

## OpenText™ Intelligent Capture

### **RescanPlus Operator Guide**

This guide describes how to use the RescanPlus module in production to examine and replace pages that other modules or processes have flagged for rescanning.

ECPCORE220300-URS-EN-01

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**OpenText™ Intelligent Capture  
RescanPlus Operator Guide**  
ECPCORE220300-URS-EN-01  
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**Open Text Corporation**

275 Frank Tompa Drive, Waterloo, Ontario, Canada, N2L 0A1

Tel: +1-519-888-7111

Toll Free Canada/USA: 1-800-499-6544 International: +800-4996-5440

Fax: +1-519-888-0677

Support: <https://support.opentext.com>

For more information, visit <https://www.opentext.com>

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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 **File View**, to hide or display panels or reset the default layout. (when you right-click in the **File View** panel, the **File View** menu displays.)
- 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 RescanPlus, you can undock the following windows and tabbed panels in RescanPlus:

- **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 Understanding Running Rescan in Production Mode

RescanPlus automatically obtains the settings defined for ScanPlus. Setting up RescanPlus for production, therefore, consists of reviewing and modifying the settings in the RescanPlus setup windows. For example, you may want to clear some of the scanner event actions in the **Event Actions** window to prevent pages that are re-scanned from generating higher level nodes. The scanner configuration in the **Scanner** window must also be changed if a different scanner is used at the RescanPlus station.

### 1.2.1 Running in the Wait for Task Modes

When starting RescanPlus in production mode, the operator has the option to run batches with ready tasks using the **Only show batches with ready tasks** checkbox.

#### To receive tasks:

1. Start RescanPlus in production mode. The production window displays. The **Select batches from the list** window also displays all batches containing RescanPlus in their processes
2. Select a mode in which to receive tasks:
  - **Run All:** Select **Run All** to receive queued tasks from any open batch.
  - **Run Selected:** Select **Run Selected** to receive queued tasks from a specific batch. To only view batches that have tasks queued for the module, select the **Show only Batches with tasks** checkbox.

Select the batch and select **OK**. After selecting a processing mode, the Intelligent Capture Server sends tasks to the RescanPlus workstation as they become available. When RescanPlus receives one or more tasks, it displays the tasks within the tree for the batch. For more information on how to interpret and rescan RescanPlus tasks, see *“Rescanning Pages in a Batch” on page 8*.

3. To stop processing tasks, do one of the following:
  - If RescanPlus is in the waiting for task mode: Select **Cancel** to stop task waiting and return to main form.
  - If RescanPlus is processing the task (batch is already opened): Close batch to return to main form.

## 1.2.2 Understanding Rescanning Pages in a Batch

RescanPlus displays tasks within the context of the tree for their associated batch. RescanPlus also displays the batch's name in its title bar, so even if you run the module in the **Run All** mode, you will know which batch RescanPlus is currently processing.

When RescanPlus receives one or more tasks, it displays the tree for the associated batch and places focus on the thumbnail image corresponding to the first page marked for rescan. RescanPlus also displays the full page image in the **Image** pane. When a thumbnail image has focus, a dotted triangle displays immediately after the thumbnail. If the thumbnail is highlighted, a blinking box displays around it. RescanPlus also highlights the thumbnail image when NeedsRescan = 1, 3, 4, or 6 for a task.

RescanPlus behaves much like the ScanPlus module when pages are scanned or imported. Scanner event actions are processed using the same setup that ScanPlus uses. This means that higher level nodes can be inserted, and pages can be discarded. RescanPlus does not support automatic batch creation during scan or import.

The manner in which scanned or imported pages are added to the tree depends on several factors, such as the value of Rescan.NeedsRescan of the highlighted page, how many consecutive pages are highlighted, and what level RescanPlus is triggered at. A set of pages can be one or more consecutive pages that were marked for rescan.



**Note:** A new batch cannot be created in RescanPlus, no matter what actions or settings are indicated. RescanPlus will close the progress window automatically if the scanner source is flatbed.

### Considerations when Writing a Process with the RescanPlus Step

Prior to the RescanPlus step, you must set the RescanPlus InputImage to ScanPlus OutputImage. In the RescanPlus step, the rescanned image is saved to RescanPlus InputImage and therefore also to ScanPlus OutputImage. Then after the RescanPlus step, you can use either ScanPlus OutputImage or RescanPlus InputImage for the rescanned image. Furthermore, if you set the ScanPlus OutputImage value to RescanPlus OutputImage, then make sure to also set the ScanPlus OutputFileType to the RescanPlus OutputFileType. Otherwise, some problems may result, such as ScanPlus being unable to load the updated file because it does not know about the file type that was changed by RescanPlus.

### 1.2.3 Rescanning Pages in a Batch

RescanPlus enables operators to rescan pages in a batch, including pages identified as rejected by the operator or by a quality assurance module, and requires that the pages be rescanned. A new batch cannot be created in RescanPlus, no matter what actions or settings are indicated.

#### To rescan pages in a batch:

1. Start RescanPlus in production mode and run it in one of the Wait for Task modes. When RescanPlus receives one or more tasks from the batch, it displays the task(s) within the tree for the batch.
2. Locate the thumbnail image's hardcopy counterpart within the stack of documents from the ScanPlus station.
3. Place the page in the RescanPlus station's scanner and select **Scan Pages** (shortcut: **CTRL+S**). RescanPlus inserts the new page into the batch. Note that you may also select **Preview Pages** (shortcut: **F7**) if you want to preview the page before adding the page to the batch. Or, you can import a page image from a local or network file by selecting **Import Files** (shortcut: **F8**).

After inserting the new page in the batch, RescanPlus sends the task back to the Intelligent Capture Server. The Intelligent Capture Server routes the task to the next module defined in the process.

4. RescanPlus advances to the next task (shortcut: **F5**). RescanPlus places focus on the next task and highlights it if `NeedsRescan = 1` or `3`.
5. Repeat steps 3 and 4 until RescanPlus displays the **No pages to Rescan in this batch** message. When you are finished processing RescanPlus tasks, select **Close Batch** (shortcut: **F4**).
6. In the **Close 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.
  - **Leave locks:** Retains the locked nodes in a batch. When RescanPlus 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 RescanPlus is in **Run All Batches** mode) or **Close Batch** to finish processing the batch.


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



**Note:** RescanPlus will close the progress window automatically if the scanner source is flatbed.

## 1.2.4 Understanding Triggering RescanPlus at Level 0

If RescanPlus is triggered at level 0, you can move to the next set by using the **Go to Next Task** button. Moving to the next task clears the current set (Rescan.RescanDeclined is set to 1, Rescan.Thumbmarks is set to 0 for each highlighted task). This can clear more than one task if multiple consecutive tasks were highlighted by RescanPlus.

 **Note:** When RescanPlus is triggered at level 0, any page that is re-scanned will have its NeedsRescan Input IA Value set to 0 by the RescanPlus module. This will ensure that, when the task is restarted after being canceled or otherwise terminated, the already re-scanned pages will not be re-scanned again.

When triggering at level 0, if more than one thumbnail image is highlighted consecutively, RescanPlus deletes all the consecutive thumbnail images when you rescan one or more pages if the value for NeedsRescan = 1 (rescan current page). Also, RescanPlus inserts rescanned pages after the first thumbnail image with focus if NeedsRescan = 2 (insert after current page). RescanPlus enables you to process the tasks individually but deletes the thumbnail image with focus when you rescan pages if NeedsRescan = 3 (rescan current page and insert additional pages).

Until RescanPlus receives a task, it displays **Waiting for task** in its status bar. If RescanPlus displays this message, either the Intelligent Capture Server has not received tasks to route to RescanPlus (in which case the previous module is either not finished processing its tasks or it did not reject any pages), or RescanPlus has already processed all the available tasks from that batch.

If RescanPlus does not receive tasks from a batch in a reasonable amount of time, you should check the status of tasks in the Intelligent Capture Administrator module. If no tasks are queued for these modules or RescanPlus, select **Stop** to end the RescanPlus session.

## 1.2.5 Understanding Triggering RescanPlus at Level 7

If RescanPlus is triggered at level 7, there may be multiple sets per task and you can move to the next set by using the **Next Rescan Pages** button. Declining the current set moves to the next set (Rescan.RescanDeclined is set to 1, Rescan.Thumbmarks is set to 0 for each highlighted page). Rescanning the current set will rescan pages that are marked to be re-scanned (Rescan.NeedsRescan is set to 8 and Rescanned is set to 1). If there are no more pages marked for rescan in the current task, the button will change to **Next Rescan Pages**.

When RescanPlus is triggered at level 7, any page that is re-scanned will have its NeedsRescan Input IA Value set to 8 by the RescanPlus module. If the task is closed or otherwise terminated before being completed, it will need to be queued again by the IPP Rescan Error routine if new nodes are created. All trigger values, including the Input Image value, need to be set on the new nodes so that the task will be queued again.

RescanPlus always sets the NeedsRescan value to 8 for re-scanned nodes, but the *IPP* is responsible for setting any remaining triggers. For example, if you use a Ready

trigger and the batch is closed or terminated before completion, the Ready trigger must be set in the IPP's error routine so that the server properly retriggers the task for RescanPlus.

## 1.2.6 Running in Open Batch Mode

When you start RescanPlus in production mode, you have the option of opening any batch that uses RescanPlus in its process. The ability to open a batch without receiving tasks gives you the opportunity to view and modify a batch at any time. If an opened batch has tasks, they are loaded in RescanPlus. The batch processing behavior is similar to the task processing mode.

Routing occurs in the process file when you set the RescanPlus Input Image to another module's Output Image. If no image files have been routed RescanPlus when you open a batch, RescanPlus displays this message in its **Image** window for the selected node: **File not found**. The Intelligent Capture Server also sends this message to RescanPlus: **No pages to rescan in this batch**.

There are certain considerations when using a RescanPlus step in a process. For more information, see [“Considerations when Writing a Process with the RescanPlus Step” on page 7](#).

### To open a batch in RescanPlus:

1. Start RescanPlus in production mode.
2. Select **Open Batch**. The **Open Intelligent Capture Batch** window displays.
3. In the **Open Intelligent Capture Batch** window, select the batch and select **OK**. Note that this window only lists batches that use RescanPlus in their process.
4. View or modify the batch. Select **Finish and Close Batch** to close the batch.

## 1.3 Defining RescanPlus Settings During Production

RescanPlus 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 RescanPlus 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 RescanPlus 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, RescanPlus 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.

### 1.3.1.2 Selecting the Scanner in Production Mode

If the scanner that was selected during setup is unavailable, or if the RescanPlus operator needs to change the existing scanner selected for production, the RescanPlus 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 RescanPlus 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 RescanPlus 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 RescanPlus 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 RescanPlus before RescanPlus detects the scanner. If **None (No Scanner)** is selected, the **Scan Pages** and **Preview Pages** buttons in RescanPlus are disabled during production, and the operator cannot perform these functions. After selecting a scanner, the operator must configure the RescanPlus 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 RescanPlus step to use the proper settings for the new scanner.

### 1.3.1.3 Creating a Scanner Configuration

In production mode, RescanPlus 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 RescanPlus 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 setup a new scanner configuration:

1. From the **RescanPlus 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.

#### 1.3.1.3.1 Updating Scanner Configuration Profiles

Scanner configurations are module-based. This means that the RescanPlus and ScanPlus modules have independent scanner configurations. All RescanPlus-based steps in processes and batches share RescanPlus-based scanner configurations. Likewise, all ScanPlus-based steps share ScanPlus-based scanner configurations. As a result, all scanner configuration profiles are available to all client machines in the system.



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

Changes to RescanPlus 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** pane.

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

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

#### 1.3.1.4 Specifying Scanner Settings

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

##### To specify scanner settings:

1. From the **RescanPlus 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** pane.
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. The scanner driver's documentation provides more information about the windows and settings that are accessed via these links.
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.
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 RescanPlus is currently connected to.
12. Select **OK** to save the changes and close the **Scanner** window.

### 1.3.1.5 Changing Batch Step Settings

Operators can change batch level settings, such as separation or tree levels, while running RescanPlus 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 RescanPlus window in production mode, select a batch by selecting **Open saved batch**.
2. In the **Start by selecting a batch** window, select a batch from the list or enter a batch name manually, then select **Open**.
3. In the RescanPlus window, select **Settings**.
4. From the **Related Tasks** list in the **General settings** area, select **Setup step settings** to display the **RescanPlus Setup** window for the batch.
5. Set up RescanPlus to change its configuration.

### 1.3.1.6 Applying Miscellaneous Settings in Production Mode

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

#### To use miscellaneous settings in production mode:

1. From the RescanPlus window in production mode, select **Settings**.
2. In the **Settings** pane, select **Miscellaneous settings**.
3. In the **Miscellaneous Settings** window, select the checkboxes for the options needed by the operator:
  - **Enable refreshing rate during scanning/importing:** Selecting this checkbox allows RescanPlus 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 RescanPlus 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 selected 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.

## 1.3.2 Defining View Settings

The view settings for RescanPlus 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, RescanPlus 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, RescanPlus supports the functionality to apply the current image view settings to all scanned or imported images in a batch.

### 1.3.2.2 Defining Scaling Settings

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

**To define scaling settings:**

1. From the RescanPlus 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.



**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).

### 1.3.2.3 Defining Orientation Settings

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

**To define orientation settings:**

1. From the RescanPlus 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 orientating 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.

### 1.3.2.4 Defining Miscellaneous File View Settings

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

**To change how images are displayed:**

1. From the RescanPlus window in production mode, select **Settings**.
2. In the **Settings** pane, 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.

### 1.3.2.5 Changing Tree View Settings

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

### 1.3.2.6 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 RescanPlus 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.

### 1.3.2.7 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 RescanPlus window in production mode, select **Settings**.
2. In the **Settings** pane, 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.

### 1.3.2.8 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 RescanPlus 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

RescanPlus 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

RescanPlus 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 RescanPlus 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 RescanPlus 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 RescanPlus.
3. Immediately after the type of report is selected, RescanPlus will automatically generate and display the report in the preview window at the bottom of the **Summary Report** pane.
4. Once the report is generated, the RescanPlus 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 RescanPlus 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 1-1: 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.
Task start time	Time when the task was started.
Task processing time	Hours and minutes passed since the task was started.
Number of pages marked for rescan	The number of pages marked for rescan when the task was started.
Number of rescanned pages	The number of the pages previously marked for rescan and that have been rescanned during task processing.
Number of discarded sheets	The number of sheets that have been discarded, as configured in the <b>Event Actions</b> 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, RescanPlus displays the - symbol.

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

**Table 1-2: 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 <b>Event Actions</b> 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 1-3: Information Displayed for Include Detailed Information in Report**

Element	Description
Task number	Ordinal task number.
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.
Start time	Time when the task was opened.
Task processing time	Time period (hours and minutes) when the task was processed.
Number of pages marked for rescan	The number of pages marked for rescan when the task was started.
Number of rescanned pages	The number of the page nodes added since the task was started. This also includes images that had been scanned but then deleted.
Number of scanned sheets	The number of scanned sheets during batch processing.

Element	Description
Number of discarded sheets	The number of sheets that have been discarded, as configured in the <b>Event Actions</b> 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, RescanPlus displays the - symbol.

### 1.4.3 Printing Summary Reports

The RescanPlus 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 RescanPlus 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 RescanPlus application, select the **Automatically print the scan report when the application exits** checkbox.

### 1.4.4 Configuring Page Setup for Reports

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

#### To configure page setup for a report:

1. From the **RescanPlus** window in production mode, select **Summary**.
2. Select **Page Setup** in the **Actions** panel.
3. In the **Page Setup** pane, 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

RescanPlus 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 an Intelligent Capture batch.

### 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. RescanPlus displays the page in its **Image** pane and offers the following set of options:
  - **Accept Page / Continue:** RescanPlus adds the page to the open batch or file and scans the next page.
  - **Rescan Page:** RescanPlus 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:** RescanPlus adds the page to the open batch or file and then returns to the standard control buttons.
  - **Reject Page / Quit:** RescanPlus does not add the page to the open batch or file and then returns to the standard control buttons.




 **Note:** When previewing pages in production mode with a **MultiStream** scanner, the module only displays thumbnails of the first image stream. RescanPlus will close the progress window automatically if the scanner source is flatbed.

4. When the operator is finished previewing pages, select the appropriate quit option. RescanPlus returns to the standard control buttons: **Finish and Close Batch**, **Scan Pages**, **Preview Pages**, and **Import Files**.

## 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 1-4: Available Image and Document File Formats for Importing**

Image Formats	Document File Formats
<ul style="list-style-type: none"> <li>• <i>BMP</i></li> <li>• <i>CAL</i></li> <li>• <i>DCX</i></li> <li>• <i>GIF</i></li> <li>• <i>JBG</i></li> <li>• <i>JP2</i></li> <li>• <i>JPEG</i></li> <li>• <i>MDA</i></li> <li>• <i>PCX</i></li> <li>• <i>PDA</i></li> <li>• <i>PDF</i></li> </ul> <p> <b>Note:</b> If the <b>Process image file</b> checkbox is selected in the <b>Image Processing</b> section of the <b>Import</b> configuration window, PDF files can be considered as non-graphical or graphical file format.</p> <ul style="list-style-type: none"> <li>• <i>PNG</i></li> <li>• <i>TIF</i></li> <li>• <i>TIFF</i></li> </ul> <p> <b>Note:</b> 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 RescanPlus. Using an image width that is a multiple of 16 will likely fix the problem.</p>	<ul style="list-style-type: none"> <li>• <i>DOC</i></li> <li>• <i>HTM</i></li> <li>• <i>HTML</i></li> <li>• <i>PDF</i></li> <li>• <i>RTF</i></li> <li>• <i>TXT (ANSI, UTF)</i></li> <li>• <i>XLS</i></li> <li>• <i>XML</i></li> </ul> <p> <b>Note:</b> Graphical files are recognized at the file format level. This means that RescanPlus does not rely on file extensions and uses PixTools to read a file extension. For document file formats, RescanPlus 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 RescanPlus production window, create a batch or open an existing batch.
2. Select **Import files to batch** from the **Actions** panel.

3. Navigate to the batch in the directory window, select the files to import using the **Add** button, then click **Open**. Remove files by selecting them and selecting **Remove** or **Remove All**. RescanPlus shows each imported image in the **Tree View** window.
4. Select **Finish and Close 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 Defining Indexing Fields

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

### To enter index information:

1. Create or open the batch that has indexing fields.
2. From the RescanPlus window, select **Index**.
3. Start scanning or importing pages. When RescanPlus acquires the first page, it displays the predefined indexing fields on the **Index** tab. RescanPlus places focus in the first field and highlights its corresponding zone on the image.
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. RescanPlus 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, RescanPlus 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, RescanPlus displays a thumbnail image for each batch page and a folder icon for each higher level node in the tree. RescanPlus 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 on other workstations, 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 allows you to jump to the first or last page of the batch, select a page by number to view (note that when using this command, 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 1-5: 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 <b>CTRL</b> 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 <b>CTRL</b> and then select each of the page nodes.</p> <p>Press <b>SHIFT</b> to quickly extend a current selection within the same level. For example, if you want to highlight 50 page nodes, you can press <b>SHIFT</b>, select the first page node, and then scroll down to the 50th page node and select it. RescanPlus highlights all the nodes in between.</p> <p>You can use the <b>SHIFT</b> and <b>CTRL</b> 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. RescanPlus places the selected nodes immediately following the node to which you dragged the selection.</p> <p> <b>Note:</b> 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 RescanPlus 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 <b>Delete</b> or right-click to display a menu from which you can select <b>Delete</b>. RescanPlus confirms the number of nodes you have selected and prompts you to verify the delete action.</p> <p> <b>Note:</b> You cannot restore deleted nodes. If you accidentally delete nodes, you must rescan the affected pages and create any associated higher levels using the <b>Insert</b> command on the <b>Level</b> context menu. During scanning, the tree is locked and nodes cannot be deleted. Stop scanning before deleting nodes. Depending on how RescanPlus 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 <b>Scan Pages</b>, <b>Preview Pages</b>, or <b>Import Files</b>. RescanPlus inserts the pages directly after the selected node.</p> <p>If you select a level 1 node and then select <b>Scan Pages</b>, <b>Preview Pages</b>, or <b>Import Files</b>, RescanPlus 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, RescanPlus creates a 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 command. RescanPlus creates a level 2 and level 1 node, and then places the new pages under the level 1 node.</p> <p> <b>Note:</b> Before you insert pages into a batch, you must select the <b>Finish and Close Batch</b> button. 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 RescanPlus 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 <b>Insert</b> option.</p> <p> <b>Note:</b> During scanning, the tree is locked and nodes cannot be inserted. Stop scanning before inserting nodes. Depending on how RescanPlus 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>

Tree Action	Description
Refreshing nodes in the tree	Refreshing RescanPlus updates the tree so that it reflects any changes to the tree structure. This option is available within the <b>File View</b> panel by right-clicking and selecting <b>Refresh</b> from the File View context menu.

## 1.8.2 Viewing Pages in the 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 **File View** panel by right-clicking to display a menu with many of the same commands. For a description of the **File View** toolbar options, see “**File View Panel**” on page 32. 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 1-6: File View Actions Menu**

Action	Instructions
Viewing a thumbnail image	Click the thumbnail image.
Refreshing the tree	Select <b>Refresh</b> by right-clicking from the <b>File View</b> panel. RescanPlus updates the tree so that it reflects any changes to the tree structure. This action guarantees that the page image displayed in the <b>File View</b> panel is the most current image. You can also press <b>F5</b> .
Viewing the previous, next, or a specified page	Right-click from the <b>File View</b> panel, then select <b>Next Page</b> , <b>Previous Page</b> , or <b>Go to Page</b> by right-clicking from the <b>File View</b> panel. If you select <b>Go to Page</b> , you are prompted to enter a page number. Note that this number represents a page node's position within the entire batch (level 7).

Action	Instructions
Fitting the image within the <b>File View</b> panel	<p>Right-click from the <b>File View</b> panel, then select:</p> <ul style="list-style-type: none"> <li>• <b>Fit To Width:</b> Displays the image so that its width is that of the <b>File View</b> panel.</li> <li>• <b>Fit To Window:</b> Displays the image so that the entire image fits within the <b>File View</b> panel.</li> <li>• <b>Scale 1 to 1:</b> Displays one pixel of the image for each pixel in the <b>File View</b> panel.</li> </ul>
Zooming in or out and specifying a zoom factor	<p>Right-click from the <b>File View</b> panel, then select:</p> <ul style="list-style-type: none"> <li>• <b>Zoom In:</b> Zooms in on the image by a factor of 10*.</li> <li>• <b>Zoom Out:</b> Zooms away from the image by a factor of 10*.</li> <li>• <b>Change Zoom Factor:</b> Changes the default zoom factor, which is 10.</li> </ul> <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 <b>File View</b> shows only the area of the image selected by the mouse. If you want to pan outside the selected area, simultaneously press <b>SHIFT</b> 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 <b>File View</b> panel, then select <b>Orientation</b>.</p> <p> <b>Note:</b> 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).</p>
Scaling to Gray	<p>Right-click from the <b>File View</b> panel, then select <b>Smoothing</b> 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 <b>File View</b> panel, then select <b>Invert</b> to display a negative of the image.</p>

Action	Instructions
Applying settings to all images in the Batch	Right-click from the <b>File View</b> panel, then select <b>Apply Settings To All Pages</b> to apply image appearance, zoom, and orientation settings to all batch pages. Select <b>Apply Settings To All Pages</b> to apply future changes to viewing options to all loaded images. Changes you have already made are not applied.
Hiding the tree	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 make RescanPlus run faster. Note that a width of 4 thumbnails usually will allow RescanPlus to operate at scanner rated speeds.)

### 1.8.2.1 File View Panel

The **File View** panel displays an image of the page currently being imported or scanned. If not 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.

The options for the **File View** panel in the ScanPlus production window are:

**Table 1-7: File View Options**

Element	Description
Zoom Out icon	Reduces the size of the page displayed in the <b>Image</b> pane.

Element	Description
Custom scale icon	<p>Increases or decreases the size of the page displayed in the <b>Image</b> pane. Use the list box to specify one of the following sizes:</p> <ul style="list-style-type: none"> <li>• 1600%</li> <li>• 800%</li> <li>• 400%</li> <li>• 200%</li> <li>• 100%</li> <li>• 75%</li> <li>• 50%</li> <li>• 25%</li> <li>• 10%</li> <li>• <b>Fit to height</b></li> <li>• <b>Fit to width</b></li> <li>• <b>Fit to Window</b></li> </ul>
Zoom In icon	Increases the size of the page displayed in the <b>Image</b> pane.
Fit to Window icon	Adjusts the size of the page displayed in the <b>Image</b> pane so that it fits entirely within the current <b>View</b> pane size setting, and automatically resizes as <b>Image</b> pane is resized.
Fit to Width icon	Adjusts the size of the page displayed in the <b>Image</b> 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 <b>Image</b> 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 <b>Image</b> pane.

## 1.9 Changing the Image View During Production

Select **Settings** from the navigation panel to modify the default settings for image view during production. In some modules, this option is available from the **View** tab. The precise text and location of these options depends on the module.

**To change the image view during production:**

1. Run the module for production.
2. Use options in the **View Settings** panel, buttons on the **File View** toolbar, or execute the appropriate keyboard shortcut to change the image view.
  - **View Settings:** Use this panel to change page orientation, change brightness and contrast levels, scale the image to gray, or invert the image.
  - **File View** toolbar: Use the toolbar to zoom in and out, select a magnification level, fit to window, fit to height, fit to width, or scale 1-1.
  - **Keyboard shortcuts:** Keyboard shortcuts for changing image view and module-specific keyboard shortcuts are provided in the *OpenText Intelligent Capture - Module Reference (ECPCORE-CMD)* guide.

**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

**IPP**

Integrated ProcessFlow Project

**JBG**

JBIG file extension

**JP2**

Joint Photographic Experts Group 2000

**JPEG**

Joint Photographic Experts Group

**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

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**PDF**

Portable Document Format

**PNG**

Portable Network Graphics

**RLE**

Run Length Encoding

**RTF**

Rich Text Format

**TIF**

Tagged Image File file extension

**TIFF**

Tagged Image File Format

**UTF**

Unicode Transformation Format

**XLS**

Microsoft Office Excel file extension

**XML**

Extensible Markup Language