

OpenText™ Intelligent Capture

ScanPlus Operator Guide

This guide describes how to use the ScanPlus module in production to create batches and scan or import new documents.

ECPCORE220300-USC-EN-01

**OpenText™ Intelligent Capture
ScanPlus Operator Guide**
ECPCORE220300-USC-EN-01
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Chapter 1

Production

After the module has been set up, tested, and placed in a production environment, operators and administrators will run the module in production.

For information related to common production tasks such as logging in to the module to run it for production and using common access keys and shortcuts, see *OpenText Intelligent Capture - Common Production Tasks Guide (ECPCORE-UMD)*.

1.1 Changing the Production Window Layout

To change the production window layout of the current batch, operators can:

- Right-click any of the panels except the **File View** panel to hide or display panels or reset the default layout. (Right-clicking the **File View** panel displays the **File View** context menu)
- Press **CTRL+TAB** to move from panel to panel in the production window.

1.1.1 Undocking Windows in the Production Window Layout

If your administrator has enabled the undocking capability in ScanPlus, you can undock the following windows and tabbed panels in ScanPlus:

- **File View** panel
- Group of tabbed panels which include:
 - **View Settings** tab
 - **Scan Settings** tab
 - **Batch Summary** tab
 - **Indexing** tab

To undock the File View window:

- Select the title bar by mouse, drag, and then drop the panel where you want to position it. To return the panel to its original position, double click the title bar.

To undock any tabbed pane:

- Choose one of the following undocking options:
 - Drag the individual tab and drop it in its required position.
 - Drag the title bar of the group of tabbed panels. With this method, all tabbed panels become floating and you can move the tabbed panels as a collection. Each separate tab can then be moved by dragging the tab.



Note: Occasionally, the individual tab retains the name that was displayed in the caption of the group of tabbed panels instead of the name of the individual tab.

1.2 Scanning Pages

ScanPlus enables control of basic scanning operations through options in its control panel.

To scan pages:

1. Start the ScanPlus module for production.
2. Select **Create new batch** to create a new batch or **Open saved batch** to open an existing batch to scan or import pages.
3. If creating a new batch, select a process for the new batch from the process scroll list or search for a process using the **Search** field. If you are using the **Search** field, the ScanPlus process scroll list will display the processes that match the text typed into the field.

After selecting the process, provide the following information:

1. – a name for the new batch. Do not use the < character in the batch name. Administrators cannot search for batches in Intelligent Capture Administrator if the batch name contains the < character
2. – a priority for the batch (low, normal, high or default priority)
3. – a description for the batch



Note: To choose whether to use this description for the next batch, select **Reuse description for the next batch**.

Click the **Create** button when finished to create the new batch.

4. If selecting an existing batch, select the batch from the **Pick a batch from the list** list, or enter the batch manually in the field at the bottom of the **Start by selecting a batch** window.
5. Place pages into your scanner. Consult your scanner's documentation for instructions on how to load pages. If you are opening an existing batch, click the thumbnail image in the **Tree** pane after which you want the newly-scanned pages to be inserted.
6. In the navigation panel of the ScanPlus production window, select **Scan Pages**. Your scanner will begin scanning and the new pages will appear in the **Tree** pane. During this time, a small **Scanning** progress window opens showing the number of pages that have been scanned. If you want to cancel scanning, select **Stop Scanning** in the **Scanning** progress window.

When scanning pages in production mode with a MultiStream scanner, note that the module only displays thumbnails of the first image stream. More

exactly, ScanPlus displays images mapped to the OutputImage IA value, and if a second stream is mapped to OutputImage, ScanPlus shows the second stream. The control panel buttons change to a **Stop Scanning** button and your scanner scans hardcopy pages until the document feeder is empty.

When your scanner has an automatic document feeder and flatbed combination, selecting **Scan** causes the scanner to attempt scanning from the feeder. If the feeder is empty, it scans from the flatbed. If your scanner has a flatbed only (no automatic document feeder), use the ScanPlus **Flatbed scanning mode**. ScanPlus will close the progress window automatically if the scanner source is flatbed.



Note: With Kodak i260 scanners, if a document is in the flatbed and the automatic document feeder is empty, selecting **Scan** results in an automatic document feeder not ready message. Select **Preview Pages** to scan one page at a time from the flatbed.

7. Select **Stop Scanning** to stop scanning. When the scanner's document feeder is empty, or when you select **Stop Scanning**, the ScanPlus module prompts you to continue scanning or finish scanning.



Note: With Eastman Kodak Digital Science 3590C scanners, selecting **Continue Scanning** after using the **Stop Scanning** button in the ScanPlus module results in an error message from the scanner driver. You can safely dismiss this error and continue scanning.

8. To continue scanning, place another set of pages on the scanner's document feeder and select **Continue Scanning**. To finish the scanning process, select **Finish Scanning**.
9. When you have finished scanning pages into the batch, select **Finish Batch**.
10. In the **Finish Batch** window, select one of the following **Lock options**:
 - **Remove all locks to allow other modules to accept tasks from this batch:** Removes all the locks from a node in a batch when the batch is closed.
 - **Leave locks:** Retains the locked nodes in a batch. When ScanPlus processes a batch, it locks batch nodes in accordance to the trigger level. If this option is selected and the user closes the batch without removing the locks, the server locks the nodes and does not route the batch to the next module in the process for further processing.

Click **Go to Next Batch** (available if the batch has locks and ScanPlus is in **Run All Batches** mode) or **Close the batch** to finish processing the batch.

If the batch does not have locks and ScanPlus is in **Run All Batches** mode, click **Yes** to close the batch.



Note: A page is defined as a single-sided image, which is scanned or imported into an Intelligent Capture Server by modules such as Scan, ScanPlus, Standard Import, Web Service Input, and Ricoh GlobalScan Plug-in. For every page

scanned or imported in simplex mode, one page is counted. For every page scanned or imported in duplex mode, two pages are counted. Each single-sided page is counted once when it enters the system.

1.2.1 Scanning Large Images

To optimize the environment for scanning or importing large images (over 100 *MB*) in ScanPlus, and to prevent potential problems, such as an out of memory issue, try one of the following options:

- Use the **Compression** settings specified in the **Image Output** window to have ScanPlus save scanned images with compression.
- If changing the compression does not help, or if you do not want to use compression, the `FileCacheSize` and `MemoryEstimationFactor` parameters can be edited in the `settings.ini` file.
 - First, try setting `FileCacheSize=1`.
 - If this does not help, set `FileCacheSize=1` and `MemoryEstimationFactor` to more than 0.4.
 - If this does not help, set `FileCacheSize=1` and `MemoryEstimationFactor=1.0`.
 - If this does not help, set `NetBufferSizeMB` to a value that is appropriate for the current scanner hardware and `MemoryEstimationFactor=1.0`. The `NetBufferSizeMB` indicates the network buffer size. By default this value is set to 100 MB.

If large images can be scanned or imported without any problems, there is no need to change the `FileCacheSize` and `MemoryEstimationFactor` parameters in the `settings.ini` file.

More information on changing parameters in the `settings.ini` file is provided in the *Client Configuration Settings* topic in the *Intelligent Capture Guide*.

1.3 Defining ScanPlus Settings During Production

ScanPlus enables operators to modify some general batch settings, including scanner or view settings, during production. These configuration changes can be made any time after a batch has been created or opened.



Note: If changes are made, only the subsequently scanned pages from that batch display the new settings. Previously scanned pages and pages from other batches are not affected.

1.3.1 Defining General Settings

The general settings for ScanPlus in production mode provide options for changing or modifying scanner settings, batch settings (such as separation or tree levels) and other miscellaneous user settings.

1.3.1.1 Selecting or Modifying Scanner Settings

Before the ScanPlus process starts, a scan configuration must be selected from a list of defined configurations. When the operator opens or creates a batch with a default configuration, ScanPlus automatically selects this configuration. If a default configuration is not specified, the operator should manually select a scanner and a scan configuration.



Note: The last used scanner driver and the last used scanner configuration is available to all operators using the same workstation.

1.3.1.1.1 Selecting the Scanner in Production Mode

If the scanner that was selected during setup is unavailable, or if the ScanPlus operator needs to change the existing scanner selected for production, the ScanPlus operator can specify a new scanner.



Note: The last used scanner driver and the last used scanner configuration is available to all operators using the same workstation.

To select the scanner driver:

1. From the ScanPlus production window, select **Scanner Settings**.
2. Click **Select/Modify scanner settings** in the **Scanner Driver** area. (The scanner driver for the scanner connected to the ScanPlus workstation is automatically loaded.)
3. In the **Scanner Selection** window, select the scanner from the available scanner drivers list, then click **Select** to close the window. The selected scanner displays in the **Current Scanner** field.



Note: When ScanPlus cannot find the scanner when opening the **Scanner Selection** window, the following message displays: Can't locate SCSI device; check cable and power.

If the power to the scanner was switched off, the operator may need to reboot the computer running ScanPlus before ScanPlus detects the scanner. If **None (No Scanner)** is selected, the **Scan Pages** and **Preview Pages** buttons in ScanPlus are disabled during production, and the operator cannot perform these functions. After choosing a scanner, the operator must configure the ScanPlus step of each process intended for use with that scanner to establish default settings. If planning to reprocess or continue processing an existing batch, the operator must reconfigure its ScanPlus step to use the proper settings for the new scanner.

1.3.1.2 Creating a New Scanner Configuration

In production mode, ScanPlus can create and assign a scanner configuration profile that will be associated with a particular scanner. Scanner configurations cannot be shared between ScanPlus and RescanPlus. The configuration defines the scanner settings that will be used by the selected scanner for processing batches. Multiple configurations can be created for one scanner. If ScanPlus operators need to change the existing scanner configuration selected for production, they can specify a new scanner configuration, or edit and delete an existing configuration.



Note: Configuration names are case-sensitive and names cannot be shared between configurations.

To set up a new scanner configuration:

1. From the **ScanPlus Setup** window, select **Scan**.
2. Select **Change selected scanner** to specify the scanner to which the configuration will be assigned.
3. Select **Create** to display the **Create Scanner Configuration** window.
4. Type a **Configuration Name** and **Description** in the appropriate fields for the scanner driver configuration, then click **OK**.
5. The newly created configuration name appears in the **Available Configurations** list box. Select **Edit** to change the configuration name or description, or click **Delete** to remove the configuration name from the list box.
6. Select the **Display configurations for the current scanner only** checkbox to show only the configurations associated with the currently selected scanner.
7. Select **OK** to save the changes and close the **Scanner** window.

1.3.1.2.1 Updating Scanner Configuration Profiles

Scanner configurations are module-based. This means that the ScanPlus and RescanPlus modules have independent scanner configurations. ScanPlus scanner configurations are centrally stored and shared among all ScanPlus steps in all processes and batches. Therefore, all ScanPlus scanner configurations are available in all ScanPlus steps in all processes and batches across the system. Similarly, RescanPlus scanner configurations are similarly stored and shared (but are maintained independently from ScanPlus scanner configurations).



Note: The last used scanner driver and the last used scanner configuration is available to all operators using the same workstation.

Changes to ScanPlus scanner configuration can be done in the following locations:

- **Quick Panel/Scanner Settings**
- **Select/Modify Scanner Settings** window

- **Set Up Step Settings > Scanner** panel

The scope and priority of changes made in **Quick Panel/Scanner Settings** and **Select/Modify Scanner Settings** differ in scope and priority from changes made in the **Set Up Step Settings > Scanner** panel.

Changes made in **Quick Panel/Scanner Settings** or **Select/Modify Scanner Settings** affect only the current ScanPlus session. These changes are lost when ScanPlus is closed or when the current batch is configured to use another scanner profile. These changes do not affect other ScanPlus instances or scanner configuration profiles.

Changes to scanner settings that are made in the **Set Up Step Settings > Scanner** panel are different because they affect all users. These changes are seen by all ScanPlus modules.

For example, if Module 1 is using a scanner configuration that is changed system-wide by Module 2, Module 1 does not see these changes until it restarts or reloads the scanner configuration. If Module 1 is using a scanner configuration profile and changes it through the **Set Up Step Settings > Scanner** panel, these changes take effect immediately for Module 1, overriding any changes made in **Quick Panel/Scanner Settings** and **Select/Modify Scanner Settings**.

If the operator cancels changes from **Quick Panel/Scanner Settings** or **Select/Modify Scanner Settings**, all changes are discarded. System-wide stored scanner configuration remains unchanged and settings previously made in **Quick Panel/Scanner Settings** or **Select/Modify Scanner Settings** remain in effect.


For example, if an operator creates a batch from process P1 and then changes the scanner mode from **Automatic** to **Duplex** using **Quick Panel/Scanner Settings**, the scanner uses **Duplex** mode for that batch. When the operator creates another batch from process P1, the scanner continues using **Duplex** mode. Now if the operator creates a batch from a process that uses a different scanner configuration profile, and then creates another batch from process P1, the scanner reverts to using **Automatic** mode because the changes previously made in **Quick Panel/Scanner Settings** were lost when the batch was closed.

Scan Settings Quick Panel

The **Scan Settings Quick Panel** in the ScanPlus production window contains the following controls that enable the user to change scanner settings:

Table 1-1: Scan Settings Quick Panel Menu

Element	Description
Scan Mode	Specifies the scanning source, for example, Auto , Flatbed or Feeder . Choices depend on the capabilities of the selected scanner.
Settings for	Specifies the camera (front/back) to use for scanning the image.

Element	Description
Apply to all streams	Applies scanner settings to all streams.
Resolution	Selects the scanning resolution in dots per inch. Choices depend on the capabilities of the selected scanner.
Brightness	Adjusts the display brightness of the image in the Image pane. Move the slider to the right to increase the brightness. For binary images, this control only affects appearance when the image is displayed smaller than actual size. For grayscale and color images, this control affects the brightness at any display size.
Contrast	Adjusts the display contrast of the image in the Image pane. Move the slider to the right to increase the contrast. For binary images, this control only affects appearance when the image is displayed smaller than actual size. For grayscale and color images, this control affects the contrast at any display size.
Kodak Settings	Available with Kodak model scanners only.
Imprinter checkbox	Enables the scanner’s imprinter feature. Available only if the selected scanner has an imprinter function.
ISIS Settings – Configure Driver button	Displays a window to configure the scanner’s driver default paper size settings.
Revert	<p>Dismisses the changes made during current session. If this button is clicked, ScanPlus reloads the scanner configuration from the server and applies it for scanner.</p> <p> Note: Reloading scanner configuration is not applied when a new batch is created automatically during scanning. Additionally, this feature does not impact the scanner configuration counters persistent through all batches such as the Kodak Image Address counter.</p>

Select/Modify Scanner Settings

The options available from the **Select/Modify scanner settings** window are:

Table 1-2: Select/Modify Scanner Settings Options

Element	Description
Scanner Driver	Displays information about the currently-selected scanner driver, if any.
Change selected scanner	Specifies the scanner that will be used for ScanPlus . The selected scanner is displayed in the Current Scanner field.
Current Configuration	Displays the scanner configuration selected for the scanner. The Modify configuration link launches a window for modifying the selected scanner configuration.
Available Configurations	Displays the available scanner configurations.
Display configurations for the current scanner only	Displays only the configurations associated with the currently selected scanner.
Set as current button	Selects the scanner configuration highlighted in the Available Configurations field as the current configuration.
Back button	Returns to the previous window.

1.3.1.3 Specifying Scanner Settings

Once operators have selected a scanner to use with ScanPlus and created or selected a scanner configuration, they can then set up the scanner settings by clicking **Modify Scanner Settings** on the **Scanner Drivers and Configurations** pane.

To specify scanner settings:

1. From the **ScanPlus Setup** window, select **Scan**.
2. Highlight a scanner configuration from the list of available configurations, then select **Modify Scanner Settings** to display the **Scanner settings** window.
3. In the **Scanner Driver Options** area, select the **Page Size** from the list box.
4. (Optional) Select the **Enable imprinter** checkbox to enable the scanner's imprinter feature.



Note: If the scanner does not have an imprinter function, the **Enable imprinter** checkbox will be unavailable.

5. Select **Page Bounds** to set up the boundaries of the pages to be scanned.
6. Select **Preview** to set up the output pages from the scanner. Select from one of the following options:
 - **Scan Pages:** Scans all the pages in the automatic document feeder (or until **Stop Scanning** is selected).

- **Preview Page:** Scans the first side of the first page in the scanner feeder. Or, if no pages are in the feeder, it scans the page in the flatbed.



Note: The preview mode in setup mode is intended for testing purposes only. Once the operator has optimized the settings in preview mode, the operator must also adjust the standard configuration accordingly to save changes.

7. Select **Advanced Settings** to adjust additional settings for the scanner. For more information about the windows and settings that are accessed through these links, see the scanner driver's documentation.
8. In the **Scanning Settings** area, select the scan mode:
 - **Automatic:** Scans from the feeder if pages are present; otherwise, scans from the flatbed.
 - **Simplex:** Scans one side of a page.
 - **Duplex:** Scans both sides of a page, if RescanPlus uses a duplex scanner.
 - **Back side only:** Scans the back side of each page in the feeder.
 - **Flatbed:** Scans from the flatbed only, regardless of whether pages are present in the feeder.



Note: A page is defined as a single-sided image, which is scanned or imported into an Intelligent Capture Server by modules such as Scan, ScanPlus, Standard Import, Web Service Input, and Ricoh GlobalScan Plug-in. For every page scanned or imported in simplex mode, one page is counted. For every page scanned or imported in duplex mode, two pages are counted. Each single-sided page is counted once when it enters the system.

9. If using duplex or MultiStream scanning, use the **Page Side/Stream Settings** area and corresponding setup options to configure settings for different page sides and image streams.
10. Select **OK** to save the scanner settings and close the **Scanner Settings** window.
11. When returning to the **Scanner Drivers and Configurations** window, select the **Display configurations for current scanner only** checkbox to display the configurations that apply only to the scanner that ScanPlus is currently connected to.
12. Select **OK** to save the changes and close the **Scanner** window.

1.3.1.4 Changing Batch Step Settings

Operators can change batch level settings, such as separation or tree levels, while running ScanPlus in production mode.



Note: If changes are made, only the subsequently scanned pages from that batch display the new settings. Previously scanned pages and pages from other batches are not affected

To change batch settings in production mode:

1. From the ScanPlus window in production mode, select a batch by clicking **Open saved batch**. Operators can use this option to open an existing batch to scan or import pages, delete pages, move pages and so on.
2. In the **Start by selecting a batch** window, select a batch from the list or type a batch name manually, then click **Open**.
3. In the ScanPlus window, select **Settings**.
4. From the **Related Tasks** list in **General settings** area, select **Setup step settings** to display the **ScanPlus Setup** window for the batch.
5. Set up ScanPlus to change the ScanPlus configuration. See the *ScanPlus Guide* for information on setting up ScanPlus.

1.3.1.5 Applying Miscellaneous Settings in Production Mode

The **Miscellaneous** panel in production mode enables the ScanPlus operator to enable various options for the batch scanning process.

To use miscellaneous settings in production mode:

1. From the ScanPlus window in production mode, select **Settings**.
2. In the **Settings** pane, select **Miscellaneous settings**.
3. In the **Miscellaneous Settings** panel, select the checkboxes for the options needed by the operator:
 - **Enable refreshing rate during scanning/importing:** Selecting this checkbox allows ScanPlus to refresh the file view while scanning pages or importing images. When this option is selected, specify a number and the pages or seconds in the **Refresh file view every N pages/seconds** field.
 - **Automatically print the scan report when the application exits:** Selecting this checkbox allows ScanPlus to automatically generate a printed batch status report when the operator exits the application. When this option is selected, the **Include information about all batches in the report** checkbox is enabled by default. This allows the printed batch status report to include information about all batches; otherwise, the report will only include information on batches that were scanned successfully.

- **Fetch existing batches list on the new batch screen:** Selecting this checkbox enables ScanPlus to automatically complete a batch name (based on the existing list of batches) when the operator starts typing the batch name.

1.3.2 Defining View Settings

The view settings for ScanPlus in production mode provide options for changing or modifying file view and tree view settings.

1.3.2.1 Changing File View Default Settings

This section describes the default file view settings which are applied by default to any new image that is imported or scanned or to the images in a reopened batch.

In production mode, ScanPlus enables the operator to customize the default file view settings, such as orientation or brightness/contrast, orientation, smoothing, and zooming. These settings are stored for each user on the server and applied at the beginning of each user session to all images in the batch. A user can change the default settings at any time during the scanning session, but the changes will be applied for the newly scanned or imported images or after reopening the batch.

Once the default file view settings have been applied to the scanned or imported image, you can see them as the current file view settings for each currently displayed image. The current settings are shown in the **View Settings** quick panel on the left and in the **File View** panel. You can modify the current file view settings, and the changes will be applied immediately to the currently displayed image only. Also, ScanPlus supports the functionality to apply the current image view settings to all scanned or imported images in a batch.

1.3.2.1.1 Defining Scaling Settings

Scaling settings are used to fit the image within the **Image** pane.

To define scaling settings:

1. From the ScanPlus window in production mode, select **Settings**.
2. In the **Settings** pane, select **Change file view default settings**.
3. In the **Scaling** area of the **File View Settings** window, select one of the following options for fitting the image within the **Image** pane:
 - **Fit To Window:** Fits the entire image within the **Image** pane.
 - **Fit To Width:** Displays the image so that its width is that of the **Image** pane.
 - **Fit To Height:** Displays the image so that its height is that of the **Image** pane.
 - **Zoom:** Magnifies the image according to the value specified by the slider control or up/down arrows.

1.3.2.1.2 Defining Orientation Settings

Orientation settings are used to specify the image orientation within the **Image** pane.

To define orientation settings:

1. From the ScanPlus window in production mode, select **Settings**.
2. In the **Settings** pane, select **Change file view default settings**.
3. In the **Orientation** area of the **File View Settings** window, select one of the following options for orienting the image within the **Image** pane:
 - **Portrait**: Displays the image with the leading narrow edge at the top.
 - **Landscape**: Displays the image with the leading wide edge at the top.
 - **180 Degrees**: Displays the image with the trailing narrow edge at the top.
 - **270 Degrees**: Displays the image with the trailing wide edge at the top.

Use the **Replace Image w/ New Orientation** button to replace the original image on the server with the currently displayed image. This applies and saves the orientation of the displayed image to the original image on the server.



Note: If the node has several images from different streams, all the images will be rotated. The action is only available for batches with trigger level = batch (7).

1.3.2.1.3 Defining Miscellaneous File View Settings

Miscellaneous file view settings are used to change how ScanPlus displays images during production.

To change how images are displayed:

1. From the ScanPlus window in production mode, select **Settings**.
2. In the **Settings** window, select **Change file view default settings**.
3. In the **Miscellaneous** area of the **File View Settings** window, specify the options for viewing the image within the **Image**:
 - **Brightness/Contrast**: Adjusts the brightness and contrast of an image using the corresponding slider controls.
 - **Smoothing**: Displays images smaller than a 1:1 image size by representing the average density of missing pixels with a shade of gray.
 - **Invert**: Displays a negative of the image
 - **Reset to default**: Restores all default image view settings to default values.

1.3.2.2 Changing Tree View Settings

In production mode, ScanPlus enables the operator to customize the colors and fonts of the **Tree view** window. The **Sample** panel displays how the tree view window will actually appear with the selected settings.

1.3.2.2.1 Defining Tree View General Settings

The Tree view general settings enable the operator to define the general look and feel of the tree view.

To define tree view general settings:

1. From the ScanPlus window in production mode, select **Settings**.
2. In the **Settings** pane, select **Change tree view settings**.
3. In the **General** area of the **Tree View Settings** window, specify the settings for the following options:
 - **Pair fronts with backs:** Pairs the back sides of a set of pages with their front sides.
 - **Tree view background color:** Specifies the background color of the **Tree view** window using the drop-down arrow.
 - **Tree view font:** Specifies the font size and font style used the **Tree view** window.

1.3.2.2.2 Defining Tree View Level Settings

The Tree View level settings enable the operator to define the text color of the tree view levels.

To define tree view level settings:

1. From the ScanPlus window in production mode, select **Settings**.
2. In the **Settings** window, select **Change tree view settings**.
3. In the **Level** area of the **Tree View Settings** window, specify the settings for the following options:
 - **Normal level text background:** Specifies the text background color of the normal level in the **Tree view** window using the drop-down arrow.
 - **Normal level text color:** Specifies the text color of the normal level in the **Tree view** window using the drop-down arrow.
 - **Selected level text color:** Specifies the text color of the selected level in the **Tree view** window using the drop-down arrow.

1.3.2.2.3 Defining Thumbnail Settings

The **Tree View** thumbnail settings enable the operator to define the text color of thumbnails in the **Tree view** window.

To define thumbnail settings:

1. From the ScanPlus window in production mode, select **Settings**.
2. In the **Settings** window, select **Change tree view settings**.
3. In the **Thumbnail** area of the **Tree View Settings** window, specify the settings for the following options:
 - **Normal thumbnail text color:** Specifies the text color of the normal thumbnail in the **Tree view** window using the drop-down arrow.
 - **Selected thumbnail text color:** Specifies the text color of the selected thumbnail in the **Tree view** window using the drop-down arrow.

1.4 Using the Batch Summary Report

ScanPlus provides the ability to print statistical information for the current application session, for the currently open batch, or for all batches.

1.4.1 Making Reports

ScanPlus enables the operator the option to generate two types of reports – all batches from the current session, or only the current batch.

To create a report:

1. From the ScanPlus window in production mode, select **Summary**.
2. In the **Summary Report** pane, select one of the following options:
 - **All batches from current session:** Creates a report that includes information on all batches from the current ScanPlus session. Selecting the **Include detailed information in report** checkbox allows the report to include additional information about the batches, including batch name, process name, number of pages.
 - **Only current batch:** Creates a report that includes information about the current batch opened in ScanPlus.
3. Immediately after the type of report is selected, ScanPlus will automatically generate and display the report in the preview window at the bottom of the **Summary Report** window.
4. Once the report is generated, the ScanPlus operator can **preview the pages** of the report, **print the report** or **set up how the pages are viewed**.

1.4.2 Previewing Reports

The ScanPlus operator can preview the pages of a generated report in the preview window using the **Previous page** and **Next page** buttons to move to from one page to the next, or by using the **number** list box to jump to a specific page in the report.

If the user selects to include information only about the opened batch (**Only current batch** setting), the report displays the following:

Table 1-3: Information Displayed for Only Current Batch Setting

Element	Description
User account	The account name of the user who started the application.
Workstation	The name of the computer where the application is running.
Batch name	The name of the batch.
Process name	The name of the process used to create this batch.
Workflow step	The name of the workflow step.
Batch open time	Time when the batch was opened.
Number of pages	Actual number of pages or images in the batch.
Number of scanned pages	The number of the page nodes added since the batch was opened. This also includes images that had been scanned but then deleted.
Number of scanned sheets	The number of scanned sheets. When scanning in duplex mode, a sheet is two sides of a physical sheet. When scanning in simplex mode, a sheet is a single side of a physical sheet.
Number of discarded sheets	The number of sheets that have been discarded, as configured in the Event Actions configuration settings.
Number of imported files	The number of files that were imported since the batch was opened.
Expected number of pages	The expected number of pages according to the batch configuration. If this number is not configured, ScanPlus displays the - symbol.
Batch processing time	Hours and minutes passed since the batch was opened.

If the user selects to include information about all batches (**All batches from current session** setting), the report displays the following:

Table 1-4: Information Displayed for All Batches From Current Session

Element	Description
User account	The account name of the user who started the application.
Workstation	The name of the computer where the application is running.
Total processed batches	The total number of batches that was opened or created. If the batch was opened twice, it will also be counted twice.
Application start time	The time when the application was started.
Total scanned sheets	The total number of sheets scanned since the application was started.
Total discarded sheets	The total number of sheets discarded, as configured in the Event Actions configuration settings since the application was started.
Total imported files	The total number of files that have been imported since the application was started.

If the user selects to include detailed information about all batches (**Include detailed information in report** setting), the report additionally displays the following information:

Table 1-5: Information Displayed for Include Detailed Information in Report

Element	Description
Batch name	The name of the batch.
Process name	The name of the process used to create this batch.
Workflow step	The name of the workflow step.
Batch open time	Time when the batch was opened.
Number of pages	Actual number of pages in the batch.
Number of scanned pages	The number of the page nodes added since the batch was opened. This also includes images that had been scanned but then deleted.
Number of scanned sheets	The number of scanned sheets.
Number of discarded sheets	The number of sheets that have been discarded, as configured in the Event Actions configuration settings.
Number of imported files	The number of files that were imported since the batch was opened.

Element	Description
Expected number of pages	The expected number of pages according to the batch configuration. If this number is not configured, ScanPlus displays the - symbol.
Batch processing time	Hours and minutes passed since the batch was opened.

1.4.3 Printing Summary Reports

The ScanPlus operator can print a summary of the statistical information for the current application session, for the currently open batch, or for all batches.

To print a summary report:

1. From the ScanPlus window in production mode, select **Summary**.
2. Select **Print** in the **Actions** panel to print the report.



Note: To enable automatic printing of the report when the user exits the ScanPlus application, select the **Automatically print the scan report when the application exits** checkbox.

1.4.4 Configuring Page Setup for Reports

The ScanPlus operator can configure how the summary report pages are displayed in the preview window.

To configure page setup for a report:

1. From the ScanPlus window in production mode, select **Summary**.
2. Select **Page Setup** in the **Actions** panel.
3. In the **Page Setup** window, specify the paper size and source, orientation and margins for the pages of the summary report.
4. Select **OK** to save the changes and return to the **Summary Report** window. The page setup options defined by the operator are automatically applied to the summary report displayed in the preview window.

1.5 Previewing Pages

ScanPlus enables the operator to preview pages before adding them to a batch or local file. This feature gives the operator the opportunity to optimize scanner settings before and during scanning, as well as to create sample images to use when setting up index zones. You must select a scanner to use this feature.



Note: Preview options only apply to batches.

A page is defined as a single-sided image, which is scanned or imported into an Intelligent Capture Server by modules such as Scan, ScanPlus, Standard Import, Web Service Input, and Ricoh GlobalScan Plug-in. For every page scanned or imported in simplex mode, one page is counted. For every page scanned or imported in duplex mode, two pages are counted. Each single-sided page is counted once when it enters the system.

To preview pages:

1. Create or open the batch or local file.
2. Place the first page to be previewed in the scanner's document feeder or on its flatbed. Select **Preview Pages**.
3. ScanPlus displays the page in its **Image** pane and offers the following set of options:
 - **Accept Page / Continue:** ScanPlus adds the page to the open batch or file and scans the next page.
 - **Rescan Page:** ScanPlus rejects the page and scans in the next. To adjust scanner settings and then rescan a page, make sure the same page is reloaded before selecting this button.
 - **Accept Page / Quit:** ScanPlus adds the page to the open batch or file and then returns to the standard control buttons.
 - **Reject Page / Quit:** ScanPlus does not add the page to the open batch or file and then returns to the standard control buttons.
4. When the operator is finished previewing pages, select the appropriate quit option. ScanPlus returns to the standard control buttons: **Finish Batch**, **Scan Pages**, **Preview Pages**, and **Import Pages**.






Note: When previewing pages in production mode with a MultiStream scanner, the module only displays thumbnails of the first image stream.

1.6 Importing Page Images or Files


The following image and document file formats can be imported into a new or existing batch during processing:

Table 1-6: Image and Document File Formats

Image Format Formats	Document File Formats
<ul style="list-style-type: none"> • <i>BMP</i> • <i>CAL</i> • <i>DCX</i> • <i>GIF</i> • <i>JBG</i> • <i>JP2</i> • <i>JPEG</i> • <i>MDA</i> • <i>PCX</i> • <i>PDA</i> • <i>PDF</i> <p> Note: If the Process image file checkbox is selected in the Image Processing section of the Import configuration window, PDF files can be considered as non-graphical or graphical file format.</p> <ul style="list-style-type: none"> • <i>PNG</i> • <i>TIF</i> <p> Note: Some simple BMP files (including 4-bit Gray <i>RLE</i> Compression and 8-bit Palette RLE Compression) created by Windows Paintbrush may appear corrupted when imported using ScanPlus. Using an image width that is a multiple of 16 will likely fix the problem.</p>	<ul style="list-style-type: none"> • <i>DOC</i> • <i>HTM</i> • <i>HTML</i> • <i>PDF</i> • <i>RTF</i> • <i>TXT (ANSI, UTF)</i> • <i>XLS</i> • <i>XML</i> <p> Note: Graphical files are recognized at the file format level. This means that ScanPlus does not use file extensions and uses PixTools to read a file extension. For document file formats, ScanPlus checks the file extension and tries to represent the file in accordance with the extension format.</p>


To import images or files from a local or network drive:

1. From the ScanPlus production window, create a batch or open an existing batch.
2. Select **Import Pages** from the **Actions** panel.
3. Navigate to the batch in the directory window, select one or more files to import using the **Add** button, then click **Open**.

 **Note:** When selecting several files to import, the last file selected in the set is the first file that is imported. Therefore, to import files in sequential order, select the files individually from last to first.

Remove files by selecting them and selecting **Remove** or **Remove All**. ScanPlus shows each imported image in the **Tree View** window.

4. Select **Finish Batch** when finished.

 **Note:** Adobe® Acrobat® Reader® is required to view PDFs in the image view pane. Microsoft Excel is required to view XLS files in the image view pane.

1.7 Indexing while Scanning or Importing Documents

If defining indexing fields during setup, ScanPlus prompts operators to type index information during production. ScanPlus places the cursor in the first indexing field defined for a page and highlights its corresponding index zone on the page image. The operator types the information highlighted by the zone in the indexing fields listed on the **Index** window of the **ScanPlus Setup** window.

To type index information:

1. Create or open the batch that has indexing fields.
2. From the ScanPlus window, select **Index**.
3. Start scanning or importing pages. When ScanPlus acquires the first page, it displays the predefined indexing fields on the **Index** tab. ScanPlus places focus in the first field and highlights its corresponding zone on the image. If the **Zoom to zone** feature was selected during setup, then the index zone is zoomed during production.
4. Type the index information highlighted by the zone into the corresponding indexing field.
5. Press **TAB** to move to the next indexing field. Repeat steps 4 and 5 until all fields have been populated.
6. Click **Save** or press **ENTER** to advance to the next page. To retype information after moving to another page, simply select the appropriate thumbnail image. ScanPlus displays the page's indexing fields. Place the cursor in the field and retype the information.
7. Close the batch when finished.

1.8 Manipulating and Viewing Tree Nodes

During production, ScanPlus displays a control panel on the left, the **Tree View** panel in the middle, and the **File View** panel on the right. In the **Tree View** panel, ScanPlus displays a thumbnail image for each batch page and a folder icon for each higher level node in the tree. ScanPlus also displays an enlarged view of the currently selected thumbnail in the **File View** panel. If you select a higher level node, the **File View** panel shows an enlarged image of the first page node under that higher level node.



Caution

Do not manipulate nodes in the tree without first understanding the consequences. Inserting, deleting, or rearranging nodes can cause stuck batches, lost pages, error messages being displayed, and in some cases corruption of the entire batch. Be sure your administrator has instructed you on the proper procedures to follow.



While working within the **Tree View**, right-click to display the Tree View context menu. This menu enables you to jump to the first or last page of the batch, select a page by number to view (note that when using this option, pages are counted sequentially, not according to the number displayed in the tree), and insert and delete nodes.



1.8.1 Manipulating Nodes in the Tree

This table describes how to select, move, insert, delete, hide, and refresh nodes.

Table 1-7: Actions for Manipulating Nodes in the Tree

Tree Action	Description
Selecting nodes	<p>To select nodes for movement or deletion, highlight the nodes by dragging the mouse over them.</p> <p>Press CTRL while highlighting nodes to select nonconsecutive nodes within the same level. For example, if you want to select the last page in every folder, you can press CTRL and then select each of the page nodes.</p> <p>Press SHIFT to quickly extend a current selection within the same level. For example, if you want to highlight 50 page nodes, you can press SHIFT, select the first page node, and then scroll down to the 50th page node and select it. ScanPlus highlights all the nodes in between.</p> <p>You can use the SHIFT and CTRL keys for the same selection, but you cannot press them at the same time. If you select a non-highlighted node, all nodes previously selected are cleared.</p> <p>When you select a node at a level higher than 0, all page nodes under that node are highlighted. If you want to select higher level nodes in addition to their page nodes, you must begin the selection process at that higher level.</p>

Tree Action	Description
Moving nodes	<p>Select the nodes you want to move and then release the mouse. Then, grab any highlighted node and drag the selection to the node after which you want to insert it. When that node is highlighted, release the mouse. ScanPlus places the selected nodes immediately following the node to which you dragged the selection.</p> <p> Note: You can only move selected nodes among the same level. For example, if you highlight two level 1 nodes, you can only place them after another level 1 node. Because there is only one level 7 node, it cannot be moved. During scanning, the tree is locked and nodes cannot be moved. Stop scanning before moving nodes. Depending on how ScanPlus was set up, you may not be able to move nodes at certain levels.</p>
Deleting nodes	<p>Select the nodes you want to delete. Press Delete or right-click to display a menu from which you can select Delete. ScanPlus confirms the number of nodes you have selected and prompts you to verify the delete action.</p> <p> Note: You cannot restore deleted nodes. If you accidentally delete nodes, you must rescan the affected pages and create any associated higher levels using the Insert option on the Level context menu. During scanning, the tree is locked and nodes cannot be deleted. Stop scanning before deleting nodes. Depending on how ScanPlus was set up, you may not be able to delete nodes at certain levels. Attempting to delete the level 7 node does not actually delete the level 7 node. In other words, you cannot delete the batch. However, if you try to delete the level 7 node, then all the other nodes in the tree will be deleted, leaving only the level 7 node.</p>

Tree Action	Description
Inserting page nodes	<p>Click the thumbnail image after which you want to add pages and then select Scan Pages, Preview Pages, or Import Files. ScanPlus inserts the pages directly after the selected node.</p> <p>If you select a level 1 node and then select Start scanning, Preview Pages, or Import Files, ScanPlus inserts page nodes immediately before any page nodes already in the level 1 node.</p> <p>If you select a node higher than level 1 in which to add pages, ScanPlus creates a new node for each level between the selected higher level node and the page level. For example, if you want to insert pages in a level 3 node, select the level 3 node and then select the option. ScanPlus creates a new level 2 and level 1 node, and then places the new pages under the level 1 node.</p> <p> Note: Before you insert pages into a batch, you must select the Finish Scanning option. If you want to insert pages into a local file, simply select the thumbnail image after which you want to insert the new pages. When ScanPlus adds pages, it follows any defined scanner events.</p>
Inserting higher level nodes	<p>Select the node after which you want to insert the higher level node. Right-click and select the appropriate level from the Insert option.</p> <p> Note: During scanning, the tree is locked and nodes cannot be inserted. Stop scanning before inserting nodes. Depending on how ScanPlus was set up, you may not be able to insert nodes at certain levels. You cannot insert a level 7 node; in other words, you cannot split the batch.</p>
Hiding the contents of a level 1 or higher node	<p>Double-click the node. (Double-click the node again to display its contents.)</p>
Refreshing nodes in the tree	<p>Refreshing ScanPlus updates the tree so that it reflects any changes to the tree structure. This option is available within the File View panel by right-clicking and selecting Refresh from the File View context menu.</p>

1.8.2 Viewing Pages in the File View Panel

The **File View** panel displays an image of the page currently being imported or scanned. This table describes the actions you can perform in the context menu of the **File View** panel. A description of the **File View** toolbar commands is provided in “**File View Panel**” on page 32. You can customize these file view settings and the changes are applied only to the images in the currently opened batches. Settings are disabled if an image is not selected or if the selected page is not an image.



Note: XLS and DOC format files open in a separate window instead of in the **File View** panel. To view files of this format in the **File View** panel, follow the instructions described on the Microsoft website (<http://support.microsoft.com>).

Table 1-8: File View Actions Menu

Action	Instructions
Viewing a thumbnail image	Click the thumbnail image.
Refreshing the tree	Select Refresh by right-clicking from the File View panel. ScanPlus updates the tree so that it reflects any changes to the tree structure. This action guarantees that the page image displayed in the File View panel is the most current image. You can also press F5 .
Viewing the previous, next, or a specified page	Right-click from the File View panel, then select Next Page , Previous Page , or Go to Page by right-clicking from the File View panel. If you select Go to Page , you are prompted to enter a page number. Note that this number represents a page node's position within the entire batch (level 7).
Fitting the image within the File View panel	Right-click from the File View panel, then select: <ul style="list-style-type: none"> • Fit To Width: Displays the image so that its width is that of the File View panel. • Fit To Window: Displays the image so that the entire image fits within the File View panel. • Scale 1 to 1: Displays one pixel of the image for each pixel in the File View panel.

Action	Instructions
Zooming in or out and specifying a zoom factor	<p>Right-click from the File View panel, then select:</p> <ul style="list-style-type: none"> • Zoom In: Zooms in on the image by a factor of 10*. • Zoom Out: Zooms away from the image by a factor of 10*. • Change Zoom Factor: Changes the default zoom factor, which is 10. <p>This number is different if you change the zoom factor.</p>
Zooming in on a selected region	<p>Right-click and drag over the area you want to zoom in on. The File View shows only the area of the image selected by the mouse. If you want to pan outside the selected area, simultaneously press SHIFT and click until the pointer changes to a hand. Use the hand to move the image.</p>
Changing a page's orientation	<p>Right-click from the File View panel, then select Orientation. Select the page orientation from the sub-menu. Use the Replace Image w/New Orientation button to apply the currently selected orientation to the original image, and save the rotated image back to the server.</p>
Scaling to Gray	<p>Right-click from the File View panel, then select Smoothing to display images smaller than a 1:1 image size by representing the average density of missing pixels with a shade of gray.</p>
Inverting a page	<p>Right-click from the File View panel, then select Invert to display a negative of the image.</p>
Applying settings to all images in the Batch	<p>Right-click from the File View panel, then select Apply Settings To All Pages to apply image appearance, zoom, and orientation settings to all batch pages. Select Apply Settings To All Pages to apply future changes to viewing options to all loaded images. Changes you have already made are not applied.</p>
Hiding the tree	<p>Drag the window pane separator completely to the left. (When using very high-speed scanners, that is those scanning more than 100 images per minute, hiding the tree may enable ScanPlus to run faster. Note that a width of 4 thumbnails usually will allow ScanPlus to operate at scanner rated speeds.)</p>

1.8.2.1 File View Panel

The **File View** panel displays an image of the page currently being imported or scanned. If no page is currently being imported or scanned, the panel displays the image of the page that is currently selected in the **Tree** pane.



Note: If the **File View** panel is closed, right-click the panel to re-display the view.

Table 1-9: File View Panel

Element	Description
Zoom Out icon	Reduces the size of the page displayed in the Image pane.
Custom scale icon	Increases or decreases the size of the page displayed in the Image pane. Use the list box to specify the size.
Zoom In icon	Increases the size of the page displayed in the Image pane.
Fit to Window icon	Adjusts the size of the page displayed in the Image pane so that it fits entirely within the current View pane size setting, and automatically resizes as Image pane is resized.
Fit to Width icon	Adjusts the size of the page displayed in the Image pane so that it fits entirely within the width of the window.
Fit to Height icon	Adjusts the size of the page displayed in the Image pane so that it fits entirely within height of the window.
Scale 1 to 1 icon	Displays the image such that one pixel of image data is represented by one pixel in the Image pane.

Glossary

ANSI

American National Standards Institute

BMP

Bitmap file extension

CAL

U.S. Department of Defense Computer Aided Acquisition and Logistics Support format

DCX

Multipage *PCX* file extension

gif

Graphic Interchange Format

HTM

HTML file extension.

HTML

HyperText Markup Language

JBG

JBIG file extension

JP2

Joint Photographic Experts Group 2000

JPEG

Joint Photographic Experts Group

MB

megabyte

MDA

MO:DCA file extension

MO:DCA

Mixed Object:Document Content Architecture

PCX

PC Paintbrush bitmap format file extension

PDA

Calera Processed Document Architecture file extension

PDF

Portable Document Format

PNG

Portable Network Graphics

RLE

Run Length Encoding

RTF

Rich Text Format

TIF

Tagged Image File file extension

UTF

Unicode Transformation Format

XLS

Microsoft Office Excel file extension

XML

Extensible Markup Language