan and click on **Import**.

- Browse your explorer for the exported *.ips file, then click on **Open**. The imported project is directly available in the **Projects** window.

Tip:
Installing a new version of IRISPowerscan
When installing a new version of IRISPowerscan, don't forget to export the project(s) to be kept for the new version before you desintall the application:
1. Export your project(s)
2. Deinstall IRISPowerscan
3. Install the new version of IRISPowerscan
4. Import your project(s)

USER INTERFACE

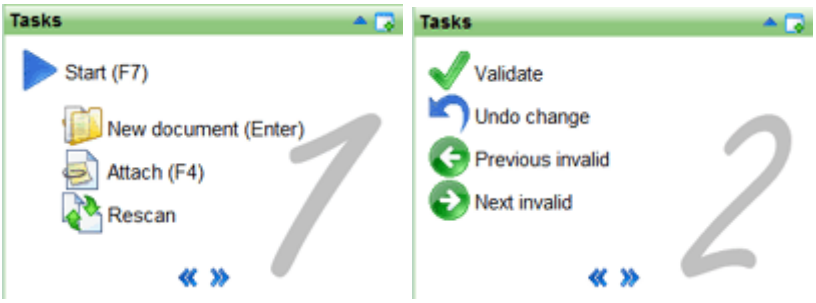
Once a project is open, you get to the actual user interface. The user interface contains various resizable panes (left part), customizable toolbars, an image viewer (right part), and a slider (bottom right part).



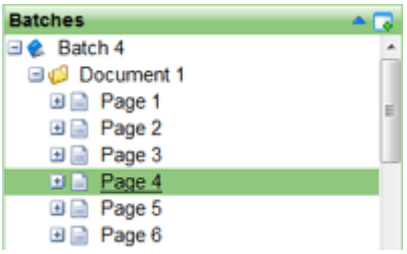
Panes

The number of panes displayed on screen depends on the workspace chosen (see: Starting up, Workspaces). All panes are resizable: use the horizontal and vertical resize pointers to resize them. The panes can be minimized and restored by a simple click on their title bars. The panes' contents can be displayed in a separate window: click on the **Plus** sign in the title bar to open a separate window.

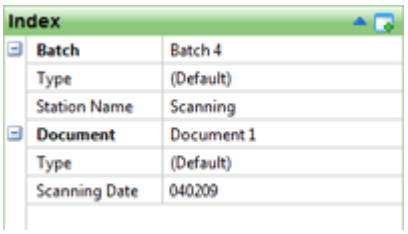
- The **Tasks pane** gives access to all main scanning and indexing tasks such as: **Start**, **Attach**, **Rescan**, **Validate**, etc.



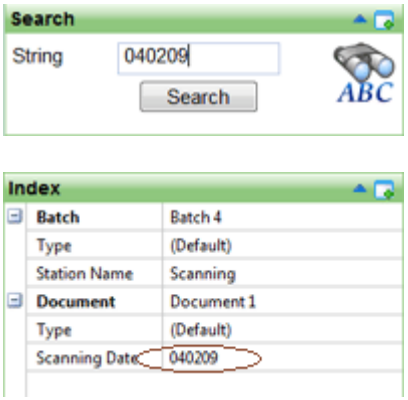
- The **Batches pane** displays the hierarchical structure of the scanned objects (batches, documents, pages). From this pane, you can delete, cut, copy, paste an object, drag & drop objects, split or merge them.



- The **Index pane** lists the index fields that are being filled out for the current batch and/or document. Fields that do not match the validation rules set for the indexing are highlighted in red.

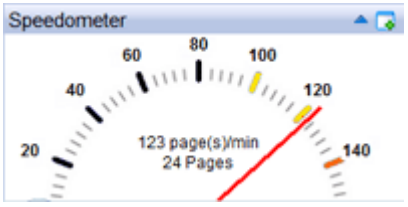


- The **Search pane** enables you to carry out searches on the document index values. The searches cover all the batches of documents of the open project. If several results are available, the user can go from one result to the other by pressing the **Search** button. IRISPowerscan will then position itself on the various documents containing the searched value.



- The **Properties pane** displays the basic properties of the object selected in the explorer.

- The **Speedometer** displays the medium speed with which IRISPowerscan is scanning the documents.



Toolbars

All toobars are dockable. A tooltip appears each time the cursor slides over their icons. Toolbars can be either hidden or displayed: select **Toolbars** from the **View** menu, then select or deselect the required toolbars.

- The **main toolbar** (top left part) gives access to all frequent scanning and indexing commands, as well as to the various workspaces (first icon on the left).

- The **Scanner bar** gives access to all main scanning parameters. The other scanning parameters are defined in the **Page Setup** window (choose **Page**> **Setup** from the **Settings** menu).

- The **Browse bar** (top right part) offers to navigate through the document structure (batches/documents/pages). You can get up and down a level, or get to the next, the last, the previous or the first object within a given level. The last arrows on the right offer to get from one invalid field to the other in the **Index** pane.

- The **Image bar** (right part) gives access to all operations to be carried out on the scanned images (selection, rotation, cropping, adjustments, etc.).

Viewer

The viewer displays the images that have been selected in the **Batches** pane. Up to 81 images can be displayed at a time. Filtering criteria can be applied: display only front or rear pages, color or bitonal images, etc. A scroll bar (on the right) is available for browsing the images.

The image headers bear icons, numbers, flags. Images displayed on a light grey background are front pages. Images displayed on a dark grey background are rear pages.

Slider

The slider offers to easily browse through the images of the object selected in the **Batches** pane. It contains a navigation bar that corresponds to the **Browse** bar.
A red dotted line indicates the separation between documents. The color of the image borders can be customized (right-click on the viewer, select **Change Color** and choose your preferred color).

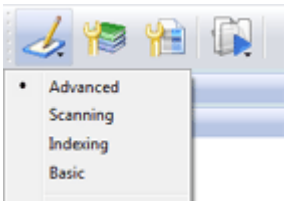
AVAILABLE WORKSPACES

The application is provided with various default workspaces (four in total), i.e. various versions of the user interface. These workspaces are made available to the different users according to their particular user profile*.
(*) Access to the workspaces is defined by the application's system administrator through the user management features.

All workspaces are customizable.

To access the default workspaces:

- Click the **Workspaces** button on the main toolbar or select **Workspaces** from the **View** drop-down menu.



The list of default workspaces directly depends on the user's profile

To customize a workspace:

The user can to a certain extend* customize the workspace(s) to which he has access.
(*) Full customization of the workspaces can be handled by administrators only. See: Software Options, Workspaces.

- Select the workspace to be modified.
- Simply open, hide and/or customize the various user interface components (see: Starting up, User Interface).

  Alternatively, from the **View** drop-down menu, select or deselect the toolbars to be displayed on screen, the status bar, the slider, and choose the number of images to be displayed in the image viewer.
- Save your customized workspace: from the **View** menu, select **Workspaces** (the current workspace is selected in the list of workspaces), then click on **Save**.

CHAPTER 4
SOFTWARE OPTIONS

SOFTWARE OPTIONS

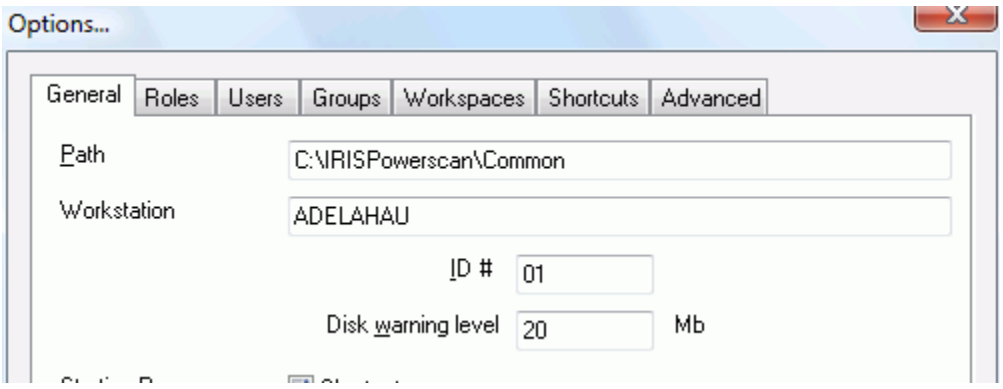
Features available for system administrators only.

Note:
The default automatic login when starting IRISPowerscan for the first time is **SysAdmin** (case sensitive), which is assigned to the application's system administrator.

System administrators of IRISPowerscan can set the software options. These include the software general options, the user profiles, workspaces, shortcuts, as well as more advanced features.

To set the software options:

- Select **Options** from the **Settings** drop-down menu (either from the **Start up** window or from the user interface).
- Introduce the required data in the various tabs, then click **OK**.



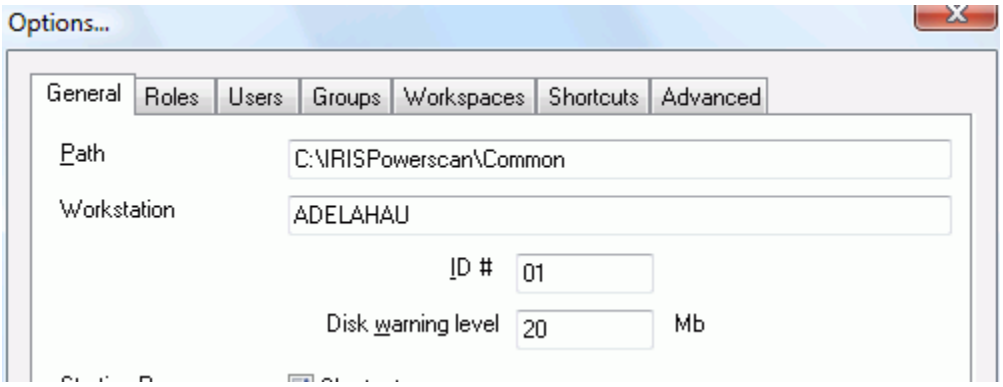
GENERAL OPTIONS

Features available for system administrators only.

System administrators of IRISPowerscan can set the software general options.

To set the software general options:

- Select **Options** from the **Settings** drop-down menu (either from the **Start up** window or from the user interface).
- Introduce the required data in the **General** tab.



Path: confirm (or change) the location of the application data files
Workstation: confirm (or change) the name of the workstation (<STATION_NAME>)
(Note: In a multi-station environment, each station must be identified by means of a unique station name and station ID.)
ID number: confirm (or change) the application ID number (<STATION_ID>)
Disk warning level: confirm (or change) the maximum volume (in Mb) that the application may contain (a warning message will appear on screen once the limit is reached)
Starting Page: select/deselect the boxes according to the pre-configured projects to be displayed/hidden in the **Start up** page.
Theme: select your preferred theme (user interface color)

Unit: choose the unit in which the dimensions of the images must be given in the application

USER PROFILES

Features available for system administrators only.

System administrators of IRISPowerscan can define the users, user groups, and user profiles.

In IRISPowerscan, user profiles are referred to as roles. A role corresponds to a generic class of users to whom a certain number of permissions are granted. Permissions enable to carry out actions on the various categories of objects (batches, documents, pages), to setup or select scanners, to use tools, and access certain projects and/or workspaces.
A user will be given one or several roles.
Users can also be defined as part of user groups.

To access the user management module:

- Select **Options** from the **Settings** drop-down menu (either from the **Start up** window or from the user interface). The default roles, users, and groups are detailed in the **Roles**, **Users** and **Groups** tabs.

Creating and modifying roles

Select the **Roles** tab, use the **Add**/**Modify** buttons, and select/deselect the needed options in the various tabs.
General
Select/deselect the actions allowed for the different categories of objects.
Projects
Select/deselect the projects to which the users having this role will

have access.
Workspaces
Select/deselect the workspaces to which the users having this role will have access.

Creating and modifying users

Select the **Users** tab, use the **Add**/**Modify** buttons, and introduce the needed data in the user's properties window.
General
Name: user's name (e.g.: fdupont).
Description: describe the user (e.g.: François Dupont)
Password: introduce the user's password
Language: select the preferred user interface language for the user.
Trace: select an option in order to enable the generation of a log file containing information on the user's actions (**Medium**/**Full** refer to more or less detailed information).
Administrator: check the box to give the user the **System Administrator** right.

> **Tip**:
> Only system administrators have access to the software options. You must thus make sure that at least one user is qualified as system administrator. By default, the user **SysAdmin** (password SysAdmin) is set as a user administrator. The **SysAdmin** logon is automatic. No logon screen will thus be displayed at start up.

Automatic login: check the box if you want to enable the automatic login of the user (this option is particularly interesting if you want to create a generic user having a given role on a given workstation).

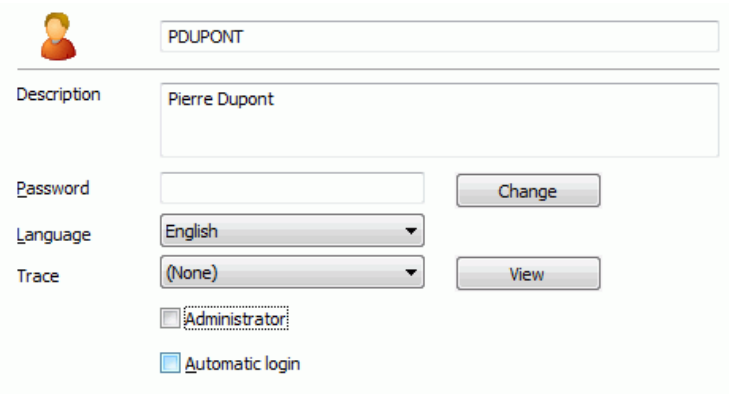
If you do so, remember to make sure that this option is deactivated in the system administrator profile.

Roles

Assign one or several roles to the user.

Groups

Assign one several groups to the user.



Creating and modifying groups

Select the **Groups** tab, use the **Add**/**Modify** buttons, and introduce the needed data. Select/deselect the needed options in the various tabs.

Name: group's name.

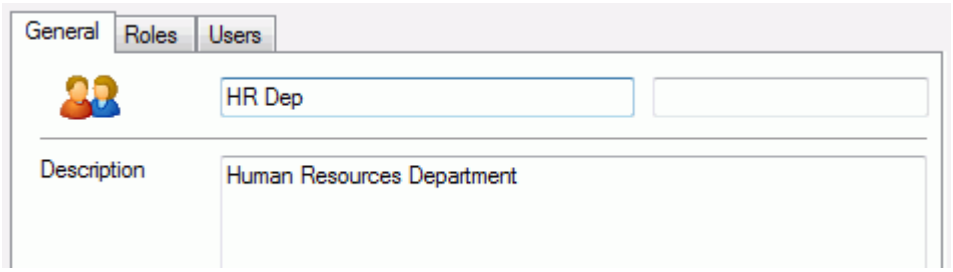
Description: describe the group.

Roles

Select/deselect the role(s) to be attributed to the group.

Users

Select/deselect the users who must be part of this group.



WORKSPACES

Features available for system administrators only.

System administrators of IRISPowerscan can customize any of the workspaces available in the application, or even create new workspaces and assign them to the various users.

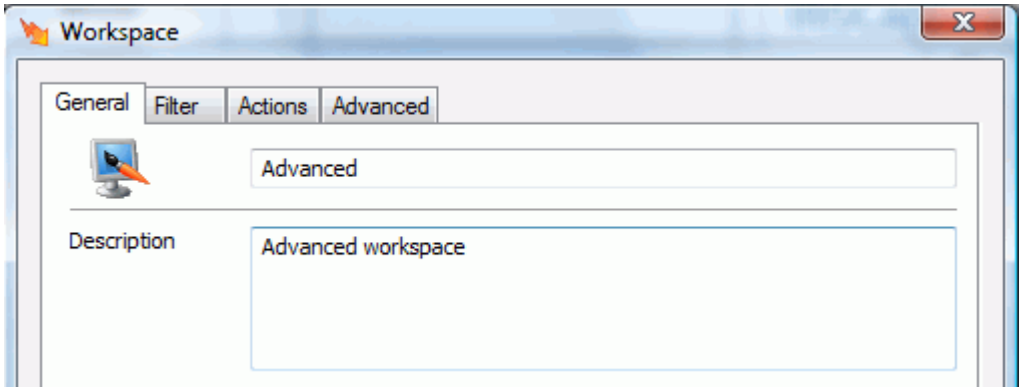
To customize a workspace:

- From the **Settings** menu, select **Options**, then the **Workspaces** tab.

- Select the workspace to be customized and click on **Modify**, then change the options in the various tabs:

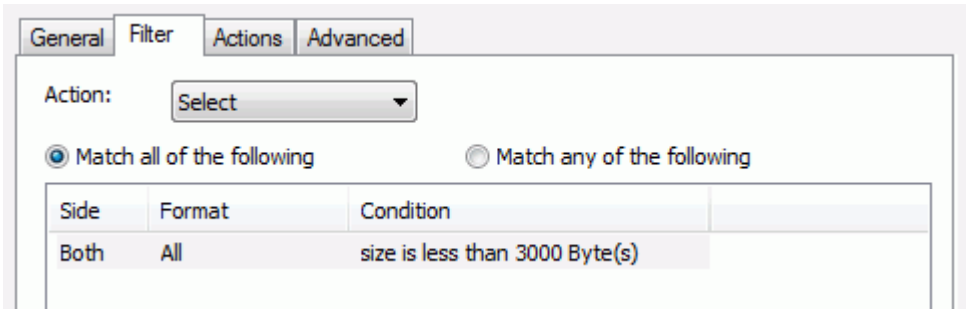
  General tab:

  - **Display**: indicate the number of columns and rows of images to be displayed in the viewer.
  - **Show title bars**: indicate whether the image title bars must be displayed in the viewer.
  - **Slider**: indicate whether the slider must be hidden or not, and where it must be positioned on your screen.
  - **Show pages**: if you deselect this option, the document pages will not be displayed in the **Batches** pane.
  - **Show images**: if you deselect this option, the document images will not be displayed in the **Batches** pane.
  - **Small icons**: if you deselect this option, bigger icons will appear in the **Batches** pane.
  - **Form**: if you select this option, the index values will be displayed in a form rather than a grid in the **Index** pane.



Filter tab:

This tab allows you to define a filter to be applied on the viewer. You can ask the application to show, hide, select, or flag certain images (front/rear, bitonal/grayscale/color) matching certain conditions (e.g.: size is less than x, etc. When pressing on the **Filter** button in the viewer, IRISPowerscan will apply the filter. (**Match all**: enable the action if matches all the conditions - **Match any**: enable the action if matches at least one condition).



Advanced tab:

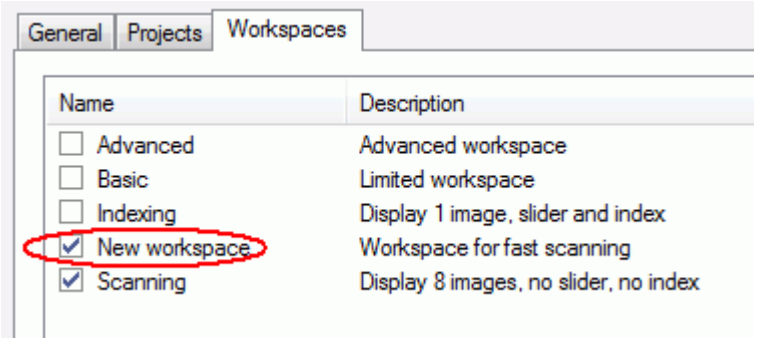
Deselect, select or define the toolbars and panes to be made visible in the user interface. Use the **Move Up** and **Move Down** buttons to reorder the panes.

To create a new workspace:

- From the **Settings** menu, select **Options**, then the **Workspaces** tab.

- Click on **Add** to add the new workspace, give it a name, a description, and select the required options in the 3 tabs (**General**, **Filter**, **Advanced**) (see above), then click **OK** to save the settings.

- In the **Role** tab, choose the role to which you want to assign the new workspace, then click on **Modify**. In the chosen role's **Properties** window, open the **Workspace** tab and select the new workspace, then click on **OK** to save your settings. All users having the given role will have access to the new workspace.



SHORTCUTS

Features available for system administrators only.

System administrators of IRISPowerscan can confirm the list of keyboard shortcuts that have been set for the application. He can clear the shortcuts, set new ones, or reset the default ones.

To clear a shortcut:

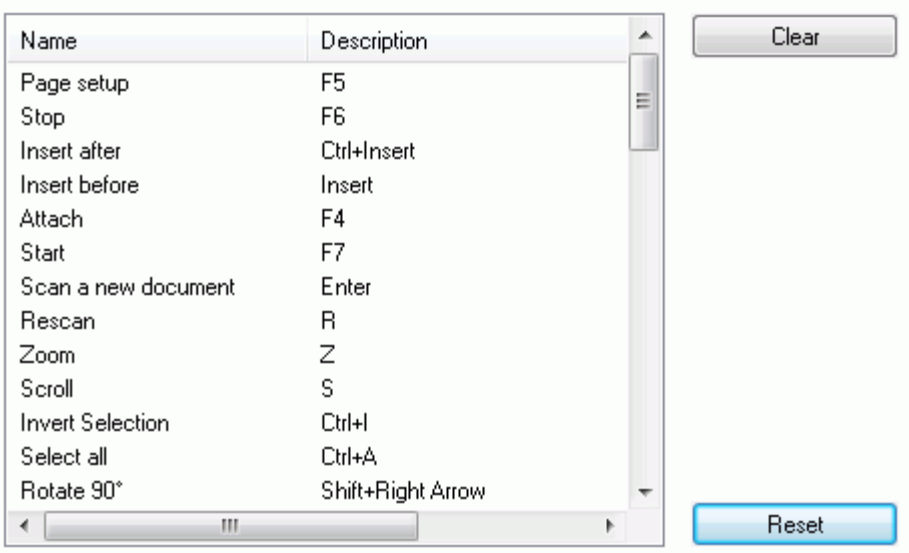
- Select the shortcut in the list, then click on **Clear**.

To set a shortcut:

- Select the shortcut in the list, then press the desired key on your keyboard.

To reset the shortcuts:

- Click on **Reset**. The default shortcuts definitions will be reloaded.



ADVANCED

Features available for system administrators only.

System administrators of IRISPowerscan can set the necessary parameters to use the **Shared Drive Add-on** to IRISPowerscan. The **Shared Drive Add-on** offers to set and locate on a shared drive a certain configuration of the application (corresponding to the software options). Each time the configuration is being changed by the administrator, that same configuration is updated for all the connected workstations.

To configure the Shared Drive Add-on:

Refer to the separate **IRISPowerscan Add-ons documentation**.

System administrators can also set a batch counter which is not linked to the projects.

To set the Batch counter:

- Set the number of the first batch. Once the maximum number is reached, the counter is reset to the minimum number (in this case: 1).

Tip:
A batch counter can be set at project level. See: Project Setup, Project options.

CHAPTER 5
PROJECT SETUP

PROJECT SETUP

If the configuration of the project chosen in the **Start Up** window does not totally fit your needs, you can refine or modify its settings in the **Project Setup** window.

To access the Project Setup window:

- Open the chosen project.
- Select **Setup** from the **File** menu, or click the **Project Setup** button  from the main toolbar. The **Project Setup** window opens with the chosen project configuration.

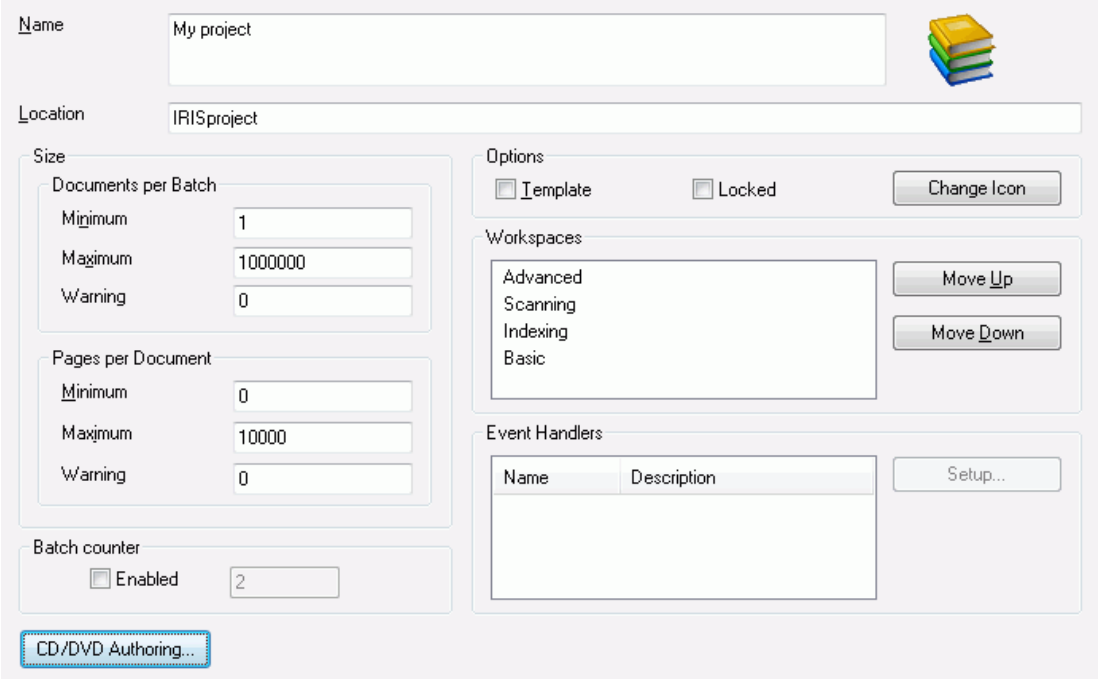
You must carefully analyze your documents and the work to be performed in IRISPowerscan, then check and refine the parameters

in the following **Project Setup** tabs:
General
Scanning
Indexing
Processing
Security

GENERAL

Project options

To set the project's general options, select or fill in the required fields in the **General** tab of the **Project Setup** window (see: Project Setup).



Name: confirm your project name. You may localize the name in the languages in which the application is available. To do so, select another interface language (select Settings, Language), introduce the localized name in the Project Setup window, then click OK.

Location: folder name of the physical location of the project (in this case: C:\IRISPowerScan\Common\Apps\IRISproject)

Size
You can set a limit to the size of your batches/documents (in number of documents/pages). During the scanning, the software will automatically display a warning message each time it gets to the limit. If you go on scanning even though the limit has been reached, your batch/document will be displayed in red in the explorer, and the output processing will not be possible.
Documents per Batch: determine the minimum and maximum number of documents within a batch, and ask the application to warn you whenever a batch comes to its end (in number of documents before reaching the size limit).
Pages per Document: determine the minimum and maximum number of pages within a document, and ask the application to warn you whenever a document comes to its end (in number of pages before reaching the size limit).

Batch counter: enable this box if you want to use a separate counter for your particular project*. Introduce the number from which the numbering must start. The number will be incremented by 1 (introduce "0" if you want the new batch to start with "1").
(*) By default, IRISPowerscan uses a unique batch counter for all projects. See: Software options, Advanced.

Options
Template: select this option if you want this project to become a new template project; it will be listed in the template projects list in the **Start up** window.
Locked: if you lock the project, only a system administrator will be able to modify the **Project Setup**.
Change icon: you can change the project icon that will appear in the Start up window. To change the icon: click and browse for your own *.ico file.

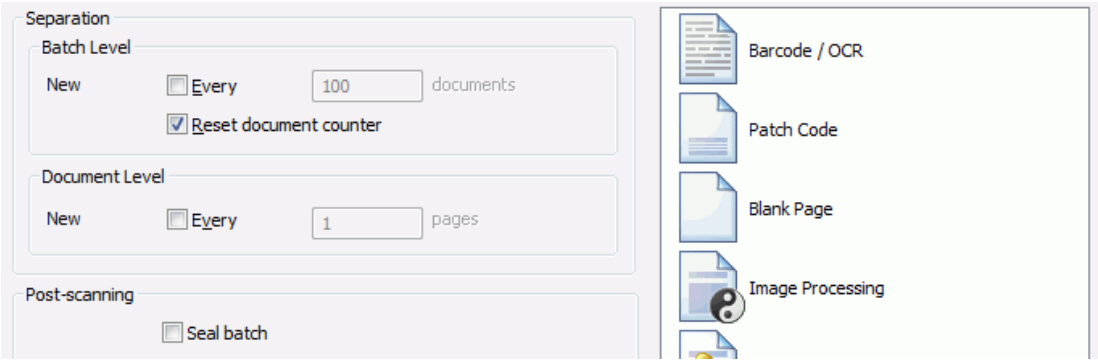
Workspaces
Determine the order in which the workspaces will appear in the user interface. Select the required and use the **Move Up** and **Move Down** buttons on the right.

Event Handlers
Use this option if you want to change the standard behavior of the application: you will then link another program to the application thanks to an API. Refer to the white paper provided by I.R.I.S. on this subject to define your settings (**Setup** button).

SCANNING

Scanning options

In the **Scanning** tab (of the **Project Setup** window, see: Project Setup), you can set the document separation procedure as well as post-scanning and compression options.
If you intend to use **barcodes**, **OCR (ICR) zones**, **patch codes** or **blank pages** to identify, separate or index your documents, or if you wish to set image processing operations, you must also define the required settings in the various **Scanning** modules (access through icons on the right).



Separation (based on batch or document counter)

The batch/document separation procedure is based on the number of objects they contain.
Batch Level: set the number of documents after which the software must automatically create a new batch.

Reset document counter (default): if you check this box, the document counter is reset to 1 each time a new batch is being created.

Document Level: set the number of pages after which the software must automatically create a new document.

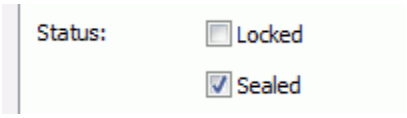
Tip:
The separation process can be set according to:
- **OCR/ICR zones**
- **Patch codes**
- **Blank pages**

To define such separation processes, select the corresponding modules in the right part of the **Scanning** tab and click on **Setup**.
Refer to: Scanning, Barcode/OCR, Setting barcode properties, Setting OCR zone properties, Defining and using patch codes, Defining and using blank pages.

Tip:
The IRISFingerPrint add-on to IRISPowerscan provides an additional separation process based on the general image layout. Get in contact with I.R.I.S. to acquire such add-on. Then refer to the separate **IRISPowerscan Add-ons documentation**.

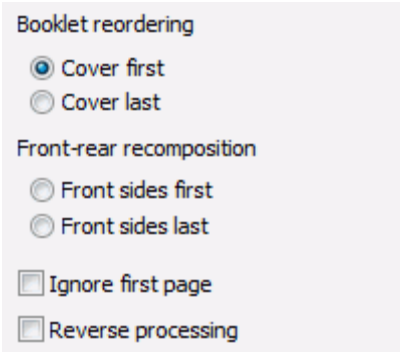
Post-scanning

Seal batch: tick this option to seal your batches as soon as the scanner stops scanning. If a batch is sealed, you will no longer be able to scan new documents in it.
To unseal a batch: get to the main application window, **Batches** pane, and select the batch to be unsealed. Right-click to access its **Properties** window, and deselect the **Seal** option.



Seal document: tick this option to seal your documents as soon as the scanner stops scanning. If a document is sealed, you will no longer be able to scan new pages in it.
To unseal a document: get to the main application window, **Batches** pane, and select the document to be unsealed. Right-click to access its **Properties** window, and deselect the **Seal** option.

Reorder: tick this option to make the software reorder your pages according to the parameters set in the **Reordering** window.
This option is used if you intend to scan booklets from which staples are simply being removed, or if you have to recompose front and rear pages that were scanned with a simplex scanner.
The parameters will be applied as soon as the scanner stops scanning.
To access the **Reordering** window, get to the application main window and click **Reorder** from the main toolbar .



Options

Compression:
Default: select this option to make the application produce image files according to what was defined at scanner level (either compressed or uncompressed files).
Always: select this option to make IRISPowerscan always compress your images to the JPEG (color & grayscale) or TIFF G4(B&W)

format, without taking into account what has been defined at scanner level.
Never: select this option in order never to compress the images and thus produce BMP images. Caution: This will slow down the scanning.

Barcode/OCR

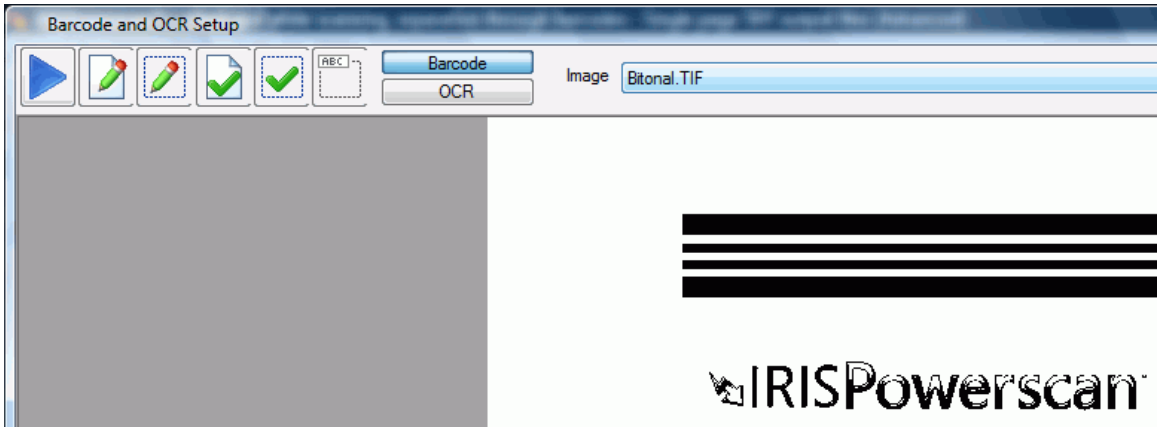
Barcode and OCR setup

The **Barcode/OCR Setup** module is used to define the **barcodes/OCR zones** to be automatically read on the images.
These zones can be used to:
- **separate** the batches/documents,
- **extract indexing** values,
- **identify** the **type** of batch/document.

The reading takes place during the scanning process. Manual data extraction ("On the Fly OCR") will still be possible after the scanning (see: Indexing validation, Indexing tools).

To access the Barcode and OCR Setup window:

- Open your project. Select **Setup** from the **File** menu, or click the **Project Setup** button from the main toolbar, then select the **Scanning** tab and click on the **Barcode/OCR Setup** button.



The **Barcode and OCR Setup** window allows you to scan an image and define general properties for all defined barcodes/OCR zones, as well as barcode/OCR zone-specific properties. You must first select your template image in the **Image** drop-down list before barcode/OCR zones can be defined.
To create your own template images. See: Project Setup, Scanning, Barcode/OCR, Capturing template images.

Default template images
The template project that you have chosen for creating your own project already contains one (or more) template image. This image is automatically displayed when opening the **Barcode and OCR Setup** window.

Capturing template images

The template image to be used for barcode/OCR zone definition must be in the **Image** drop-down list before barcodes or OCR zones can be defined. There are two ways to capture images for barcode/OCR setup: you can either scan an image directly from the **Barcode and OCR Setup** window, or scan an image from the main window and copy it to the **Project Setup**.

1. To scan an image from the Barcode and OCR Setup window:

- Click on the blue **Scan** button (**Scan an image**) on the left. The **Scan Image** window opens.

- Enter a name in the **Image name** field. The image name should not contain the following special characters: ", ?, *, ., >, <, /, \

- Position the document in the feeder and click on the **Scan** button. The image appears in the **Scan Image** window. (The current Page Setup will be used for the scanning (see: Scanning, Page Setup). Any auto-rotation, auto-cropping and deskew settings will be applied to the scanned image before it appears).

- If the image you scanned is acceptable, click **OK** to save it as a template image.

2. To scan an image from the main window and copy it to the Project Setup

- Select the template image in the application viewer, right-click on it, and select **Copy to Project Setup**.
  The image is directly available in the **Project Setup** window, **Image** field.

Defining barcodes

To define barcodes:

- From the **Project Setup Scanning** tab, select **Barcode/OCR** to access the **Barcode and OCR Setup** window. If your project

already contains template zones, these will directly appear on screen.

What to do with the default template barcodes?

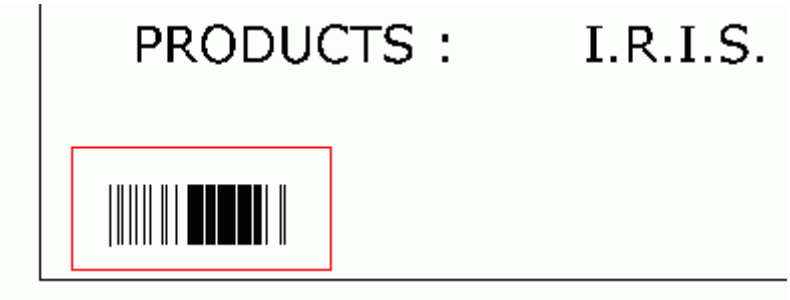
The template project that you have chosen when starting your project (see: Starting up, Creating a project) is provided with template images and default template zones. Before defining new barcodes, check whether the template zones can be useful to you: check their type, location and properties. You may wish to simply modify them rather then start creating new zones from scratch.
You can for example use a template barcode and relocate it on the image, change any of its properties, etc. (see: Project setup, Scanning, Barcode/OCR, Setting the barcode properties).

!Caution
If you decide not to use the default template barcodes, delete them.

- To create a new barcode, select the template image to be used for barcode definition in the **Image** drop-down list.
- Click the **Barcode** button 

at the top of the window.
- Place your cursor at the top left corner of the barcode area. Click the left mouse button and drag the cursor until a rectangle is drawn around the area of the barcode.
  The barcode will be enclosed in a red box.

Tip
Leave at least a 1/4-inch of space around a barcode to guarantee that the full barcode will always fall within the zone. Move the zone around the barcode until the highest confidence rate is achieved (see: Project setup, Scanning, Barcode/OCR, Testing barcodes and OCR zones.)



Note
Barcode zones are project-specific; not image-specific. Therefore, displaying a new image will continue to display the zones as defined.

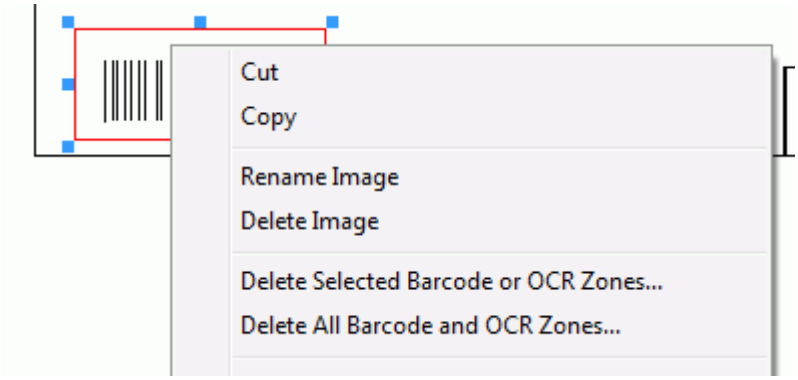
- Define the barcode properties in the **Barcode Zone Properties** window. See: Project setup, Scanning, Barcode/OCR, Setting the barcode properties.
- Once the barcode has been properly defined on the template image, you can test it. See: Project setup, Scanning, Barcode/OCR, Testing barcodes and OCR zones.

Modifying the barcode zone

You can always modify the barcode zone. Simply click on the barcode zone and drag the whole rectangle or any of the red lines as you wish.

Deleting the barcode zone

You can always delete any barcode zone. Select the barcode zone and right-click to access the context menu; Click **Delete Selected Barcode or OCR Zone**.



Defining OCR zones

To define an OCR zone on a template image:

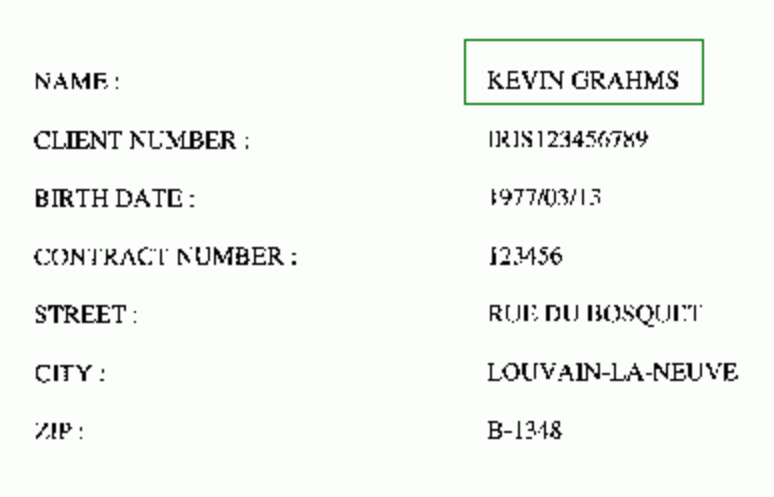
- From the **Project Setup Scanning** tab, select **Barcode/OCR** to access the **Barcode and OCR Setup** window.
  If your project already contains template zones, these will directly appear on screen.

What to do with the default template OCR zones? The template project that you have chosen when starting your project (see: Starting up, Creating a project) is provided with template images and default template zones. Before defining new OCR zones, check whether the template zones can be useful to you: check their location and properties. You may wish to simply modify them rather then start creating new zones from scratch. You can for example use a template OCR zone and change any of its properties, etc. (see: Project setup, Scanning, Barcode/OCR, Setting the OCR zone properties). !Caution If you decide not to use the default template OCR zones, delete them.

- To create a new OCR zone, select the template image to be used for the definition of the OCR zone in the **Image** field (down arrow to access the drop-down list).
- Click on the **OCR** button OCR at the top of the window.

- Place your cursor at the top left corner of the OCR zone. Click the left mouse button and drag the cursor until a rectangle is drawn around the OCR zone.
  The barcode will be enclosed in a green box.

Tip:
For variable length and height, make sure that you draw the zone large enough to capture all the data. At the same time, be careful not to draw the zone too large so that stray data (e.g.: lines on a form) can accidentally be captured.

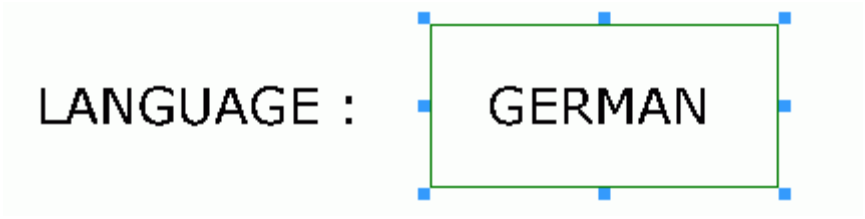


- Define the OCR zone properties in the **OCR Zone Properties** window. See: Project setup, Scanning, Barcode/OCR, Setting the OCR zone properties.

- Once the OCR has been properly defined on the template image, you can test it. See: Project setup, Scanning, Barcode/OCR, Testing barcodes and OCR zones.

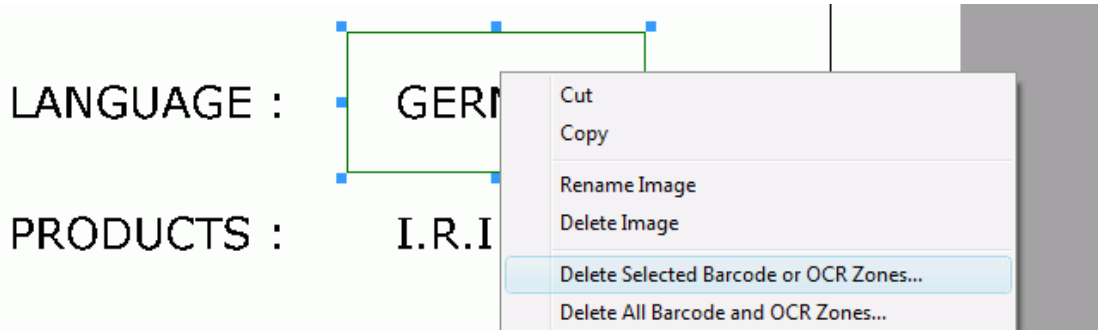
Modifying the OCR zone

You can always modify the OCR zone. Simply click on the OCR zone and drag the whole rectangle or any of the green lines as you wish.



Deleting the OCR zone

You can always delete any OCR zone. Select the OCR zone and right-click to access the context menu. Click **Delete Selected Barcode or OCR Zone**.



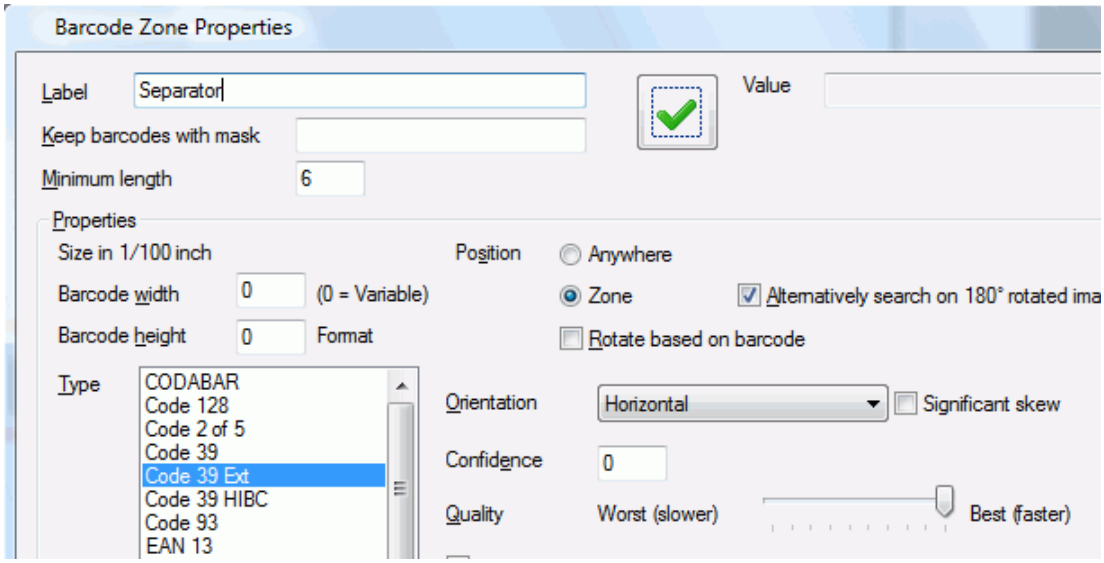
Setting barcode properties

Once a barcode has been located on a document template, you can define its properties (size, type, name, etc.). You can also tell the software whether it must be used as separator for the batches/documents, if it must be used to create attachments, etc.

To set the barcode properties:

- Once you have drawn your barcode on the template image, IRISPowerscan attempts to read the barcode in the zone and automatically displays the **Barcode Zone Properties** window. (Alternatively, select the barcode zone and click on **Barcode zone and OCR properties**  from the toolbar).
  Select or fill in the required options in the **Barcode Zone Properties** window. Click **OK** to confirm, then set the general

barcode properties (see: Scanning, Barcode/OCR, General barcode and OCR properties).



Label: name of the barcode*. This name identifies the barcode and, if the barcode is used as an index field, it will appear in the **Index Setup** as BC_[Label] (see: Indexing, Defining index fields).
(*) The label will appear in the top left corner of the barcode zone (in red) by clicking on  on the **Barcode and OCR Setup** window toolbar).

Keep barcodes with mask: give the barcode a mask to make sure that only barcodes with that mask are retained for the defined zone. For example, a mask of A(8) will retain a barcode value of up to, but not exceeding, eight alphabetic characters ("Surgery" will be retained - "Admission" will not be retained). See: Project setup, Scanning, Barcode/OCR, Setting a mask syntax.
Minimum length: indicate the minimum number of characters to be contained in the barcode. If the barcode does not contain the minimum number, it will not be returned by the software.

Properties

Size: if the barcode has a fixed width and height, enter these values in the **Barcode width** and **Barcode height** fields. Making an entry in one or both of these fields increases the performance of barcode reading. If one of the dimensions is variable, enter "O".

Position: indicate the position of the barcode on the template image.
Anywhere: if the barcode can appear anywhere on the image (the rectangle around the barcode will become blue).
Zone: if the barcode is always positioned at the same place (the position is indicated by drawing the barcode on the template image (see: Project setup, Scanning, Barcode/OCR, Defining barcodes).

Alternatively search on 180° rotated images (only in case the **Zone** option is selected): tick this option to prevent barcode read failure in case a page is scanned upside down. If the barcode reading fails on a page, the software will thus look for the zone after rotating the image by 180 degrees. This slows down barcode reading.

Rotate based on barcode: tick this option to rotate all the pages of the document in the same manner as the lead page containing the barcode zone.

Type: select the barcode type(s)* from the list.
(*) The barcode to be read may be of different types.

Verify checksum: tick this option to make the software automatically verify the barcode check character(s), if there are any.

Orientation: indicate the barcode's orientation on the template image: horizontal, vertical, etc.
If your barcodes are all in the same orientation (i.e. all horizontal or all vertical), it is recommended that you indicate the specific orientation; this will increase the reading performance.
If your barcodes are predominantly in the same orientation but there may have an occasional barcode in the opposite direction, it is recommended to use the appropriate "then" orientation, e.g. "Horizontal then Vertical". This will improve the reading performance.

Significant skew: enable this option if there is a possibility that barcodes could be skewed on a page. Significant skew means more that 15 degrees.

Confidence: enter a confidence level if you want to restrict what the software will consider to be a successful reading.
When reading a barcode, the software reader indicates how confident it was in correctly reading the barcode (see: Project setup, Scanning, Barcode/OCR, Testing barcodes and OCR zones). If this confidence percentage (between 0 and 100%) falls below the specified confidence level, then a barcode value is not returned.

Quality: if you notice that the quality of the barcodes to be read is rather poor, slide the quality indicator to the left. This will however slow down the barcode reading.

Allow out-of-specs barcodes: tick this option if you suspect the barcodes to be "out-of-specs", i.e. that they have been generated without respecting the barcodes specifications.

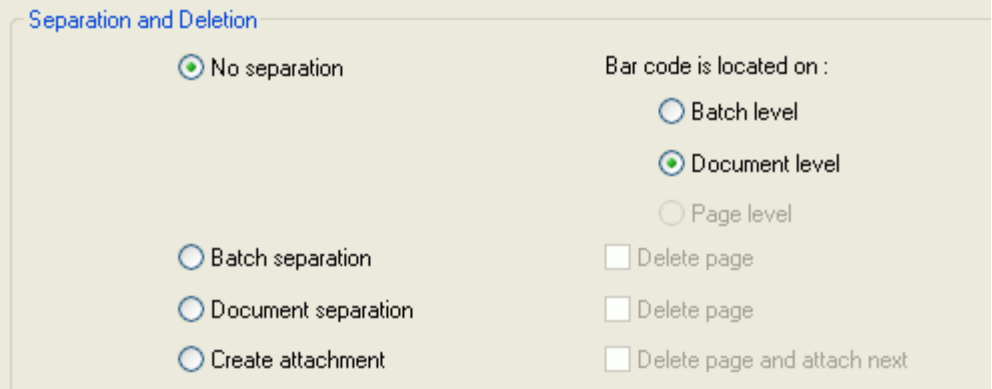
Minimum partial read: enable this option if you want the software to generate a barcode value even if a barcode is incomplete. This may be the case if the end of the barcode is unavailable or of insufficient quality, etc. If enabled, enter the minimum number of characters that will be allowed for a partial read. This option is useful for barcodes that are only used for document or batch separation where the absolute value is less critical.

Verify checksum: tick this option to make the software automatically verify the barcode check character(s) - if there are any.

Separation and Deletion

When a barcode is detected, it can be used to enable the following options:
- Separate batches

- Separate documents
- Create attachments.



No separation: if you choose this option, you must indicate what level the barcode is located on. Barcodes can be found at batch level or document level.
Batch level: the barcode is located at batch level; barcodes that are located on the batch level or that separate batches are available for batch and document indexing.
Document level: the barcode is located at document level; barcodes that are located on the document level or that separate documents are available for document indexing. They are not available for batch indexing.

Batch separation: check this option to separate batches with the defined barcode.
(Remember to fill in the **Keep barcodes with mask** and/or **Minimum length** fields if you wish to restrict batch separation to a specific barcode value or mask).
Delete page: check this option to delete the page containing the barcode that started the new batch.

Document separation: check this option to separate documents with the defined barcode.
(Remember to fill in the **Keep barcodes with mask** and/or **Minimum length** fields if you wish to restrict document separation to a specific barcode value or mask).
Delete page: check this option to delete the page containing the

barcode that started the new document.
(This is important when inserts are used for the purpose of document separation and do not contain any significant information. The barcode, however, is still available for document level indexing).
(Remember to select **Rotate based on barcode** if you want to rotate all the pages in the document in the in the same orientation as the orientation of the barcode of the document.
Note: Rotate based on barcode is not available if the barcode separator page is deleted).

Create attachment: check this option to create an attachment with the defined barcode.
(Remember to fill in the **Keep barcodes with mask** and/or **Minimum length** fields if you wish to restrict the attachment to a specific barcode value or mask).
Delete page and attach next: check this option to delete the page (both front and rear) containing the barcode and to use the next page as the attachment.
(Remember to select **Rotate based on barcode** if you want to rotate the attachment (both front and rear) in the same orientation as the orientation of the barcode on the page.

Important

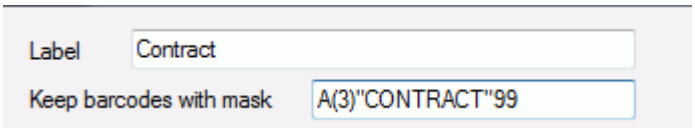
The **Create attachment** option is only valid for one attachment page. If multiple attachments are required, then an attachment barcode must be applied to each attachment.

The barcode on the attachment page is not available for indexing.

Separation triggered by change of value: check this option if you want the separation to take place only if the barcode value changes.

Setting a mask syntax

The barcode masks are defined according to a mask syntax. They are used to validate the values detected on the documents, such as, for example, the index field values.



A mask is made of characters that correspond to different values:
A = alphabetic character (from A to Z and a to z)
X = alphanumeric character
9 = a digit (from 0 to 9)
? = any character
E.g.: if the value mask is **AA99**: the value is valid if it starts with two alphabetic characters followed by two digits.

Some portion of the mask may have to match a literal expression. This expression must then be written between quotes.
E.g.: if the value mask is **AA"CONTRACT"99**, the value is valid if it starts with two alphabetic characters followed by the literal expression "CONTRACT", followed by two digits.

For each character, you can also specify a counter, i.e. the number of characters that must be present in the value.
E.g.: ?(3) means up to 3 characters.
E.g.: A(3) means up to 3 alphanumeric characters.
E.g.: A(3)"CONTRACT"99 the value is valid if it starts with up to three alphabetic characters followed by the literal expression "CONTRACT", followed by two digits.

Number type mask characters
9 = numeric
E.g.: 9(3) or 999 => 453 or 123 or 657, etc.

Date type mask characters
D = numeric

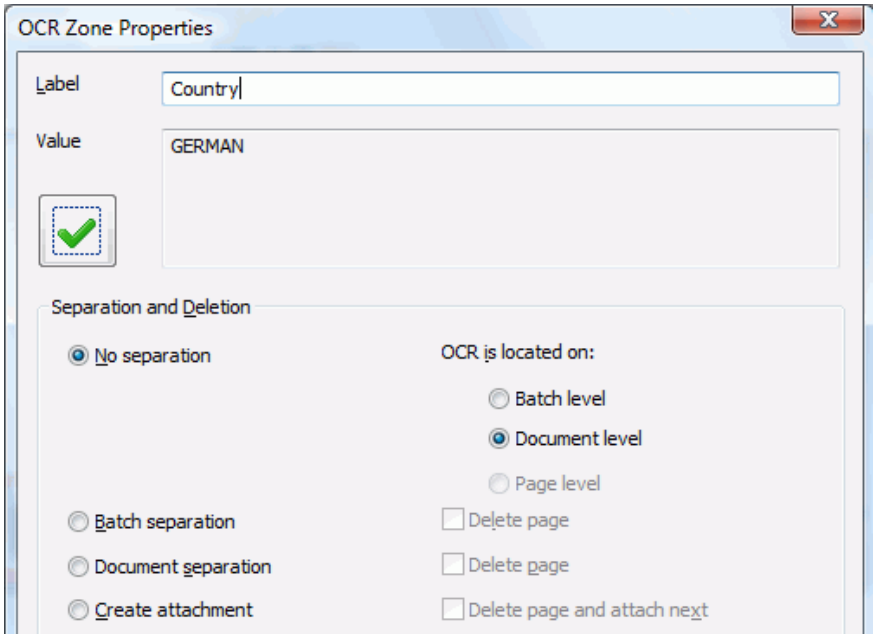
M = alphabetic
Y = alphanumeric
H = any character
m = minute
s = second
t = time
E.g.:
DDMMYY => 240309
D(2)M(2)Y(4) => 24032009 or 2439
H(2)"h"mm => 15h30 or 9h05, etc.

Setting OCR zone properties

Once an OCR zone has been located on a document template, you can define its properties (size, language, etc.). You can also tell the software whether it must be used as separator for the batches/documents, if it must be used to create attachments, etc.

To set the OCR zone properties:

- Once you have drawn your OCR zone on the template image, IRISPowerscan attempts to read the information in the zone and automatically displays the **OCR Zone Properties** window. (Alternatively, select the OCR zone and click on **Barcode zone and OCR properties**  from the toolbar).
  Select or fill in the required options in the **OCR Zone Properties** window. Click **OK** to confirm.



Label: enter a name for the OCR zone. This name identifies the OCR zone and will appear in the **Index Setup** as OCR_[Label] in the list of default values (see: Indexing, Defining index fields).
(*) The label will appear in the top left corner of the barcode zone (in green) by clicking on  on the **Barcode and OCR Setup** window toolbar).

Note
The OCR label does not define or identify an index field. All index fields must be defined in **Project Setup**, **Indexing**.

Multi-line OCR
When the text in an OCR zone is on more than one line, IRISPowerscan will insert a caret character (^) between each line of data. The result is a delimited string of OCR text that can be broken up into separate index fields.

Gap between words
A gap between words on the same line that is greater than 5/16 of an inch will be interpreted by IRISPowerscan as multiline OCR data.

Separation and Deletion

When an OCR zone is detected, it can be used to enable the following options:
- Separate batches

- Separate documents
- Create attachments.

No separation: if you choose this option, you must indicate what level the OCR zone is located on. OCR zones can be found at batch level or document level.

Batch level: OCR zones that are located on the batch level or that separate batches are available for **batch and document indexing**.

Document level: OCR zones that are located on the document level or that separate documents are available for **document indexing**. They are not available for batch indexing.

Batch separation: check this option to separate batches with the defined barcode.

Document separation: check this option to separate documents with the defined OCR zone.
Delete page: check this option to delete the page containing the OCR zone that started the new document.
(This is important when inserts are used for the purpose of document separation and do not contain any significant information. The barcode, however, is still available for document level indexing).

Create attachment: check this option to create an attachment with the defined OCR zone.
Delete page and attach next: check this option to delete the page (both front and rear) containing the OCR zone and to use the next page as the attachment.

Important
The **Create attachment** option is only valid for one attachment page. If multiple attachments are required, then an attachment OCR zone must be applied to each attachment. The OCR zone on the attachment page is not available for indexing.

Separation triggered by change of value: check this option if you want the separation to take place only if the OCR value changes.

Properties

Language: select the language of the OCR zone in the drop-down list.
Character set: define the character set that must be supported by the OCR engine; any character outside the defined character set will be ignored.

Keep OCR with mask: give the OCR zone a mask to make sure that only OCR zones with that mask are retained for the defined zone. See: Project setup, Scanning, Barcode/OCR, Setting a mask syntax.

Handprint: select this option in order to read handprinted data (ICR text). IRISPowerscan is able to read handprinted numbers and handprinted capital letters in languages using the Latin alphabet, as well as the dot, comma and hyphen symbols.

Format

Remove spaces: select this option to remove spaces in the OCR result.

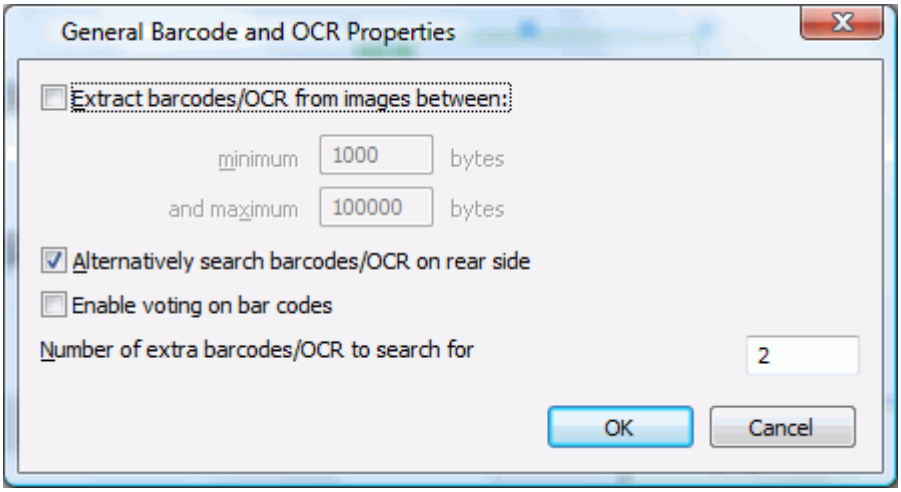
Remove format: select this option to remove formatting characters (e.g. carriage return) in the OCR result.

General barcode and OCR properties

You can provide properties that will apply to all barcodes and OCR zones that have been defined for the project.

To set general barcode and OCR properties:

- From the **Barcode and OCR Setup** window (**Barcode/OCR** section), select the **General Barcode and OCR Properties** button and fill in the required options. Click **OK** to confirm.



Extract barcodes/OCR from images between: enter values in the minimum and maximum fields. The values limit the images from which barcodes or OCR text will be read to only those whose size falls in between these values.

Alternatively search for barcodes/OCR on rear side: enable this option if you want to search for the barcode/OCR text on the rear side of the document.

Enable voting on barcodes: check this option if you want to activate the voting on barcode recognition results*.
(*) IRISPowerscan integrates several barcode recognition engines. The voting system calls all the engines for every barcode zone, then chooses the best result.

Tip: Enabling the voting system means that you get better results, but it takes more processing time. The recognition becomes slower.

Number of extra barcodes/OCR to search for: specify a number if you want the software to search the image for the specified number of extra barcodes/OCR zones.

Testing barcodes and OCR zones

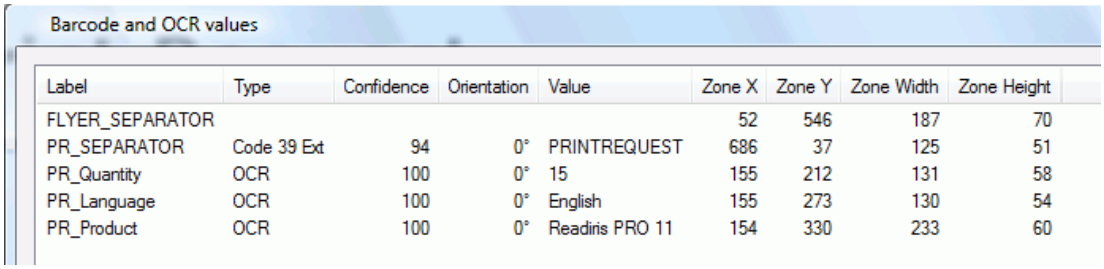
You can test the reading of your barcodes and OCR zones. The extracted values will be displayed in the **Barcode and OCR values** window.

To test a selected barcode or OCR zone:

- Select the barcode or OCR zone on the template image and click on **Test Selected Barcode or OCR Zone** .

To test all barcodes and OCR zones:

- Click on **Test all Barcodes** and **OCR Zones** .


Barcode and OCR values

Label	Type	Confidence	Orientation	Value	Zone X	Zone Y	Zone Width	Zone Height
FLYER_SEPARATOR					52	546	187	70
PR_SEPARATOR	Code 39 Ext	94	0°	PRINTREQUEST	686	37	125	51
PR_Quantity	OCR	100	0°	15	155	212	131	58
PR_Language	OCR	100	0°	English	155	273	130	54
PR_Product	OCR	100	0°	Readiris PRO 11	154	330	233	60

Note:
If a barcode/OCR zone cannot be found for a zone, the zone is still included in the value list with only the label and zone coordinates displayed.

Label: label of the barcode/OCR zone.

Type: type of barcode found. If the zone is an OCR zone, the Type will be "OCR".

Confidence: confidence level (in percentage) of the barcode/OCR value found.

Orientation: orientation of the barcode (with 0 degrees representing a horizontal right-side up barcode).

Value: value of the barcode/OCR string.

X and **Y**: are coordinates of the upper left corner of the barcode/OCR zone. The coordinates are in 1/100 of an inch and represent the distance of the zone from the upper left corner of the image.

Width and **Height**: width and height of the barcode/OCR zone in units or 1/100 of an inch.

Patch code

Defining and using patch codes

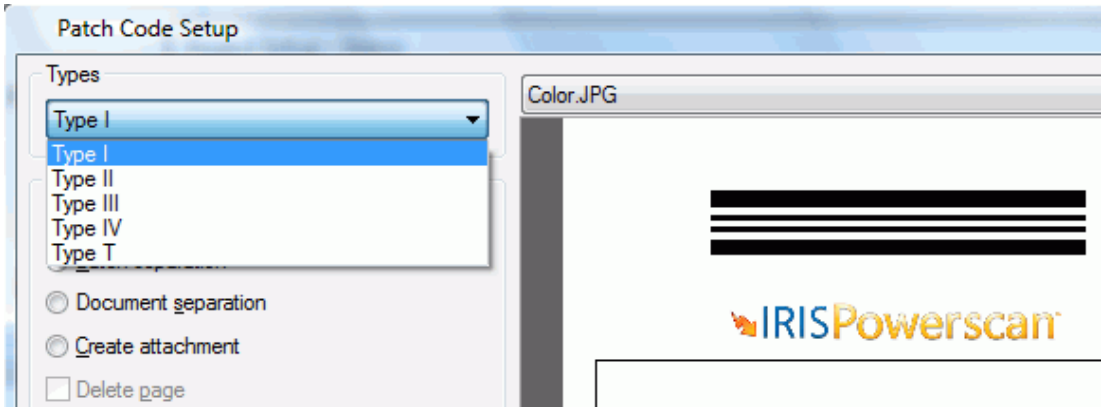
The **Patch Code** module is used to define the patch codes to be detected on the images in order to separate the batches/documents. The reading will automatically take place during the scanning process.

To access the Patch Code Setup window:

- From the **Project Setup Scanning** tab, select the **Patch Code** icon on the right.

To define how to use a patch code:

- From the **Patch Code Setup** window, select the type of patch to be detected, then the required options in the **Action** section:



Batch separation: to make the software create a new batch when detecting the selected patch code.

Document separation: to make the software create a new document when detecting the selected patch code.

Create attachment: to make the software create an attachment when detecting the selected patch code.

Delete page: to make the software delete the page is the selected patch code is detected on the page.

Patch based rotation: tick this option to rotate all the pages of the document in the same manner as the lead page containing the patch code.

Search also on 180° rotated images: tick this option to prevent patch code read failure in case a page is scanned upside down. If the patch code reading fails on a page, the software will thus look for the zone after rotating the image by 180 degrees. This slows down patch code reading.

Search also on rear images: tick this option to make the software also look for the patch code on the rear sides of the images.

Testing the patch codes

The **Patch Code Setup** window also enables to test your document patch codes. Simply select an image in the right part of the window (drop-down list) and IRISPowerscan will test whether the patch code can be properly detected.

Tip:
To make an image available for project setup, access the application viewer and select the image to be used:
- Select the required image in the viewer, right-click on it, and select **Copy to Project Setup**.
- The image is directly available in the **Project Setup** window, **Image** drop-down list.

To test a patch code on a template image:

- From the **Project Setup Scanning** tab, select the **Patch Code** icon on the right to access the **Patch Code Setup** window.
- In the left part of the window, select the type of patch to be detected, and on the right side, select the template image on which the patch code must be read.

Tip:
To make an image available for project setup, access the application viewer and select the image to be used:
- Select the required image in the viewer, right-click on it, and select **Copy to Project Setup**.
- The image is directly available in the **Project Setup** window, **Image** drop-down list.

- The type of path code is directly displayed at the bottom of the window.

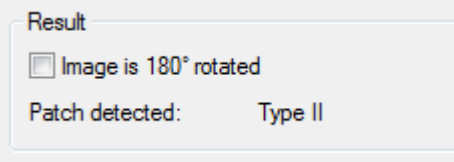


Image is 180° rotated: tick this option to also test a patch code after rotating the image by 180°.

Blank page

Defining and using blank pages

The **Blank Page** module is used to define the blank pages that will be used to separate the batches/documents.
The detection will automatically take place during the scanning process.

You must first define what should be considered as a blank page, then determine how the detected blank pages should be used in your project.

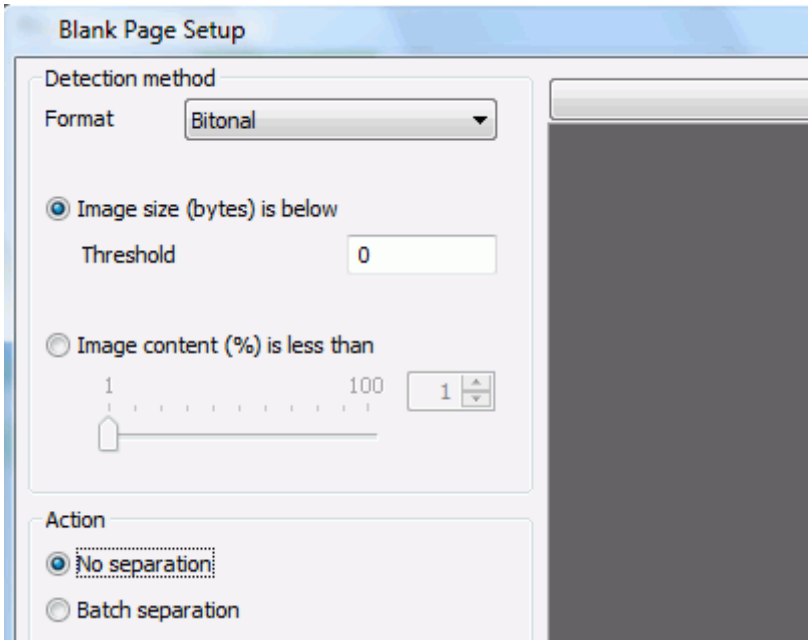
Caution: A page is considered blank only if both the front and the rear sides are blank.

To access the Blank Page Setup window:

- From the **Project Setup Scanning** tab, select the **Blank Page** icon on the right.

To define what is to be considered as a blank page:

- In the **Blank Page Setup** window, define what should by considered as a blank page by the application in the **Detection method** section, then fill in the required options in the **Actions** section.



Detection method

Format: select the type of image for which you want to set up the detection method. (The detection method can be different for black&white and color/grayscale images).

Image size is below: set the image size in number of bytes. Below the defined threshold, the page will be considered as blank.

Image content is less than: set the percentage of content of the page. Below this content, the page will be considered as blank.

Action

No separation: if a blank page is detected, it should not be used as a separator.

Batch separation: to make the software create a new batch when detecting a blank page*.

(*) Both front and rear images are blank

Document separation: to make the software create a new document when detecting a blank page*.

(*) Both front and rear images are blank

Create attachment: to make the software create an attachment when detecting a blank page*.
(*) Both front and rear images are blank

Delete page: to make the software delete the detected blank pages*.
(*) Both front and rear images are blank

Delete image: to make the software delete the detected blank images.

Flag: to display a flag in the application viewer on top of each detected blank image.

Testing blank pages

The **Blank Page Setup** window also enables to test your blank pages. Simply select an image and IRISPowerscan will test whether the page is considered as blank according to the parameters that have been set.

To test a blank page:

- In the **Blank Page Setup** window, select the image you want to test from the **Image** drop-down list (right part of the window).

Tip:
To make an image available for project setup, access the application viewer and select the image to be used:
- Select the required image in the viewer, right-click on it, and select **Copy to Project Setup**.
- The image is directly available in the **Project Setup** window, **Image** drop-down list.

- The test results are directly displayed in the **Test results** section at the bottom of the window.

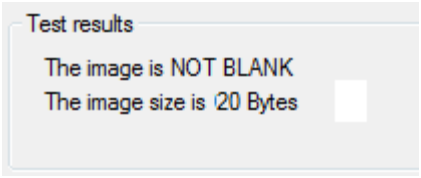


Image processing

Defining image processing operations

The **Image Processing** module is used to define the image processing to be carried out on the images (contrast, binarization, deskew, despeckle, black border removal, etc.), either during the scanning, or after it.
The image processing to be performed *during* the scanning is set at **Project Setup** level and is described below.
The image processing to be performed *after* the scanning is referred to as image "adjustments". For instructions on how to apply them, see: Post-scanning operations, Editing images, Adjusting images.

Once your settings have been defined, they are automatically applied to all the images being scanned at the next scanning process.

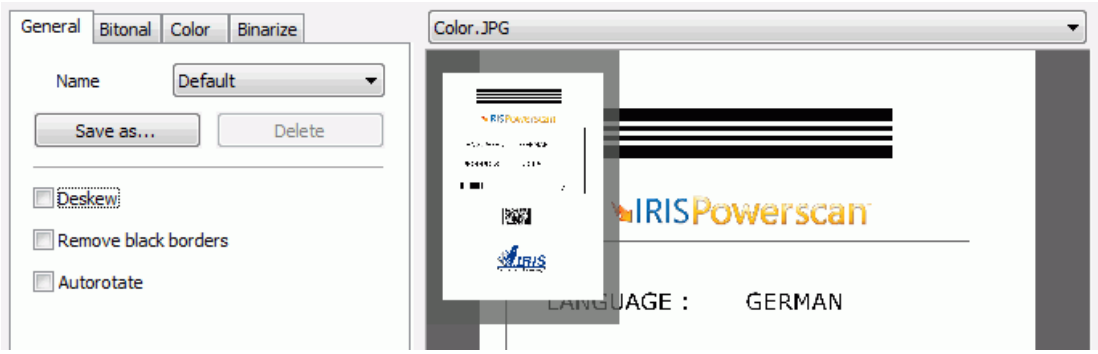
Tip:
You can create various image processing models, then later activate the one that best fits your needs.

To access the Image Processing window:

- From the **Project Setup Scanning** tab, select the **Image Processing** icon on the right.

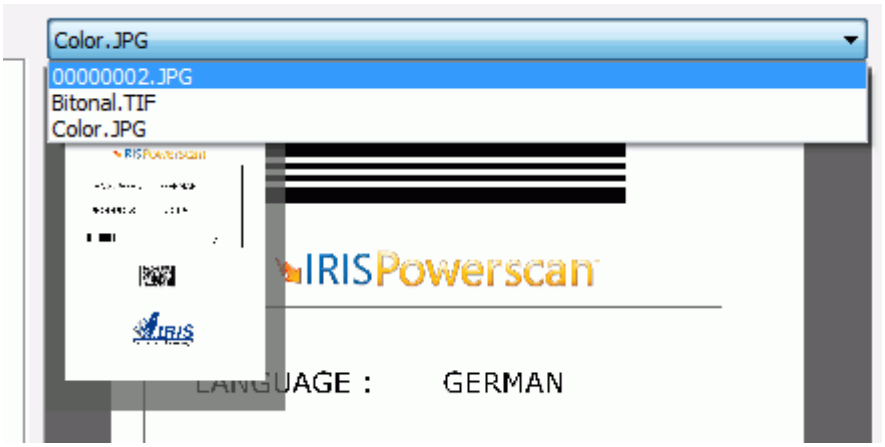
The **Image Processing** window pops up with a preview pane on the right in which you can directly check the results of any chosen

processing operation (see the **Image Processing** window below, right part of the window).
Each IRISPowerscan project comes with a series of test images (click the drop-down arrow on the right), but you can also use your own test images. To import you own images in the **Image Processing** window:
- scan them,
- select them from the application main viewer,
- right-click and copy them to the project setup (**Copy to Project Setup**).



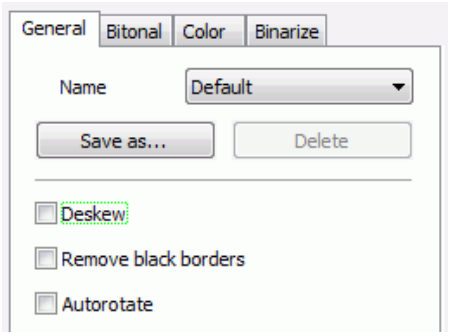
To define your image processing features:

- In the **Image Processing** window, right part, select the image(s) on which you want to test the results of the processing. Two versions of the image are displayed: a small one and a large one. The small one corresponds to the selected source image, the large one dynamically shows the result of the processing activated in the left part of the window.



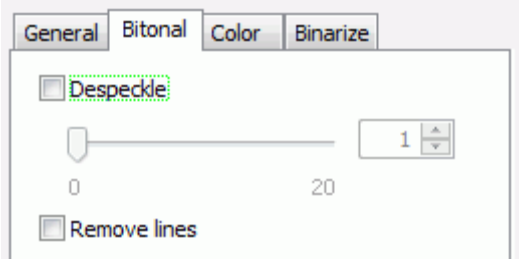
- In the left part of the **Image Processing** window, define your processing settings.

General tab



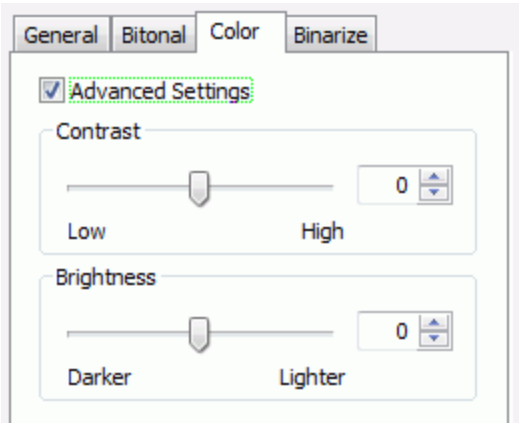
Deskew: to have the software automatically deskew the images.
Remove black borders: to have the software remove the image black borders.
Autorotate: to have the software automatically rotate your images. This option is relevant only if your images contain text (the software uses the OCR technology to detect the page orientation).

Bitonal tab (for black&white images only)



Despeckle: to have the software remove the noise (little dots) present on the images. Determine the dots' size with the slider.
Remove lines: to remove the lines present on the images. Determine the lines' size (in inches) with the slider.

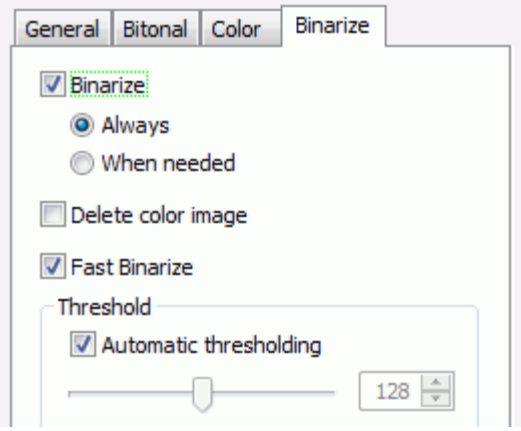
Color tab (for color images only)



Advanced Settings
Contrast: to set the image contrast. Use the slider.
Brightness: to set the image brightness. Use the slider.

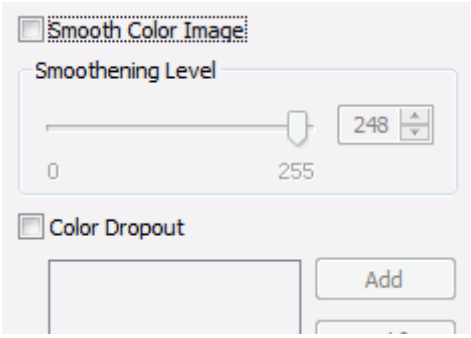
(**Tip**: Please note that these operations are quite fast, either during or after the scanning.)

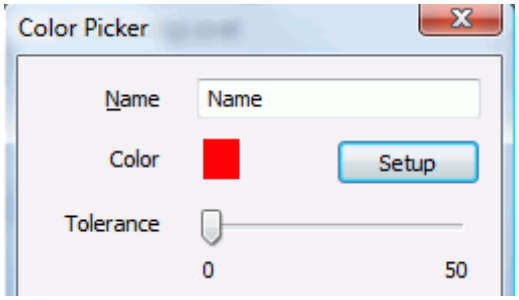
Binarize tab



Binarize: if you want the software to binarize your images. (*IRISPowerscan is able to work in dual-stream with any scanner, i.e. to produce bitonal images from color images).*
Always: to make the software always binarize the images and keep the bitonal images after the scanning.
When needed: to make the software binarize the images *only* for the reading of barcodes, OCR zones, patch codes, etc. The software will automatically binarize the images before the reading. The bitonal images will not be kept after the scanning.
Delete color image: to delete the corresponding color images (only during scanning).
Fast Binarize: to activate the default fast binarization.
Threshold: select the automatic threshold or set your own thresholding.

If you want to set your own binarization options, deactivate **Fast Binarize** and set your own options:
Brightness
Contrast
Advanced Settings:
Smooth Color Image
For each option, use the slider bar, make a few tests and check the resulting images in the right part of the **Image Processing** window.
Color Dropout: use this option to define colors to be dropped.





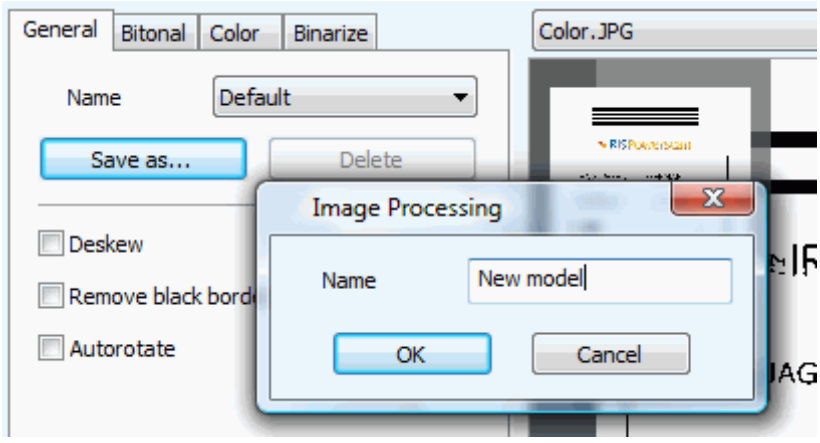
Tip:
Test the **Binarize** options on the images selected in the right part of the **Image Processing** window before you set the final parameters.

- Click **OK** to confirm your settings.

To save your image processing model:

- In the **General** tab, click **Save As**.

- Give your model a name in the **Name** field and click **OK** to confirm.



Stamp

Adding stamps on images

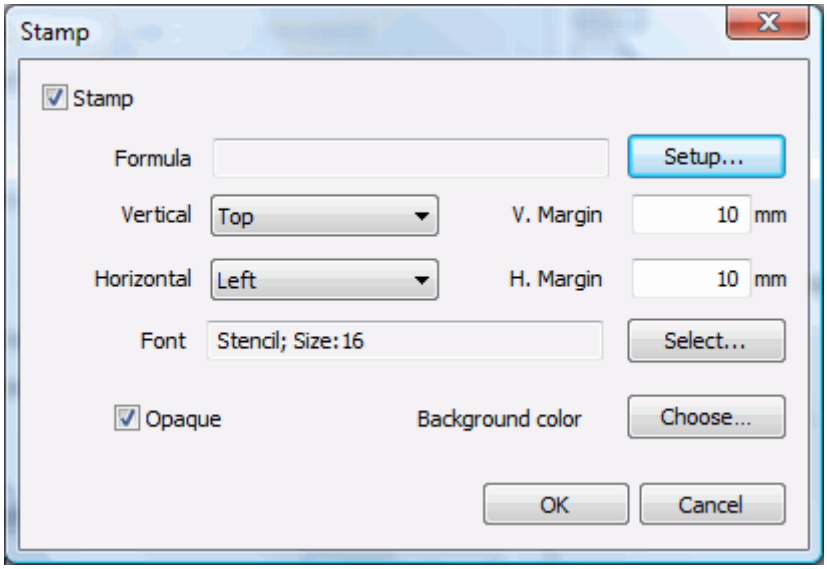
The **Stamp** module is used to add stamps to be placed on the document images, e.g.: the user name and the scanning date.

To access the Stamp window:

- From the **Project Setup Scanning** tab, select the **Stamp** icon on the right.

To define a stamp:

Introduce your settings in the **Stamp** window:



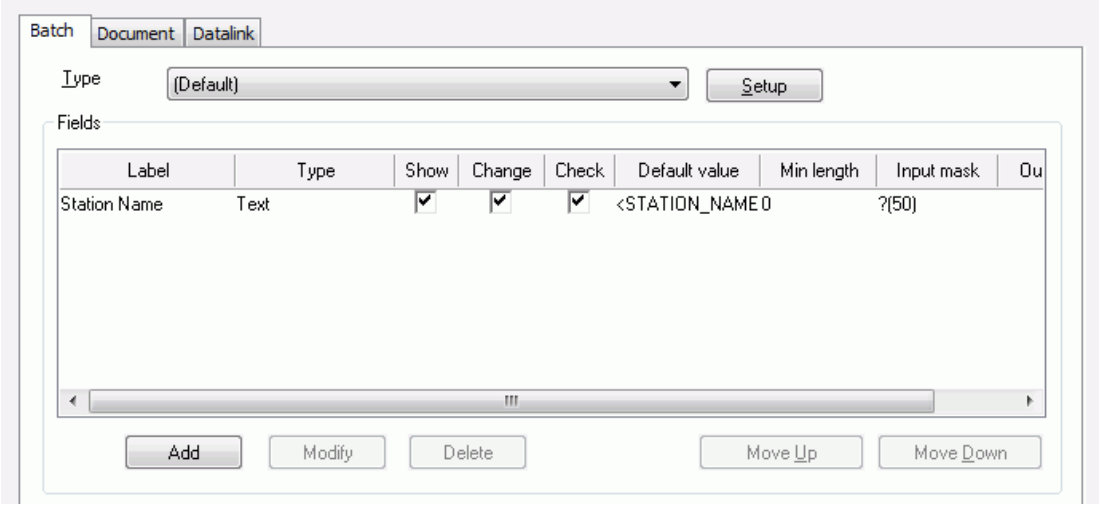
Formula: determine the data to be contained in the stamp, using the **Setup button** on the right.
Determine the stamp position, font, and background color.

INDEXING

Indexing

The **Indexing** tab (of the **Project Setup** window, see: Project Setup) is used to define the indexing fields that will be automatically filled in by IRISPowerscan at batch and document level. The validation of the indexing is handled by the user. It can be done either during the scanning or after the scanning.

If your project contains documents/batches of different types, you will also define them in this tab.



Defining batch/document types

To define various types of batches/documents, you must give them a name and define their identifiers (barcodes and/or OCR zones).

To define a type of batch/document:

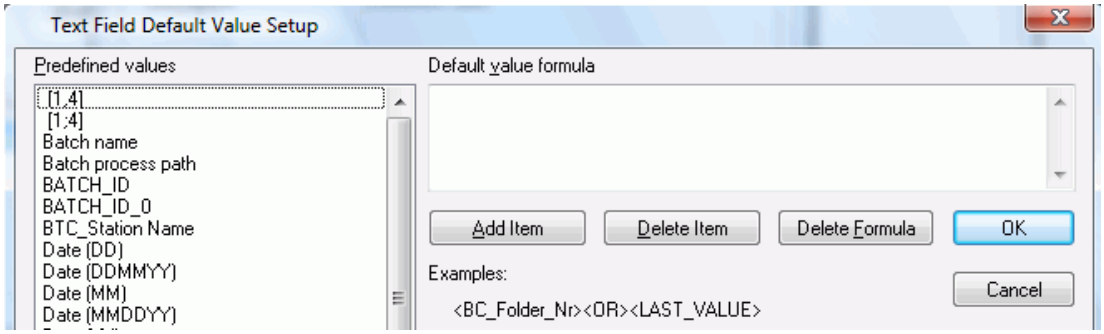
- In the **Indexing** tab, choose the **Batch** or **Document** tab, then open the **Setup Index Types** dialog box (click the **Setup** button of the **Type** field).

- In the **Setup Index Types** dialog box, click on **Add** to add a new type. In the **Index type** dialog box, fill in the required information and click on **OK** to confirm.
  Label: type in the name of the batch/document type; this name that will appear in the **Index** pane.

- In the **Setup Index Types** dialog box, also define the type's identifier. The identifier is the same for all types. It is usually a barcode or an OCR zone. Get to the **Formula** field and click on **Setup**, then choose the formula that contains the required barcode/OCR zone (the barcode/OCR values are defined in the **Barcode/OCR** section - see: Barcode/OCR). To match a type, the extracted value will have to correspond exactly to one of the type values.
  Complex formulas can also be used (see 3rd example below).
  E.g. :
  - 2 types: Contracts, Letters
  - identifier is a barcode that contains either "CONTRACT" or "LETTER"
  E.g.:
  - 10 types: 10 names of people
  - identifier is an OCR zone that correspond to any of the persons defined as document types
  E.g.:
  - 12 types: Contract 01, Contract 02, (...), Contract 12
  - identifier is a barcode containing the word "Contract", plus a space, plus the month
  In this case, the formula is <bc_type>" "Date[MM]

If the scanning date is January, the value extracted from the barcode is "Contract". The document corresponds to the first type (i.e.: Contract 01).

To define the formula, refer to: **Project setup**, **Indexing**, **Defining value formulas**.



Defining index fields

For each type of batch or document to be processed in IRISPowerscan, you can define an unlimited number of index fields. The field values are extracted from barcodes or OCR zones present on the documents, or from system values (e.g. name of the user who scanned the document, scanning date, etc.).

To define index fields at batch level, access the **Batch** tab within the **Project Setup Indexing** tab.
To define index fields at document level, access the **Document** tab within the **Project Setup Indexing** tab.

To define an index field:

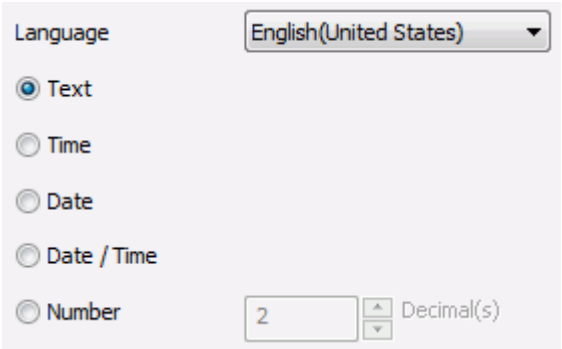
- Choose the batch/document type for which you want to define an indexing field in the **Type** field, then click the **Add** button below the **Fields** section.
- Fill in the required options in the **General** and **Advanced** tabs, then click **OK** to confirm.

General tab

Label: name of the field to be displayed in the **Index** pane.

Description: describe the field's content.

Type: type of the field (text, number, date). The **Custom** type can be used to extend the field type. This enables to specify a culture for the **Date** (**Time**) fields, the decimals for numbers, currency, etc.



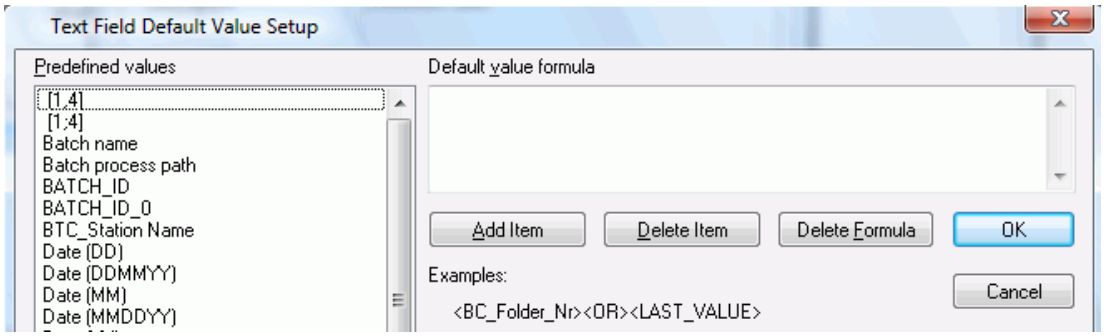
Show: tick the box if the field must be visible in the **Index** pane.

Allow Change: tick this box to enable the user to manually change the value in the **Index** pane.

Check during Scanning: tick the box if the scanning must stop when the software encounters an error during the indexing.

Default Value: from the **Setup** button, define the value formula: type any text between quotes, and/or choose a system value from

the list, and/or choose a barcode/OCR formula (these are set up using the Barcode/OCR section).
To define the formula, refer to: Project setup, Indexing, Defining value formulas.



Minimum Length: define the minimum number of characters to be contained in the value. If the value does not contain the minimum number, it will be considered as invalid by the software and will be highlighted in red in the **Index** pane. It will thus not be possible to process (export) it.

Input mask: define the format of the value. If the value does not have the given format, it will be considered as invalid by the software and will be highlighted in red in the **Index** pane. See: Project setup, Scanning, Barcode/OCR, Setting a mask syntax.

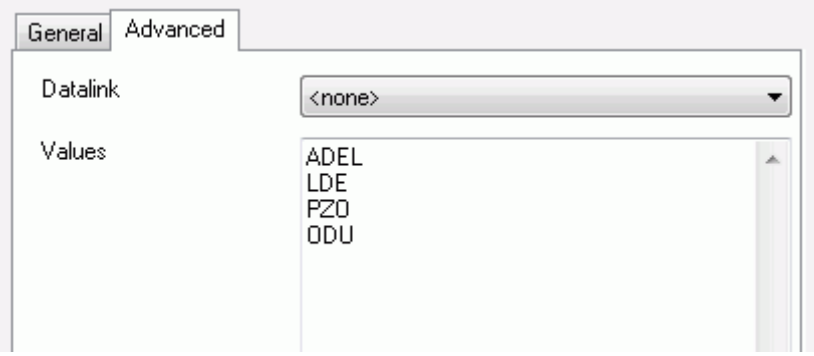
Output mask: define the format into which the value must be converted when producing index files during processing.

Advanced tab

The options available in this tab are used to set multiple value fields, with possible multi selection. You can indeed connect a field with an external database or with a list of valid values. If the data extracted from the documents does not correspond to one of the (database) values, the index field will be considered invalid by the application and appear in red in the **Index** pane.

DataLink: type in the database name, i. e. the one that has been defined in the DataLink tab. See: Project setup, Indexing, DataLink.

Values: define a list of possible values.



In some cases, it is very useful to define values as pairs made of a CODE and a DATA.
CODE is the value that will be stored (and exported), DATA is the value being displayed in the Index pane.
The CODE must be put between brackets, followed by the DATA, as shown in the following examples:
[BE]Belgium
[FR]France
[GE]Germany

Extract on page: by default, indexing fields are extracted from the first page, but you can specify another page in this field.

Auto-format: when enabled on custom fields, the indexing value will be automatically formatted to match the field definition (e.g.: on a 2 decimal number, "12" becomes "12.00").

Auto-completion: when a list of values has been defined for the indexing field, it will automatically be completed according to the first characters typed.

Multiple values: tick this option to make multi-selection possible in the index field.

Separator: select the separator that will be used to separate the values in the index field.

Padding: numeric values can be automatically padded with leading zero's in order to match the number of characters specified.
Introduce the total number of characters to be contained in the field.

Setting batch/document names

The names you assign to your batches/documents will appear in the explorer (**Batches** pane) while the documents are being scanned.

You can build up the names as you wish to. Formulas can be made of custom character strings, and/or system values, and/or from barcodes/OCR zones picked up from the documents.

E.g.: "Contract"<OCR_name>
This first part is a chosen word, the second part of the name corresponds to the clients name which is picked up from the document.

To define a batch/document name:

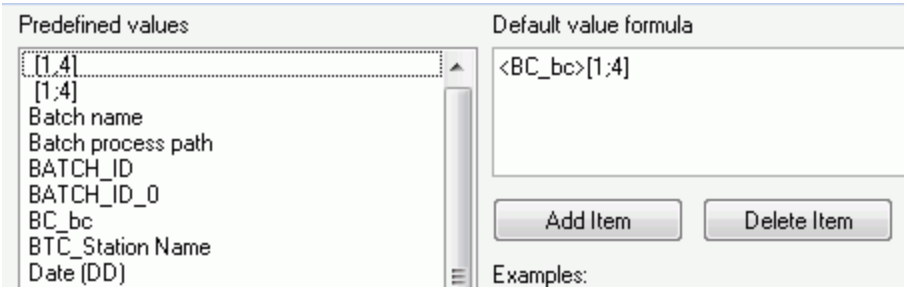
- In the **Indexing** tab, access the **Batch** or **Document** tab, then get to the **Name** section at the bottom.

- Click on **Formula Setup** and introduce the required formula: type in a character string between quotes and/or choose a system value from the list and/or choose a barcode/OCR formula (these are set up using the Barcode/OCR section).
  To define the formula, refer to: Project setup, Indexing, Defining value formulas.

Defining value formulas

Formulas are expressions that determine a value's contents. They are evaluated by the software during the scanning or when a batch/document is being created.

Formulas can be used to:
- (Re)name a batch or a document (see: Project setup, Indexing, Setting batch/document names)
- Automatically fill in index fields (see: Project setup, Indexing, Defining index fields)
- Identify the type of document ((see: Project setup, Indexing, Defining batch/document types)



An expression is made of variables and a literal part.

Variables are predefined values that are computed by IRISPowerscan at runtime. They can be:
• The username (<USER_NAME>)
• the id (<STATION_ID>) or the name (<STATION_NAME>) of the station
• the id (<BATCH_ID>) or the name (<BATCH_NAME>) of the current batch
• the id of the current document (<DOCUMENT_NUMBER>)
• the id of the current page (<PAGE_ID>)
• the current date and time
• any OCR value (<OCR_label of the OCR zone>)
• any barcode value (<BC_label of the BCR zone>)
E.g.: The formula <BC_Separator>":"<OCR_Language> is the concatenation of an barcode zone, a literal (":") and an OCR zone.

E.g.: Typically, you can build unique batch identifier like this:
<STATION_ID>"_"<BATCH_ID>"("<DATE_MDY>"
"<TIME_24>")"

Tip:
<LAST_VALUE> is the latest value of a particular index field.

You can extract some part of the variable specifying the offset (position of the first character) and the length.
<variable>[p,n] extracts n characters at offset p.
<BC_Value>[1;4] extracts the leading four characters.
E.g.: BC_Value = 12345678 <BC_Value >[1;4] = 1234

Tip:
The offset can be less than zero which means "starting from the end"

<BC_Value >[-4;2] extracts two characters; 4 position before the end
E.g.: BC_Value = 12345678 <BC_Value >[-4;2] = 56

Sometimes barcode contains many values delimited by a separator
You can extract a particular value specifying the index and the separator.
<variable>[i;s] extracts the value at index i (ième value) for a given separator s
E.g.. 12345678;NURSERY;AA1234
<BC_Value>[1;";"] = 12345678
<BC_Value>[2;";"] = NURSERY
<BC_Value>[3;";"] = AA1234

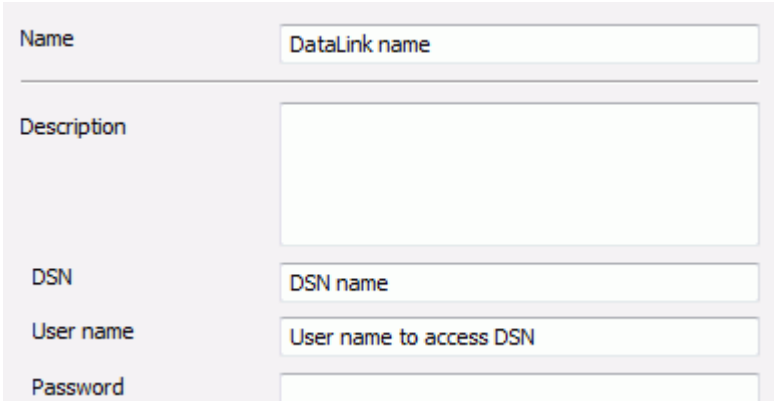
The operator <OR> can be used to combine expressions; in that case the first not empty expression will be kept.
E.g.: <BC_Value><OR><LAST_VALUE><OR>"unknown"

DataLink

The **DataLink** tab offers to establish a connection between IRISPowerscan and an external database. The objective is to validate the index values extracted from the documents against a list of valid values defined in the external database. See: Project setup, Indexing, Defining index fields.

To establish the connection:

- Install the ODBC driver under Windows.
- In the **DataLink** tab, click on **Add** to introduce a new data source and introduce the required data in the **DataLink Setup** window, then click **OK** to confirm.



- In the **Indexing** tab, access the concerned index field and establish the connection.

PROCESSING

Processing options

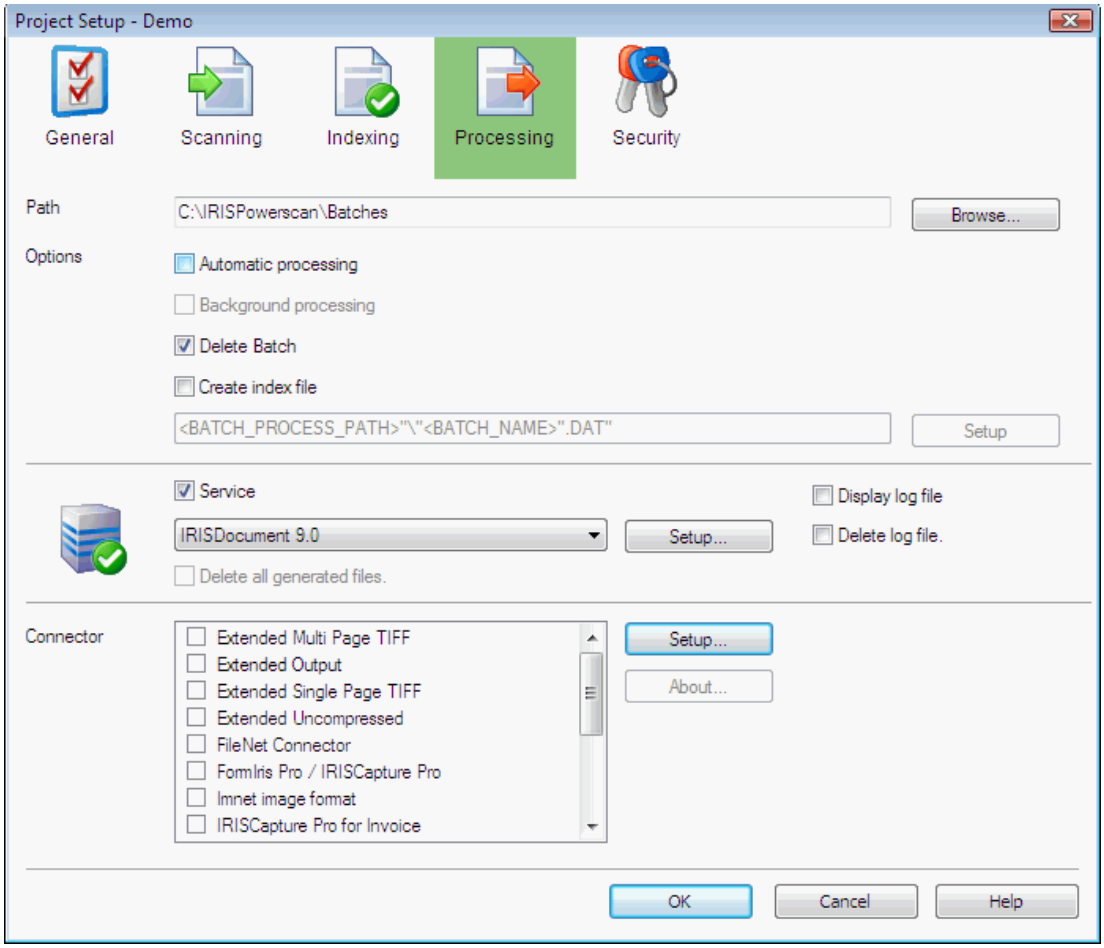
The **Processing** tab (of the **Project Setup** window, see: Project Setup) allows you to define the **service** that will be used for

document creation, as well as the **connectors** to export your data to other applications or repositories.

The **service** that is embedded in IRISPowerscan is **IRISDocument 9.0**. IRISDocument allows you to perform OCR (Optical Character Recognition) on your scanned documents, enhance and hyper-compress them and convert them into a wide range of text-searchable output formats. Supported formats include PDF, hyper-compressed PDF, PDF/A, XPS, hyper-compressed XPS, RTF, XML, HTML, etc.

Different types of **connectors** are available in IRISPowerscan and can be used on their own, or in combination with the service. Which connector is best suited for you depends on your processing needs. Refer to the section **About the connectors** (in **Project Setup** > **Processing** > **Connectors**) to learn how to choose and configure the right connector.

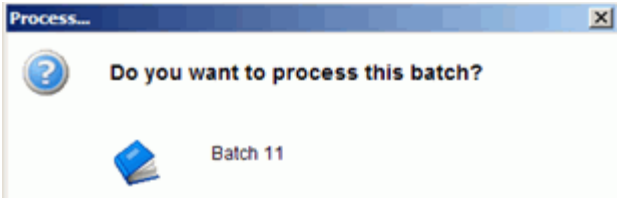
Tip:
The processing is launched by the user each time a batch is ready for processing (i.e. when the user has checked that everything is fine in the batch.



Path: confirm the proposed location path for the output files, or browse for another location.

Options

Automatic processing: if you check this option, the user will be prompted to launch the processing once the scanning is complete and all index fields are valid.



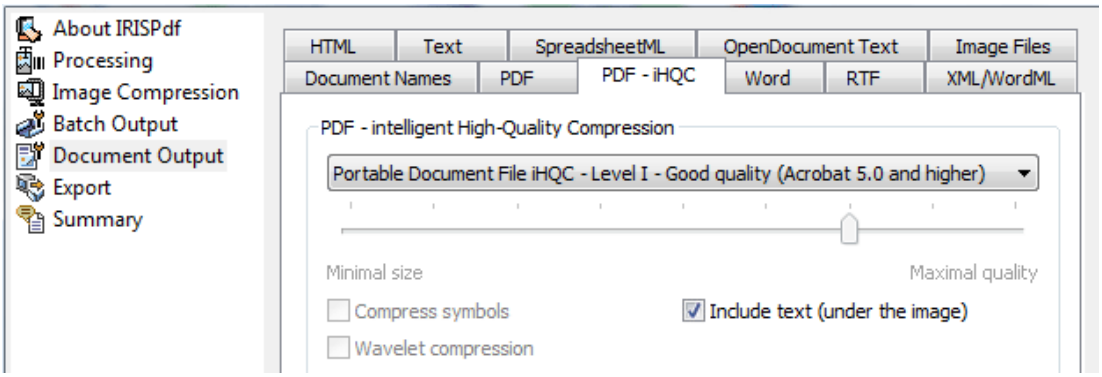
Background processing: if you select this option, the processing will work in the background after being launched. The user will not

have to wait for the processing to finish before he starts to scan again.

Delete batch: if you select this option, the batch is deleted after processing and it disappears from the **Batches** pane. If you do not select it, the user will be able to see the processing results in the viewer.

Create index file: tick this option to generate an index file containing all information about the processed batch (number of documents, images, etc.).

Service: **IRISDocument 9.0** is embedded as a service* in IRISPowerscan. IRISDocument allows you to perform OCR on your scanned documents, enhance and hyper-compress them, and convert them into a wide range of text-searchable output formats. Tick the **Service** box and then click **Setup** to configure IRISDocument 9.0. For information on how to configure IRISDocument, refer to the **IRISDocument user guide**.
(*) Only one service available in this version.



Display log file: enables to have the service log file automatically displayed at the end of the processing.

Connector: choose a connector from the list to convert your scanned images into images files and export them to custom locations or third-party applications and repositories. Refer to the section **About the connectors** for more information.

Tip:
If you activate both a service and a connector, the documents generated by the service will be available for the connector.

CONNECTORS

About the connectors

IRISPowerscan offers several types of connectors: **built-in connectors**, **extended connectors** and **IRISConnect connectors**.

Built-in connectors

The built-in connectors can be subdivided into two categories:

- basic image format connectors

  The Basic image format connectors convert your scanned documents into image files. The following image file formats are supported: **Multi-page TIFF**, **Single-page TIFF** and **PDF (image)**.

- connectors to form and invoice reading applications

  IRISPowerscan supports various form and invoice reading applications, such as **IRISCapture Pro**, **FormIris Pro/IRISCapture Pro** and **IRISXtract for Documents**.

To access these connectors:

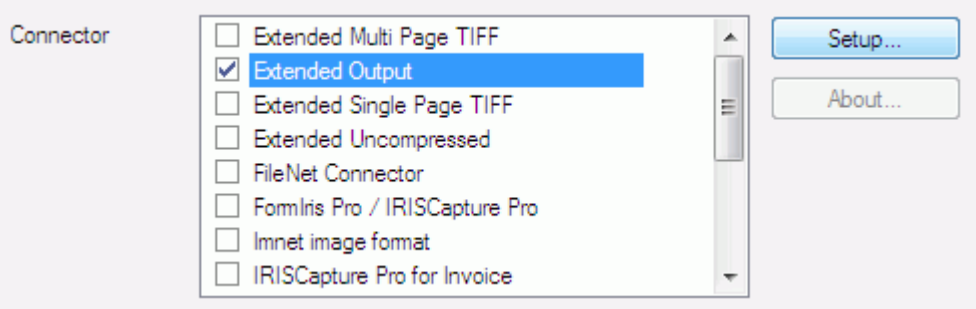
- Click  to enter the Project Setup.
- Click the **Processing** tab.
- Select the desired extended connector from the list and click **Setup**.

Extended connectors

The extended connectors convert your scanned documents into **image files** and **text-searchable documents** (via the IRISDocument service) and offer advanced **storage**, **indexing** and **export** options.

The extended connectors can, for instance, store your files and documents in custom locations (based on formulas), create XML and CSV index files for each batch, document and image you scan, and export your files and documents to FTP servers, SMTP servers (E-mail) or call executable applications for further processing.

Three pre-configured extended connectors are available: **Extended Multi-page TIFF**, **Extended Single-page TIFF** and **Extended Uncompressed (BMP)**. Although these connectors are pre-configured they can be fully customized.



For more information about the extended connectors, and how to configure them, refer to the About the extended connectors section below.

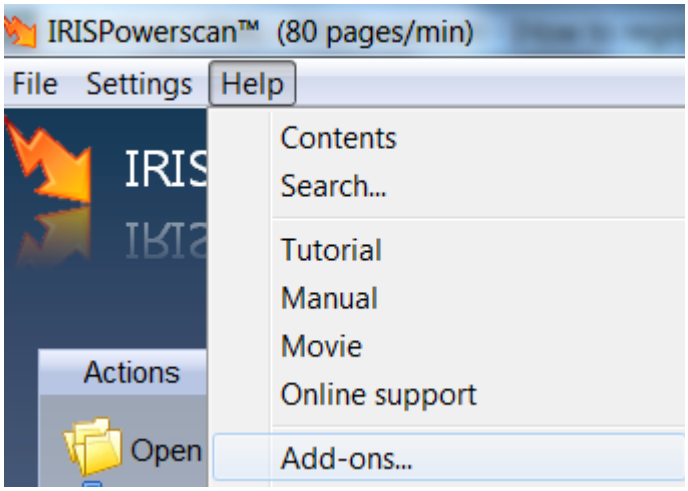
IRISConnect connectors

IRISConnect connectors allow you to export your processed, fully indexed, documents to a series of ECM (Electronic Content Management) and Cloud systems, via IRISConnect.

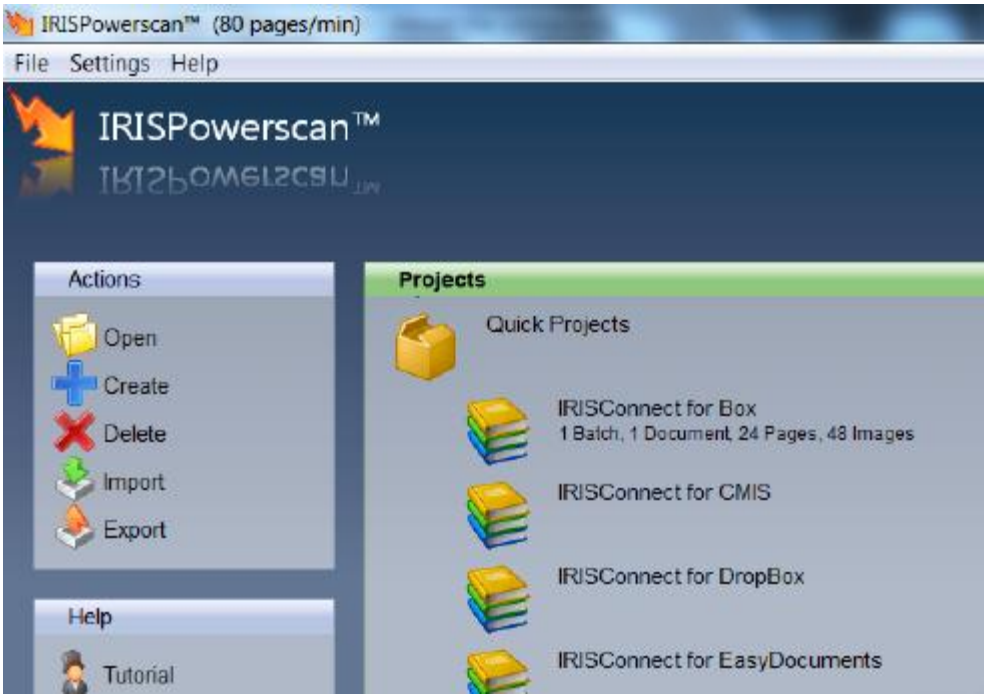
Note that IRISConnect connectors are to be acquired separately. To acquire any IRISConnect connectors, contact I.R.I.S. at irispowerscan@iriscorporate.com. Once you've acquired an IRISConnect Connector it must be registered.

To register an IRISConnect connector:

- In the **Help** menu, click on **Add-ons**.



- Select the connector of your choice from the list.
- Copy the hardware key and send it to **irispowerscan@iriscorporate.com**.
- You will receive the software key in return.
- Enter the software key you received from I.R.I.S. in the **Software key** field, then click **OK**.
- Once you've registered an IRISConnect connector, a dedicated Quick Project is created in the start-up screen.

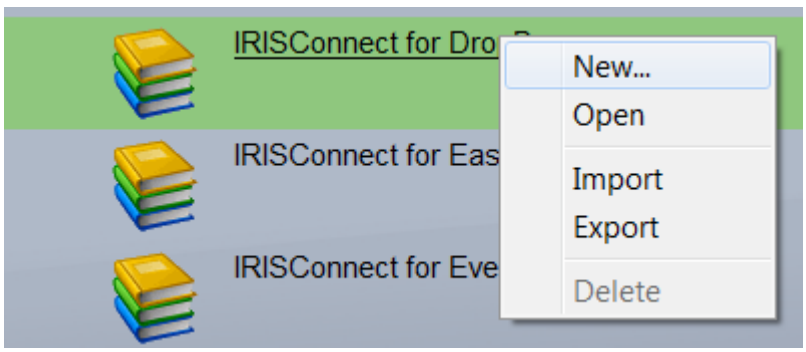


Important note: these Quick Project contain Configuration Wizards that allow you to set up a connection via IRISConnect in a few easy steps. If you want to have access to the Project Setup, however, to do a manual configuration of the connector, then you need to create a new Quick Project first, based on the IRISConnect Quick Project.

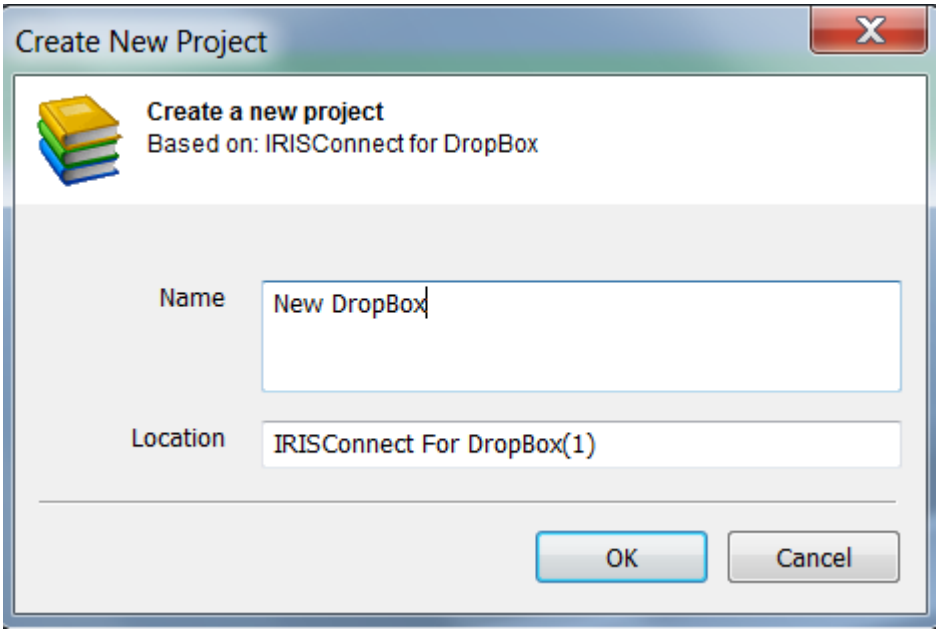
To create a new Quick Project:

- Select the IRISConnect Quick Project that was created automatically.

Example



- Then click **New**.
- Name the new Project and make sure to keep the default location.



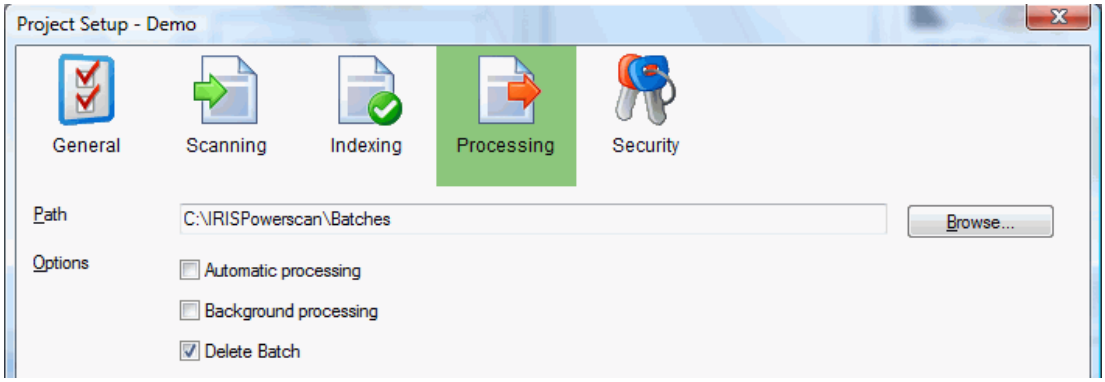
- When you click **OK**, the Configuration Wizard will start.

  See the sections **About the IRISConnect connectors** and **Using the Configuration Wizards** for more information.

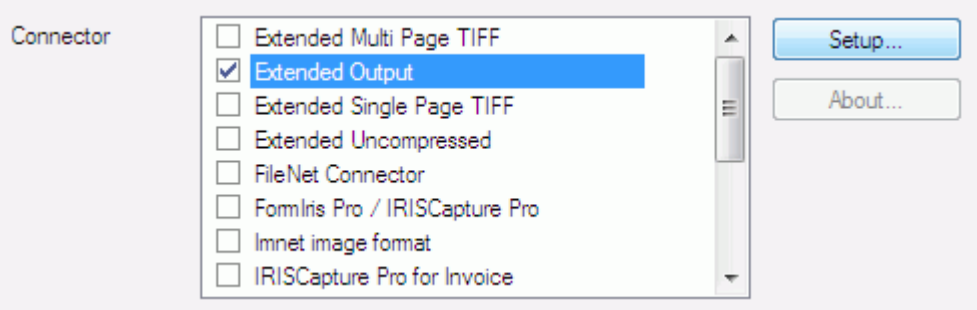
- Once the configuration is finished, you can access the connector via the **Project Setup**.

To access the connectors:

- Click  to enter the Project Setup.
- Click the **Processing** tab.



- Select the desired connector from the **Connector** list, then click **Setup** to configure it.



EXTENDED CONNECTORS

About the extended connectors

Three pre-configured extended connectors are available in IRISPowerscan: **Extended Multi-page TIFF**, **Extended Single-page TIFF** and **Extended Uncompressed (BMP)**. These pre-configured connectors can be fully customized, however.

Pre-configuration

By default, these connectors convert your scanned documents into **multi-page TIFF**, **single-page TIFF** and **BMP files** respectively, and apply **pre-configured storage** and **indexing** options:

- **Extended Multi-page TIFF** converts your scanned documents into a single TIFF file per batch and stores it in the batch process path. By default, this starts with C:\IRISPowerscan\Batches\Batch 1.TIFF. An XML index file is created per batch. CSV index files are created containing information about the processed batches and documents.

- **Extended Single-page TIFF** converts each image of your scanned documents into a TIFF file and stores them in the batch process path. By default, this starts with C:\IRISPowerscan\Batches\0000000001.TIFF. An XML index file is created per batch. CSV index files are created containing information about the processed batches, documents and images.

- **Extended Uncompressed** converts each image of your scanned documents into a BMP file and stores them in the batch process path. By default, this starts with C:\IRISPowerscan\Batches\0000000001.BMP. An XML index file is created per batch. CSV index files are created containing information about the processed batches, documents and images.

The **export** options are not activated by default. The export options allow you, amongst others, to send your image files and documents via SMTP servers (E-mail), to FTP servers and network folders and call executable applications for further processing.

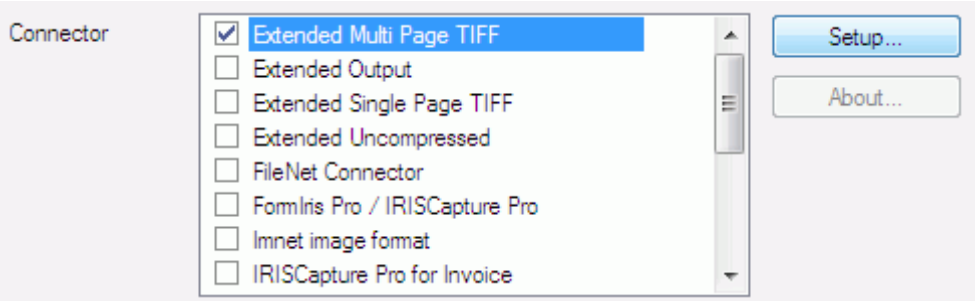
The extended connectors can also be used in combination with the **IRISDocument service** to convert your scanned documents into text-searchable documents that can be stored and exported in the same way as described above.

The extended connectors can also be used in combination with the **legal archiving mode**.

Customizing the extended connectors

- Click  to enter the Project Setup.

- Click the **Processing** tab.
- Select the desired extended connector from the list and click **Setup**.

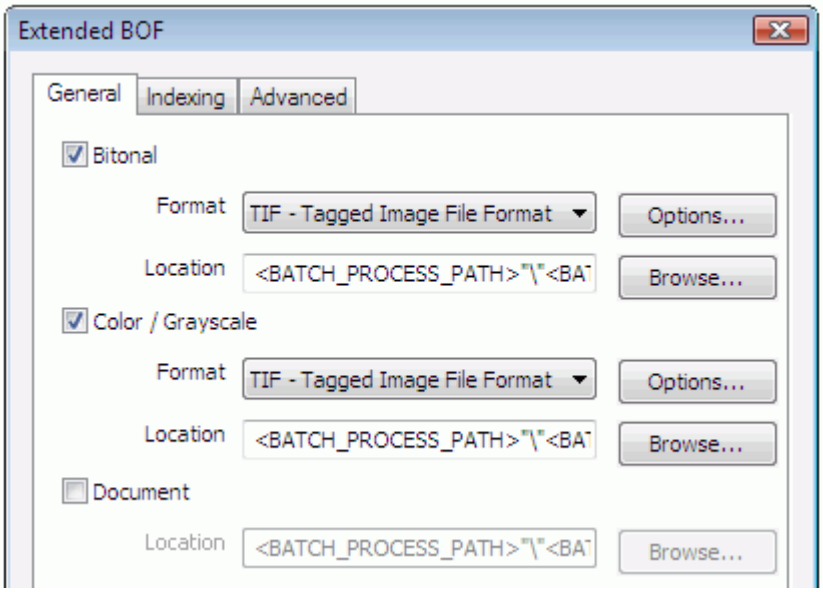


- The configuration of the extended connectors is divided over three tabs, in which the different options are grouped:
    - the **General** tab
    - the **Indexing** tab
    - the **Advanced** tab

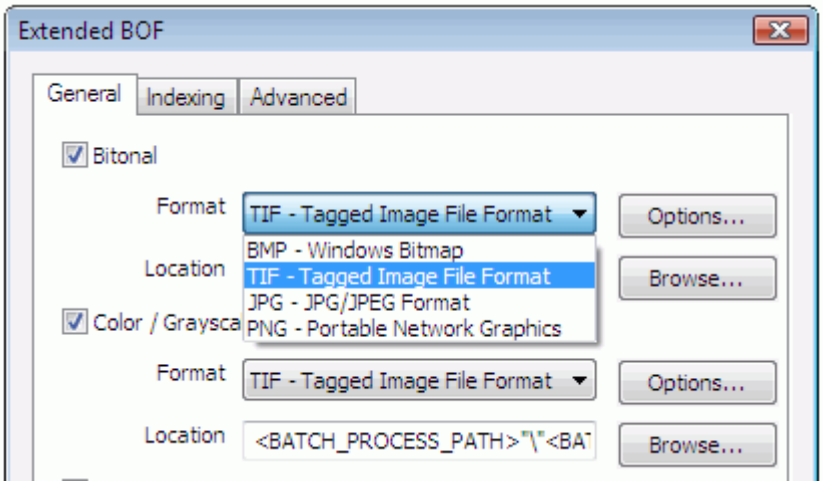
For more information on how to configure the extended connectors, refer to the corresponding sections below: **Configuring the general options**, **Configuring the indexing options**, **Configuring the advanced options**.

Configuring the general options

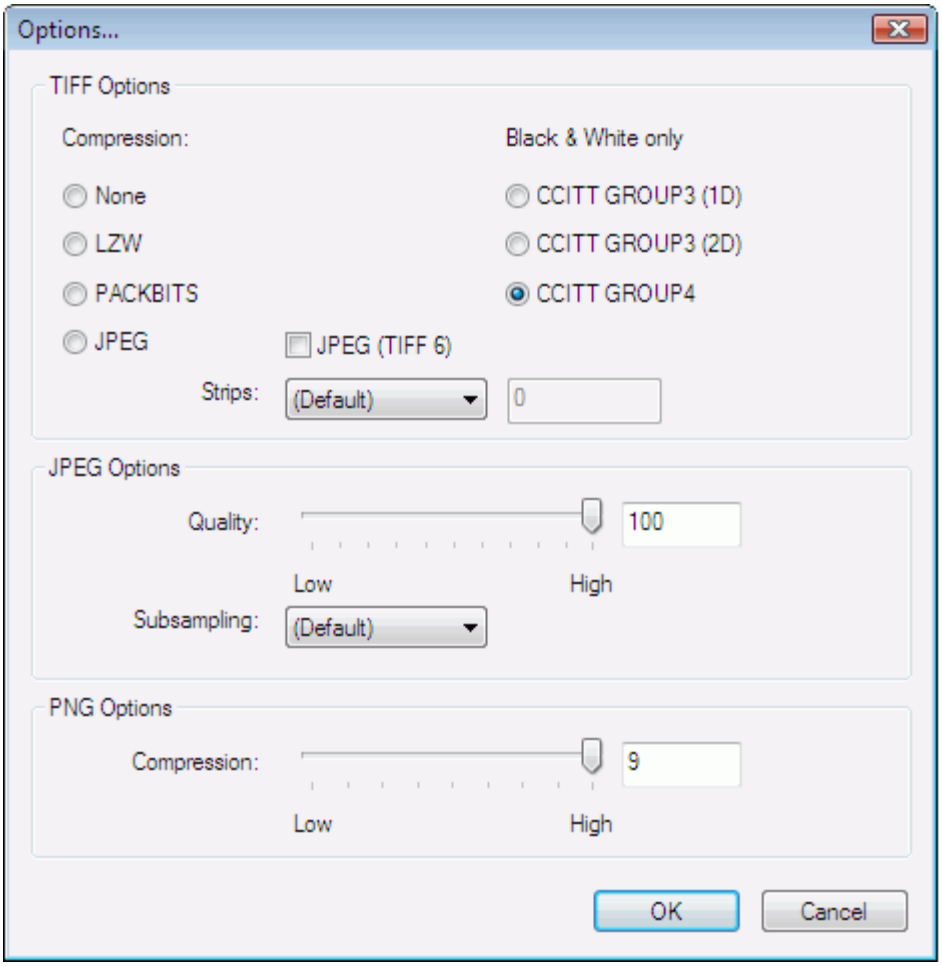
- On the **General** tab select the type of input documents you will be scanning: **Bitonal** and/or **Color/Grayscale**.



- In the **Format** lists, select which type of image file you want IRISPowerscan to generate for Bitonal and Color/Grayscale images.

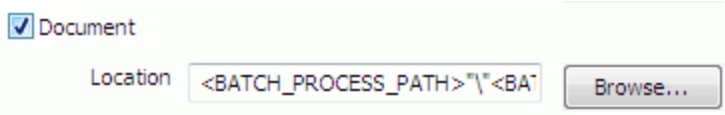


- Click the **Options** buttons to configure the compression settings of the image formats.



- When you are done, click **OK** to close the image compression options.

- If you are using the **IRISDocument service** to convert your scanned documents into text-searchable output documents, select **Document** on the **General** tab.



- Click the **Browse** buttons to select the location where IRISPowerscan will store your image files and/or documents.

  Formulas are used to determine the location and file naming options. By means of these formulas you can choose to generate

a single file per batch, document or image.

A formula consists of variable fields and absolute values. The absolute values are put between double quotation marks. During the examination of a formula, IRISPowerscan replaces the variable fields by their absolute and maintains the absolute values (while leaving out the quotation marks).

E.g. <BATCH_PROCESS_PATH>\"sub_folder"

During the examination, the variable field BATCH_PROCESS_PATH will be replaced by its value. The default value is "C:\IRISPowerscan\batches".

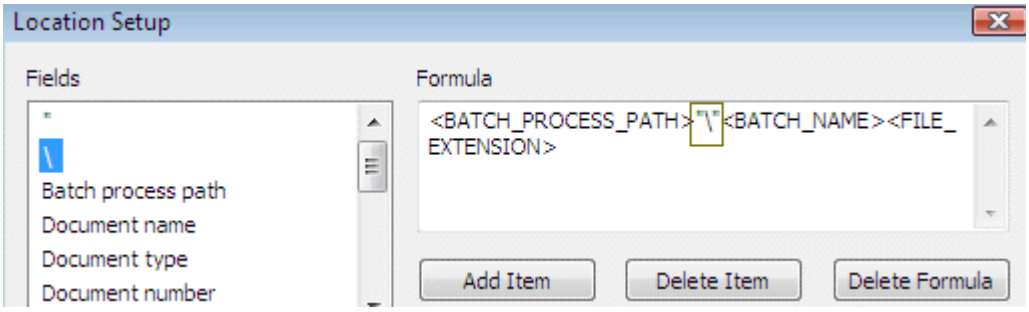
The absolute value "sub_folder" will be maintained, but without quotation marks.

So, the end result will be C:\IRISPowerscan\batches\sub_folder.

- To determine a formula, select the fields of your choice from the **Fields** list and click **Add** to add them. Make sure to add a **back slash** (\) between two fields.

  Note: when you add the back slashes from the **Fields**, double quotations marks are added in front and behind them. The quotations marks are required to obtain a valid formula.

  Caution: do not put a back slash in front of the file extension field, however.



Examples of formulas

Description	A single image file will be created per batch
Example	C:\IRISPowerscan\Batches\Batch 01.TIFF
Formula	<BATCH_PROCESS_PATH>"\"<BATCH_NAME><FILE_EXTENSION>

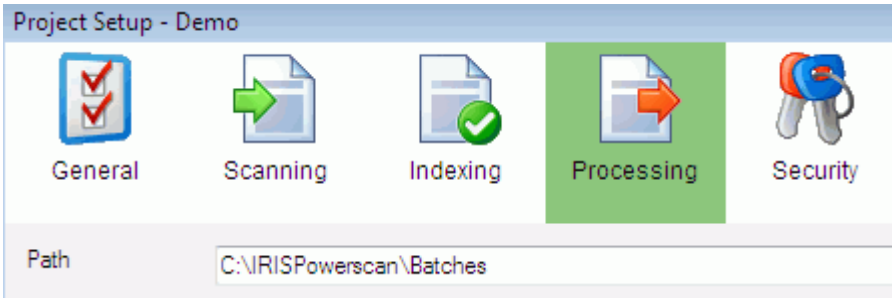
Description	An image file will be created per document
Example	C:\IRISPowerscan\Batches\Batch 02\Document 1_1_2.PDF
Formula	<BATCH_PROCESS_PATH>"\"<BATCH_NAME>"\"<DOCUMENT_NAME><FILE_EXTENSION>

Description	An image file will be created per document type
Example	C:\IRISPowerscan\Batches\Invoice.PDF
Formula	<BATCH_PROCESS_PATH>"\"<BATCH_NAME>"\"<DOCUMENT_TYPE><FILE_EXTENSION>

Description	A subfolder will be created per document
Example	C:\IRISPowerscan\Batches\Document 1.1.0\1.TIFF
Formula	<BATCH_PROCESS_PATH>"\"<BATCH_NAME>"\"<DOCUMENT_NAME>"\"<IMAGE_NUMBER><FILE_EXTENSION>(*)

(*) The field <IMAGE_NUMBER> is always required when generating single-page TIFF and BMP files.

Note: when you are configuring the formulas, you can also use the **Browse** button to specify another location directly, instead of using the BATCH_PROCESS_PATH. The Batch Process Path is the path you specify on the **Processing** tab of the **Project Setup** window.



By means of the **Browse** button you can for instance select D:\Backup instead of the standard C:\IRISPowerscan\Batches.

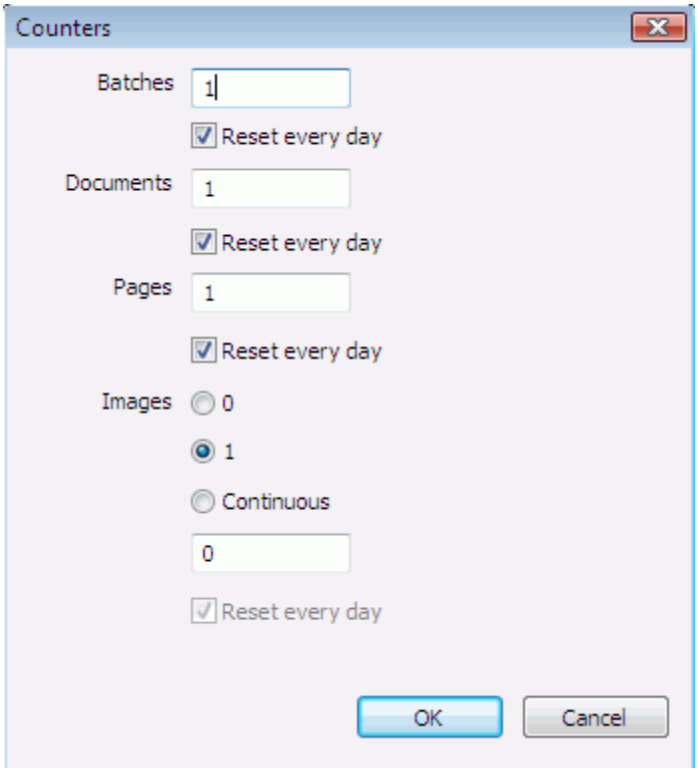
Other general options

Counter

The general options of the extended connectors contain a **counter**. It counts all the **batches**, **documents, pages** and **images** that are exported via the extended connector.

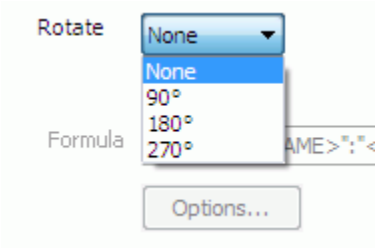
By default, the counter starts at 1.1.1.0. To customize it, click the **Options** button.

Select the **Reset every day** options if you want to reset the counter on a daily basis.



Rotate

The images that are exported can be rotated by **90°**, **180°** and **270°**.



Stamp

A stamp can be put on your documents. This stamp can identify the user who scanned the documents, the time of scanning, the document name, etc.

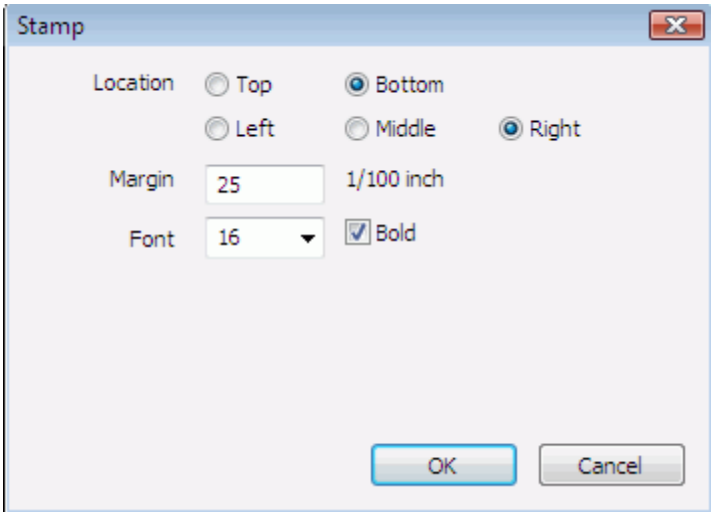
- To determine which content the stamp must contain, click the **Setup** button.

- Select the **Fields** you want to add to the stamp and then click **Add**.

  For instance:
  <STATION_ID>"\"<USER_NAME>"\"<TIME_HH_24>"

- Click **OK** to close the settings.

- To determine where on your documents the stamp will be put, click the **Options** button.

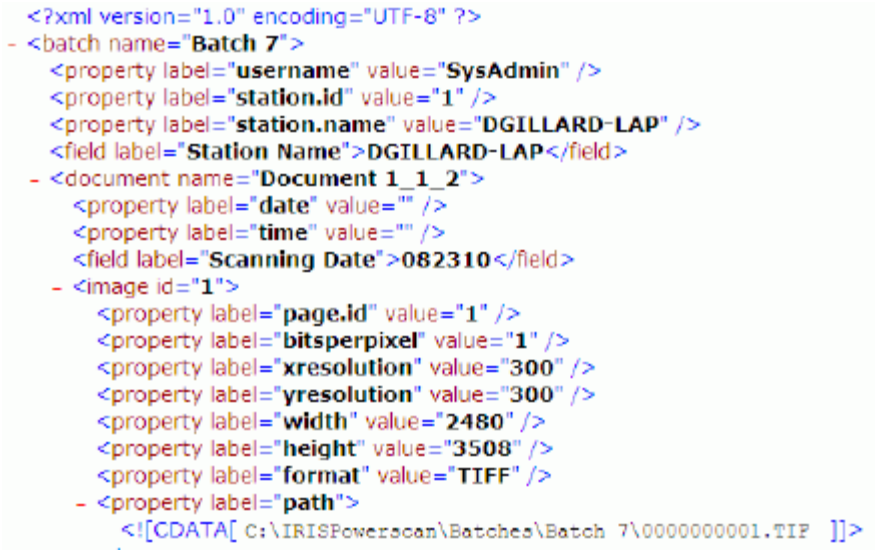


- When you are done configuring the general options, click **OK** to close the options or move to the **Indexing** and **Advanced** tabs to configure those options.

Configuring the indexing options

The extended connectors offer various indexing options. Two types of index files can be created: **XML index files** (which have a fixed content) and **CSV index files** (whose content can be customized).

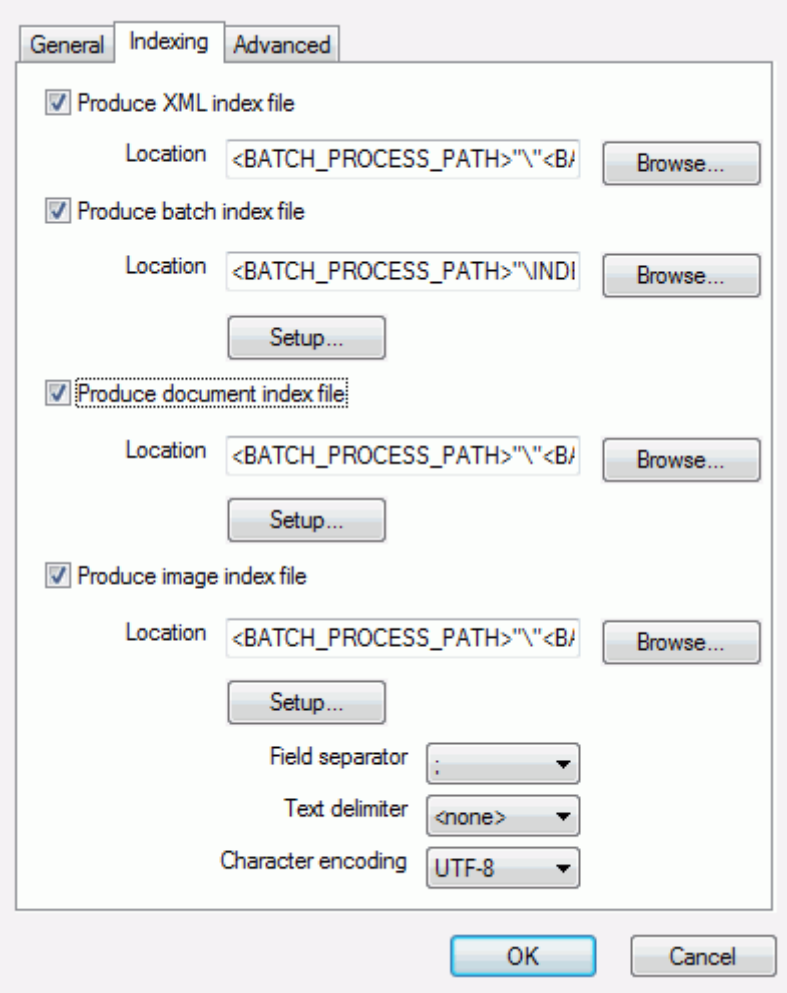
All index files contain detailed information about the processed documents.



Example of XML index file

To configure the indexing options:

- Click the **Indexing** tab of the connector you selected to access the **Indexing** options.



To generate an XML index file:

- Select the option **Produce XML index file**.

  Note: the other 3 options generate CSV index files.

- Click the **Browse** button to determine in which location the XML index file will be stored.

  Formulas are used to determine the location of the index files.

  Based on the formula, the connector can, for instance:

  - generate 1 XML file per batch:
  <BATCH_PROCESS_PATH>"\"<BATCH_NAME>.XML

- generate 1 XML file per document:
<BATCH_PROCESS_PATH>"\"<BATCH_NAME>"\"<DOCUMENT_NAME>.XML

For more information on how to use formulas, refer to the section **Configuring the general options**.

- Select the **Text separators**, **Field delimiters** and **Character encoding** you want to use, then click **OK** to close the settings.

To generate a CSV index file:

- Select any of the three options: **Produce batch index file**, **Produce document index file** and **Produce image index file**.

  The first option creates 1 index file per batch and contains information about the entire **batch**.

  The second option creates index files that contain information about the processed **documents**.

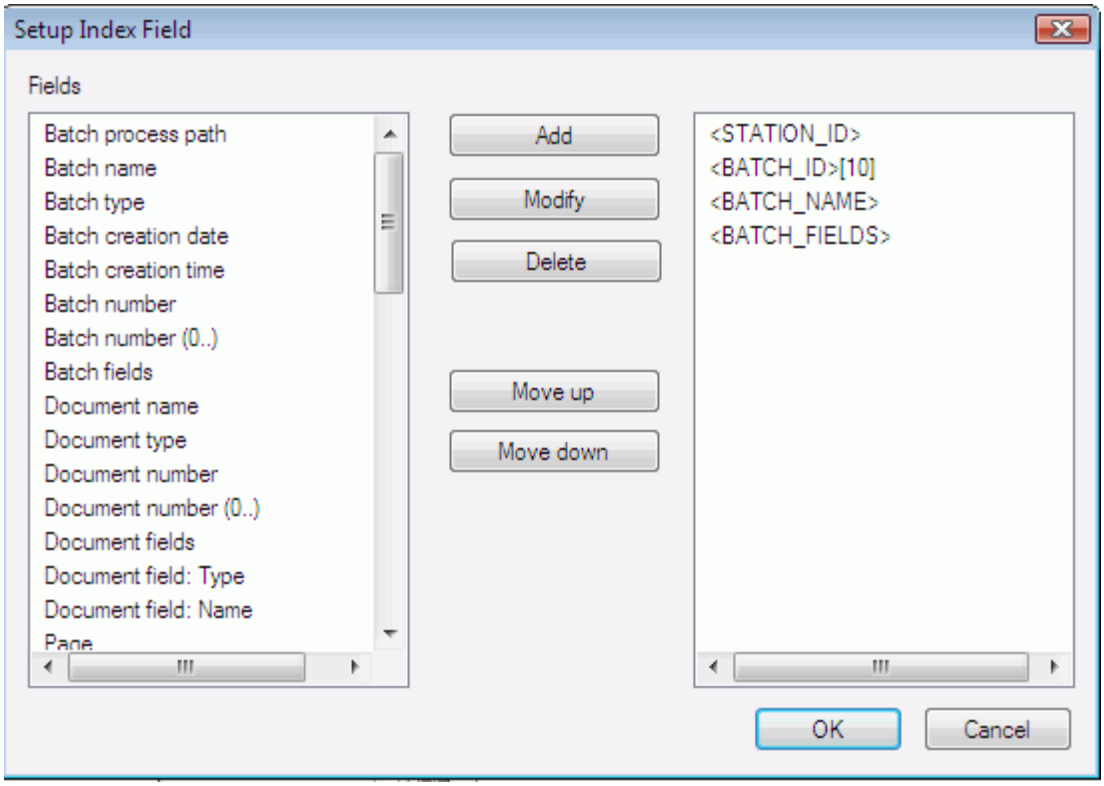
  The third option creates index files that contain information about the processed **images**.

  Note: the three options can be selected at the same time.

- Click the **Browse** buttons to determine in which location the CSV index files will be stored.

  Again, formulas are used to determine the location.

- Then click the **Setup** buttons to determine the content the index files must contain.



- Select the **Text separators, Field delimiters** and **Character encoding** you want to use, then click **OK** to close the settings.
- When you are done configuring the indexing options, click **OK** to close the options or move to the **Advanced** tabs to configure those options.

Configuring the advanced options

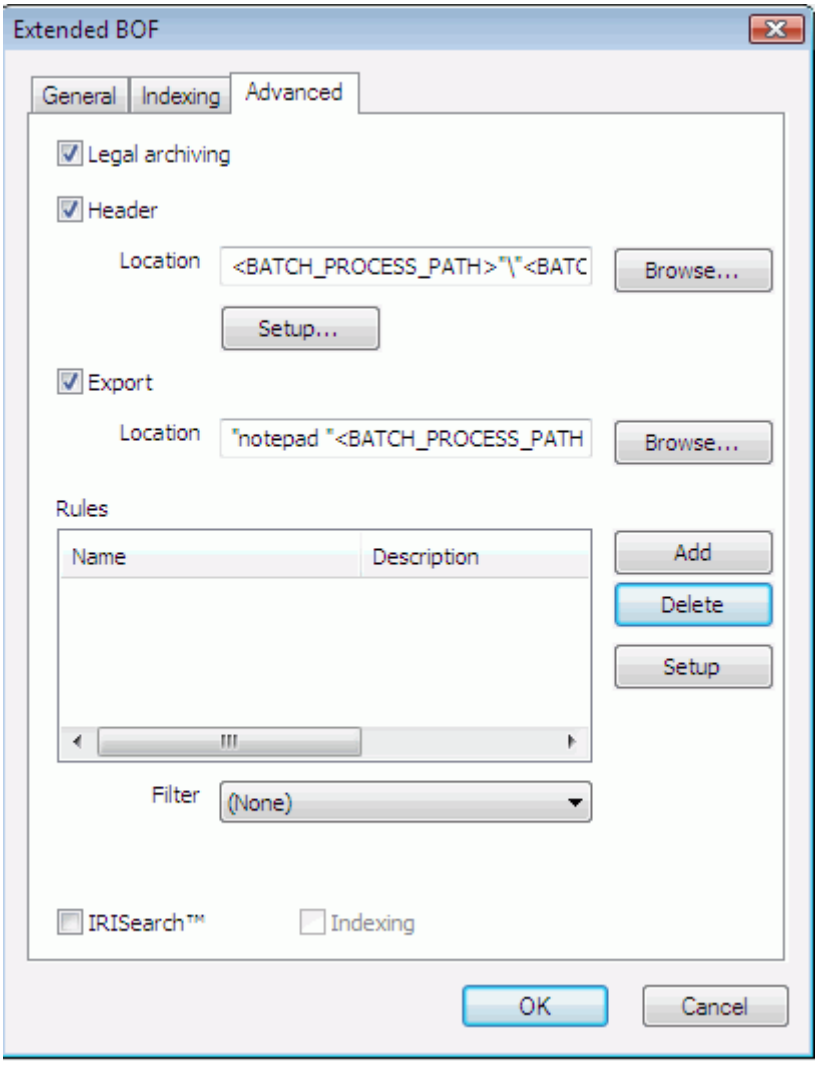
The extended connectors offer several advanced options. You can, for instance, activate the **legal archiving mode**, which ensures that the documents you export comply with the legal archiving regulations*, and **export** your documents to executable applications for further processing, export them via SMTP servers (E-mail), send them to network folders, FTP servers and Microsoft Message Queuing services, etc.

*legal archiving: when legal archiving is activated, the documents contain a signature that identifies: 1) the person who scanned the

documents and proves 2) that the documents have not been modified since the scanning, 3) that any content has been added or 4) removed since the scanning and 5) that the order of the images has not been changed.

To configure the advanced options:

- Click the **Advanced** tab to access the **Advanced** options of the connecter you selected.



Legal archiving

- Select **Legal archiving** if you want your documents to comply with the legal archiving regulations (see ***** above).

Header

- Select **Header** to generate an index file per image.
- Click the **Browse** button to select in which **location** this index file will be stored.
- Then click **Setup** to determine the content it will contain.

> **Note**: formulas are used to define the location and the content. For more information on how to use formulas, refer to the section **Configuring the general options** (in **Project Setup** > **Processing** > **Extended connectors**).

Export

- Select **Export** to export your image files and documents to executable applications.
- Click **Browse** to define the rule that will be used for the export.

  Type in the name of the executable you want to use, then define the location by means of the fields.

  For example: "notepad "<BATCH_PROCESS_PATH>"\"<BATCH_NAME>"\index.txt "

  Note: do not forget to add the back slash from the **Fields** list between two fields. Otherwise the rule will not be valid.

Rules

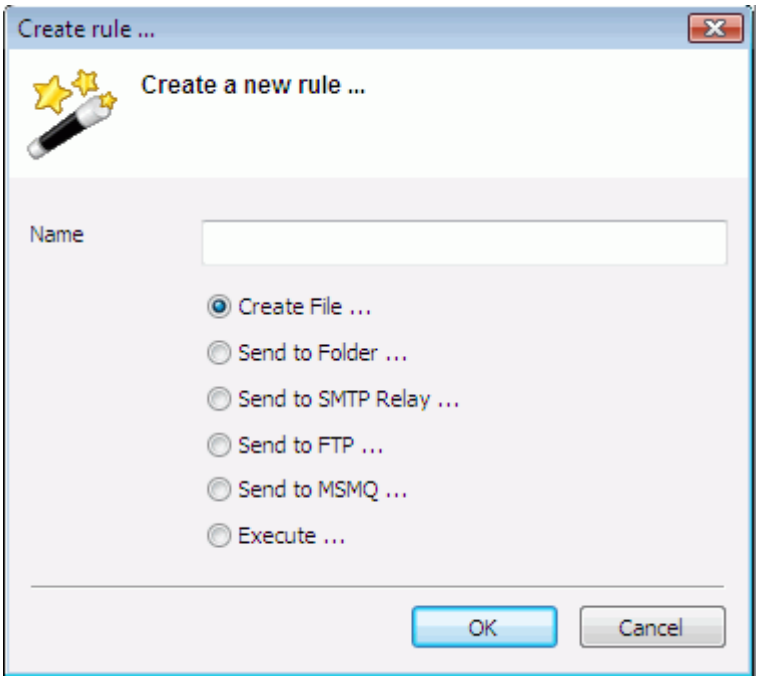
In the **Advanced** options, **rules** are used to export image files and documents to other destinations, such as SMTP servers (E-mail), FTP servers, network folders, etc.

- To add a rule, click the **Add** button.

- Select to which destination you want to export your documents.

  Note: the option **Create File** allows you to create customized index files.

  Note: the option **Execute** is actually the same as the **Export** option on the **Advanced** tab.



- Then type in an appropriate **name** for the rule.
- Click **OK** to return to the **Advanced** tab.
- Now click **Setup** to complete the configuration of each rule.
- When you are done, click **OK** to return to the **Advanced** tab.

Filter

If you have created multiple document types in IRISPowerscan you can apply a filter and select which document type you want to export.

IRISearch

- Select the **IRISearch** option if you want your documents to be searchable by the IRISearch application.
- Select **Indexing** if you want to update the indexing of Windows search.

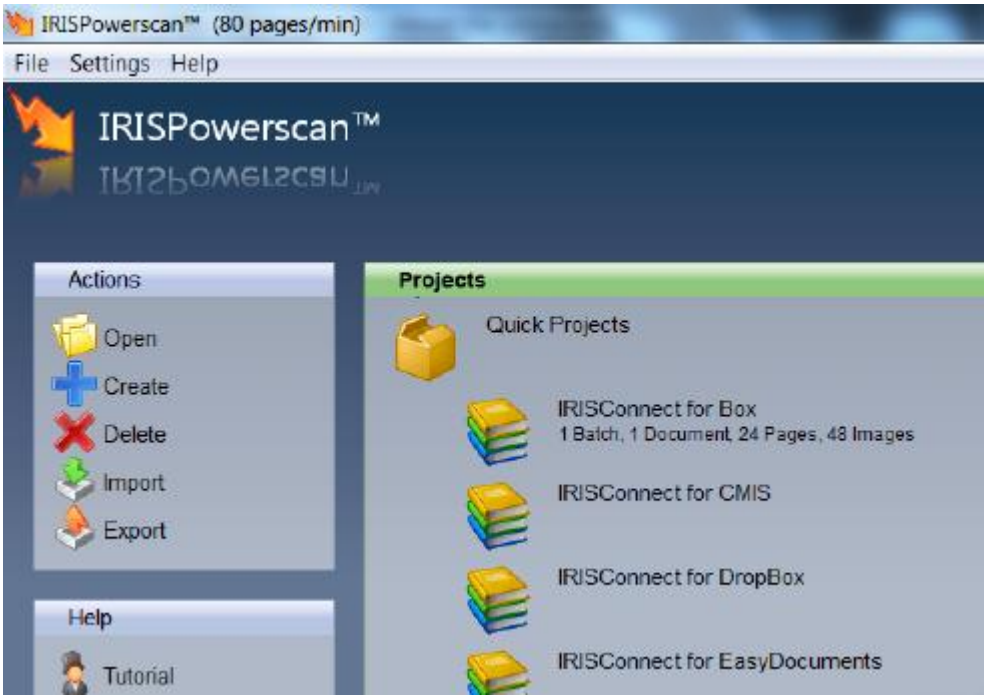
IRISCONNECT CONNECTORS

About the IRISConnect connectors

The IRISConnect connectors allow you to connect IRISPowerscan to a wide range of Electronic Content Management Systems (ECM's) and Cloud systems. This way, the documents you process – and also the indexes you attribute to them – can be exported automatically from IRISPowerscan to the destination of your choice.

As soon as you've registered an IRISConnect connector, its corresponding Quick Project is created in the IRISPowerscan start-up screen.

Example



To use the connectors:

- Double-click the Quick Project to start the Configuration Wizard.

  The Configuration Wizard allows you to do a quick, basic configuration of the connector. You won't have access to the Project Setup afterwards to do any manual configurations.

- **Or**: **Create a new Quick Project** first, based on the existing Quick Project, then start the Configuration Wizard.

  In this case, you will have access to the Project Setup and you'll also have access to the **IRISConnect interface** to do an advanced configuration.

Tip:
Refer to the separate **IRISConnect documentation** to make full use of the IRISConnect Connectors.

Refer to the section **Using the Configuration Wizards** for more information about the wizards.

Using the Configuration Wizards

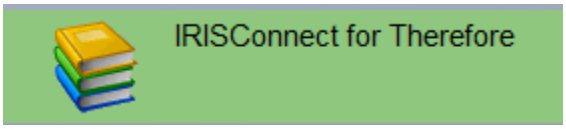
The Configuration Wizards allow you to set up the connectors in a few easy steps. They guide you through the different steps of a quick, basic configuration.

Once you have gone through the steps, the documents you scan and process are exported via IRISConnect. The IRISPowerscan Project Setup is unavailable. This means you cannot change any other (advanced) IRISPowerscan settings outside the Wizard.

All Wizards are structured in the same way, for every connector. There are only slight differences when it comes to setting up a connection. This is due to the fact the various ECM systems require different login credentials.

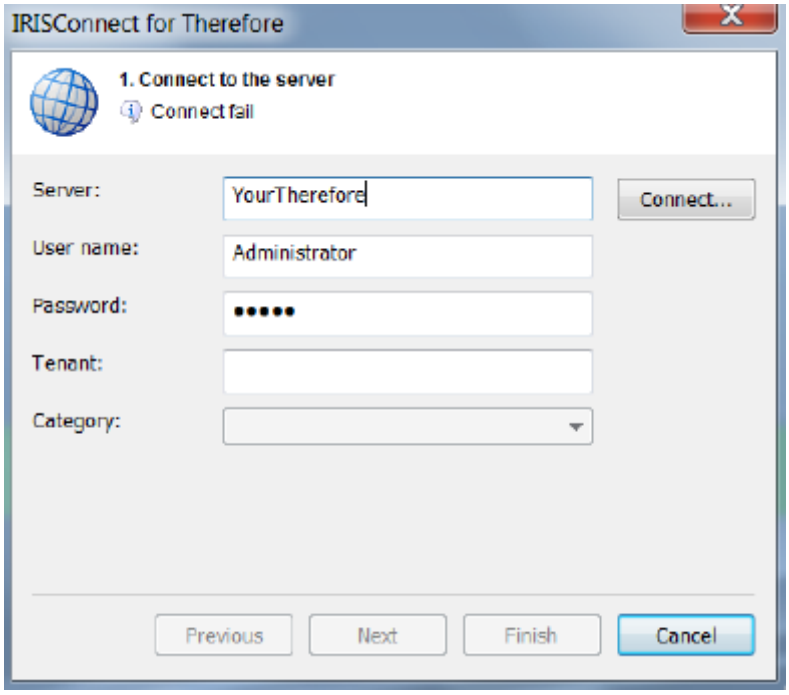
Starting the Wizard

- In the IRISPowerscan start-up screen, double-click the Quick Project of your connector to start the Configuration Wizard.



Step 1: Connect to the Server

This is the mandatory step.



- Enter the server link and your login credentials.

  The login credentials differ from one ECM system to another, so this screen also differs from one connector to another.

- Then click the **Connect** button.

  Note: in some case you need to click Connect twice: one time to establish the connection, and one time to connect to the underlying database/category/etc.

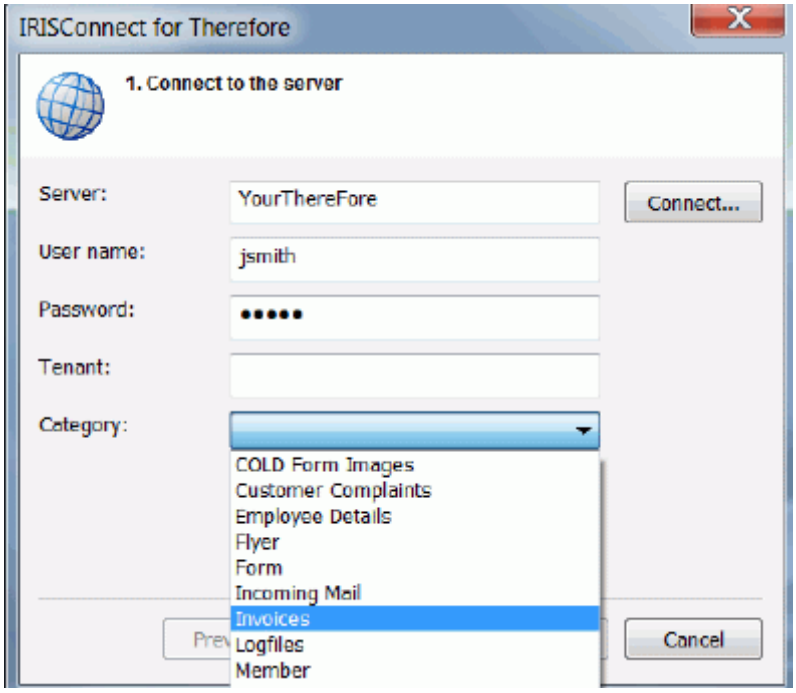
- Click **Next** to continue with **Step 2** or click **Finish** to open the project and start processing documents.

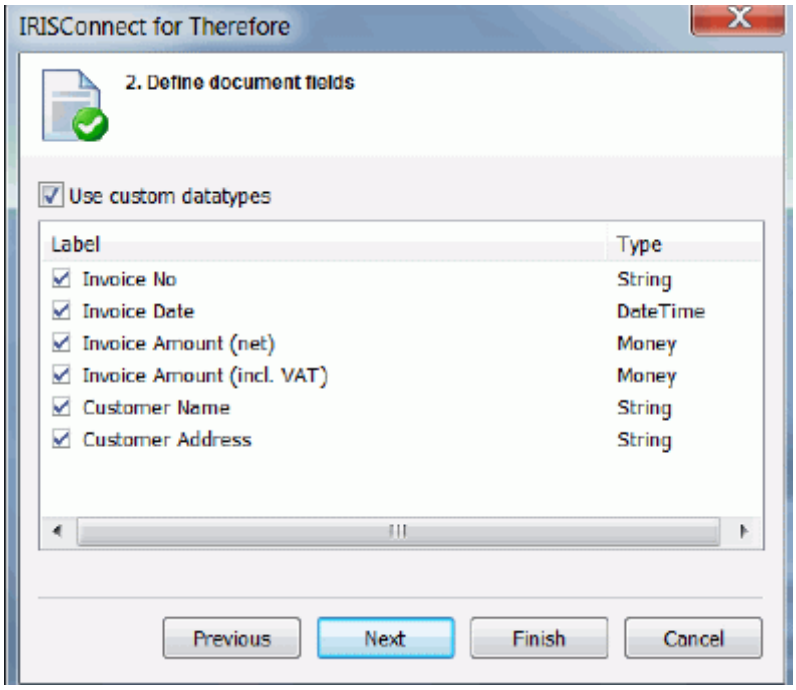
Step 2: Define document fields

Based on the settings you selected in Step 1, the Wizard automatically retrieves all the corresponding fields that are available in your ECM system.

Example

Suppose you selected Invoices at Step 1 of the Therefore Wizard. Then you will see the following available fields at step 2.



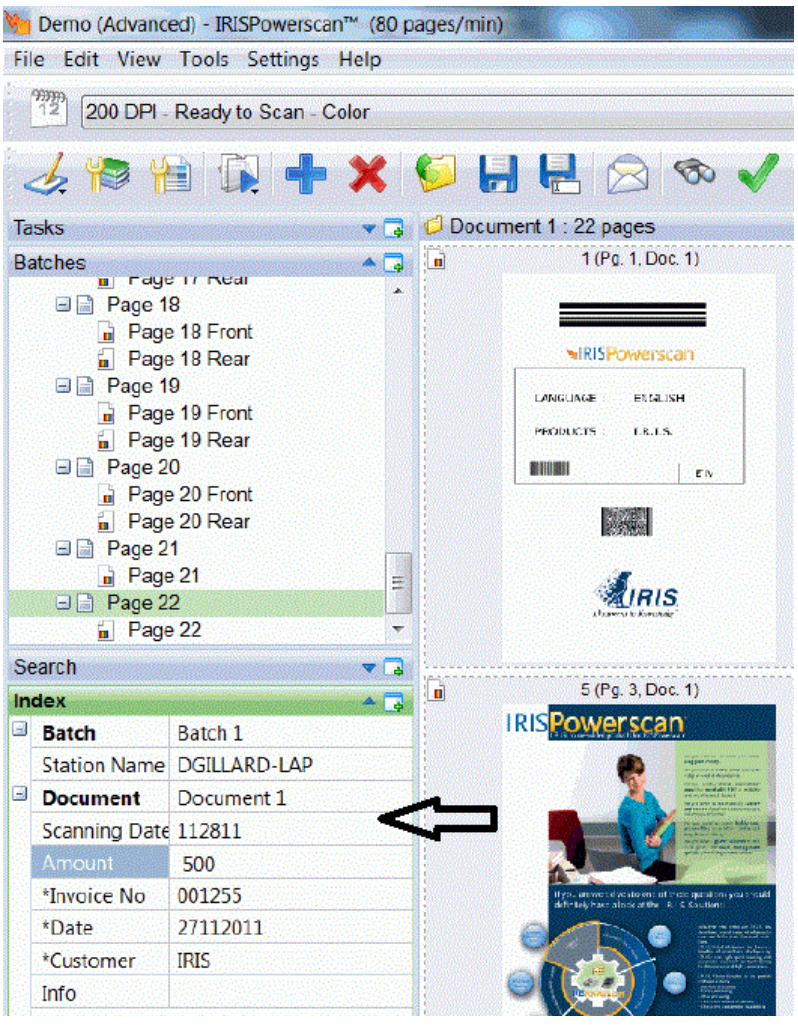


The fields you see listed in Step 2 of the Wizard are the ones that are available in your ECM system - in this case Therefore.

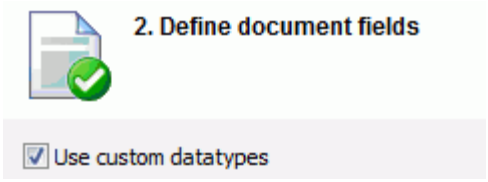
- Select the document fields you want the Wizard to create in IRISPowerscan.

  By default, the Wizard creates them all.

  The document fields you select in step 2 of the Configuration Wizard appear in the Index section of IRISPowerscan after scanning a batch or document. When you fill in the index fields in IRISPowerscan, they will be exported to the corresponding index fields in your ECM system. Hence, you can export fully indexed documents thanks to IRISConnect.



If you keep the default option Use custom data types activated in step 2 of the Wizard, then you have to fill in the document types fields according to specific naming conventions in IRISPowerscan. The fields that are mandatory are marked in red.

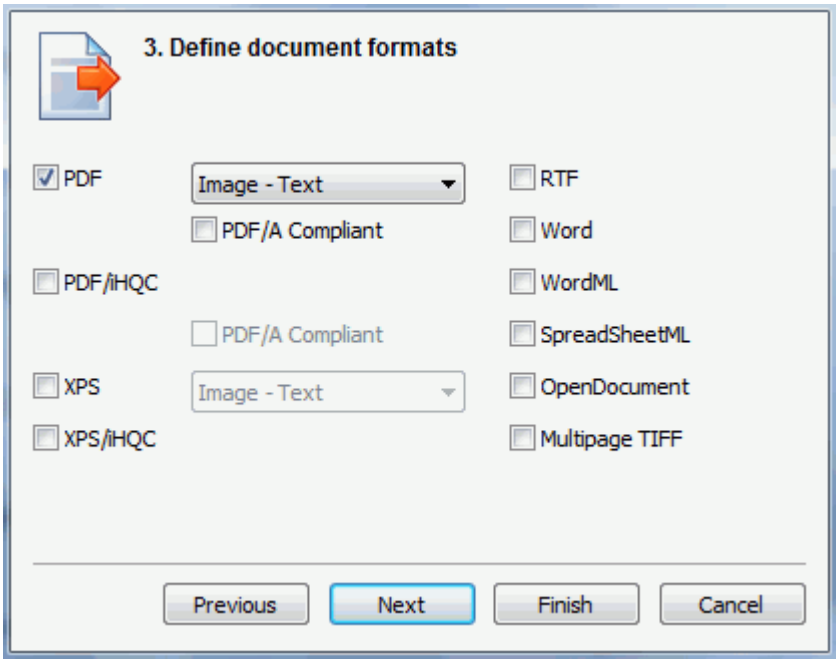


If you deactivate the option Use custom data types in the Wizard, then all document fields can be filled in as text in IRISPowerscan.

- When you are done, click **Next** to continue the configuration or click Finish to open the project and start processing documents.

Step 3: Define document formats

During this step you can select the output format you want to generate.



- Select the options of your choice:

  PDF

  - **PDF Image-Text** generates searchable PDF files that contain the original page image on top of the recognized text.
  - **PDF Image** generates image PDFs. They are not text-searchable.
  - **PDF Text** generates Text PDFs and creates graphic zones as images.
  - **PDF Text-Image** generates PDF files in which the recognized text is placed on top of the image.

  PDF/A compliant generates PDF/A files that are suitable for long-term archiving.

  PDF-iHQC: generates highly-compressed PDF files using intelligent High-Quality Compression technology.

  The PDF-iHQC files can also be **PDF/A-compliant**.

XPS

  - **XPS Image-Text** generates searchable XPS files that contain the original page image on top of the recognized text.
  - **XPS Image** generates image XPS files. They are not text-searchable.
  - **XPS Text-Image** generates XPS files in which the recognized text is placed on top of the image.

- **XPS-iHQC**: generates highly-compressed XPS files using intelligent High-Quality Compression technology.

RTF: generates RTF (Rich Text Format) files.

Word: generates Microsoft Word files.

WordML: generates WordML files (supported by Microsoft Word 2007 and 2003).

SpreadSheetML: generates SpreadsheetML output (supported by Microsoft Excel 2007, 2003 and 2002).

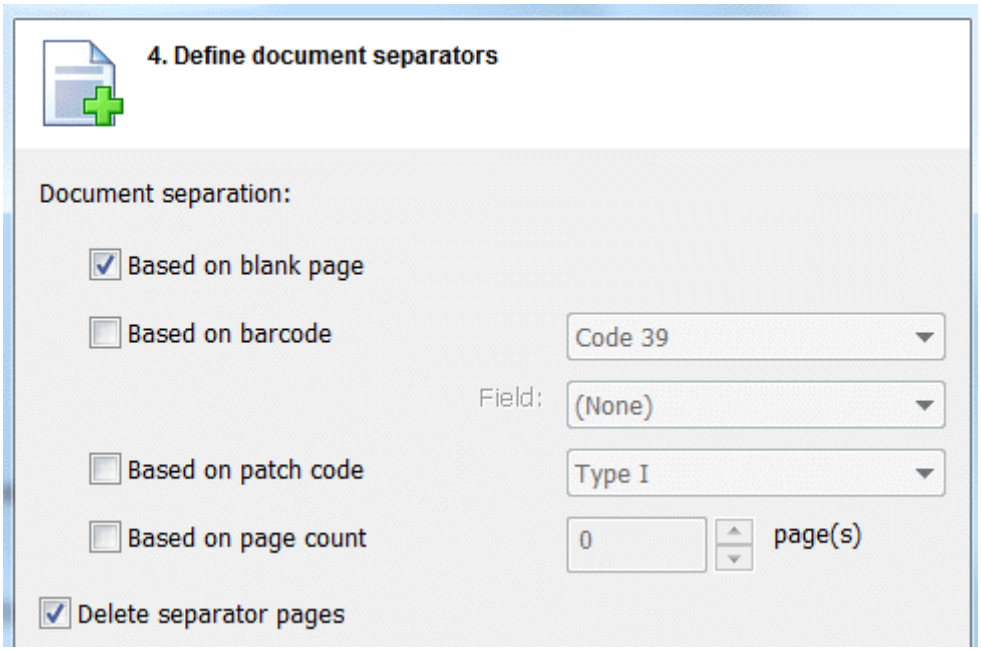
OpenDocument: generates OpenDocument files (XML-based open format).

Multipage TIFF: generates Multipage TIFF files.

- Click **Next** if you want to continue the configuration or click **Finish** to open the project and start processing documents.

Step 4: Define document separators

During this step you can select how you want to separate your documents. You can separate documents based on blank pages, barcodes and patch codes. When IRISPowerscan encounters one of those it will know to start a new document. You can also configure IRISPowerscan to start a new document after a certain number of pages (page count).



Separation options

- **blank pages**
- **barcodes**

  Select the type of barcode that will be used to separate documents.

  Field: indicate the index field (of the Index Pane in IRISPowerscan) where the barcode values must be inserted.

- **patch code**

  Select the type of patch code that will be used to separate documents.

- **page count**

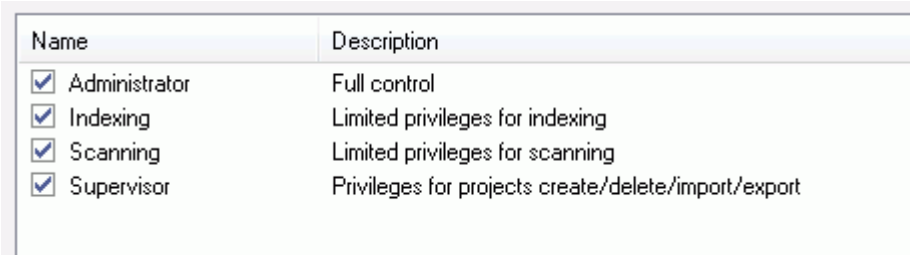
  Indicate after how many pages you want IRISPowerscan to start a new document.

When you are done, click **Finish** to open the project and start processing documents.

SECURITY

Features available for system administrators only.

The **Security** tab (of the **Project Setup** window, see: Project Setup) gives an overview of the roles that can access the selected project.

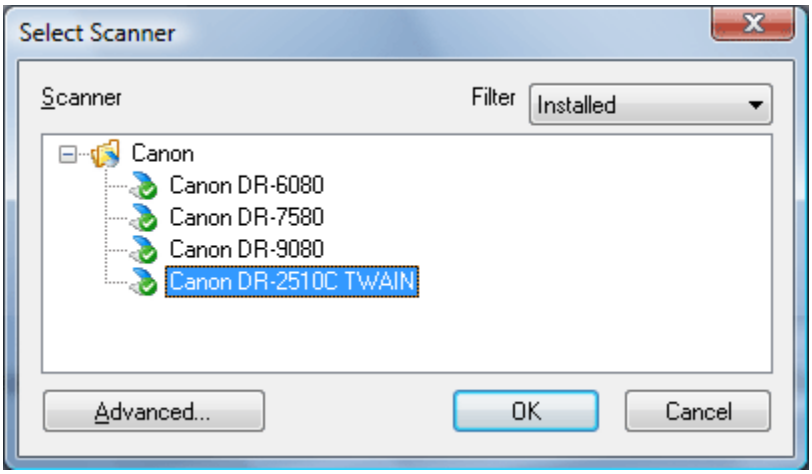


Remember that all roles, users and user groups are defined through the **User Management** module. See: Software options, User profiles.

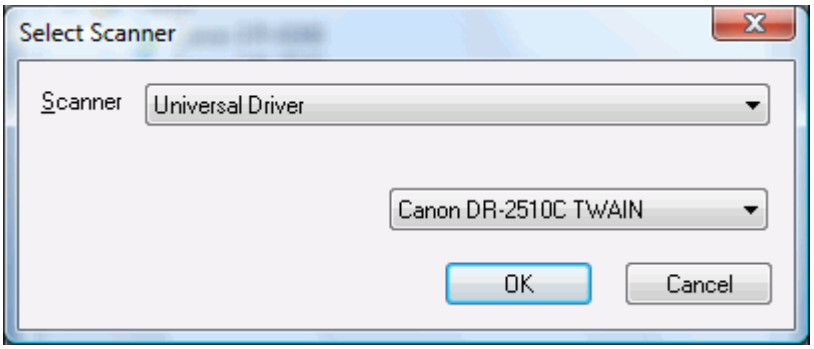
CHAPTER 6
SCANNING

SCANNER SELECTION

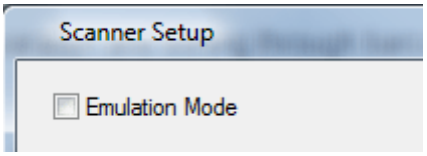
When running IRISPowerscan, you are automatically prompted to confirm the scanner selection in the **Select Scanner** window*. You must select your scanner then click **OK**.
(*) You can also access the scanner selection is window by selecting **Scanner**, **Select**, from the **Settings** drop-down menu (either from the **Start up** window, or from the user interface).



If the scanner is not displayed in the list, click **Advanced** and select the right source (Universal Driver and scanner).



Once a scanner has been connected, the **Emulation mode** (which enables to run emulation images) is disabled and the scanning of document sheets can start. (You can access the **Scanner Setup** dialog box by selecting **Scanner**, Setup, from the **Settings** drop-down menu).



SCANNER SETUP

By default, the application is set to run with the **Twain** protocol which requires a Twain driver version 1.9 or higher. If you do have a Twain driver 1.9 or higher, the Twain driver interface will be accessed via the application **Page Setup** window (see: Scanning, Page Setup: scanner icon on the right).

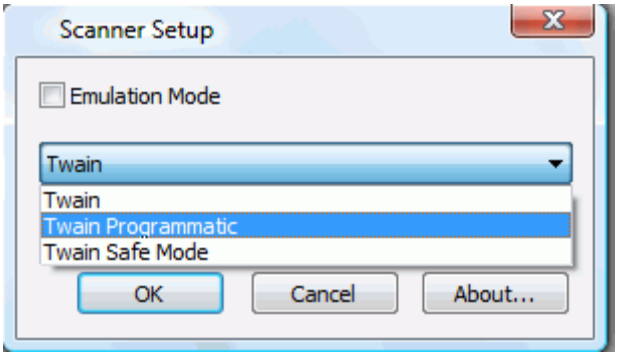
It is recommended to make a few scanning tests.
If your Twain driver version is prior to 1.9, or if the scanning does not seem to work properly - e.g.: the received images do not match the defined scanner settings -, you must choose one of the other communication methods with the scanner:
- **Twain Programmatic**: if the scanner Twain driver is prior to version 1.9
- **Twain Safe Mode**: if the scanning still does not work

If you choose any of the above options, all scanning parameters will be set in the application **Page Setup** window, **Scanner** tab.

If the scanning still does not work properly, choose **Show Scanner Dialog**. By doing so, you will be able to introduce your scanner settings directly in your scanner interface each time you want to start the scanning.
Be careful:
- this will have to be done each time you want to start the scanning
- you must make sure your scanning parameters do match the settings introduced in the application **Page Setup** window (see: Scanning, Page Setup).

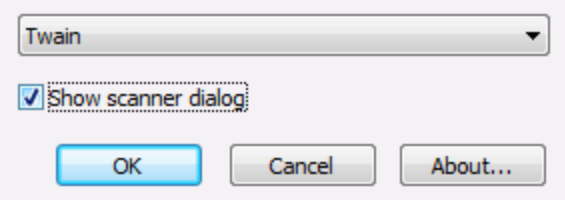
To change the scanner communication method:

- Access the **Scanner Setup** window: select **Scanner**, **Setup**, from the **Settings** drop-down menu (either from the **Start up** window, or from the user interface).
- Choose another communication method in the drop-down list,



or:

choose **Show Scanner Dialog**.



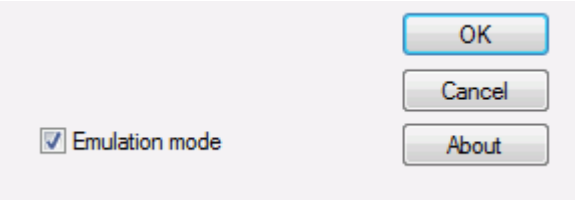
RUNNING EMULATION IMAGES

IRISPowerscan is also provided with emulation images. These can be used for demonstration or testing purposes. You can run the emulation images to make a few tests before you start with the actual production scanning process.

The **Emulation Mode** that enables to run these emulation images is activated by default. If you connect a scanner, however, the **Emulation Mode** becomes disabled.

To reset the Emulation Mode:

- Select **Scanner**, **Setup**, from the **Settings** drop-down menu (either from the **Start up** window, or from the user interface).
- Select **Emulation Mode** in the **Scanner Setup** dialog box.



To run the emulation images:

- Make sure the application is set to run in **Emulation Mode** (see above). The big blue **Scan** button on the main toolbar turns into a small one.

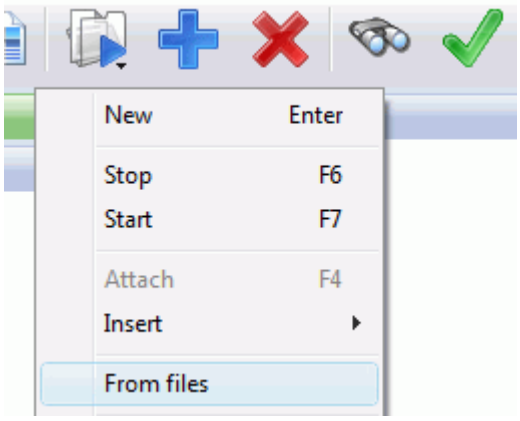
- Click on **Scan**, then **Start** in the drop-down menu to scan the emulation images.

CAPTURING EXISTING FILES

The software offers to capture existing files, i.e. images of documents that were previously scanned. This is the **Scan from Files** option.

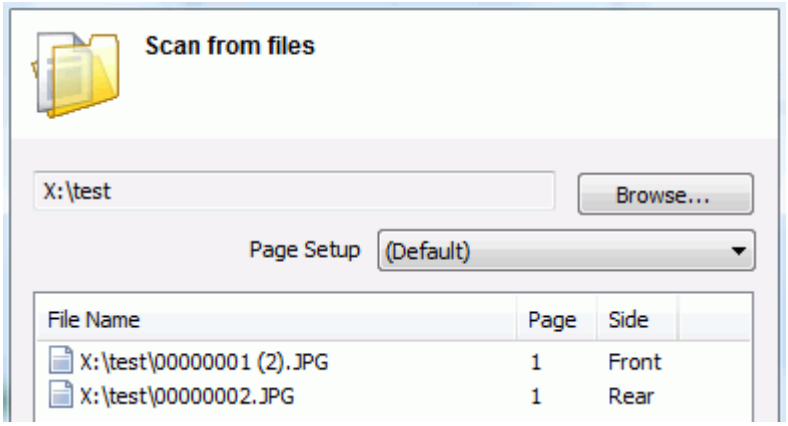
To capture existing images:

- From the **Settings** drop-down menu, select **Scanner**, **From Files**, or click on **Scan** on the main toolbar, then **From Files**, then browse for your image files.
  The **Scan** icon on the main toolbar changes.



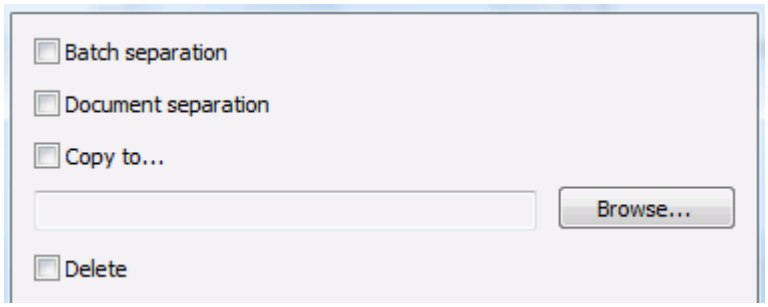
Tip:
Next time you will launch the scanner (by using **Start**/New Document (**ENTER**)/**Insert**/**Attach**/**Rescan**), you will be prompted to browse for the folder containing the images.

- Click the **Scan** icon on the main toolbar, then select **Start**, and browse for your files. The image formats supported are: BMP, TIFF, Multi-page TIFF, JPEG, PNG, PDF.



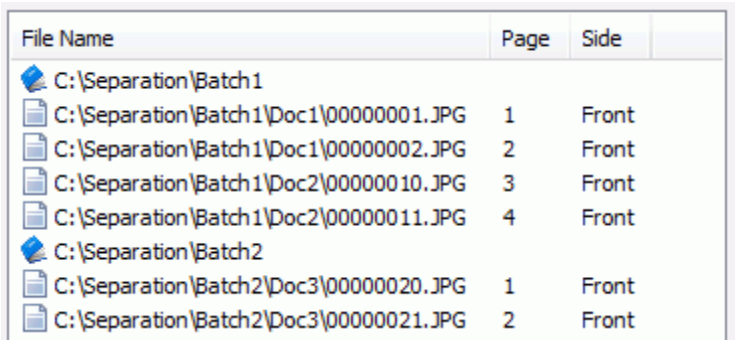
- Select the necessary **Page Setup**:
  The images in the input folder must be consistent with the project scanner settings (Page Setup). E.g.: If the scanner is configured for black & white images only, the color images contained in the input folder will be ignored.
  Default: corresponds to the current scanner settings (see: Scanning, Page setup (scanning parameters), Page setup)
  Simplex: to rapidly indicate that the folder only contains front pages.
  Duplex: to rapidly indicate that the folder contains front pages as well as rear pages.

- Click the **Options** button to select your options, then click **OK** to confirm.



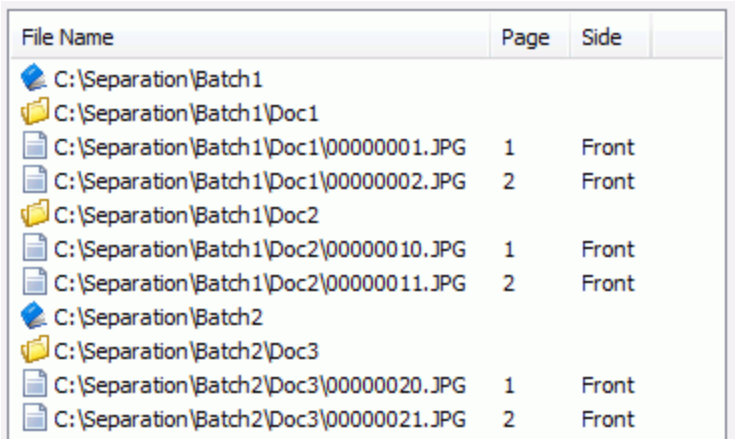
Batch separation/Document separation: up to 2 levels of the hierarchical structure of the existing files can be kept (in IRISPowerscan the 2 possible levels are: Batch, Document). A separation is triggered when a new multipage document (either TIFF or PDF) is found, or on any subfolder.

- *Batch separation only*: to convert the first hierarchical level in batches, all images will be placed one after the other in the batches



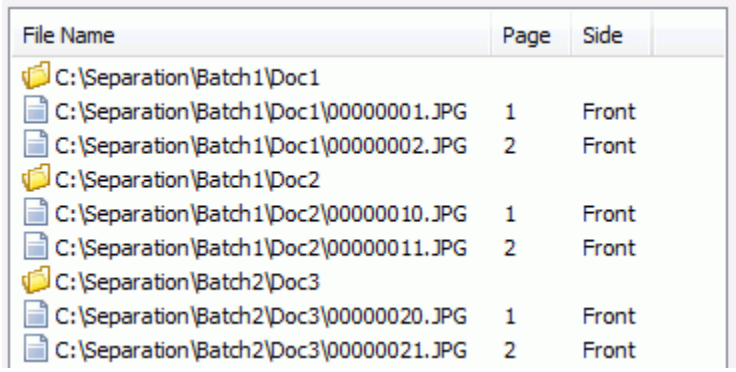
File Name	Page	Side
C:\Separation\Batch1		
C:\Separation\Batch1\Doc1\00000001.JPG	1	Front
C:\Separation\Batch1\Doc1\00000002.JPG	2	Front
C:\Separation\Batch1\Doc2\00000010.JPG	3	Front
C:\Separation\Batch1\Doc2\00000011.JPG	4	Front
C:\Separation\Batch2		
C:\Separation\Batch2\Doc3\00000020.JPG	1	Front
C:\Separation\Batch2\Doc3\00000021.JPG	2	Front

- *Batch separation + Document separation*: to convert the first hierarchical level in batches, the second hierarchical level in documents, and all images will be placed one after the other in the documents.



File Name	Page	Side
C:\Separation\Batch1		
C:\Separation\Batch1\Doc1		
C:\Separation\Batch1\Doc1\00000001.JPG	1	Front
C:\Separation\Batch1\Doc1\00000002.JPG	2	Front
C:\Separation\Batch1\Doc2		
C:\Separation\Batch1\Doc2\00000010.JPG	1	Front
C:\Separation\Batch1\Doc2\00000011.JPG	2	Front
C:\Separation\Batch2		
C:\Separation\Batch2\Doc3		
C:\Separation\Batch2\Doc3\00000020.JPG	1	Front
C:\Separation\Batch2\Doc3\00000021.JPG	2	Front

- *Document separation only*: to convert the first hierarchical level in documents and insert them into the current batch, all images will be place one after the other in the documents.



File Name	Page	Side
C:\Separation\Batch1\Doc1		
C:\Separation\Batch1\Doc1\00000001.JPG	1	Front
C:\Separation\Batch1\Doc1\00000002.JPG	2	Front
C:\Separation\Batch1\Doc2		
C:\Separation\Batch1\Doc2\00000010.JPG	1	Front
C:\Separation\Batch1\Doc2\00000011.JPG	2	Front
C:\Separation\Batch2\Doc3		
C:\Separation\Batch2\Doc3\00000020.JPG	1	Front
C:\Separation\Batch2\Doc3\00000021.JPG	2	Front

Copy to: to make a copy of your files at another location.
Delete: to delete the original files.
File monitoring: to make the software automatically scrutinize the files of the selected folder. All new images available in the folder will automatically appear in the **Scan from files** window the next time you open the module. If images have already been captured, they will not appear in the list.

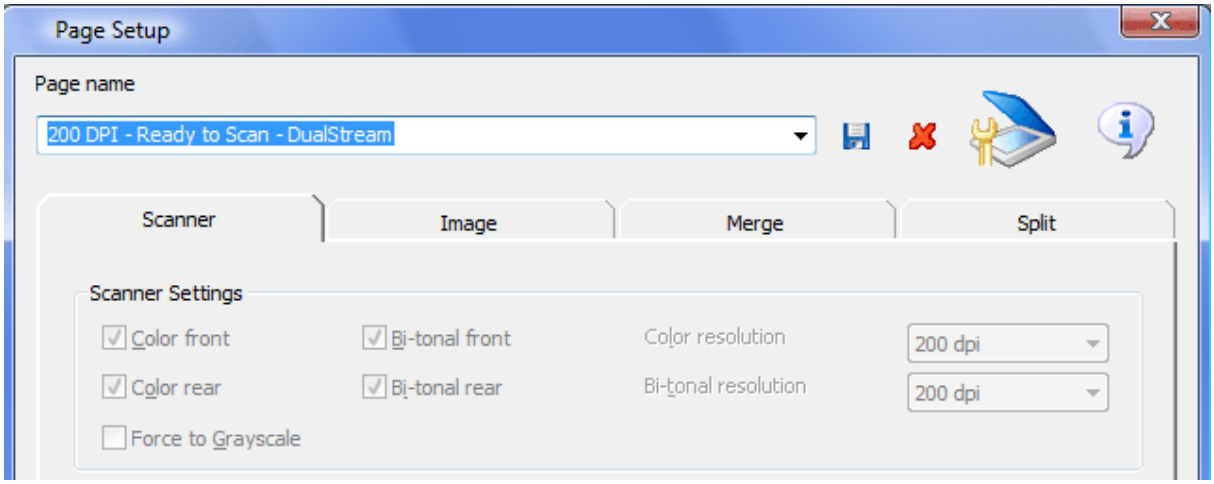
PAGE SETUP (SCANNING PARAMETERS)

Page setup (scanning parameters)

The **Page Setup** window allows you to set the scanning parameters and get ready for the scanning. You can set:
- the scanning parameters
- the image parameters
- the automatic merge of documents
- the automatic split of documents

To access the Page Setup window:

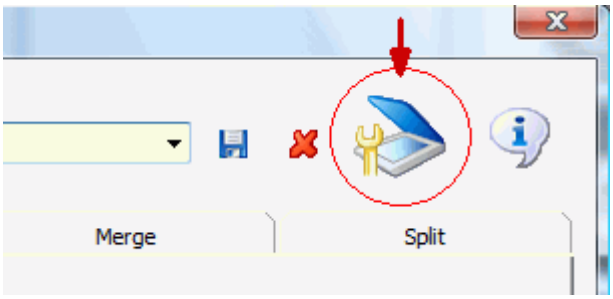
- Click on the **Page Setup** button on the main toolbar, or select **Page**, **Setup** from the **Settings** drop-down menu (either from the **Start up** window, or from the user interface).



The scanner settings are disabled. They must be introduced in the Twain user interface: select the scanner icon at the top right of the window to access to the scanner Twain user interface.

Note:

If your scanner Twain driver version is prior to 1.9, the scanner icon will not be displayed and the scanner settings will be enabled in the **Scanner** tab.



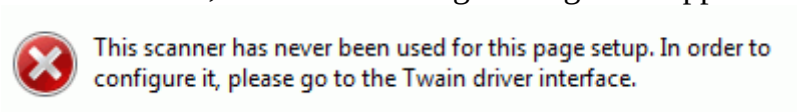
<u>Important</u>:

Enable communication between your scanner and IRISPowerscan

The first time you intend to scan with your scanner, you must first activate the link between the scanner and IRISPowerscan. To do so, simply access the Twain user interface, if necessary confirm or set your settings, then click **OK** in the Twain interface. The corresponding scanner settings are automatically activated in the **Page Setup** window, **Scanner** tab. Also confirm the settings by clicking **OK** in the **Page Setup** window.

If you do not activate the link between the scanner and IRISPowerscan, you

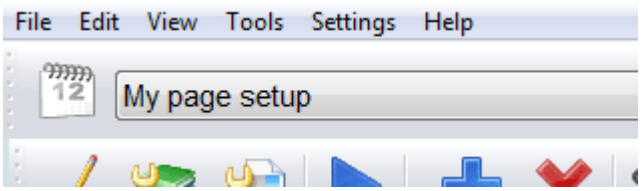
will not be able to scan, and the following message will appear on screen:



To define your settings in the Page Setup window:

- Select an existing page setup configuration from the **Page name** field and modify it according to your needs: set your scanner settings, image parameters, and required merge/split operations.

  If you change the scanner options in the Twain user interface, it is recommended to give the configuration a new name. The new name will later appear in the top part of the user interface (**Scanner** bar).
  To save the configuration with the new name:
  - Type in the new name in the **Page Name** field and click on the **Save** icon on the right.



- Click on **OK** to confirm your scanning configuration.

Scanner settings

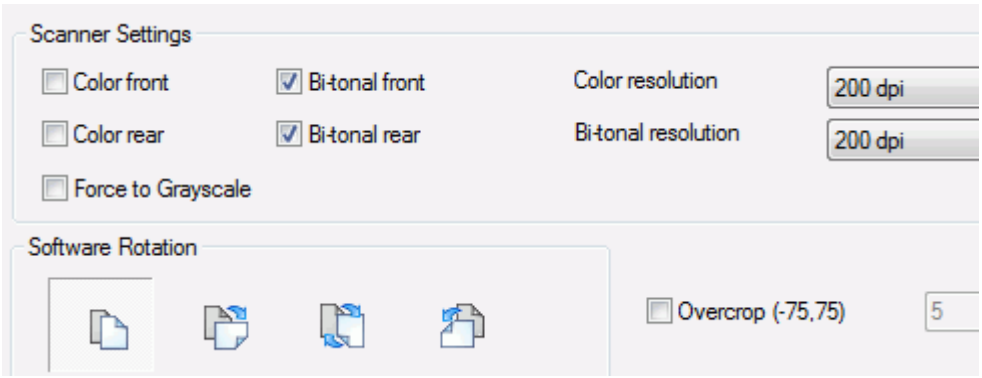
To set the scanner settings:

- Access the Twain user interface (press the scanner icon at the top right of the **Page Setup** window) and introduce your scanner settings. Click **OK** to confirm your settings in the Twain user interface window.

  Once you have confirmed your settings, the corresponding

options get automatically adapted in the **Scanner** tab of the **Page Setup** window.

- If your scanner Twain driver version is prior to version 1.9, your settings must be introduced in the **Page Setup** window, **Scanner** tab.
  Indicate the type of images to be generated: color/bitonal images, etc., as well as the resolution needed. Also tell whether the document pages must be rotated, cropped, etc.



Color front: to scan the document front pages in color.
Color rear: to scan the document rear pages in color.
Bi-tonal front: to scan the document front pages in black and white.
Bi-tonal rear: to scan the document rear pages in black and white.
Color resolution: select the required resolution for color images.
Bi-tonal resolution: select the required resolution for black and white images.
Force to Grayscale: to ask grayscale images to the scanner rather than color images (the "Color" option must be selected)

- Introduce the other scanning parameters:

  Software Rotation: select the required automatic rotation operation.

  Overcrop: to remove a little margin all around the images, e.g. a black border.
  Note: a more powerful black border removal option can be activated in the Image Processing module. See: Project Setup, Scanning, Image processing, Defining image processing operations.

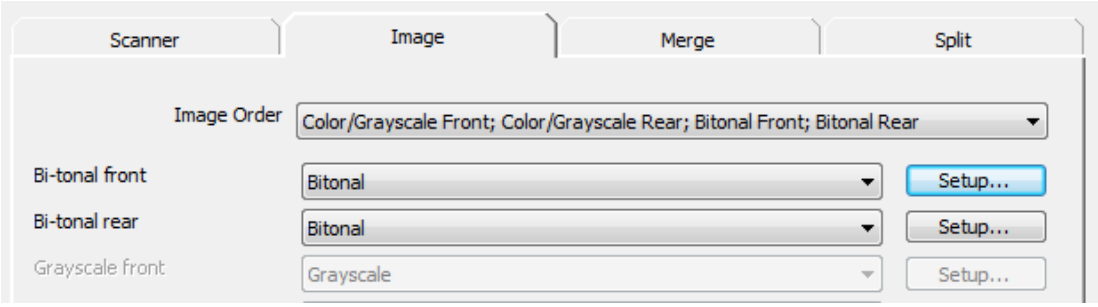
Flatbed: select the option to use a flatbed scanner. **Delay**: set the number of seconds that the flatbed will wait before it starts scanning the next page, so that the operator has the time to position the next page on the scanner.

Duplex Mode: (default: **Classic**) choose the **Calendar** mode if you want to rotate the rear images by 180° (this is useful if you scan a calendar).

Image parameters

To set the image parameters:

- In the **Image** tab, select the order in which the scanned images must appear in the application.
- Define the setup features of each image in the corresponding **Image Setup** window (click the **Setup** button on the right).

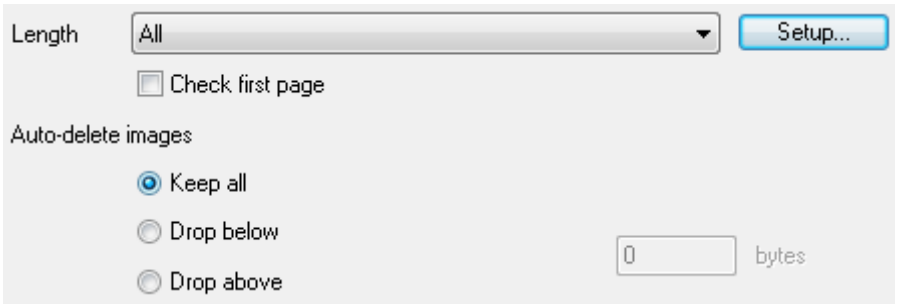


Filters

Set the brightness and contrast values in the required fields.

JPEG Quality: JPEG quality controls the amount of file compression performed by the scanner when producing JPEG images. If you increase the image compression (smaller file size), you decrease the image quality.

Check



Length: select the document format required for the images. All the images that do not match the format (dimensions) specified in this field will be dropped. If necessary, change the dimensions through the **Setup** button.
Check first page: disable this option to ask the software not the check the first page of your documents. (This is useful when you scan e.g. envelopes as first pages (the envelopes are scanned as headers). Because of their larger size, you do not want to check their size.
Auto-delete images: you can set the size (in bytes) below which or above which the images must be deleted. This can be used to delete blank bitonal images (in TIFF G4 format).
Note that more advanced blank page deletion/detection option is available in the application. It can be set at project setup level. See: Project setup, Scanning, Blank page, Defining and using blank pages.

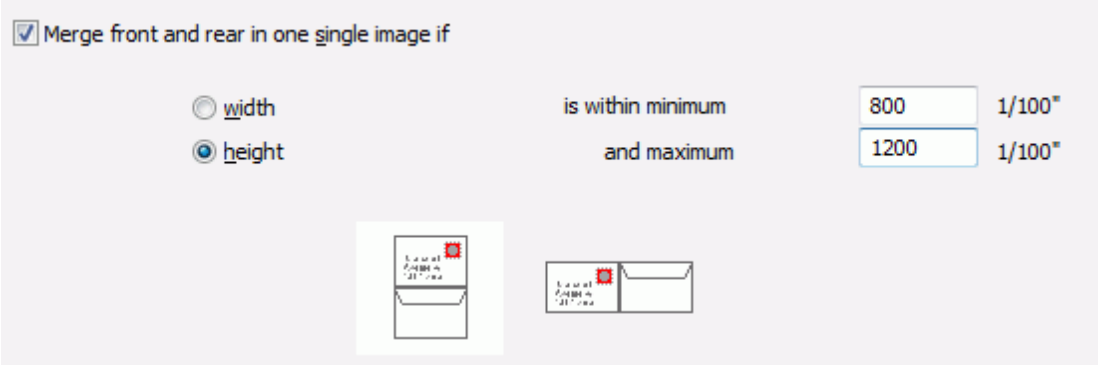
Mask

Scan mask: this is used to define the region of the image to be scanned.

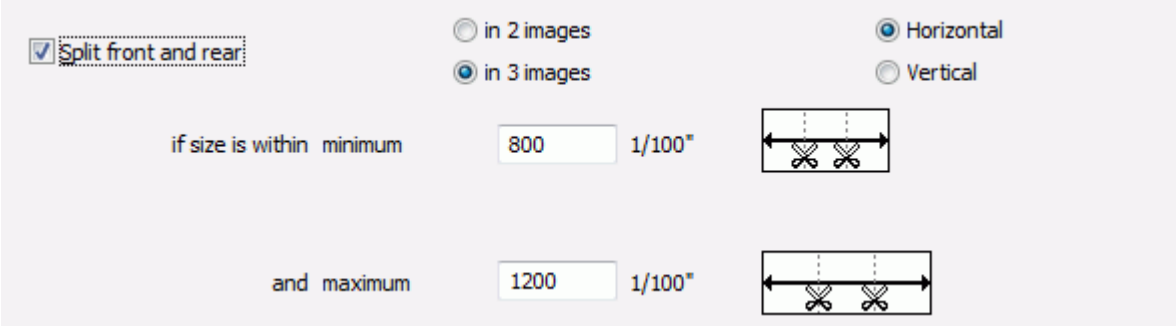
Automatic merge/split

To set an automatic merge/slit of your documents:

- In the **Merge** tab, indicate whether the front and rear images of a page must be merged and in which conditions. (You may wish to merge two A4 pages to get an A3). The merge will be done only if the width or height of the images correspond to the dimensions set in 1/100 of inch.
  Width: indicate the minimum and maximum width
  Height: indicate the minimum and maximum height



- In the **Split** tab, indicate whether the front and rear images must be split into 2 or 3 parts, and in which conditions. (You may wish to split an A3 image into two A4 images). The split (into 2 or 3) will be done only if the width or height of the image correspond to the dimensions set in 1/100 of inch.
  Width: indicate the minimum and maximum width
  Height: indicate the minimum and maximum height

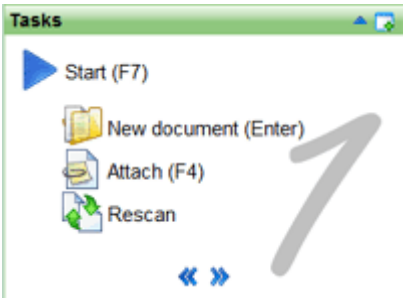


SCANNING TASKS

Scanning operations

Important
Before you start scanning documents, remember to:
- Make sure the hardware key provided with your software is properly plugged into your computer's USB port.
- Make sure your scanner has been properly installed and connected to IRISPowerscan. See: Installation, Installing your scanner, Scanning, Scanner selection.
- Define your scanning parameters in the **Page Setup** window. See: Scanning operations, Page setup.

All frequent commands related to the scanning are available from the main toolbar or from the **Tasks** pane.

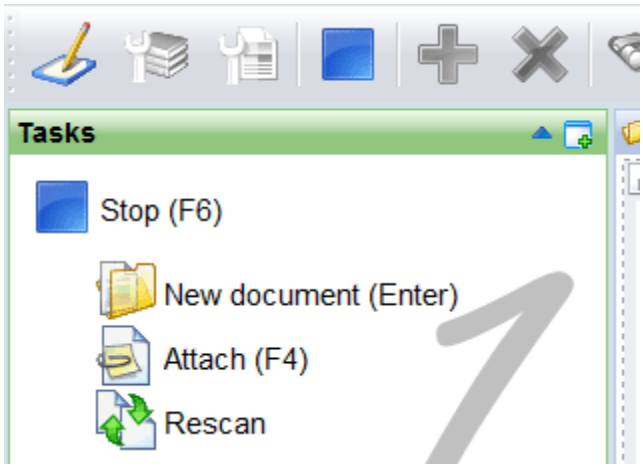


To scan your documents:

- Insert the documents in the scanner feeder.
- Click on the **Scan** button in the main toolbar or on **Start** in the **Tasks** pane. Use any other scanning features available in the **Tasks** pane. Use the **Batches** pane to organize the hierarchical structure of the scanned documents.

To interrupt the scanning:

- Click on the **Stop** button (blue square) in the main toolbar or in the **Tasks** pane. The blue square appears instead of the **Start** button (blue arrow) once the scanning has been launched.



Alternatives

1. Scan emulation images (for capturing emulation images provided with the application)
See: Scanning, Running emulation images.

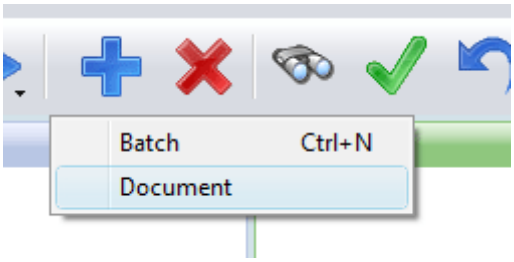
2. 'Scan from Files' (for acquiring existing images into the application)
See: Scanning, Capturing existing files.

Creating new batches/documents

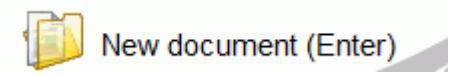
At any moment during the scanning, you can manually create a new document or batch. All the scanned pages will be integrated into the new object.

To create a new document:

- Click on **New** on the main toolbar and select **Document**. A new document is instantly created in the **Batches** pane.
  You can now start the scanning.



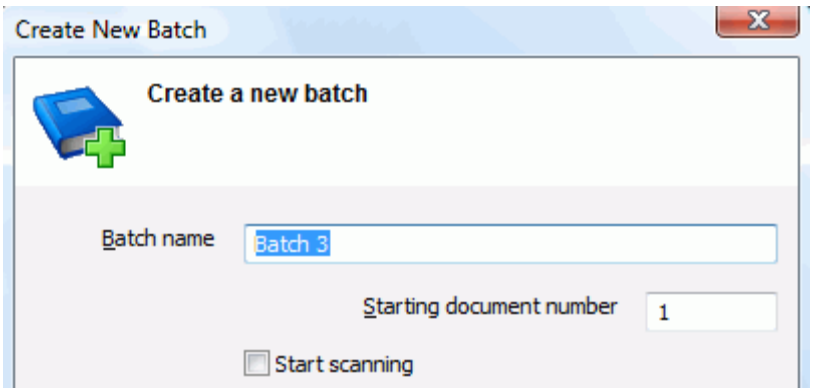
Alternatively, click on **New document** in the **Tasks** pane (or press the **Enter** key of your keyboard). By doing so, you will not only create a new document, but also launch the scanning.



To create a new batch:

- Click on **New** on the main toolbar and select **Batch**. A new batch is instantly created in the **Batches** pane.

- Confirm the batch name and numbering of the documents in the batch creation window and click **OK**. Tick the **Start scanning** option if you want to automatically start the scanning just after the batch creation.



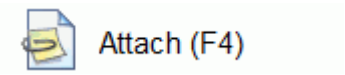
Attaching documents

At any moment in time during the scanning, you can attach a page to the object selected in the **Batches** pane.

To attach objects:

- Click on the **Attach** button in the **Tasks** pane (or press the **F4** key of your keyboard). The scanned documents will be attached to the object selected in the **Batches** pane.

  Repeat the operation for each page to be attached.



Tip:
Attaching a page means that the page will always be appended at the end of the current document. No document separation will be handled.
Examples:
- Even if the attached page contains a barcode set as a separator in the application (this is set at project setup level), the barcode will not act as a separator.
- Even if a document has been configured to contain x pages (this is set at project setup level), you will be able to attach one or more pages.

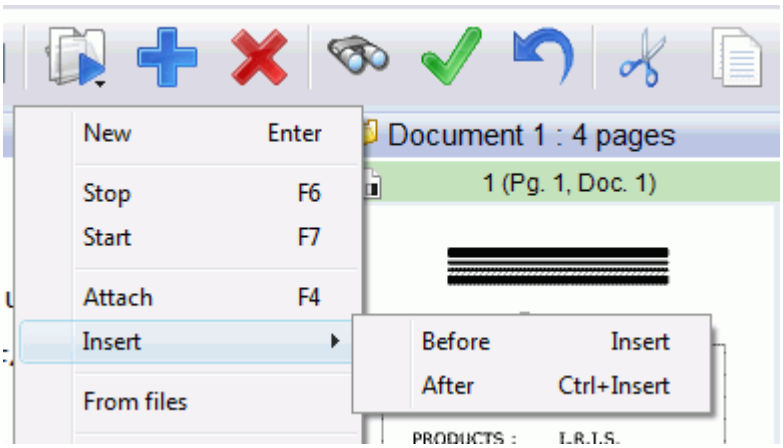
Inserting pages

At any moment in time during the scanning, you can insert a page before or after the object selected in the **Batches** pane.

To insert pages:

- Click on **Scan** on the main toolbar and select the **Insert** option in the drop-down menu.

- Choose whether you want to insert before or after the selected object.
  The pages will be inserted in the **Batches** pane.

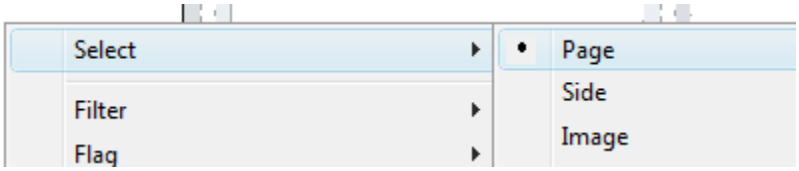


Rescanning pages

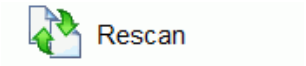
If some of your documents have been badly scanned, you can have them rescanned by the application. The newly scanned images will directly be integrated at the right place in the hierarchical structure of documents.

To rescan pages:

- Check that the page selection is activated in the viewer: right-click on the viewer or select the **Tools** menu from the toolbar, then choose **Select** and **Page**.



- Select the badly scanned page(s) in the viewer.
- Introduce the page(s) again in the scanner paper feeder and click on **Rescan**.



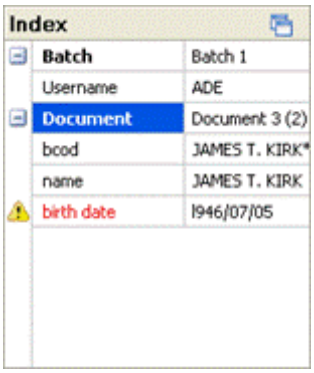
CHAPTER 7
INDEX VALIDATION

INDEX VALIDATION

Batch/document indexing is carried out automatically during the scanning process according to the parameters defined in the project setup (see: Project setup, Indexing).

The index values are further displayed in the **Index** pane (see: Starting up, User interface) for verification. If an indexing value does not match the validation rules set for that value in the project setup, it is automatically highlighted in **red**.

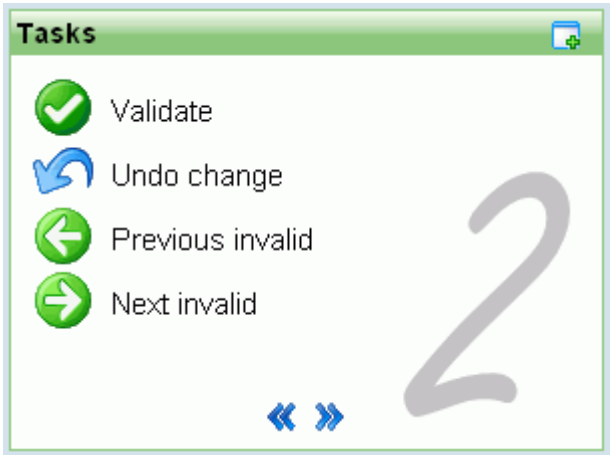
To perform the index validation, the user must modify the invalid values so as to make them valid. See:
- Index validation, Indexing operations.
- Index validation, Indexing tools.



INDEXING TASKS

Indexing operations

All frequent commands related to index validation are available from the main toolbar or from the **Tasks** pane (if necessary, use the blue arrows to the right or to the left at the bottom of the pane to access the next indexing tasks).



To validate an index value:

Once you have modified an index value in the **Index** pane, you must directly validate it to make it valid for the application.

- Once you have set the correct indexing value, click on **Validate** ✔ on the main toolbar or on **Validate** in the **Tasks** pane. The value becomes valid.

To undo the last modification:

At any moment in time, you can remove the values that have just been changed in the indexing fields. You will then come back to the previous index values.

- Click on **Undo** in the main toolbar or on **Undo change** in the **Tasks** pane.

To get to the previous invalid document (or batch):

To easily get from one invalid document to the other, you can use the arrows to the left or to the right in the **Tasks** pane. Alternatively use the arrows of the **Browse** bar (see: Starting up, User interface).

Press the arrow to the left (**Previous invalid**).

To get to the next invalid document (or batch):

- Press the arrow to the right (**Next invalid**).

INDEXING TOOLS

Indexing tools

To modify an invalid index value displayed in the **Index** pane, you can perform any of the following:

- Manually **(re)type** the value in the field.
- Select a value from the field's **drop-down list**. See: Index validation, Indexing tools, Drop-down lists).
- Select a value among the **5 values** that were last entered in the field (see: Index validation, Indexing tools, Last five values).
- Extract a value from a document image and drag it to the indexing field, using the **Drag&Drop OCR** tool (see: Index validation, Indexing tools, Drag&Drop OCR).

Use the shortcuts

Use the shortcuts to easily get to the previous/next index field:

To go to the next index field:

- Press the Tab key of your keyboard.

To go to the previous index field:

- Press SHIFT + Tab key of your keyboard.

Drag&Drop OCR

Thanks to the OCR technology, the user can directly extract values from the document images. The software "reads" the data, converts it into editable text, and transfers it directly to the required field. This allows the user not to retype the data in the indexing field. All he needs to do is to located the required data.

If your application is provided with the **ICR** module, the user will also be able to extract hand-printed data (capital letters and figures).

If your application is provided with the **MICR** module, the user will also be able to extract banking data (OCR-A, OCR-B, E13B, CMC7).

To Drag&Drop an OCR zone in an indexing field:

- Locate the data to be picked up in the viewer.
- Position your cursor on the indexing field to be modified/filled in.
- Click on the button **Drag&Drop OCR**  in the **Image** toolbar (right side of the viewer).

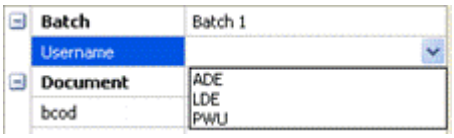
- Position your cursor in the top left corner of the OCR zone to be extracted, then drag your cursor to the bottom right corner of the zone.
  The selected data instantly appears in the indexing field.

Drop down lists

An index field may contain a drop-down list. Multi-value fields are set at project setup level (they contain either a list of values or a link to an external database through **DataLink**), (see: Project setup, Indexing, Defining index fields). The user can thus easily select any value from the list. If multi-selection has been enabled for the field, the user can select several items in the list.

To select a value from the drop-down list:

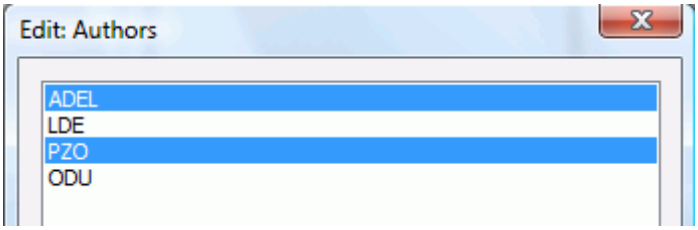
- Click the down arrow at the right end of the field and select the required value.



To select several values from the drop-down list:

- Click the icon at the right end of the field.

- Select the values in the **Edit** dialog box and click **OK**.

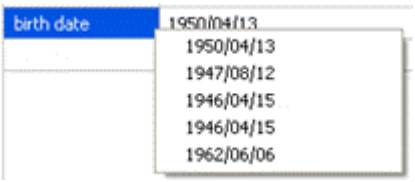


Last five values

The software automatically "remembers" the values that were last introduced in the indexing fields. If the value to be entered in the field is one of the last 5 values, the user can select the value in the field list rather than retype it.

To select a value within the last five values:

- Right-click on the indexing field to access the list, then select the required value.



CHAPTER 8
POST-SCANNING OPERATIONS

POST-SCANNING OPERATIONS

Once the scanning is complete on a certain number of documents, you can operate changes in the **hierarchical structure** that has been build (you can reorder the files, merge them, split them, etc.). You can also perform **image editing** in the viewer (image rotation, image binarization, image cropping, etc.).

Right-click in the viewer and in the **Batches** pane to access most post-scanning operations. For image editing, also use the **Image** bar.

Image editing

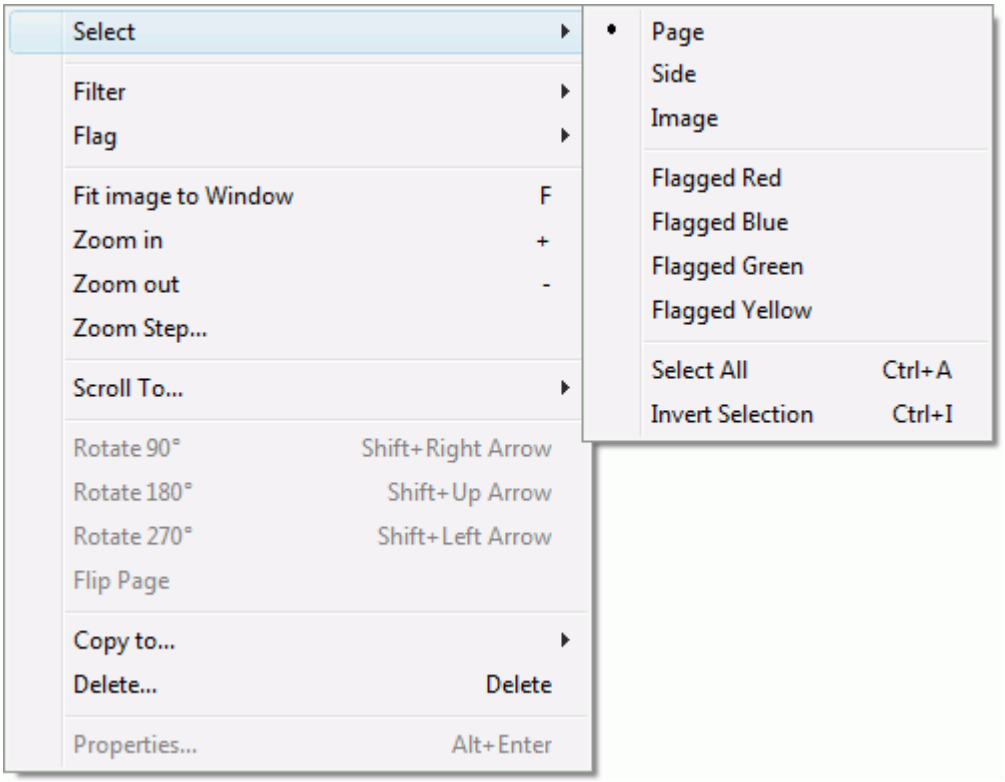
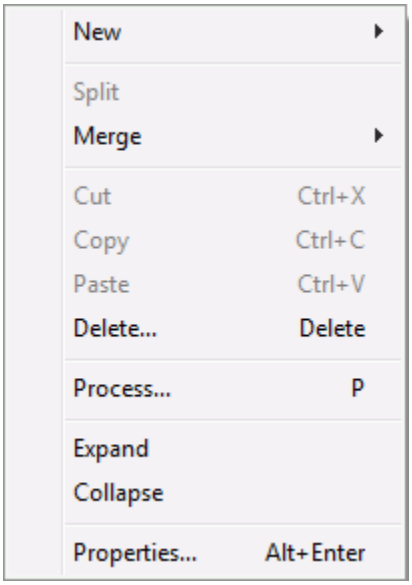


Image (re)organization

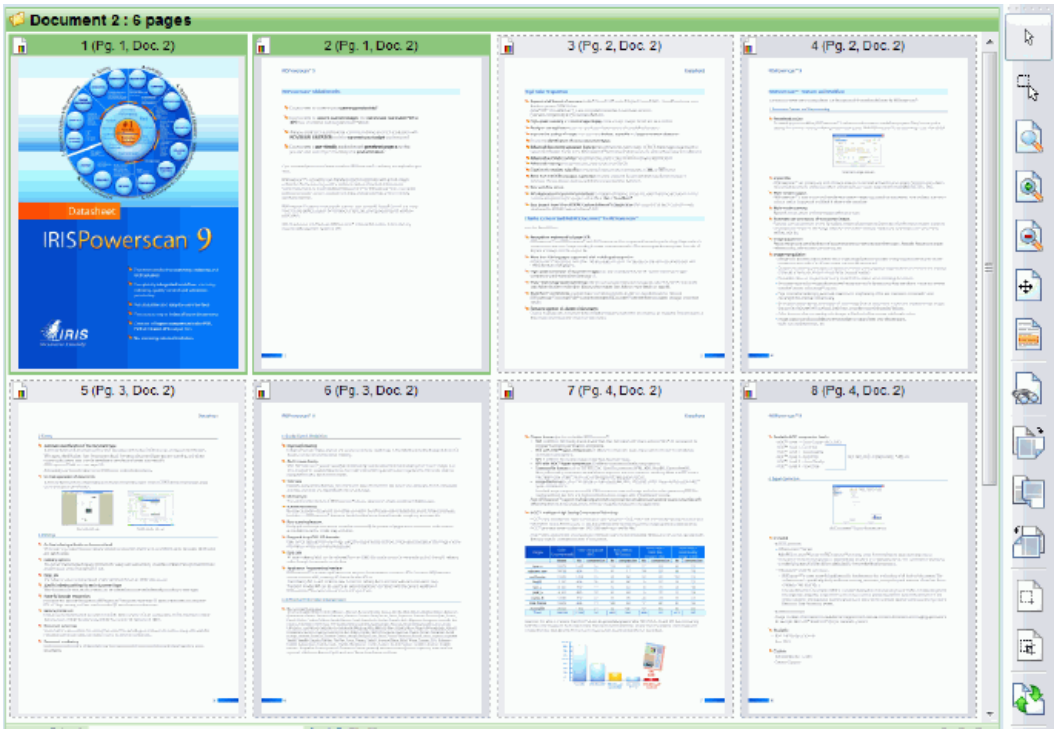


Refer to full User Guide
Also refer to the full User Guide for detailed instructions on:
- Editing images
- Zooming and scrolling images
- Selecting and filtering images
- Rotating and flipping images
- Erasing image zones
- Cropping images
- Adjusting images
- (Re)organizing images
- Reordering images
- Splitting and merging

EDITING IMAGES

Editing images

You can perform all sorts of post-scanning operations on the images. Those operations can be carried out from within the viewer. They can be launched from the **Image toolbar** (on the right).



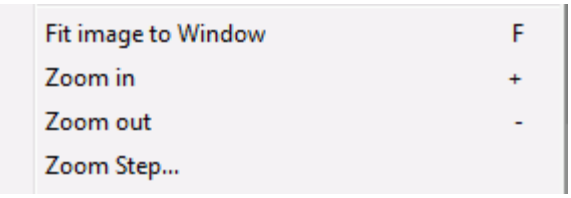
Zooming and scrolling images

Zooming and scrolling options offer the user to better see the image details before editing the images.

Zoom

To zoom an image, click on the **Zoom** button  , position your cursor on the image zone to be magnified and keep your mouse pressed while moving your cursor within the zone.

Additional zoom options are available from the context menu (right-click):



Fit image to Window: to make the image fit the viewer window.

Zoom in: to magnify the image.

Zoom out: to diminish the image size.

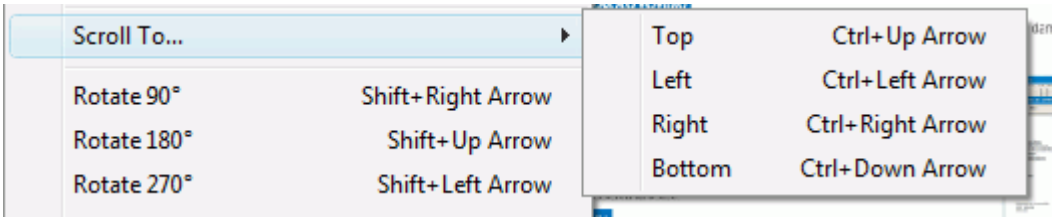
Zoom Step: to determine the zoom step percentage.

Scroll

Once you have magnified the images, you can also scroll them.

To scroll an image, click the **Scroll** button , position your cursor on the image to be scrolled and keep your mouse pressed while moving your cursor.

Additional scroll options are available from the context menu (right-click).



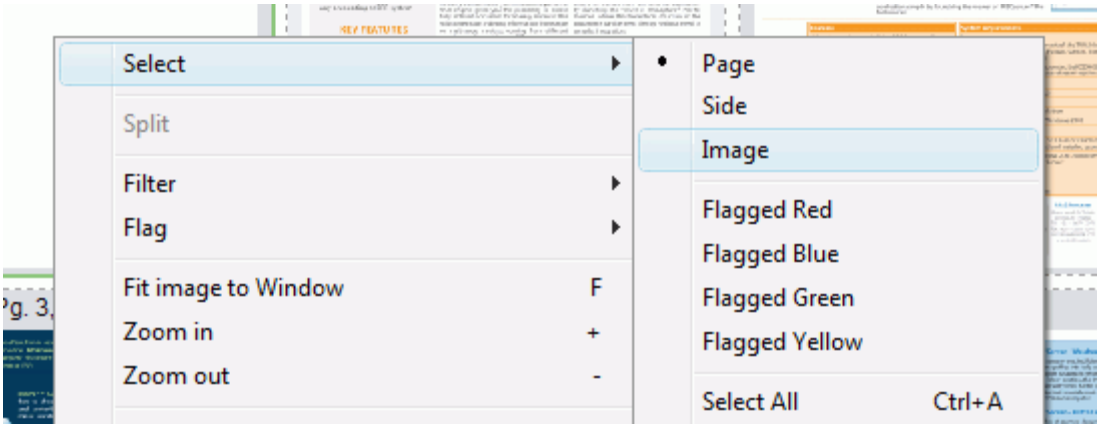
Selecting and filtering images

Before you carry out post-scanning operations on the images, you can select or filter them in the viewer or in the **Batches** pane by using the and buttons or the context menu (right-click in the viewer).

Image selection

To set the image selection:

- Access the context menu from the viewer and select the required option.



Page: to make the software select one page at a time.

Side: to make the software select one side of a page at a time. If you have scanned the front and the rear sides of a page, both in color and black&white, the front (or rear) sides will be selected.

Image: to make the software select one image at a time.

Flagged: to make the software select only the flagged images.

Select All: to select all the images.

Invert Selection: to invert the last selection, i.e. select the images that were last unselected.

To apply the image selection:

- Click the **Select** button  from the **Image** bar, then get to the required, pages/images in the viewer.

Image filtering

You can apply to the viewer the image filtering that has been set for a given workspace (the available workspaces are created and customized by the system administrator. See: Software options, Workspaces).

To activate the image filtering:

- Click the **Filter** button  from the **Image** bar or select **Filter**, **Advanced** from the context menu. The viewer automatically filters the images.

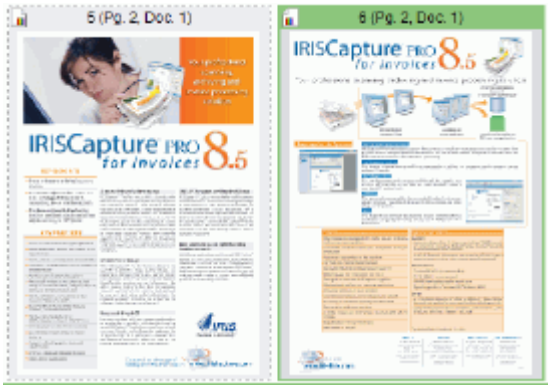
Rotating and flipping images

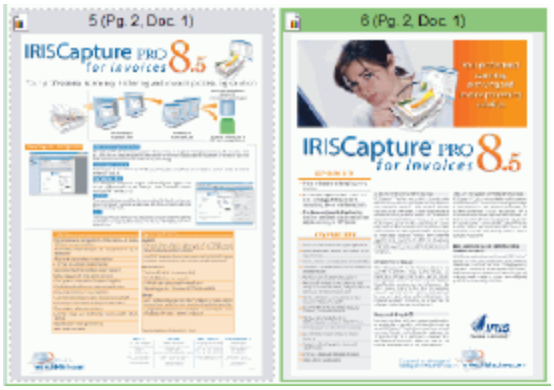
To rotate images, select the images to be rotated in the viewer, then click on the buttons **Rotate 90°**  , **Rotate 180°**  and **Rotate 270°**  from the image toolbar, or select the required rotation option from the context menu.

Flip Page

You can also flip pages, i.e.: invert the front and the rear sides of a page.

Select **Flip Page** from the context menu.





Erasing image zones

You can select an image zone and erase it from the image.

To erase an image zone:

- Select the image from which you want to erase a zone.
- Click on the **Region** button on the **Image** toolbar.
- Draw a rectangle around the zone to be erased, then click on **Erase**.

Cropping images

You can select an image zone, then keep it while cropping the rest of the image.

To crop an image:

- Select the image to be cropped.
- Click on the **Region** button on the **Image** toolbar.
- Draw a rectangle on the image to determine where the image must be cropped, then click on **Crop**.
  Only the zone defined by the rectangle remains in the image.

Adjusting images

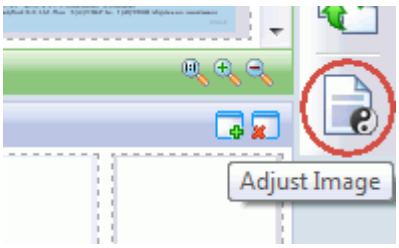
Once your documents have been scanned, you can still apply some adjustments on the scanned images (contrast, binarization, deskew, despeckle, black border removal, etc.) thanks to the **Image Processing** module.

Caution:
Remember that any parameter set in the **Image Processing** module will remain activated until you next change it. It will thus automatically apply all the images being scanned at the next scanning process.

Tip:
You can create several image adjustment models and save them, then later activate them.

To perform image adjustments:

- From the application main viewer, select the image(s) on which you want to apply adjustments, then click the **Adjust Image** button at the bottom right of the viewer:



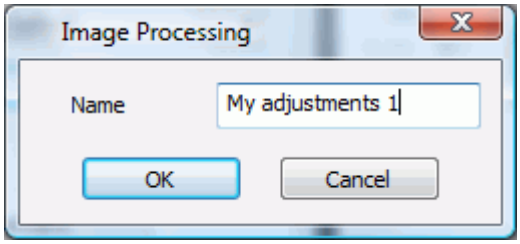
The **Image Processing** window pops up with a preview pane on the right in which you can view the first image of your selection. Two versions of the image are displayed: a small one and a large one. The small one corresponds to the selected source image, the large one dynamically shows the result of the processing activated in the left part of the window.

- In the left part of the **Image Processing** window, define your adjustments. Proceed exactly the same way as for the image processing options defined at project level. See: Project Setup, Scanning, Image Processing, Defining image processing operations.
- Once you're happy with your adjustments, click **Apply** to apply the defined image adjustments on the selected images.

To save a specific image adjustment model:

- In the **Image Processing** window, **General** tab, click **Save As**.

- Give your model a name in the **Name** field and click **OK** to confirm.



(RE)ORGANIZING IMAGES

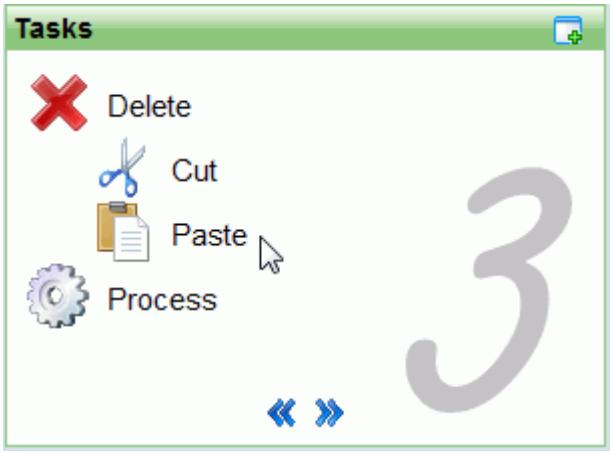
(Re)organizing images

The scanned images can be easily (re)organized from the **Batches** pane. Drag&Drop operations can also be carried out in the viewer.

Tip:
Use the **Collapse** and **Expand** options from the **Batches** pane's context menu to view the contents of your document hierarchical structure.

You can:
- delete objects
- rename objects
- merge objects
- Cut/Copy&Paste objects
- Drag&Drop objects

Some operations can be directly launched from the main toolbar or from the **Tasks** pane.

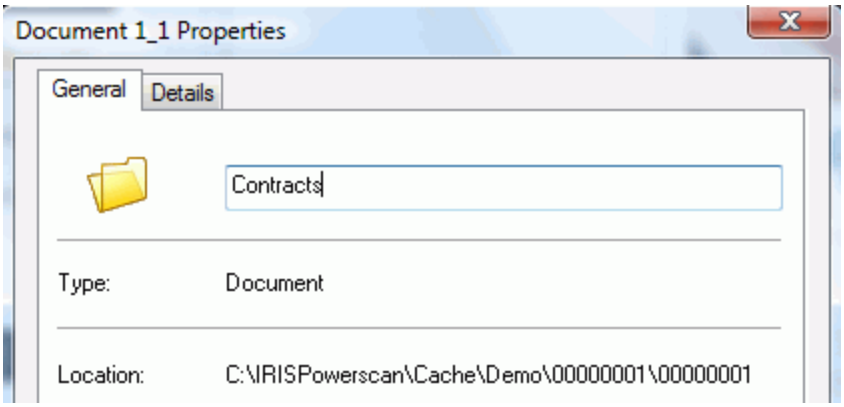


To delete objects:

- Select the object(s) to be deleted in the **Batches** pane or in the viewer. The objects of the 3 hierarchical levels can be deleted: batch, document, page.
- Click on the **Delete** button on the main toolbar, or on **Delete** in the **Tasks** pane.

To rename objects (applies to batches and documents):

- Select the object to be renamed in the **Batches** pane.
- Right-click to get access to the **Properties** window.
- Modify the name in the **Properties** window.



Reordering images

You can reorder the scanned images by using the **Cut&Paste**, **Copy&Paste**, and **Drag&Drop** features of IRISPowerscan.

To perform a Cut&Paste:

- Select the object to be cut in the **Batches** pane.
- Click on **Cut** on the main toolbar or in the **Tasks** pane. The cut object becomes grayed out.
- Locate your cursor at the place you want to insert the object and click on **Paste** on the main toolbar or in the **Tasks** pane.

To perform a Copy&Paste:

- Select the object to be copied in the **Batches** pane.
- Click on **Copy** on the main toolbar or in the **Tasks** pane, then position your cursor at the place you want to copy the object and click on **Paste** on the main toolbar or in the **Tasks** pane.

To perform a Drag&Drop:

- Select the object to be dragged in the **Batches** pane or in the viewer.
- Drag it to the required position.
  The object will be inserted just *before* the object towards which it is being dragged.

Splitting and merging

You can split one object into different objects, or on the conversely, merge various objects and make it one object.

To split objects:

- Select to object to be split in the **Batches** pane.
- Select **Split** from the context menu (right-click), or click on **Split**  on the main toolbar. The software creates a new object, gives it a number, and introduces the required objects.

To merge objects:

- Select the object to be merged with another one in the **Batches** window.
- Select **Merge** from the context menu (right-click), or click on **Merge**  on the main toolbar, then select **Previous** or **Next** according to what needs to be merged. The software merges the two objects and gives a new number to the object.

CHAPTER 9
OUTPUT PROCESSING

OUTPUT PROCESSING

The output processing enables to convert or export the scanned images according to the settings introduced at project setup level (see full User Guide: Project Setup, Processing, Processing options).

This processing can take place either on one batch - or on several batches of documents at a time - once all indexing fields are valid for the application.

> **Tip**:
> If the **Automatic processing** option has been selected in the **Project Setup**, or if you work with a project that is set with the automatic processing, you will be automatically be prompted to launch the processing when needed.

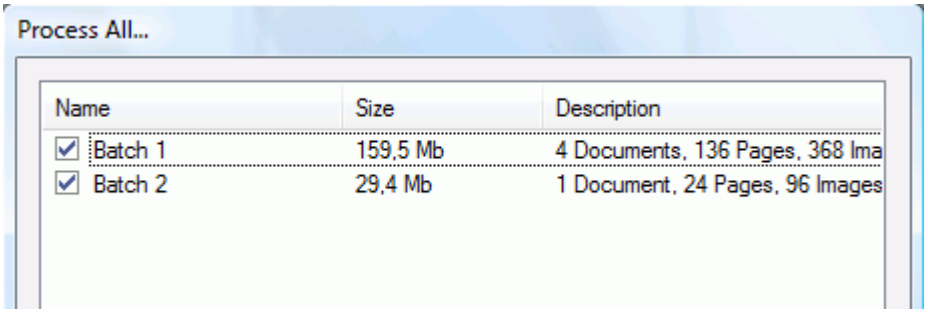
To launch the output processing on one batch:

- Click the **Process** button  from the main toolbar or from the **Tasks** pane, or simply click **P**, or from the **Edit** menu, select **Process**.
- Confirm in the **Process** dialog box.

To launch the output processing on several batches:

- Click the **Process All** button  from the main toolbar, or from the **Edit** menu, select **Process All**.

- Confirm the batches to be processed in the **Process All** dialog box and click **OK** to confirm.



INDEX